

Configuring

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Setting up to use documents in PDF jobs

To use documents in PDF jobs, you define how to identify the documents, map data in the documents to RICOH ProcessDirector document properties, and add markup to the documents. Finally, you save the setup information in a RICOH ProcessDirector Plug-in for Adobe Acrobat control file.

You map data in the documents to document properties supplied with RICOH ProcessDirector or to custom document properties that you define. Define the custom document properties and load them to RICOH ProcessDirector Plug-in for Adobe Acrobat before you map data.

 **Note:**

- This procedure gives general setup instructions. For detailed instructions, see the related topics.

To set up to use documents in PDF jobs:

1. Open a PDF file in Adobe Acrobat Professional and click **Ricoh ⇒ Select** to make RICOH ProcessDirector Plug-in for Adobe Acrobat the active tool.
2. Define page groups, which identify the start of each document in a job:
 1. Draw a box around the text you want to use to define text-based page groups, or anywhere to define page groups that are not based on text.
 2. Select **Define Page Group** from the pop-up menu.
 3. Select one of the options from the **Page Groups** list.
 4. Click **OK**.
5. Click **Ricoh ⇒ View Page Group Navigator** and verify that the documents in the PDF file have been defined correctly.
3. Map data in the documents to document properties:
 1. Left-click just above the top left corner of the data to capture. Drag the mouse to draw a box around the data.
Make the box large enough to capture the longest occurrence of the data in your PDF files. Some characters in a PDF file have a larger white-space buffer than other characters.
 2. Select **Define Document Property** from the popup menu.
You see the captured data in the **Selected Text** area of the dialog.
 3. Select a RICOH ProcessDirector document property from the list.
 4. Use the Placement Conditions section to specify the pages to extract the document property data from.
For example, to extract the document property data from the first page of each document, select **Pages based on a rule**, and then select **First Front Only**.
 5. Click **OK** to create the document property.
6. Click **Ricoh ⇒ View Document Property Values** and scroll through several page groups in your PDF file to verify that RICOH ProcessDirector Plug-in for Adobe Acrobat extracted the correct document property values for each page group.
7. To map data in the documents to another document property, repeat the steps above.
4. Add markup, such as barcodes, OMR marks, images, hidden areas, and text:
 1. Left-click to specify the top left corner of the new markup. Drag the mouse to draw a box.
For hidden areas, the box specifies the area. For barcodes, OMR marks, images, and text, the box specifies the upper left corner. The box does not specify the area that contains the barcode, OMR mark, image, or text.
 2. Select an option such as **Add Barcode** from the popup menu.
 3. Supply the requested information.
 4. Click **OK** to create the markup.
5. Save your page group definition, document properties, and markup in a control file:
 1. Click **Ricoh ⇒ Save Control File**.
 2. Give the control file a name or accept the default value.
 3. Click **Save**.
You see a confirmation message.
 4. Click **OK**.

6. Send or copy the control file to a directory on the primary computer that the RICOH ProcessDirector system user has access to.

When you create workflows that process PDF jobs containing documents, specify the name and location of the control file in each step based on the **IdentifyPDFDocuments** or **BuildPDFFromDocuments** step template.

 **Note:**

- If you get unexpected results when you process a PDF 2.0 file with a step based on the **IdentifyPDFDocuments** step, do one of these:
 - Use the version of the RICOH ProcessDirector Plug-in for Adobe Acrobat supplied with RICOH ProcessDirector version 3.6 and above to update the control file. Remember to copy the control file to the correct location for RICOH ProcessDirector to use it.
 - Place a step based on the **OptimizePDF** step template in the workflow before the **IdentifyPDFDocuments** step.

Parent topic: [Configuring the PDF Document Support feature](#)