Overview

Usage scenario for applying document markup based on a preferences file

In this scenario, a company changes their PDF print process to add a marketing offer to customer statements in a composed PDF file before printing the statements. One of two different marketing offers can be added. The choice for each statement is based on the award level that a customer has attained. Because the award level is not part of the data on the statement, the company exports award levels from their customer database into a text file that contains headers. That text file is used as a preferences file. The values in the file determine the offer applied to each statement.

The preferences file contains customer account numbers and award levels. Customers at the Platinum award level receive one offer, and customers at the Gold award level receive another offer. Customers who have not attained an award level do not receive an offer.

Before changing their process, the company prints all their statements using the **EnhancePDFDocuments** supplied workflow. The value of the **Identify PDF control file** property on the **IdentifyPDFDocuments** step is `/aiw/aiw1/control_files/EnhancePDFdocs.ctl`. The value of the **Build PDF control file 1** property on the **BuildPDFFromDocuments** step also is `/aiw/aiw1/control_files/EnhancePDFdocs.ctl`.

The company uses the **HotFolderPDF** supplied input device with the **Child workflow** property set to **EnhancePDFDocuments**.

They use RICOH ProcessDirector Plug-in for Adobe Acrobat to identify the statements as individual documents in the production PDF file for each job. The data in each statement includes the account number.

To support the new process, the administrator:

- Sets up custom document properties and adds markup for the offers.
- Creates a document property mapping object.
- Makes the preferences file available to RICOH ProcessDirector.
- Adds the **ApplyPreferences** step to the **EnhancePDFDocuments** workflow.

Setting up custom document properties and adding markup

To set up custom document properties and add markup, the administrator:

- Defines and activates two custom document properties on the **Administration ⇒ Objects ⇒ Custom properties** page:
  - **Doc.Custom.AccountNumber**, with **Account number** for the **Field name**
  - **Doc.Custom.AwardLevel**, with **Award level** for the **Field name**
- Loads the updated RICOH ProcessDirector document properties to RICOH ProcessDirector Plug-in for Adobe Acrobat.
- Uses the **Define Document Property** function in the plug-in to map account number data in the documents to the **Account number** document property (database name **Doc.Custom.AccountNumber**).
  During processing, the **IdentifyPDFDocuments** step in the workflow extracts the data for the **Account number** document property from each document in the PDF file for the job.

  > ⬇ Note:
  > - The **Define Document Property** function cannot be used to map data to the **Award level** document property (database name **Doc.Custom.AwardLevel**) because the documents do not have that data. During processing, the **ApplyPreferences** step in the workflow uses the preferences file to populate the property values.

- Uses the **Manage Rules** function in the plug-in to define two rules:
  - The `Award_level_platinum` rule has these rule conditions: `Doc.Custom.AwardLevel = Platinum`
  - The `Award_level_gold` rule has these rule conditions: `Doc.Custom.AwardLevel = Gold`
- Uses the **Add Image** function in the plug-in to add two images:
  - The first image is placed on documents that meet the conditions in the `Award_level_platinum` rule.
  - The second image is placed on documents that meet the conditions in the `Award_level_gold` rule.
- Uses the **Save control file** function in the plug-in to save the document property definition and the markup for the two images in the `EnhancePDFdocs.ctl` control file.
- Sends the control file to the RICOH ProcessDirector server.

Creating a document property mapping object

The administrator creates a **CustomerPreferences** document property mapping object with these values:

- In the **General** section, the value of **File type** is **CSV**.
- In the **Property Mapping** section the values are:

Heading	Document property	Usage

Account Number	Account number	Identify document
Awards	Award level	Update property

Making the preferences file available to RICOH ProcessDirector

To make the preferences file available to RICOH ProcessDirector, the administrator:

- Creates an `/aiw/aiw1/preferences` directory for preferences files.
- Asks the department that provides the preferences file to name it `EnhancePDFprefs.csv` and write it to the `/aiw/aiw1/preferences` directory.
- Makes sure that the preferences file is ready for RICOH ProcessDirector to process:
  - The file must be in comma-separated values (CSV) format or tab-delimited format.
    The columns of data must have the headings specified in the document property mapping object: `Account Number` and `Awards`.
    This example shows a portion of the file:

```
Account Number,Awards
2000144372,Gold
2001144678,None
2001154898,Platinum
2004187456,None
2007192007,None
2010197554,Gold
2010223114,Gold
2012234096,Platinum
2231547625,None
```

Modifying the workflow

To modify the **EnhancePDFDocuments** workflow that the company uses to print statements, the administrator adds an **ApplyPreferences** step after the **IdentifyPDFDocuments** step and sets values for the step properties:

- The value of **Preferences file** is `/aiw/aiw1/preferences/EnhancePDFprefs.csv`.
- The value of **Property mapping** is **CustomerPreferences**.

Processing jobs through the workflow

After setting up the workflow and testing it, the administrator places the workflow in production.

The **HotFolderPDF** supplied input device receives a PDF job with statement documents and submits it to the **EnhancePDFDocuments** workflow.

The job moves to the **IdentifyPDFDocuments** step. RICOH ProcessDirector identifies the documents in the PDF file and determines the value of the **Doc.Custom.AccountNumber** property for each document. RICOH ProcessDirector writes the values of the property to the document properties file for the job.

The job moves to the **ApplyPreferences** step. RICOH ProcessDirector reads the information in the `EnhancePDFprefs.csv` file and creates one column of data in the document properties file. The column contains values for the **Doc.Custom.AwardLevel** property.

The job moves to the **BuildPDFFromDocuments** step. RICOH ProcessDirector applies images to the documents by using the values for the **Doc.Custom.AwardLevel** property in the document properties file.

Parent topic: [Preference Management](#)