Configuring

Associating service policies with workflows

You can associate a service policy with one or more workflows. The service policy calculates the planned checkpoints and the SLA deadline for all jobs that use the workflow. Each workflow can have one associated service policy. To measure the performance of jobs using an SLA deadline, you must also identify an SLA target step for the workflow.

If more than one service policy applies to a workflow, you might need to create additional workflows. For example, if you have created two service policies – one for jobs from client ABC and another for jobs from client XYZ – and both clients use workflow **PDF**, you could create another **PDF** workflow. The workflows can have identical properties except for the associated service policy. You might, for example, name the two workflows **PDF.ABC** and **PDF.XYZ**.

If you change which service policy is associated with a workflow, RICOH ProcessDirector uses the new service policy to set the checkpoints and deadline for new jobs that arrive in the system. It does not use the new service policy for existing jobs unless you use the **Process Again** action to reprocess a job from the first step.

If you delete a no-service period, checkpoint and deadline times for jobs that are already in the system do not change, even if they were set using that no-service period. To reset the checkpoint times, you must reprocess the job from the beginning.

If a workflow or an authorized user changes the **Adjusted arrival time** property for a job, RICOH ProcessDirector recalculates the checkpoints for the job. Depending on the service policy, sometimes the checkpoints and the deadline change:

- If the service policy specifies the **Cutoff** adjustment method and a start time that is later than the old adjusted arrival time and earlier than the new adjusted arrival time, the checkpoints change from the day of the old adjusted arrival time to the day after the new adjusted arrival time.
- If the service policy specifies the **Cutoff** adjustment method and a start time that is later than both the old and new adjusted arrival times, the checkpoints remain the same.
- If the service policy specifies **Elapsed time** as the **Deadline calculation method**, the SLA deadline is recalculated from the Adjusted arrival time.
- If the service policy specifies **Specific time** as the **Deadline calculation method**, the SLA deadline is not recalculated.

To associate a service policy with a workflow:

1. Click the **Workflow** tab.
2. **Optional:** Right-click the name of the workflow and select **Disable**.
   If you do not disable the workflow while you edit it, jobs that use this workflow continue to move through steps. When you save, the workflow is momentarily disabled then enabled again. Jobs that are processing in the workflow could move into error.
3. Right-click the name of the workflow and select **Properties**.
4. In the **Service policy** property, select the service policy.
5. In the **SLA target step** property, select the step that represents the ultimate goal of the SLA.
   For example, if the SLA relies on printing the job by a given time, select the PrintJobs step. If the SLA relies on delivering the printed output to another department for inserting, you can create a manual step called **DeliverToInserter** and select that step as the SLA target step.
6. Click **OK**.
7. Save and enable the workflow.

Parent topic: Setting up service policies