

Configuring

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Defining a workflow that uses barcodes to track jobs

You can define a workflow that reads barcodes on documents in a job. The workflow reconciles the documents with barcodes that were read against the total documents in the job. The workflow can reprint any documents that were not accounted for during reconciliation.

Before you create a workflow, make sure that you have completed these tasks:

- For PDF jobs, use the RICOH ProcessDirector Plug-in for Adobe Acrobat to create a control file that identifies page groups.
- For PDF jobs, use the RICOH ProcessDirector Plug-in for Adobe Acrobat to create a control file that generates barcodes to add to documents.
- For AFP jobs, make sure that the jobs already contain page groups. If you want to use the **Verification recipient** property, use Document Property Designer to make a Visual Workbench control file.
- For AFP jobs, create a control file that generates barcodes to add to documents. Use the sample control file or the AFP Enhancer mode of RICOH Visual Workbench.

To define a workflow that uses barcodes to track jobs:

1. Click the **Workflow** tab.
2. Right-click a workflow that you want to use as a model, such as **VerifySample**, and select **Copy**.
If your workflow does not include **IdentifyPDFDocuments**, **BuildPDFFromDocuments**, **ReadBarcodeData**, **Reconcile**, and **CreateReprints** steps, add them.

⬇ **Note:**

- The **IdentifyPDFDocuments** and **BuildPDFFromDocuments** steps are for PDF jobs. A workflow that processes AFP jobs must have **IdentifyDocuments** and **BuildAFPFromDocuments** steps instead. An **EnableRepositioning** step is also recommended for AFP jobs.

3. Name the copy of the workflow, fill in or edit other values that you need, and click **Continue**.
4. If the workflow processes PDF jobs:
 1. Right-click the **IdentifyPDFDocuments** step and select **Properties**.
 2. On the **PDF** tab, find the **Identify PDF control file** property. Type the path to the control file containing the page groups that you created with RICOH ProcessDirector Plug-in for Adobe Acrobat.
 3. Click **OK**.
 4. Right-click the **BuildPDFFromDocuments** step and select **Properties**.
 5. On the **PDF** tab, find the **Build PDF control file 1** property and type the path to the control file that you created with RICOH ProcessDirector Plug-in for Adobe Acrobat to generate barcodes.
 6. Click **OK**.
5. If the workflow processes AFP jobs:
 1. Right-click the **IdentifyDocuments** step and select **Properties**.
 2. On the **AFP** tab, find the **Visual Workbench control file** property and type the path to the control file that you created with Document Property Designer.

⬇ **Note:**

- The Automated Verification feature requires that AFP jobs already contain page groups. If your jobs do not have page groups defined, you can use AFP Indexer to add them.

3. Click **OK**.
4. Right-click the **BuildAFPFromDocuments** step and select **Properties**.
5. On the **Documents** tab, find the **Enhance AFP control file** property and type the path to the control file. The control file is created using the sample control file or the AFP Enhancer mode in RICOH Visual Workbench.
6. Click **OK**.
6. Right-click the **ReadBarcodeData** step and select **Properties**. On the **Verification** tab, update these properties:
 1. For the **Barcode Reader** property, select the barcode reader that is going to read the barcodes on the documents in this step.
 2. For the **Complete step when all barcodes are read** property, select **Yes** if you want jobs to move to the next step when all barcodes have been read. Otherwise, select **No**.

3. For the **Results file inactivity timer** property, specify the amount of time that RICOH ProcessDirector waits for updates to the results file before moving the job to the next step.

For example, you want RICOH ProcessDirector to wait 10 minutes before moving the job to the next step regardless of whether all barcodes have been read. Specify `10 minutes` and select **No** for the **Complete step when all barcodes are read** property.

4. Select the **Document status property** (for example, **Document status 1**) that the step updates with **OK** when the barcode on a document is read.

⬇️ **Note:**

- If 2 or more **ReadBarcodeData** steps process a job, we recommend that you set each **Document status property** to a different value.

5. Select the **Document scan time property** (for example, **Document scanned 1**) that the step updates with the date and time when the barcode on a document is read.

⬇️ **Note:**

- If 2 or more **ReadBarcodeData** steps process a job, we recommend that you set each **Document scan time property** to a different value.

6. Click **OK**.

7. Right-click the **Reconcile** step and select **Properties**. On the **Reconcile** tab:

1. For the **Automatic reconciliation** property, select one of these values:

- Select **Yes** if you want RICOH ProcessDirector automatically to reconcile and reprint documents whose barcodes were not found in the **ReadBarcodeData** step.
- Select **No** if you want an operator manually to reconcile documents whose barcodes were not found in the **ReadBarcodeData** step.

2. For the **Maximum documents to reprint (%)** property, specify the maximum percentage of documents in a job that RICOH ProcessDirector can schedule for reprint during automatic reconciliation. If more than this percentage of documents must be reprinted, RICOH ProcessDirector places the job in the **Waiting to reconcile** state for manual reconciliation by an operator.

3. For the **Requested reprint printer** property, select the printer to reprint documents whose barcodes were not found.

4. Click **OK**.

8. Right-click the **CreateReprints** step and select **Properties**. On the **Reconcile** tab:

1. For the **Reprint workflow** property, do one of these steps:

- Select **Not set** if you want the reprint job to start over in the same workflow that the **CreateReprints** step is in. The sample workflow checks whether a job is a reprint job. If it is, a branch omits steps that are not needed when reprinting documents.
- Select the name of a different workflow if you want the reprint job to move to the first step in that workflow.

2. Click **OK**.

9. To make sure that the original job stays in the system until all the reprint jobs have completed, add a step based on the **WaitForRelatedJobs** step template. Place the step before the **RetainCompletedJobs** step. The retention period does not start for any of the jobs until all documents from the original job have been accounted for in the reconciliation process.

10. Save and enable the workflow.

Parent topic: [Setting up the Automated Verification feature](#)