

Configuring

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Enhancing PDF files for Archive

Use the RICOH ProcessDirector Plug-in for Adobe Acrobat to enhance sample PDF files so that you can store the documents or historical information about them in a repository.

The files must have a page group, which identifies documents, as well as the document properties required to search for documents in the repository. Use the RICOH ProcessDirector Plug-in for Adobe Acrobat to identify the page groups. For detailed information about the RICOH ProcessDirector Plug-in for Adobe Acrobat functions that you use in this procedure, such as **Define Document Property**, see the online help for the RICOH ProcessDirector Plug-in for Adobe Acrobat.

To enhance PDF files for use with the Archive feature:

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. Draw a box around the text you want to use to define text-based page groups, or draw a box anywhere to define page groups that are not based on text. Click **Define Page Group**.
 1. From the **Page Groups** drop-down menu, select **Create fixed-length page groups** or **Begin page group when the selected text is found**.
You can define a page group based on a fixed number of pages or based on text that appears repeatedly throughout the PDF file. For example, if **Page 1** appears on the first page of each document, you can use that text to define page groups.

ⓘ **Note:**

- If you use text to define the beginning of the page group, this text should appear in the same location on the first page of every document.
- If you are using a sample PDF file to define page groups, make sure that the content and location of the text you select are consistent among the production PDF files.

2. Click **OK**.
3. Click **Ricoh ⇒ View Page Group Navigator** and verify that the documents in the PDF file have been defined correctly.
4. Define the first document property that you want to use to search for documents in a repository:
 1. Left-click just above the top left corner of the data that you want to capture. Drag the mouse to draw a box around the data. Make the box big 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. You can see the captured data in the **Selected Text** area of the dialog.
 2. Select **Define Document Property** from the popup menu.
 3. Select a RICOH ProcessDirector document property from the drop-down list.
If you need document properties that are not on the drop-down list, you must define those custom document properties in the `docCustomDefinitions.xml` file. Then you run the **docCustom** utility to update configuration files and add those properties to the database. After you load the new document properties, they are available in RICOH ProcessDirector Plug-in for Adobe Acrobat wherever you define document properties. For more information about editing the `docCustomDefinitions.xml` file, running the **docCustom** utility, and loading RICOH ProcessDirector document properties, see *RICOH ProcessDirector: Installing Document Processing Features*.
 4. Use the Placement Conditions section to specify the pages to extract the document property data from.
If you want to extract the document property data from the first page of each document, select **Pages based on a rule**, and then select **All Front Pages**.
 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 is extracting the correct document property values for each page group.
5. Repeat the steps above to define each document property that you want to use to search for documents in a repository.
6. When you are ready to save your page group definition and document properties, click **Ricoh ⇒ Save Control File**.
7. Give the control file a name or accept the default value. Click **Save**. You see a confirmation message. Click **OK**.
8. Send the control file to the RICOH ProcessDirector server in a directory that the RICOH ProcessDirector system user has access to.

ⓘ **Note:** When you create your Archive workflow, specify the name and location of the control file in each step based on the [IdentifyPDFDocuments](#) or [BuildPDFFromDocuments](#) step template.

Parent topic: [Setting up the Archive feature](#)