

## Overview

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# Usage scenario for pulling reminder notices from a job when late payments are received

In this scenario, a service bureau prints reminder notices in a PDF print job for a client when customers miss payments. The service bureau holds the print job until 3:00 PM. Between 1:00 PM and 3:00 PM, the client sends a pull list, which contains the account numbers of customers who have made late payments. The service bureau suppresses the reminder notices for those customers from printing by extracting the reminder notices from the print job.

The service bureau uses RICOH ProcessDirector Plug-in for Adobe Acrobat to identify the reminder notices as individual documents in the production PDF file for each job. The data in each reminder notice includes the account number.

To change the workflow so that it pulls reminder notices for the accounts on the pull list, an administrator at the service bureau configures RICOH ProcessDirector to support the new process.

The administrator:

- Uses the **Define Document Property** function in RICOH ProcessDirector Plug-in for Adobe Acrobat to define the **Doc.PullProp** document property. To define the property, the administrator specifies the account number data that the **IdentifyPDFDocuments** step in the workflow extracts from each document in the PDF file for the job.  
 In this scenario, the administrator uses the values of the **Doc.PullProp** document property (that is, the account numbers) to determine the documents to be removed from the job. This property is supplied with all document processing features. As an alternative, the administrator can define another document property, such as **Doc.Custom.AccountNumber**, in the `docCustomDefinitions.xml` file, and use that property instead of **Doc.PullProp**.
- ⬇ **Note:** If you define a custom document property, you must run the [docCustom](#) utility, update the Custom Document Properties feature, and load the updated RICOH ProcessDirector document properties to RICOH ProcessDirector Plug-in for Adobe Acrobat.
- Uses the **Save control file** function in the plug-in to save the document property definition in the control file that identifies the reminder notices as individual documents.
  - Sends the control file to the RICOH ProcessDirector server.
  - Specifies the name of the control file as the value of the **Identify PDF control file** property for the **IdentifyPDFDocuments** step.
  - Adds a **Wait** step to the workflow after the **IdentifyPDFDocuments** step and sets the value of the **Wait until** property to 3:00 PM.
  - Adds a **SetDocPropsFromList** step to the workflow after the **Wait** step and sets values for the step properties:
    - The value of **List file directory** is `/aiw/aiw1/clientfiles/pull`.
    - The value of **Delimiter** is **New Line**.
    - The value of **Columns in list file** is **Pull property**. **Pull property** is the user interface name of the **Doc.PullProp** document property. If the administrator had defined a **Doc.Custom.AccountNumber** document property to specify the account number data, the value of **Columns in list file** would be **Doc.Custom.AccountNumber**.
    - The value of **Document property to set** is **Pull document**. **Pull document** is the user interface name of the **Doc.Pull** document property. The **Doc.Pull** property is supplied with all document processing features. It is a convenient choice for the value of the **Document property to set** document property. As an alternative, the administrator could create a custom document property and use it as the value of **Document property to set**.
    - The value of **Value for matching documents** is **YES**.
    - The value of **Value for other documents** is **NO**.
  - Adds a **Group Documents** step to the workflow after the **SetDocPropsFromList** step and sets the value of the **Group first** property to **Pull document**.
  - Adds a **CreateJobsFromDocuments** step to the workflow after the **Group Documents** step and sets the value of the **Child workflow** property to the name of the current workflow.
  - Adds conditional processing near the start of the workflow to process parent and child jobs differently. The new branch for child jobs lets them bypass the document identification steps.
  - Adds a **SetDocPropsFromConditions** step at the start of the branch for child jobs.  
 The step assigns a value to a job property based on the value of the **Pull document** document property. The property conditions file sets the value of the **Custom 1** job property to **Pull** or **Print**.
  - Creates two workflow branches, one for child jobs with documents to be printed, and the other for child jobs with pulled documents. The rules for the branches are:
    - **Custom 1 = Pull**
    - **Custom 1 = Print**
  - Adds a **SendEmail** step to the branch for child jobs with pulled documents. The step sends the PDF file for the job to the client for verification that the documents were pulled.

- The value of the **Recipient address** property is the email address of the person at the client company who requested PDF files for verification.
- The value of the **Attachments** property is `${getCurrentFile(pdf)}`.
- The value of the **Message** property is `These reminder notices were pulled from job ${Job.Name}`.
- Rejoins the two branches by connecting them to a **WaitForRelatedJobs** step.

⬇ **Note:** The workflow in this usage scenario is similar to the **PullPDFSample** workflow. Examine that workflow to see all the steps, the connectors to the branches, and the values of step properties.

The administrator enables the workflow and submits a job to it at 8:00 AM.

The job goes through the workflow branch for parent jobs and stops at the **Wait** step.

At 1:00 PM, the operator receives a pull list from the client and uploads it to the `/aiw/aiw1/clientfiles/pull` directory. The pull list contains six account numbers:

245876A270011H335698R520905B558721L875540R

At 2:50 PM, the operator receives a second pull list from the client and uploads it. The pull list contains two account numbers:

445009S500112A

At 3:00 PM, RICOH ProcessDirector releases the job from the **Wait** step.

The job moves to the **SetDocPropsFromList** step. RICOH ProcessDirector :

- Retrieves the two pull lists from the `aiw/aiw1/clientfiles/pull` directory
- Examines the values for the **Doc.PullProp** property in the document properties file in the spool file for the job.
- Creates a column of values for the **Doc.Pull** property in the document properties file.  
When the value of the **Doc.PullProp** property matches one of the eight account numbers in the pull lists, RICOH ProcessDirector sets the value of the **Doc.Pull** property to **YES**.  
It sets the value of the **Doc.Pull** property for all other documents in the document properties file to **NO**.

The job moves to the **Group Documents** step, which places each document in one of two groups based on the value of the **Doc.Pull** property.

The job moves to the **CreateJobsFromDocuments** step, which creates a child job for each group of documents and submits the child jobs to the same workflow.

The child jobs go through the workflow branch for child jobs.

When the child jobs reach the **SetDocPropsFromConditions** step, RICOH ProcessDirector sets the value of the **Custom 1** job property:

- For the child job with the **Doc.Pull** property set to **Yes**, the **Custom 1** job property is set to **Pull**.
- For the child job with the **Doc.Pull** property set to **No**, the **Custom 1** job property is set to **Print**.

RICOH ProcessDirector sends the child jobs to the print branch or pull branch of the workflow based on the value of the **Custom 1** job property.

The child job with pulled documents moves to the **SendEmail** step, and RICOH ProcessDirector emails the job to the client for verification. The child job then moves to the **WaitForRelatedJobs** step.

The child job with documents to be printed moves to the **WaitForRelatedJobs** step after the **PrintJobs** step.

When both child jobs arrive at the **WaitForRelatedJobs** step, RICOH ProcessDirector sends them to the **RetainCompletedJobs** step.

Parent topic: [Usage scenarios for pulling documents from a job](#)