

Rules & Routing

OVERVIEW

Rules & Routing is an [Output Automation tool](#) that automates print and workflow behaviors according to predefined criteria. The feature enables you to easily create and manage the routing of documents across your environment with rule-based automation, leading to increased efficiency, accuracy, and reliability in document and workflow tasks. Rules & Routing enhances control over all outputs and behaviors, like routing all specific document types to a particular printer, converting documents into different file types, or rerouting a job in case of a device outage.

What can I achieve with Rules & Routing for my print processes?

Rule-based automation boosts the efficiency of your print workflows and document processing capabilities, driving increased output quality, minimal disruption and errors, and maintained security and compliance.

You can establish print and output rules to:

- **Overcome Downtime:** Automatically redirect print jobs in cases of printer failure
- **Protect Sensitive Data:** Prevent the printing of sensitive documents
- **Increase Efficiency:** Distribute high-volume print jobs to multiple printers
- **Share Ownership:** Reassign held print jobs to another user to release
- **Distributed Delivery:** Duplicate print jobs and also print to additional selected printers in multiple locations
- **Set Paper Tray:** Override instructions received from a system/application to specify which documents should use a specific paper tray

What is a rule?

A *rule* defines how the Output Automation service manages specific documents or print jobs in a scenario and initiates an action to take place. It comprises three main components: trigger(s), condition(s), and action(s).

- **A trigger** is a specific event that occurs and launches the rule process. This is anything from a print job starting, failing, being held for secure release, and more.
- **A condition** is the criteria that must be met for the process to begin. These criteria can include specific destination printer availability, specific document titles, or a specific user or device.
- **An action** is what happens to a document under the defined criteria or set of circumstances.

Visit our [documentation](#) for a list of the pre-configured rule components and definitions.

What is the difference between Rules & Routing and a Business Process?

Rules & Routing is an Output Automation feature that routes documents, like print jobs, labels, work orders, purchase agreements, or receipts, from back-end, web-based applications or systems to specified destinations. Leveraging rules, admins can automate various intervention methods like redirecting a failed print job to another printer, converting documents to other file types like postscript to PDF or PDF to PCL, or distributing a high volume of documents to multiple printers. Each step is triggered automatically by actions and requires no additional actions by end users or admins.

However, a Business Process is a workflow tool that automates repetitive user tasks to fuel higher efficiency. For example, filling out and submitting an electronic form that triggers various approvals sent to specific stakeholders with all steps defined by the creator publishing the specific workflow.

[Visit the Vasion website](#) to learn more about using workflows to streamline your business processes.

Do my print jobs remain on my local network?

Your print jobs remain on your network from the workstation or EMR/ERP/CRM/other line-of-business system to the printer. The Output Automation Service Client within your network handles document routing to the desired destination.

Documents only travel through the cloud when you leverage [Off-Network Printing](#)—an optional remote printing feature that allows printing to and from remote locations outside the network through Vasion Print-hosted gateways. Print jobs are held for secure release in your shared storage and configured with your security settings so you can set permissions and security requirements that best suit your organization.

Where can I manage my rules and logic?

Manage all rules and logic on the Rules & Routing interface via the centralized dashboard. The rules you create are listed and run in the order they appear in the Rules & Routing workspace. You can view, reorder, edit, and delete rules from there.

Can Rules & Routing help me create redundancy across my print environment?

Yes. The Output Automation service sends documents from back-end systems and applications to a designated Service Client and route them to the desired destination. Within Output Automation, you can spin up multiple Service Clients to achieve redundancy and high availability. Rules & Routing allows additional protection to redirect print jobs to backup printers if a print job fails or loses connection with the original printer.

What happens if my rules engine cannot connect to the Client or Service?

You can set a fallback rule in the event of connectivity failure to push the pending print jobs to the destination printer or pause print jobs until the connection is restored. We recommend stopping rules if print jobs contain sensitive information to ensure rule enforcement.

How do users know if a document has been redirected?

Users receive email notifications that documents were redirected to another printer at the time of redirection by default. The email address affiliated with a user from an IdP or Active Directory group is used for the notification.

The ability for administrators to create custom emails and send them to specific email addresses will be available in a future version of Rules & Routing.

How do I distribute high-volume print jobs to multiple printers in my fleet?

You can set a rule to direct print jobs of a particular volume to distribute to multiple available printers, relieving the load from one device and increasing efficiency. The rules engine identifies the printer's status and sends a document to each available device until the job is completed.

Can I protect sensitive documents from being printed?

Yes. Rules & Routing provides the ability to restrict specific documents from being printed. You can create a workflow based on a print job being initiated with the condition of the print job title containing a specific keyword or title that indicates sensitive information, then select the 'Do not print' action.

In a future version of Rules & Routing, the engine will also be able to review the document content for certain sensitive keywords, phrases, and information or formats of information to prevent printing.

How is Rules & Routing available?

Rules & Routing is available in our Output Automation Bundle, an add-on feature to the Core license. With the bundle, you can connect your EHR/ERP/CRM systems and web-based applications to ensure high availability and eliminate process interruptions. Visit our [website](#) and schedule a demo today.