

Configuring

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Running the sample workflow that uses electronic forms to print jobs with documents

The **ElectronicFormDocSample** workflow demonstrates how to combine electronic forms with data in PDF files for jobs that contain documents. The sample workflow prints some jobs by combining electronic forms with data. It prints other jobs on preprinted forms. The workflow is installed with the Preprinted Forms Replacement feature.

The workflow includes two branches:

- The [1] **Electronic** branch sends jobs with **Electronic** in the job name through the **CombinePDFWithForm** step, which combines the electronic forms with the data. The jobs then go to the **CountPages** step. When the jobs reach the **PrintJobs** step, they are printed on plain paper.
- The [2] **Preprinted** branch sends jobs that do not have **Electronic** in the job name directly to the **CountPages** step. Those jobs bypass the **CombinePDFWithForm** step and are printed on preprinted forms.

The sample objects and files used in this workflow include:

- Workflow: **ElectronicFormDocSample**
- Input device: **ElectronicFormDocFolder**
- Media objects:
 - **SummaryAndDetails**
This media object specifies electronic forms for the first sheet of a statement with a summary on the front and details on the back.
 - **DetailsDuplex**
This media object specifies electronic forms for sheets with statement details on both sides.
 - **DetailsAndOffers**
This media object specifies electronic forms for the last sheet of a statement with details on the front and offers on the back.
- PDF files:
 - **ElectronicDoc.pdf**
 - **PreprintedDoc.pdf**
These 866-page duplex jobs, which are identical except for their job names, contain 300 documents. Each document consists of a customer statement with two, four, or six pages. All documents have a statement summary page followed by one to four pages of transaction details. If the last page of a document does not have transaction details, offers are included on the last page.
- Control file for the **IdentifyPDFDocuments** and **BuildPDFFromDocuments** steps: **ElectronicForm.ctl**
This control file contains the page-exception data for the documents in the jobs.

To run the sample workflow:

1. Click the **Main** tab.
2. In the Input Devices portlet, right-click the **ElectronicFormDocFolder** hot folder and select **Enable and Connect**.
The first time that you enable and connect the hot folder, RICOH ProcessDirector submits the **ElectronicDoc.pdf** and **PreprintedDoc.pdf** jobs to the **ElectronicFormDocSample** workflow.
The jobs move through the workflow and stop at the **PrintJobs** step. Both jobs are in the **Device unavailable** state, waiting for the **Sample** printer to be enabled.
3. Review the **SummaryAndDetails**, **DetailsDuplex**, and **DetailsAndOffers** media objects.
 1. Click the **Administration** tab.
 2. In the left pane, click **Objects ⇒ Media**.
 3. Right-click the **SummaryAndDetails** media object and select **Properties**.
 4. To view the electronic form for the front side, which contains the static portion of the statement summary page, click the blue **Front of form** link.
The PDF page used for the front of the form opens in a new browser tab.
 5. When you are finished viewing the form, close the tab.
 6. To view the electronic form for the back side, which contains the static portion of the statement details page, click the blue **Back of form** link.
The PDF page used for the back of the form opens in a new browser tab.
 7. When you are finished viewing the form, close the tab.
 8. Look at the value of the **Media name for printing** property.
The property is set to **Current name**.
 9. Right-click the **DetailsDuplex** media object and select **Properties**.
 10. View the electronic forms for the front and back of the media.

Both forms contain the static portion of the statement details page.

11. Look at the value of the **Media name for printing** property.

The property is set to **Current name**.

12. Right-click the **DetailsAndOffers** media object and select **Properties**.

13. View the electronic forms for the front and back of the media.

The form for the front side contains the static portion of the statement details page. The form for the back side contains a page of offers (with static content).

14. Look at the value of the **Media name for printing** property.

The property is set to **Selected: Letter Plain**.

4. Review the `PreprintedDoc.pdf` job.

1. Right-click the job and select **View**.

You see an 866-page job with 300 documents. Each document contains a customer statement with two, four, or six pages. You see only the variable data for the statement summary and transaction details.

2. Click **Close**.

3. Right-click the job and select **Page Exceptions**.

You see a list of 265 page exceptions, for all the pages of all the documents in the job. The job requires three preprinted forms.

- Most page exceptions are for **SummaryAndDetails** media, which is used for the first two pages of each statement.
- If a statement has four pages with a summary page and two pages of transaction details, **DetailsAndOffers** media is used for pages 3–4.
- If a statement has four pages with a summary page and three pages of transaction details, **DetailsDuplex** media is used for pages 3–4.
- If a statement has six pages with a summary page and four pages of transaction details, **DetailsDuplex** media is used for pages 3–4. **DetailsAndOffers** media is used for pages 5–6.

5. Review the `ElectronicDoc.pdf` job.

1. Right-click the job and select **View**.

You see an 866-page job with 300 documents. Each document contains a customer statement with two, four, or six pages. You see both the variable and static data for the statement summary and the transaction details. If the last page of a document does not have any transaction details, you see the offers.

- Look at pages 1–4, the first document in the job. The electronic forms for the front and back of the **SummaryAndDetails** media have been combined with pages 1–2. The electronic forms for the front and back of the **DetailsAndOffers** media have been combined with pages 3–4.
- Look at pages 5–6, the second document in the job. The electronic forms for the front and back of the **SummaryAndDetails** media have been combined with those pages.
- Look at pages 301–304, a four-page statement with a summary page and three pages of transaction details. The electronic forms for the front and back of the **SummaryAndDetails** media have been combined with pages 301–302. The electronic forms for the front and back of the **DetailsDuplex** media have been combined with pages 303–304.
- Look at pages 305–310, a six-page statement with a summary page and four pages of transaction details. The electronic forms for the front and back of the **SummaryAndDetails** media have been combined with pages 305–306. The electronic forms for the front and back of the **DetailsDuplex** media have been combined with pages 307–308. The electronic forms for the front and back of the **DetailsAndOffers** media have been combined with pages 309–310.

2. Click **Close**.

3. Right-click the job and select **Page Exceptions**.

You see a list of 265 page exceptions, for all the pages of all the documents in the job.

You see **SummaryAndDetails** and **DetailsDuplex** in the list because their **Media name for printing** property is set to **Current name**. The **CombinePDFWithForm** step combines the electronic forms for **SummaryAndDetails** and **DetailsDuplex** media with the data and but does not change the media names.

You see **LetterPlain** in the list because the **Media name for printing** property of the **DetailsAndOffers** media is set to **Selected: Letter Plain**. The **CombinePDFWithForm** step combines the electronic forms for **DetailsAndOffers** media with the data and changes the **DetailsAndOffers** media name to **LetterPlain**.

Keeping the **SummaryAndDetails** and **DetailsDuplex** media names associated with jobs lets a print shop use a different paper for those sheets. The print shop can also report paper costs to its management information system using those media names.

Parent topic: [Setting up to use electronic forms](#)