

Configuring

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Setting up to reconcile jobs manually

You can reconcile the documents in a job manually, accounting for all documents that processed successfully and reprinting all damaged documents. You also can account for all documents that are pulled from the job.

ⓘ **Note:**

- The Automated Verification and Inserter features support equipment that can scan barcodes to track documents through mechanical steps, such as insertion or sealing. Those features support both automatic and manual reconciliation. If you have Automated Verification, follow the instructions in the help system for setting up to verify documents in jobs automatically. If you have Inserter, follow the instructions in the help system for configuring the system to use inserters.

To find the documents that you want to reconcile, you can use any of these three methods:

- You can enter the values of one or more document properties that identify each document in a job. The document properties can be supplied by RICOH ProcessDirector (for example, **Document number**, **Original sequence**, or **Insert sequence**) or defined as custom document properties (for example, **Customer account number**).
The document properties that you use must be database properties, not limited properties.
- You can enter a range of values for the **Insert sequence** document property.
- You can scan a barcode on a document with a hand-held scanner attached to your computer. To use this method, you must define a barcode format that includes the document property that identifies each document in a job.

Before you can use the values of document properties or barcodes to reconcile documents, you must set up to use documents in jobs. For more information, see the help system.

To set up to reconcile jobs manually:

1. **Optional:** If you want to use barcodes to reconcile documents, create a barcode format.
The barcode format identifies the values of job and document properties in the barcode. For more information, see the related task for creating barcode formats.
2. Click the **Workflow** tab.
3. Click the name of the workflow you want to modify.
If you modify the sample **EnhancePDFDocuments** workflow, the workflow at the end of this procedure shows the results.
4. **Optional:** Disable the workflow by clicking the switch to the left of the workflow name.
If you do not disable the workflow while you edit it, jobs that use this workflow continue to move through steps. When you save, the workflow is momentarily disabled then enabled again. Jobs that are processing in the workflow could move into error.
5. Add a step based on the **CreateReprints** step template after the **Reconcile** step. For the **Reprint workflow** property:
 - Select **Not set** if you want the child job created for reprints to start over in the same workflow.
 - Select the name of a different workflow if you want the child job created for reprints to move to the first step in that workflow.
6. 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.
7. If the workflow does not have a step based on the **WriteDocumentsToDatabase** step template:
 - In a workflow that processes PDF files, add that step after the **IdentifyPDFDocuments** step and before the **BuildPDFFromDocuments** step.
 - In a workflow that processes AFP files, add that step after the **IdentifyDocuments** step and before the **BuildAFPFromDocuments** step.
8. Add a step based on the **SetPropertiesForReconcile** step template after the **WriteDocumentsToDatabase** step and after any step that changes the position of the documents in the job. Add the step before the **BuildPDFFromDocuments** or **BuildAFPFromDocuments** step.
The **SetPropertiesForReconcile** step sets the **Insert sequence** property for each document in a job. After the value is set, the operator can use it on the Reconcile Job dialog to find documents to reconcile when the job reaches the **Reconcile** step.
For example, the operator can select **By range** on the Reconcile Job dialog and specify a range of **Insert sequence** values. The operator also can select **By properties** and specify an **Insert sequence** value.
9. **Optional:** Add a step based on the **SetDocPropsFromConditions** step template before the **WriteDocumentsToDatabase** and **Reconcile** steps.
Set the **Property conditions file** property to the directory path and name of a comma-separated values (CSV) file that you create with a text editor. For example, set the value of the property to `/aiw/aiw1/testfiles/ReconcileProperties.csv` on Linux or to `C:\aiw\aiw1\testfiles\ReconcileProperties.csv` on Windows.

By default, the **Action** value for every document in a job is **Not set**. The operator must assign each document a **Requested action** value (**OK**, **Reprint**, or **Pull**) to complete the manual reconciliation process. For a job with thousands of documents, the operator must set the **Requested action** for each document that printed successfully to **OK**. The fastest way for an operator to reconcile the job is to set the **Requested action** for all documents to **OK**. The operator then resets the **Requested action** for specific documents to **Reprint** or **Pull**. To save the operator the time required to set the **Requested action** for all documents to **OK** manually, you can use a **SetDocPropsFromConditions** step to set the **Action** value to **OK** automatically. Then the operator can immediately set the **Requested action** for specific documents to **Reprint** or **Pull**.

This example shows the contents of a property conditions file that sets the value of the **Action** property for all the documents in the job to **OK**:

```
Doc.OriginalSequence,Doc.Insert.Disposition>=1,OK
```

10. **Optional:** If you want to send the child jobs for reprints to a print-only workflow, specify that workflow as the **Reprint workflow** on the **CreateReprints** step.

If you want to process the child jobs for reprints in this workflow, add a branch:

1. Start the new branch with a step based on the **BuildPDFFromDocuments** or **BuildAFPFromDocuments** step template.
2. Add a connector from the **SetDocPropsFromTextFile** step to the new **BuildPDFFromDocuments** or **BuildAFPFromDocuments** step.
3. Define this rule on the connector:
 - **Rule name:** `Reprint`
 - **Order of execution:** 1
 - **Apply any or all of the following conditions:** **AND**
 - **Condition 1:** `Document count >0`
 - **Condition 2:** `Created Document Count <1`
 - **Summary:** `Job.Doc.DocumentCount > '0' AND Job.Doc.CreatedDocumentCount < '1'`
4. Add a step based on the **SetDocPropsFromConditions** step template after the **BuildPDFFromDocuments** or **BuildAFPFromDocuments** step.
5. Add a step based on the **UpdateDocumentsInDatabase** step template after the **SetDocPropsFromConditions** step.
6. Add a step based on the **SetPropertiesForReconcile** step template after the **UpdateDocumentsInDatabase** step.
7. Connect the **SetPropertiesForReconcile** step to the step after the **BuildPDFFromDocuments** or **BuildAFPFromDocuments** step in the original branch.

For example, connect the **SetPropertiesForReconcile** step to the **CountPages** step.

11. Save the workflow and enable it.

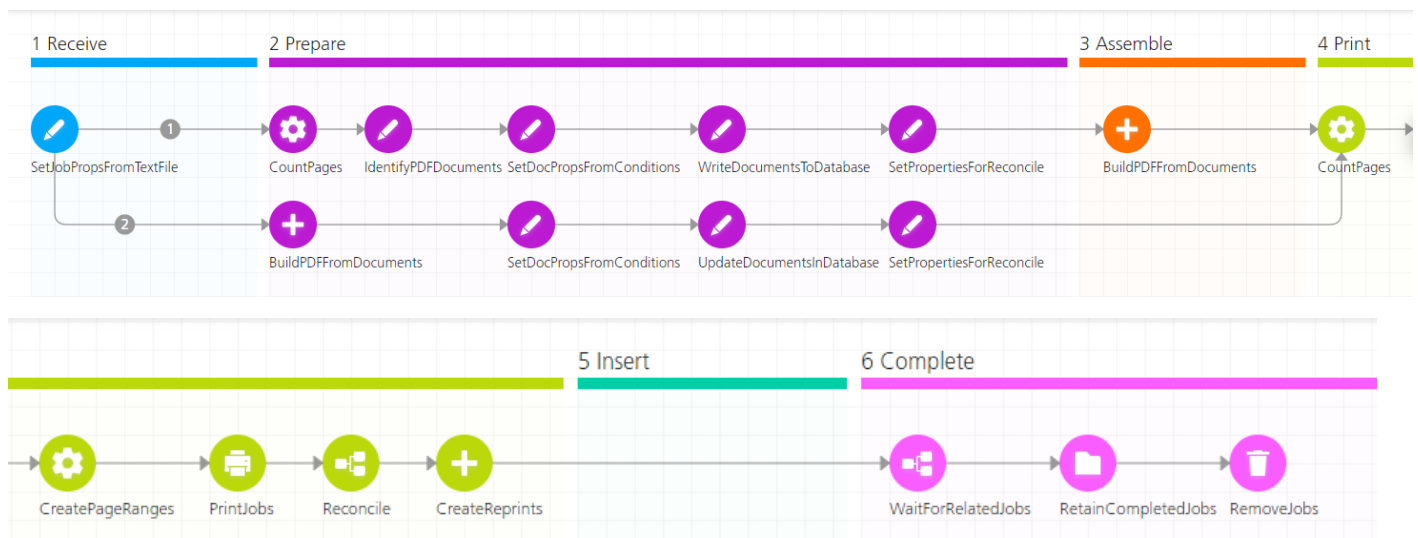
12. Test the workflow.

When a job enters the workflow, the job is processed normally until it reaches the **Reconcile** step, where it goes into the **Waiting to reconcile** state. The operator then right-clicks the job in the jobs table and selects **Reconcile**. The **Action** value of all the documents in the job is not set unless a **SetDocPropsFromConditions** step sets the **Action** to another value, such as **OK**.

The operator finds all the documents to be reprinted and sets their **Requested action** value to **Reprint**. When all the documents have a **Requested action** value, the operator clicks **OK**.

The job moves to the **CreateReprints** step. That step creates a child job containing all the documents to be reprinted and sends the job to the workflow specified for reprinting.

The illustrations below show the sample workflow as a series of phases.



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