

## Overview

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# Using information about documents

All document processing features collect and track information about individual documents in a job. RICOH ProcessDirector extracts the information (such as customer names and addresses) from data in the documents themselves. The Preference Management feature lets you use other information (such as favorite movies or document delivery preferences) about the individual or account associated with each document. The documents themselves do not contain that information.

You can use information about the individuals or accounts in two different ways:

- ▶ To change the content of documents
- ▶ To control how RICOH ProcessDirector processes documents

To change the content of documents, you apply markup based on the values of document properties. For example, you have information about the favorite movie of each customer. You create markup for several different special offers. You define a RICOH ProcessDirector document property for favorite movies. You send the information about favorite movies to RICOH ProcessDirector in a preferences file. RICOH ProcessDirector uses the information to select a special offer and apply it to each document.

To control how RICOH ProcessDirector processes documents in your workflow, you create conditional processes based on the values of document properties. For example, you have information about the document delivery preferences of each customer. You define a RICOH ProcessDirector document property for delivery preferences, and you send the information about customer delivery preferences to RICOH ProcessDirector in a preferences file. You create conditional processes that print or email documents to customers by assigning the values for the document property that specifies delivery preferences to a job property so that RICOH ProcessDirector can create separate jobs for the documents with each delivery preference.

Parent topic: [Preference Management](#)