



## Introduction

A quota is an official limit on the number or amount of items that a user is allowed to use.

Quotas can be applied to one product or a group of products (like print products). They can be assigned to a group of users or a single user. Quotas can either have a cost (like € 10.00) or an item limit (like 250 \* A4 Black & White). A combination of these is also possible, but is not recommended for simplicity purposes. Each quota has a description that is used in the transaction overview and reports (like "10 Euro, reset weekly").

Quotas have a period in which they are applicable.

Quotas can be scheduled with a certain interval (daily, weekly, monthly, yearly), each of these periods has a start- and an end-moment. Within that range the quota applies (like Monday - Friday). Outside this period, the quota is not applied until the next period starts (at the next interval (like weekly). The quota is reset at the start of each period.

In this instruction document we will explain how to set up quotas in the Inepro Back Office Suite.



### Example:

A certain group of users will get an amount of 10 units in their native currency to print. This is done each week, but the user group is only allowed to use it within the working days (Monday-Friday). How can this be set up?

We can do this with quotas ■



## Requirements

The license module for quotas needs to be installed and valid in order to use quotas ■



## Set up Quotas



### Preparations

Before quotas are set up do the following. Create a plan and determine which of the users will need a quota and if this is needed individually (not recommended), based on department, cost centre or user group or on the group of intended devices (copiers, or printers etcetera).

According to the plan:

- 1 Set the product criteria to either a specific product or a product group.
- 2 Set the selection criteria to determine which user(s) the quota has an effect on and (optionally) on which devices the quota is valid (by station group).
- 3 Set either the quantity or the amount limit of the quota (It is not recommended, for simplicity purposes, to combine a quantity and a amount limit).
- 4 Set the description (for use in reports and transaction overviews).
- 5 Set the period selection to either daily, weekly, monthly or yearly.
- 6 Set the start and end of such period in the group box below the period selection (in this example in the group box 'Weekly', the start day is Monday, and the end day Friday). These settings can be time values (Daily), day names (Weekly) or day numbers (Monthly or Yearly).



The current period group box is purely a display of the current quantity or current balance. The values are not displayed directly, if they are not visible, please close the application and restart. In this area the quota can be reset manually, by ticking the reset box.

This concludes setting up the quota, click 'OK' and the quota should be in effect and reset at the start of each period ■

## Important Quota Facts

Quotas can be a complex subject if the underlying principles are not understood. Please remember these 7 facts about Inepro quotas:

- *Quotas substitute budget purses*  
When using quotas, no budget purses can be used, because quotas are a substitute for budget purses. Staff / employees and alike should pay with either a quota or a budget, not with a combination.
- *Quotas must be defined for all functions*  
If a limited quota for copies is used, an 'unlimited quota' for printing and scanning needs to be created as well, in order to use this functions. Now, 'unlimited quotas' are not possible, but the groups that are meant to have an unlimited quota can be set up with a quota that exceeds the expected maximum a couple of times. If not all functions of one device have a quota, the functions without a quota cannot be used!



- *Quotas must be setup for all available products*  
Likewise, when a valid combination of any user and device can be found, a quota must be created for each item/product/product group that can be obtained from the device.  
That is in for instance a vending machine with 5 rows of 10 products; either all the products must have a quota, or be a part of a product group with a quota. If this is not done, the omitted products cannot be bought!
- *Quotas can be exceeded for jobs that cannot be calculated beforehand*  
In general a user cannot exceed a quota to get a print job, a coffee or a snack because it can be predicted that the transaction will not exceed the quota. Items issued by a click-interface, like copies made click-by-click cannot be calculated upfront. In these situations the quota will act as soft limit: the session will **not** be interrupted by exceeding the quota. At a new session (or sufficient idle time-out) the user will not be able to use this function anymore. But **the current job will be allowed to finish**. This is because a quota limit is never intended to leave the user with a half copied document (or other multi-part product).
- *Quotas outside the valid time frame do not apply*  
Quotas which are outside of the valid time frame (based on the valid from/valid to fields) must be regarded as not applicable. On moments outside the applied period range (like Monday-Friday) the quota must also be regarded as not applicable.
- *Quotas with an amount or quantity of zero cannot be used*  
Quotas with an amount of 0 or a 0 quantity of items left, cannot be used anymore until the quota will be reset manually or automatically at the new interval.
- *Quotas will be used up in a certain order*  
In case of more than one applicable quota the priority order will be: user, user group, department, account group, cost centre, cost centre group.

Order	Name	Description
1st	User Group	A group of users (users can have more then one of accounts)
2nd	Department	A department
3rd	Account Group	A group of accounts (enabling the selection of one of more user accounts)
4rd	Cost Centre Group	A group of cost centres
5th	Cost Centre	A cost centre is a business unit on which costs are placed on in bookkeeping
6th	User	An individual

So that means that if each of the quota groups in the table above would have an applicable quota and each of these quotas would have 10 cents, and the desired item costs 25 cent:  
Then the User Group quota is used up first (for 10 cents), then the Department quota is used up (for another 10 cents) and finally the Account Group quota is used for the last 5 cents, completing the transaction ■