

Configuring

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Making a preferences file available to the system

You can make an external preferences file available to the system in several different ways. For example, you can submit a job and a preferences file together to an input device, you can copy a preferences file to a directory on the primary computer for use with multiple jobs, or you can instruct RICOH ProcessDirector to retrieve a preferences file from an external location.

Before you make a preferences file available to RICOH ProcessDirector:

- Verify that the preferences file has headings for all the columns of data you want to use with RICOH ProcessDirector.
- Define RICOH ProcessDirector document properties for each column of data you use.
- Define a document property mapping object that maps the headings in the preferences file to the document properties.
- Decide how to make the preferences file available to RICOH ProcessDirector.
- Choose an existing hot folder input device or create a new one to use with a preferences file.

To make a preferences file available to the system, do the steps that are required for the method that you plan to use:

If you plan to send the preferences file with the job, you must configure an input device that uses the pattern batching method, then configure the step to find the preferences file.

If you plan to store the preferences file in a static location (either on the primary computer or in a shared directory), you only need to configure the step to find the preferences file.

- **Configure the input device to use the Pattern batching method.**

1. Select the input device on the Input Devices portlet.
2. If the input device is enabled, disable it.
3. Click **Actions ⇒ Properties**.
4. Click the **Batching** tab and for the **Batching method** property, select **Pattern**.
5. Enter property values for the file pattern that identifies a job.

For example, use these values to identify a PDF job:

- **File pattern:** `.*pdf$`
- **Spool file usage:** `print`
- **Spool file type:** `pdf`
- **File pattern required:** `Yes`
- **File pattern sequence:** `1`

If you have the AFP Support feature installed and want to process AFP jobs, change the **File pattern** and **Spool file type** values to `.*afp$` and `afp`.

6. Click **Add**.
7. Enter property values for the file pattern that identifies a preferences file.

For example, use these values for a preferences file in comma-separated values (CSV) format with a `csv` file extension:

- **File pattern:** `.*csv$`
- **Spool file usage:** `pref`
- **Spool file type:** `csv`
- **File pattern required:** `Yes`
- **File pattern sequence:** `2`

If the preferences file is in tab-delimited format with a `txt` extension, change the **File pattern** and **Spool file type** values to `.*txt$` and `txt`.

You can use any value for the **Spool file usage** property that is not a RICOH ProcessDirector keyword. Keywords include `control`, `overrides`, and `print`.

8. Click **Add**.
9. When you finish setting property values for the input device, click **OK**.

- **Configure the step to find the preferences file.**

When you set up the workflow that uses the preferences file, set the value of the **Preferences file** property on the **ApplyPreferences** step:

- If you plan to send the preferences file with the job, specify the symbolic name of the file, for example:
`${getFileName(pref, csv, read)}`

The symbolic name uses the values for **Spool file usage** and **Spool file type** that you specified on the **Batching** tab when you created the input device.

- If you plan to store the preferences file in a static location, specify the full path and name of the file, for example:
`/aiw/aiwl/preferences/preferences.csv`.

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