Configuring

Defining custom document properties

You use custom document properties to extract data from each document in a job. First you define the custom document properties in RICOH ProcessDirector, and then you map data in the documents to the document properties. As a job goes through the workflow, the **IdentifyPDFDocuments** step (PDF files) or **IdentifyDocuments** step (AFP files) extracts the data.

Identify data that you want to extract from documents. If RICOH ProcessDirector supplies an appropriate document property, use it instead of defining a custom document property.

For example, you want to extract account number, customer name, email address, and statement date from each document in a job. RICOH ProcessDirector supplies a document property, **Email address**, for extracting email addresses. You define custom document properties for account number, customer name, and statement date.

> ⬇ Note:
> - If you use custom document properties, starting with Version 3.11.2, you can create them on the **Administration** tab, using **Objects ⇒ Custom Properties**.
>   You can choose the database name and the label that displays in property notebooks and column headings. You can also choose what kind of data to store in the property, and the default access that the different user groups have for the property, without adding them to the `docCustomDefinitions.xml` file.
>   For more information, see the topics **[Custom properties](#)** and **[Creating and activating custom properties](#)**.
> - If you already have custom document properties defined in a `docCustomDefinitions.xml` file, you can continue to use them. Do not re-create them from the **Administration** tab. Only use that tab to create new job or document properties.
>
> - If you want to use the new function made available in RICOH ProcessDirector in Version 3.11.2 to create a custom property:
>   - Plan the properties as mentioned in steps 1-5 mentioned below.
>   - Continue with the step defined in **[Creating and activating custom properties](#)**.

To define custom document properties:

1. Choose the type of custom document property:
   - Database property
   - Limited property
   For more information about each type of custom document property and how to define them, see the topic about the `docCustomDefinitions.xml` file in the information center.

2. Choose a database (internal) name for the custom document property.

   For example, define a custom document property with the database name **Doc.Custom.AccountNumber**.

   > ⬇ Note:
   > - We recommend that the database names of your custom document properties start with **Doc.Custom**. If you do not use this naming convention, verify that none of your custom document properties have the same database name as a document property supplied with RICOH ProcessDirector.
   > - Do not use a number immediately after the period (.) in the database name. For example, the database name `Doc.3rdLineAddress` is not valid.
   > - Do not delete custom document properties after you add them to the `docCustomDefinitions.xml` file.
   > - Do not change the `name` (database name), `dataType`, or `dbType` of a custom document property. The system lets you change `caption` (user interface name), `shortCaption`, `description`, and `access`.

3. Choose a user interface name (caption) for the custom document property.

   For example, define a custom document property with the user interface name **Account number**.

   > ⬇ Note:
   > - We recommend that you do not define a custom document property with the same user interface name as a document property supplied by RICOH ProcessDirector.

4. Choose a datatype (`dataType`) for the custom document property.

   Examples include `String`, `Integer`, `IntegerNonNeg`, and `Timestamp`.

5. For database properties:

1. Choose a database type (`dbType`).

   For the `String` datatype, database types are `char`, `varchar`, and `long varchar`.
   For the `Integer` datatype, database types are `smallint`, `bigint`, and `integer`.
   For the `Timestamp` datatype, the database type is `Timestamp`.

2. Choose the level of access that users have to the custom document property:
   - **attrWriteAdmin**
     Members of the Administrator security group have write access. Members of the Monitor, Operator, and Supervisor security groups have read access.
   - **attrWriteAdminSuper**
     Supervisors and Administrators have write access. Monitors and Operators have read access.
   - **attrWriteAdminSuperOper**
     Operators, Supervisors, and Administrators have write access. Monitors have read access.

   If you do not specify an access level, Administrators have write access. Monitors, Operators, and Supervisors have read access.

   > **⊙ Note:**
   > - If you created your own security groups, they receive the same access to custom document properties as the RICOH ProcessDirector security groups that you copied to create your groups.

3. Choose a short caption.
   The short caption is displayed in table column headings.

   For example, define a custom document property with the short caption **Acct Nmbr**.

4. Choose a description.
   The user interface displays the description as help for the custom document property.

   For example, define a custom document property with the description **Customer account number**.

6. Edit the document properties configuration file:
   - The first time that you define custom document properties, make a copy of the supplied sample file. Go to this directory:
     - `/aiw/aiw1/samples/config` on Linux
     - `C:\aiw\aiw1\samples\config` on Windows
   - When you define more document properties, make a copy of the active file. Go to this directory:
     - `/aiw/aiw1/config` on Linux
     - `C:\aiw\aiw1\config` on Windows

7. Copy the `docCustomDefinitions.xml` file to a working directory, and edit the file.
   Keep a backup copy of the edited file for recovery purposes.

   For example, these lines add two database document properties with the database names **Doc.Custom.AccountNumber** and **Doc.Custom.StatementDate** to the file:

```
<docProperty name="Doc.Custom.AccountNumber"
    datatype="String"
    dbType="varchar (32)"
    access="attrWriteAdmin"
    shortCaption="Acount number"
    caption="Account number"
    description="Customer account number"/>

<docProperty name="Doc.Custom.StatementDate"
    datatype="Timestamp"
    dbType="Timestamp"
    access="attrWriteAdmin"
    shortCaption="Statement date"
    caption="Statement date"
    description="The date the statement was created"/>
```

   > **⊙ Note:**
   > - The `name` line defines the database name. The `caption` line defines the user interface name.

   These lines add two limited document properties with the internal names **Doc.Custom.SSNumber** and **Doc.Custom.CheckAmt** to the file:

```
<limitedProperties>

    <docProperty name="Doc.Custom.SSNumber"
       datatype="String"
       caption="Social Security number"/>

    <docProperty name="Doc.Custom.CheckAmt"
       datatype="String"
       caption="Check total"/>

</limitedProperties>
```

8. Use an XML editor to validate your syntax.

9. Copy the edited file to:
   - `/aiw/aiw1/config/docCustomDefinitions.xml` (Linux)
   - `C:\aiw\aiw1\config\docCustomDefinitions.xml` (Windows)

10. To have any new document properties display correctly on the user interface, edit the `docCustomDefinitions.properties` file for one or more languages. If you do not define labels for the new properties in this file, you will only see database names for the properties on the user interface. See [Naming custom document properties in more than one language](#) for the steps to edit the file.

11. Make the custom document properties that you have defined available to RICOH ProcessDirector:

    1. Run the **docCustom** utility.
       The first time that you run the **docCustom** utility, it creates the Custom Document Properties feature and adds it to Feature Manager. When you run the utility again, it adds an updated Custom Document Properties feature to Feature Manager.

    2. Use Feature Manager to install or update the Custom Document Properties feature.

12. Load the RICOH ProcessDirector updated custom document properties to the tool you use to configure document properties:
    - If you have the PDF Document Support feature, load RICOH ProcessDirector document properties to RICOH ProcessDirector Plug-in for Adobe Acrobat.
      For more information, see the related topic in the information center.
    - If you have the AFP Support feature, use one of these methods to start RICOH Visual Workbench:
      - Start RICOH Visual Workbench from the RICOH ProcessDirector server.
      - Replace the RICOH Visual Workbench application on your desktop:
        - Delete the `VisualWorkbench.zip` file and all of the unzipped files.
        - Download the `VisualWorkbench.zip` file from the RICOH ProcessDirector user interface.
        - Unzip the file, and start the new RICOH Visual Workbench desktop application.

      The document properties are loaded automatically.

Parent topic: [Configuring document processing features](#)