

Configuring

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Emailing documents during job processing

You can email PDF documents by adding a step based on the **EmailDocuments** step template to a workflow.

You must provide an email address for each document and store the email address in a document property. You can use the **Doc.EmailAddress** document property, or you can define a custom document property in the `docCustomDefinitions.xml` file. After you define a custom document property, run the **docCustom** utility and update the Custom Document Properties feature.

- If each document contains the email address of the document recipient, you can use the **Define Document Property** function in RICOH ProcessDirector Plug-in for Adobe Acrobat to specify the email address data that you want to extract from each document in a job.
- If you have the Preference Management feature installed, you can map email addresses in an external file to the document property for each document in the job.

You must have an SMTP server installed and configured to let RICOH ProcessDirector send email. RICOH ProcessDirector lets you connect to two SMTP servers. You might use the default SMTP server properties to connect to an internal SMTP server and the alternate SMTP server properties to connect to an email service provider.

To configure RICOH ProcessDirector to email documents during job processing:

1. Make a copy of an existing workflow or create a new workflow.
2. Add a step based on the **EmailDocuments** step template to the workflow after the **BuildPDFFromDocuments** step and before any step that reorders documents at the job level, such as **ReversePDFPageOrder** or **PreparePDFOutputForFinishing**.

You can place the **EmailDocuments** step after steps that reorder documents at the document level, such as **GroupDocuments**, **SortDocuments**, and **SplitDocuments**.

For jobs that email and print documents, a typical step order is:

- **IdentifyPDFDocuments**
- **SortDocuments**
- **BuildPDFFromDocuments**
- **EmailDocuments**
- **PreparePDFOutputForFinishing**
- **PrintJobs**

If you add a step to keep a copy of the job file in the spool directory to use for extracting documents to email, you can place the **EmailDocuments** step after a step that reorders documents at the job level. For example, you can place a step based on the **SnapshotJobFile** step template after the **BuildPDFFromDocuments** step and before the step that reorders documents:

- **IdentifyPDFDocuments**
- **SortDocuments**
- **BuildPDFFromDocuments**
- **SnapshotJobFile**
- **PreparePDFOutputForFinishing**
- **PrintJobs**
- **EmailDocuments**

★ Important:

- If you do not follow these recommendations for step placement, the **EmailDocuments** step could send a document to the incorrect email address without recording an error.

3. Connect the step to the other steps in the workflow.

If you want to print some documents and email others, add conditional processing to the workflow or create child workflows.

For example, you can:

- Add conditional processing for parent and child jobs at the start of the workflow (for example, after a **SetJobPropsFromTextFile** step). Define a rule for the branch that receives the parent jobs: **Job number Unlike *.***. Child jobs, which have a decimal point in their job number, go to the branch for child jobs.
- Define a **Doc.Custom.EmailPreference** document property with values of **Yes** and **No**.
- Use a step based on the **GroupDocuments** step template to group the documents based on the value of the **Doc.Custom.EmailPreference** document property.
- Use a step based on the **CreateJobsFromDocuments** step template to create a separate child job for each group.
- Use a step based on the **SetDocPropsFromConditions** step template at the start of the branch for child jobs. The step assigns a value to a job property based on the value of the **Doc.Custom.EmailPreference** document property. The property conditions file might set the value of the **Custom 1** job property (database property name **Job.Info.Attr1**) to `email` or `print`:

```
Doc.Custom.EmailPreference,Job.Info.Attr1
=Yes,email
=No,print
```

- Send the child jobs to separate email and print branches of the branch for child jobs by defining rules on the branches:
 - **Custom 1 = email** for the branch with the **EmailDocuments** step.
 - **Custom 1 = print** for the branch with the **PrintJobs** step.

4. Specify property values for the **EmailDocuments** step:

1. Set a value for the **Recipient address** property.

For example, you want to email each document to the email address in the **Doc.EmailAddress** document property. Set the value to `${Doc.EmailAddress}`.

2. Set a value for the **SMTP server type** property.

For example, you want to send documents to an external SMTP server that has been configured with the **Alternate SMTP server** properties. Set the value to **Alternate**.

3. Set the **Attach document** property to **Yes**.

4. Set a value for the **Source file for attachment** property.

Examples:

- You want to attach a document from the current PDF file in the job's spool directory. Use the default value: `${getFileName(print,pdf,read)}`.
- You want to attach a document from a PDF file that you saved with a **SnapshotJobFile** step. If you set the value of the **Snapshot file descriptor** property on the **SnapshotJobFile** step to **email**, use this value: `${getFileName(email,pdf,read)}`.

5. Set a value for the **Subject** property, the **Message** property, or both.

For example, you extracted the customer name from each document by defining a **Doc.Custom.CustomerName** document property. You can set the value of either property to `Statement for ${Doc.Custom.CustomerName}`.

6. Fill in or edit values for any other optional properties that you plan to use.

5. After you save and enable your workflow, test the workflow to make sure that it is working properly:

1. Create a test job with a small number of documents. They should have valid email addresses that you want to test with.
2. Send the job through the workflow and make sure that the correct document is sent to each email address.

When the **EmailDocuments** step sends a document to the SMTP server, it sets the **Email created** property value to **Yes** in the document property file. If the step does not send a document, it sets the property value to **No**.

⬇ **Note:**

- RICOH ProcessDirector does not receive information from the SMTP server about sending email or successful delivery to recipients.

Parent topic: [Email and progress updates](#)