

Configuring

[Configuring](#) / Setting up the Preference Management feature

Setting up the Preference Management feature

After you read the Preference Management overview topics, you can set up Preference Management by doing the configuration tasks described in this section.

After the initial configuration is complete, test your Preference Management workflows to make sure they work as you expect them to.

In this section:

[Running the sample workflow for managing output preferences](#)

The **PreferencesSample** workflow for applying processing preferences to jobs illustrates how to use a preferences file to control multichannel delivery. The **PreferencesSample** workflow creates three child jobs each of which processes documents differently based on the value of the **Output type** property.

[Defining document properties for use with a preferences file](#)

Before RICOH ProcessDirector can use data about documents, you must define the data as RICOH ProcessDirector document properties.

[Making a preferences file available to the system](#)

You can make an external preferences file available to the system in several different ways. For example, you can submit a job and a preferences file together to an input device, you can copy a preferences file to a directory on the primary computer for use with multiple jobs, or you can instruct RICOH ProcessDirector to retrieve a preferences file from an external location.

[Defining document property mapping objects](#)

You can use document property mapping objects to define the relationship between the headings in a preferences file and the document properties defined for documents in a job. The relationship determines how the **ApplyPreferences** step uses their values during processing.

[Setting up a workflow that uses an external preferences file](#)

To process documents based on information from an external preferences file, you set up a workflow that includes a step based on the **ApplyPreferences** step template. Additional steps and conditional processing (or additional workflows) might be required to handle the processing for each document based on the preference information.

Parent topic: [Configuring](#)