

Configuring

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Setting up a workflow that uses an external preferences file

To process documents based on information from an external preferences file, you set up a workflow that includes a step based on the **ApplyPreferences** step template. Additional steps and conditional processing (or additional workflows) might be required to handle the processing for each document based on the preference information.

Before you set up a workflow:

- Define the values you are using from the external preferences file as RICOH ProcessDirector document properties.
- Define a document property mapping object.
- Decide how to make the preferences file available to RICOH ProcessDirector. For example:
 - You might submit a preferences file with each job.
 - RICOH ProcessDirector might retrieve a preferences file from a static location (either on the primary computer or from a mounted drive) and use that preferences file with multiple jobs.
- Create an input device to receive the required files:
 - Job files, if RICOH ProcessDirector retrieves the preferences file from a static location
 - Job files and preferences files

To set up a workflow that uses a preferences file:

1. Click the **Workflow** tab.
2. Click the name of a workflow that you want to modify, or create a new workflow.
For example, you might copy and modify the **EnhancePDFDocuments** supplied workflow.
3. If you are editing an existing workflow, disable it.
4. Add a step based on the **ApplyPreferences** step template to the workflow after the **IdentifyPDFDocuments** step and before the **BuildPDFFromDocuments** step.
If you have the AFP Support feature installed and the workflow processes AFP files, add the **ApplyPreferences** step after the **IdentifyDocuments** step and before the **BuildAFPFromDocuments** step.
5. Set values for the properties of the **ApplyPreferences** step:

1. For the **Preferences file** property, specify the full path or symbolic name of the preferences file.
 - If you are placing the preferences file on the RICOH ProcessDirector server for use by multiple jobs, specify the full path and name of the file, for example: `/aiw/aiw1/preferences/preferences.csv`.
 - If you are submitting a preferences file with each job, specify the symbolic name of the file, for example:
 `${getFileName(pref, csv, read) }`.

 **Note:**

- To use the values in the example, you define `pref` as the value of the **Spool file usage** property and `csv` as the value of the **Spool file type** property on the **Batching** tab when you created the input device.

2. For the **Property mapping** property, select the document property mapping object you created for this workflow.
6. **Optional:** Add steps and connectors for conditional processing, if needed.
The **PreferencesSample** supplied workflow contains conditional processing that might be used with values from an external preferences file.
7. Save the workflow.
8. Test the workflow:
 1. Enable the workflow.
 2. Enable and connect the input device that sends jobs to the workflow.
 3. Submit a preferences file and a job to the workflow:
 - If RICOH ProcessDirector is retrieving a preferences file from a static location, copy a sample preferences file to that location and then submit your job to the input device.
 - If you are submitting a preferences file with your job, submit both files to the input device.

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