Configuring

Setting job defaults in a workflow

When RICOH ProcessDirector assigns a workflow to a job, the **SetJobPropsFromTextFIle** step processes all of the steps in the workflow and assigns values to job properties set by those steps. Those values are used throughout the workflow unless an **AssignJobValues** step or a step that can set job properties from a file changes them, such as **SetDocPropsFromConditions**.

When creating or editing a workflow, it is sometimes difficult to find which step sets a job property so that you can set the default value you want. You can use the **Manage job defaults** action to display a list of all of the job properties set in the workflow along with the values set on the steps.

Some job properties are not associated with steps and their values can only be set in files. For example, the Common Properties feature adds several useful job properties, such as **Company Name**, but a step template does not set the properties. You can change the default property values in a workflow with the **Manage job defaults** action.

Another use for this action is if you want to use the value of a job property to decide which branch to follow in a workflow. However, you want to set the value based on another property in a step before the branch. You do not want a default value assigned when the job is first received. You can use the **Manage job defaults** action to remove the job property from the list of properties assigned a value at the start of the workflow.

To change the default property values for a workflow:

1. Click the **Workflow** tab.

2. Click the name of a workflow you want to change default property values for.

3. Right-click on the workflow editor and select **Manage job defaults**.

4. Find the property you want to change and specify the new value.
   If the property is not in the list, use the **Add a property** field to select the property and its value.

5. **Optional:** To remove the value from a property in the list, hover over the property in the list and select the **X** that appears to the right of the value field twice.

6. After you complete your changes, click **OK**.
   A list of the changes you made is displayed.

7. Check that the changes are what you intended and click **OK**.

⊕ Note:
- Changes made on the **Manage Job Defaults** dialog are also shown on the property notebook for the steps that include the properties.
- You cannot set positional job properties using the **Manage job defaults** action.
- If you added a property that is not associated with any step in the workflow, the property and its value are shown on the **Added** tab of the job property notebook.
- If the **Process again** action is used to restart a job to the beginning of the workflow, the job defaults specified for any properties added or deleted by the **Manage job defaults** action are set.

Parent topic: Preparing to use workflows