Create and use a customized RBA rule set tasks

You want to create an RBA rule set to refine an input file, soft proof the refined PDF pages, archive and purge the entire job, and then automatically send an email to a prepress scheduler to communicate that the job is complete.

Note: This activity can't realistically achieve the archive, purge, and email processes; however, you will gain experience selecting these actions in an RBA rule.

Note: If you didn't complete the first part of this activity (*Use an RBA sample rule tasks*), complete Tasks 1 and 2 before completing the following. Tasks 1 and 2 in the first part of the activity, *Use an RBA sample rule tasks,* contain preparatory steps required for this scenario.

RBA uses customized rules to help you automate virtually every step of your workflow. From job creation to job storage, RBA lets you create a workflow that automates routine tasks and created automated detailed workflows.

Rules definition
An RBA rule is an association between an event and an action. For example, when <this event> occurs, then perform <this action>. Events trigger actions in the Prinergy system. The RBA automation engine watches for events to happen and when they do, an action is triggered.

For example:

- when the event—**Job Completed**—occurs
- the action—**Archive**—is performed

Events definition
An event is an incident or an outcome that can happen in a Prinergy workflow. An event is the trigger for a rule. Every event has properties that describe it. Properties could define a user, the time of an event, or a job object. For example, an archive event could be: archive is unsuccessful or archive is successful.

Actions definition
An action is any work that can be performed in the Prinergy system. An action must be triggered by an event. An action has parameters that define the processing. Parameters could define a process template, or outline files to move and the destination that they should move to. Parameters provide information that a job needs in order to process something. For example, when an input file is added to a job (event), it is refined into PDF pages (action). Most actions will cause additional events to occur. By creating rules that respond to secondary events, you can create complex rule sets to manage your printing workflow.

Flow definition

You can add a flow action to a rule to change the way that Prinergy event data is handled or to control the circumstances under which a subsequent Prinergy action is performed.

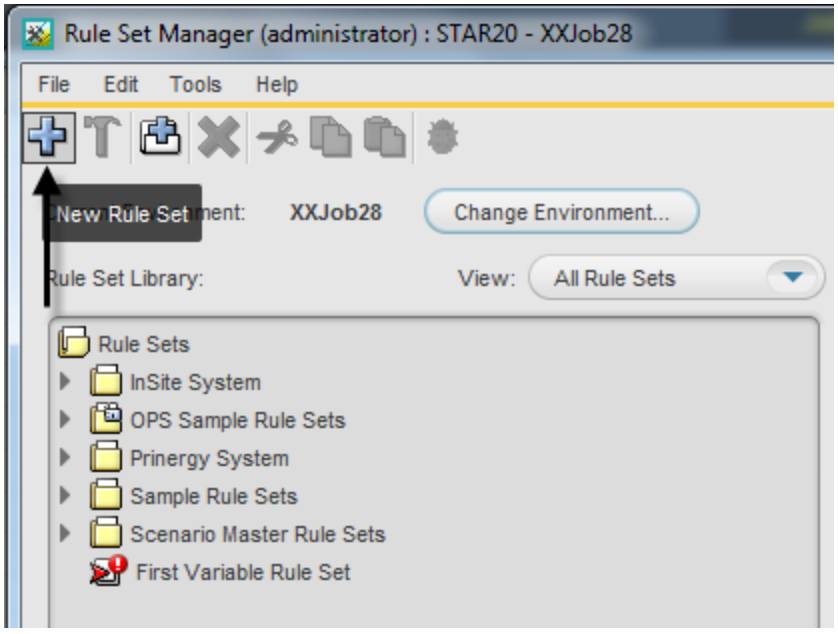
- The loop flow actions allow Prinergy to perform actions on one item at a time from a group of items, or to repeat the same actions multiple times on one item or an entire group of items.

- Use a timer flow action to delay execution of a rule. For example, pages can be automatically deleted 30 days after they are created from input files.
- A branch flow action is like asking a "yes/no" question in a rule set. If the answer is **Yes**, the action connected to the **Yes** result is triggered and all items from the previous event are passed on. If the answer is **No**, the action connected to the **No** result is triggered and all items from the previous event are passed on.
- Use a filter to specify conditions that must be met for data to be considered **Selected**. The **Filter Items** action and the **Select One Item** action consists of a property (such as **Job Status**), an operator (such as **Is**), and a value (such as **Completed**).

- Create a job rule
- Set a refine action
- Set a loose proof action
- Set an archive action
- Set a purge action
- Save and activate a job rule
- Trigger a job rule
- Delete the job rule

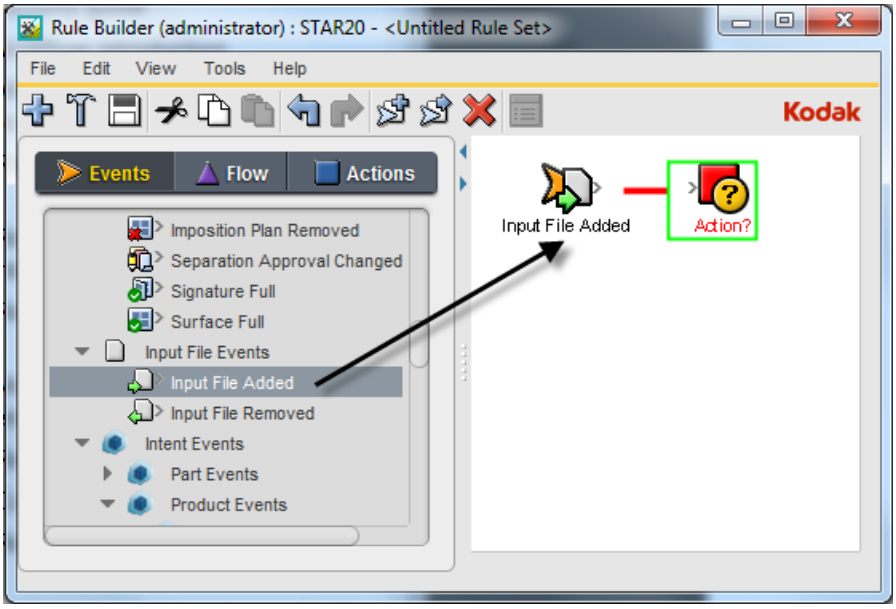
Create a job rule

1. From the **Tools** menu, choose **Rule Set Manager**.
2. Click the **New Rule Set** icon.

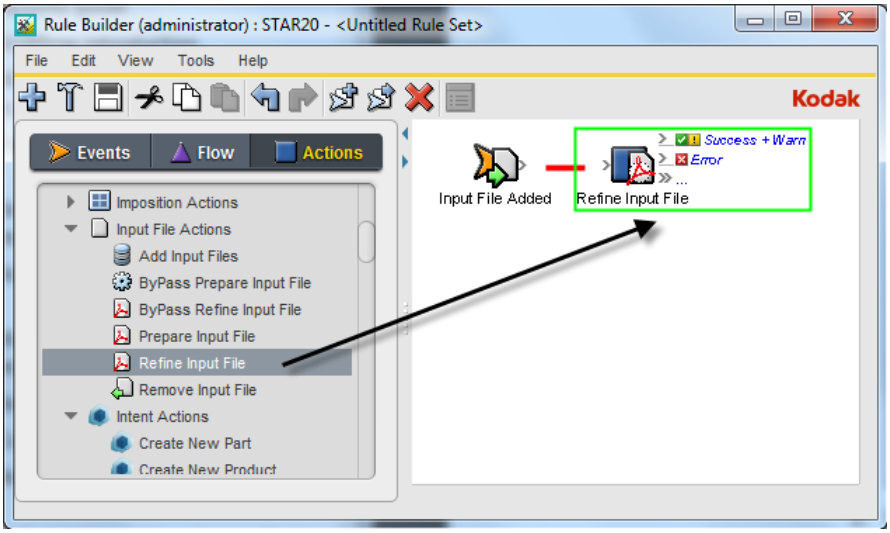


Set a refine action

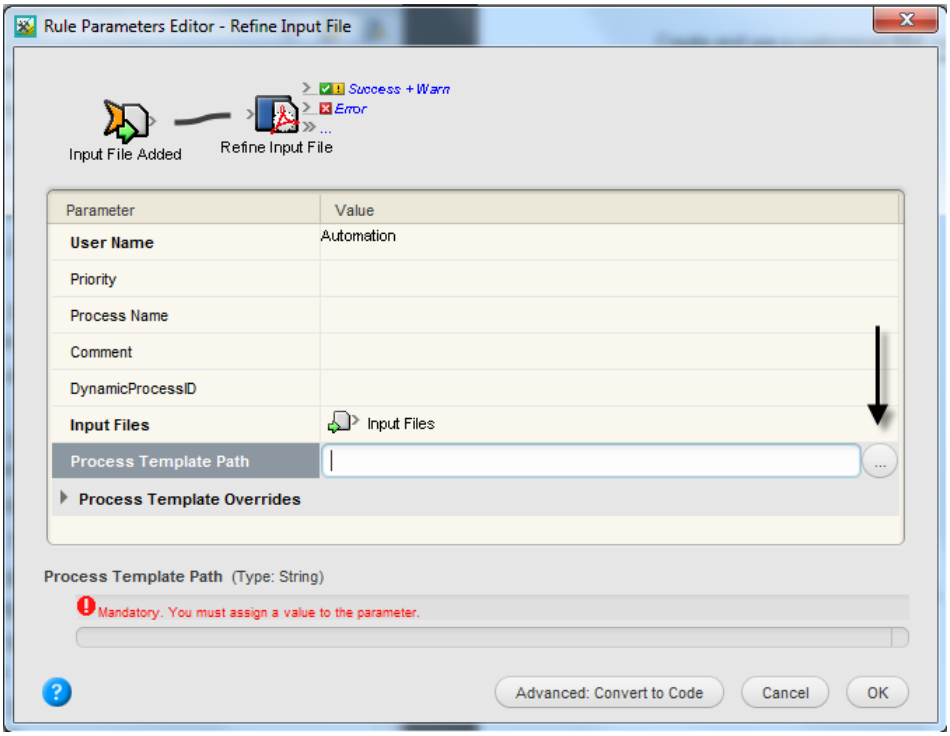
1. From the **Events** tab, drag the **Input File Added** event: `Input File Events > Input File Added` to the Rule Builder window.
   A green box will appear around the **action**.



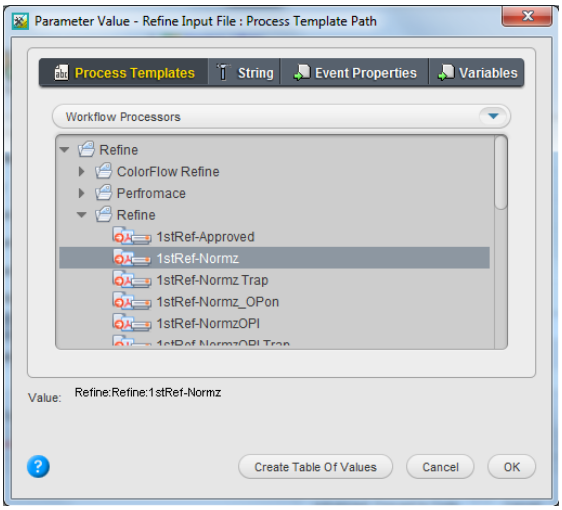
2. From the **Actions** tab, drag the **Refine Input File** action: Input File Actions > Refine Input File to the center of the green box (action).



3. Double-click the red line separating the event and action.
4. In the Rule Parameters Editor dialog box, click the text (Enter a Value) beside **Process Template Path**. Click the **Edit Value** button (...) to access the Parameter Value dialog box.



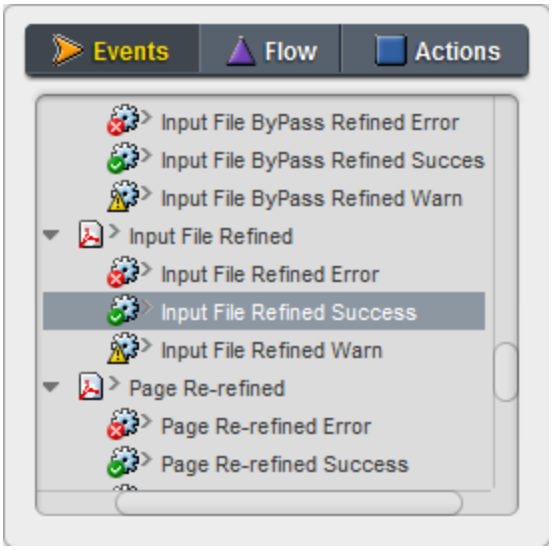
5. In the Parameter Value dialog box, select the process template: **Refine > Refine > 1stRef-Normz**. Click **OK**.



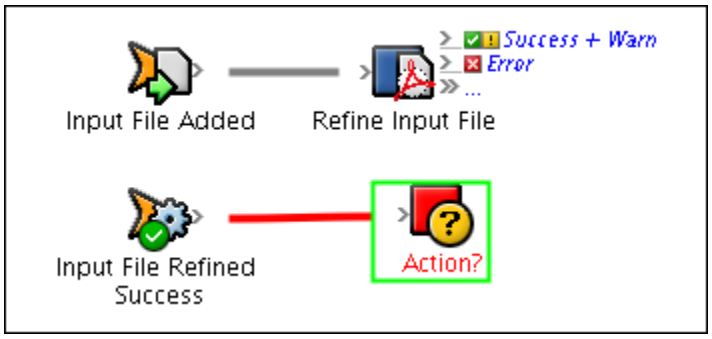
6. Click **OK** to close the Rule Parameters Editor dialog box.

Set a loose proof action

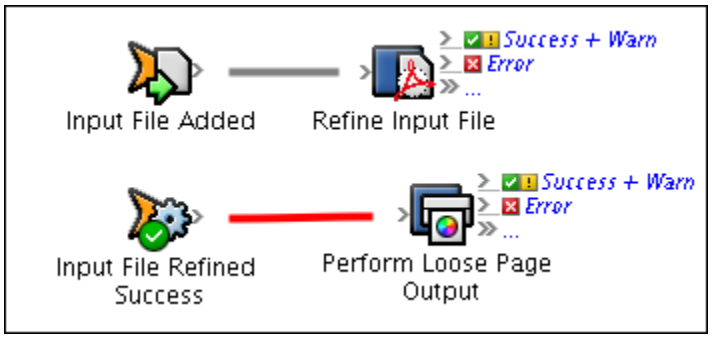
1. From the **Events** tab, drag the **Input File Refine OK** event: **Process Completed Events > Refine Done > Input File Refined Success**.



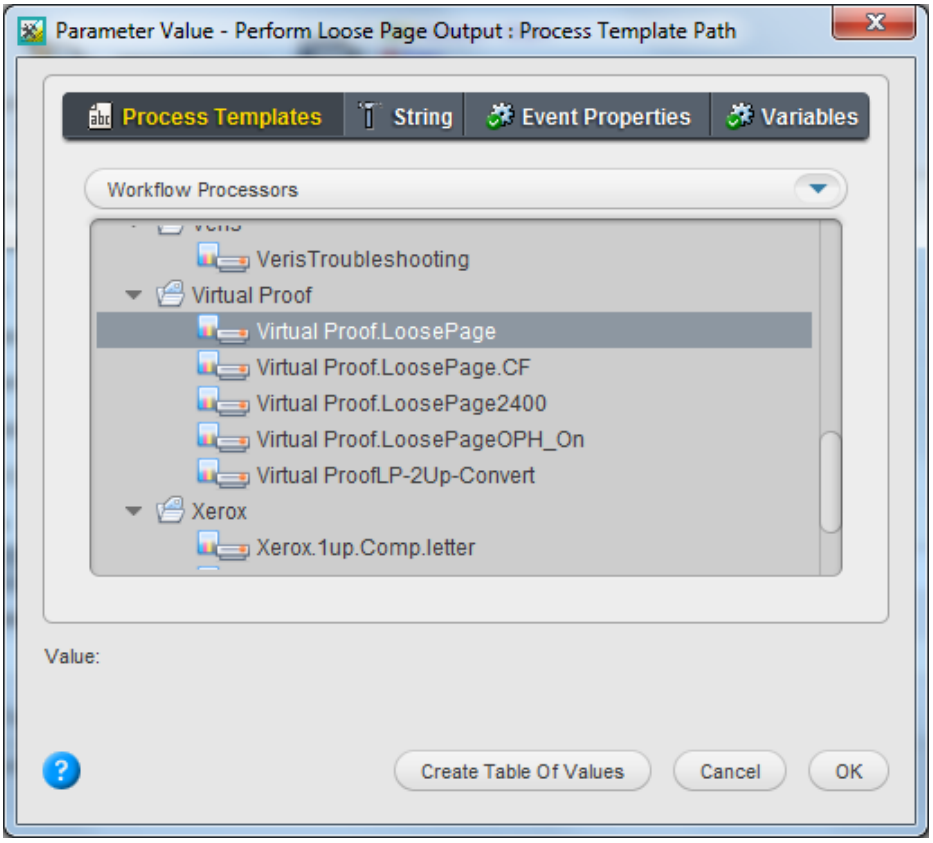
to the Rule Builder window as a second row. A green box will appear around the **action**.



2. From the **Actions** tab, drag the **Perform Loose Page Output** action: **Page Actions > Perform Loose Page Output** to the center of the green box (action).



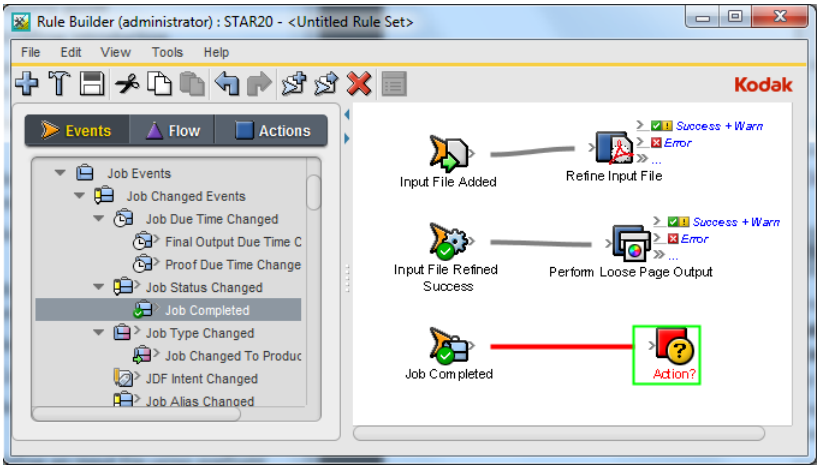
3. Double-click the red line separating the event and the action.
4. In the Rule Parameters Editor dialog box, click the text **(Enter a Value)** beside **Process Template Path**.
   Click the **Edit Value** button (...) to access the Parameter Value dialog box.
5. In the Parameter Value dialog box, select the process template: **Loose Page Proof > Virtual Proof > Virtual Proof.LoosePage**. Click **OK**.



6. Click **OK** to close the Rule Parameters Editor dialog box.

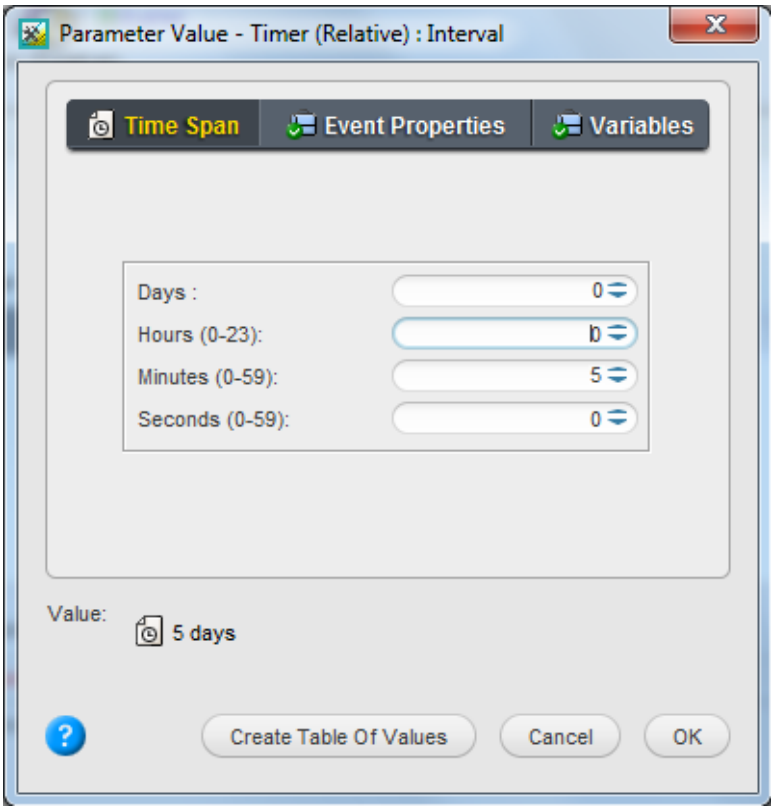
Set an archive action

1. From the **Events** tab, drag the **Job Completed** event: **Job Events** > **Job Changed Events** > **Job Status Changed** > **Job Completed** to the Rule Builder window as a third row.
2. From the **Flow** tab, drag **Timer (Relative)** to the center of the green box (action).

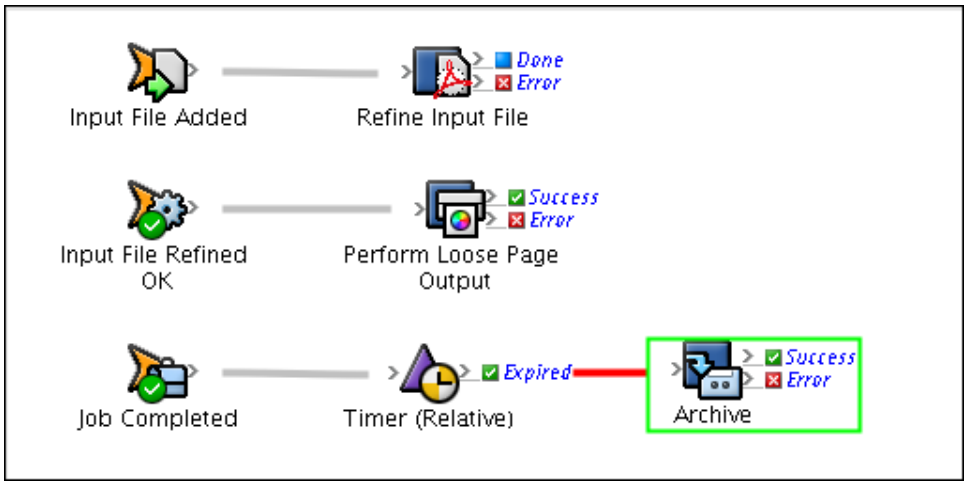


3. Double-click the red line separating the event and action**.**
4. In the Rule Parameters Editor**,** click the text **(Enter a Value)** beside **Interval.** Click the **Edit Value** button (...) to access the Parameter Value dialog box.

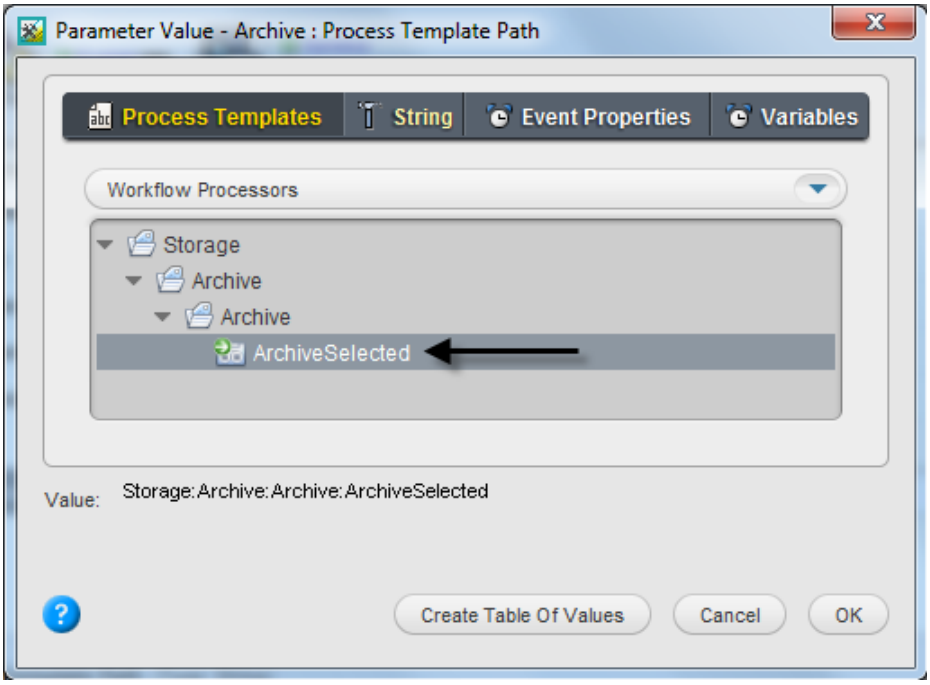
5. In the Parameter Value dialog box, In the **Minutes** list, select **5**. Click **OK.**



6. Click **OK** to close the Rule Parameters Editor dialog box.
7. From the **Actions** tab, drag the **Archive** action: **Job Actions / Archive** to the **Expired** status of the **Timer**.



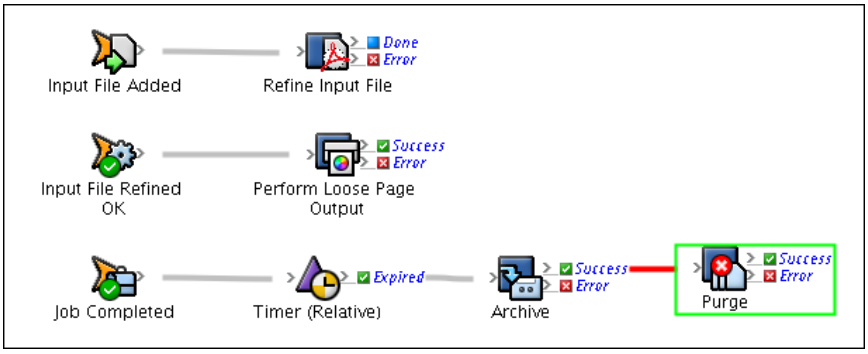
8. Double-click the red line separating **Expired** and the **Archive** action.
9. In the Rule Parameters Editor dialog box, click the text (Enter a Value) beside **Process Template Path**. Click the **Edit Value** button (...) to access the Parameter Value dialog box.
10. In the Parameter Value dialog box, select **ArchiveSelected**. Click **OK**.



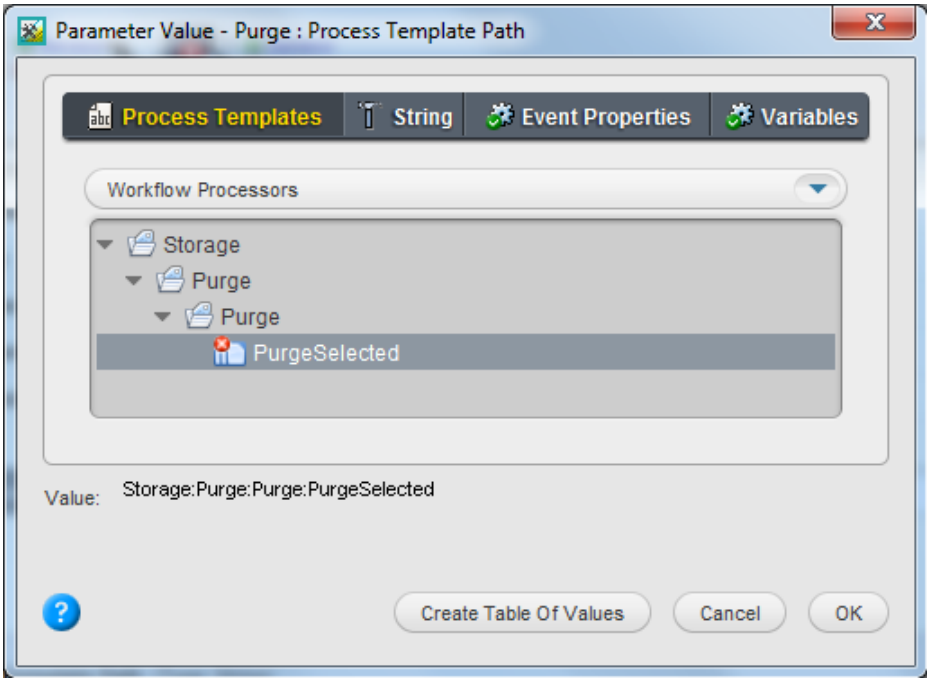
11. Click **OK** to close the Rule Parameters Editor dialog box.

Set a purge action

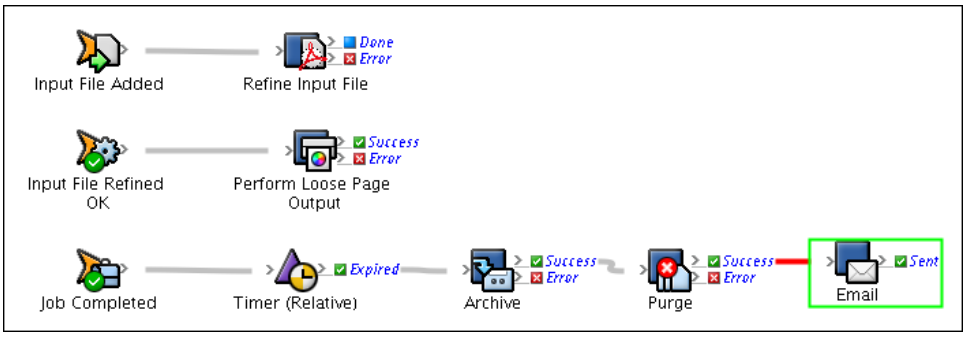
1. From the **Actions** tab, drag the **Purge** action: **Job Actions > Purge** to the **Success** status of the **Archive** action.



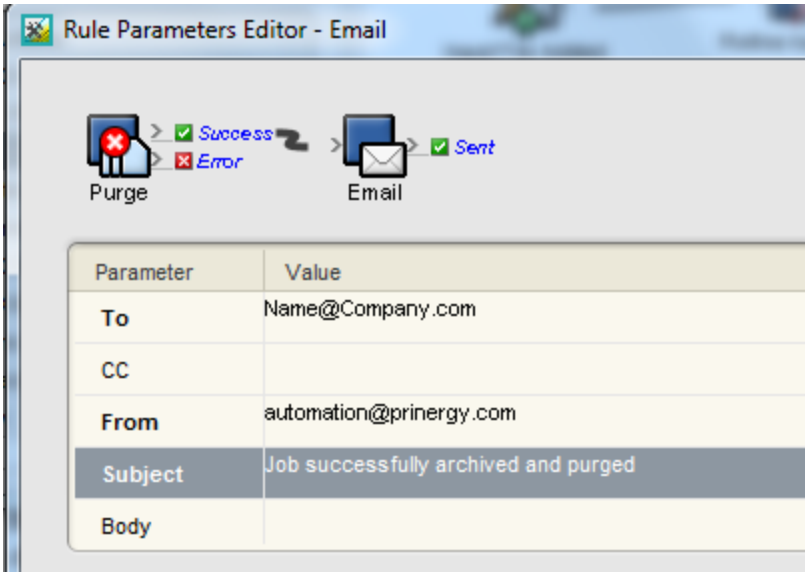
2. Double-click the red line separating **Success** and the **Purge** action.
3. In the Rule Parameters Editor dialog box, click the text **(Enter a Value)** beside **Process Template Path**. Click the **Edit Value** button (...) to access the Parameter Value dialog box.
4. In the Parameter Value dialog box, select **PurgeSelected**. Click **OK**.



5. Close the Rule Parameters Editor dialog box, by clicking **OK**.
6. From the **Actions** tab, drag the **Email** action **System Actions > Email** to the **Success** status of the **Purge** action.



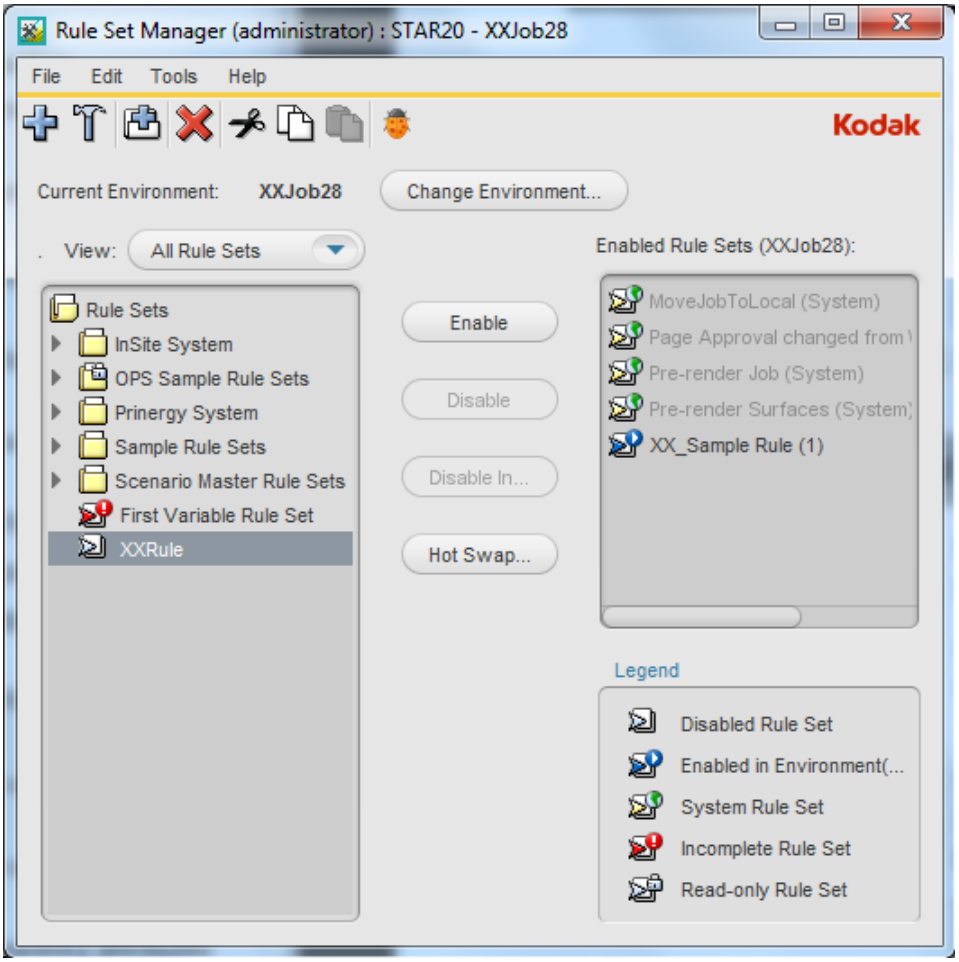
7. Double-click the red line separating **Success** and the **Email** action.
8. In the **Rule Parameters Editor**, click the text (Enter a Value) beside **To**.
9. Type an email address.
   Note: The email address is used only for example purposes for this activity. An email won't be sent to the address entered in this field.
10. In the Rule Parameters Editor, click the text **(Enter a Value)** beside **Subject.**
11. **Type** Job successfully archived and purged.



12. Close the Rule Parameters Editor dialog box, by clicking **OK**.

Save and activate a job rule

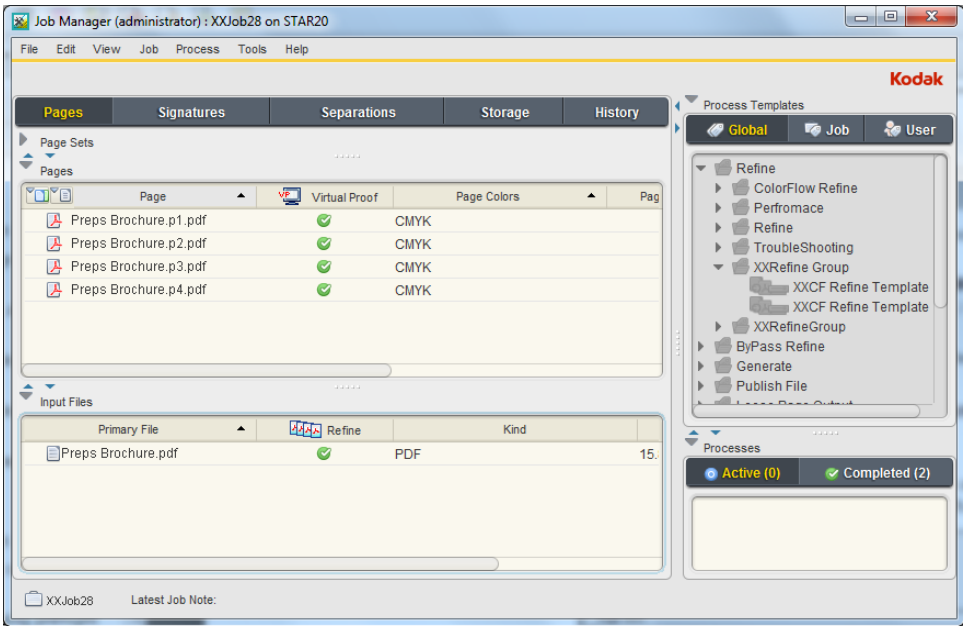
1. From the **File** menu, select **Save**.
2. In the Save Rule Set As dialog box:
   - Select **Save in: Rule Sets**
   - Name your rule set: **XXRule** (where *XX* represents your initials). Click **Save**.
3. Close the Rule Builder window.
4. In the Rule Set Manager, select you rule set **XXRule** and click **Enable**.



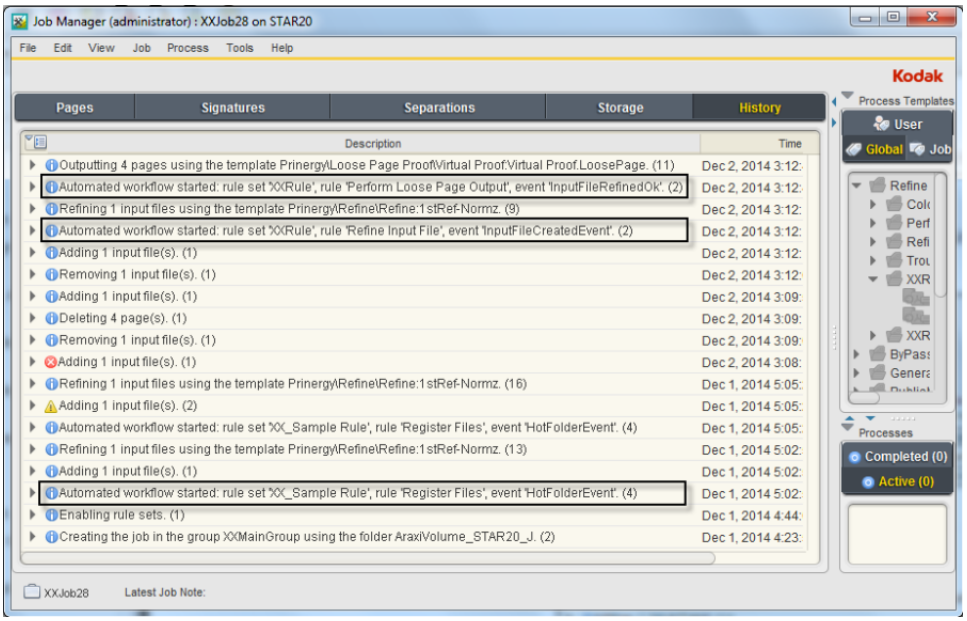
5. Close Rule Set Manager.

Trigger a job rule

1. In Job Manager, right-click the **Input Files** pane and choose **Add Input Files**.
2. In the Add Input Files dialog box, click the **Job Folder** button and locate: UserDefinedFolders/Input Files / Input File / Preps Brochure.pdf.
3. Click the **Add Selected button** to add the file to the **Files to Add** list.
   Note: Verify in the **Options** section that **Process Selected Files Using Process Template** is disabled.
4. In the Add Input Files dialog box, click **OK**.
5. Monitor the automated addition of input files, the automated refine process, and the automated creation of VPS proofs.



6. Using the **History** view, monitor the processing events and actions completed.



Note: Based on the rule actions, in five minutes the job will be automatically archived and then purged. Following the purge process, an email will be sent notifying the job was successfully archived and purged.

Delete the job rule

1. From the **Tools** menu, choose **Rule Set Manager**.
2. In the **Rule Sets** list, select your rule set **XXRule**. Click the **Disable** button.
3. Right-click your rule set **XXRule** and select **Delete**. Verify that you want to delete the rule.
4. Close the Rule Set Manager.
5. Close XXJob28 Job Manager.