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Usage scenario for pulling policies based on addresses in a disaster area

In this scenario, a service bureau prints policies in a PDF print job. Because severe flooding has made mail delivery impossible in two postal codes, the service bureau suppresses the printing of policies with customer addresses in those postal codes. It removes those policies from the print job and emails them to customers.

The workflow in this scenario does not have a step that waits for receipt of a pull list. Jobs move through the workflow without waiting. As soon as the service bureau provides a pull list of postal codes in a disaster area, RICOH ProcessDirector removes documents with those postal codes from each print job that enters the **SetDocPropsFromList** step. When mail delivery resumes to all postal codes in the pull list, the service bureau removes the pull list, and RICOH ProcessDirector does not remove documents from print jobs that enter the **SetDocPropsFromList** step. The step remains in the workflow and can be used whenever documents need to be pulled from a job.

The service bureau uses RICOH ProcessDirector Plug-in for Adobe Acrobat to identify the policies as individual documents in the production PDF file for each job. The data in each policy includes the customer name, customer email address, and postal code.

To change the workflow so that it pulls policies for customers in the disaster area, an administrator at the service bureau configures RICOH ProcessDirector to support the new process.

The administrator:

- Defines two custom document properties, **Doc.Custom.CustomerName** and **Doc.Custom.PostalCode**, in the `docCustomDefinitions.xml` file.
- Runs the **docCustom** utility and updates the Custom Document Properties feature.
- 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 define three document properties:
 - **Doc.Custom.PostalCode** specifies the postal code data.
 - **Doc.Custom.CustomerName** specifies the customer name data.
 - **Doc.EmailAddress** specifies the customer email address data.

This document property is supplied with all document processing features.

The **IdentifyPDFDocuments** step in the workflow is going to extract the data for the three document properties from each document in the PDF file for the job. RICOH ProcessDirector is going to use the values of the **Doc.Custom.PostalCode** document property to determine which documents to pull from the job. RICOH ProcessDirector is going to use the values of the **Doc.Custom.CustomerName** and **Doc.EmailAddress** document properties in the step that emails pulled documents.

- Uses the **Save control file** function in the plug-in to save the document property definitions in the control file that identifies the policies 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 **SetDocPropsFromList** step to the workflow 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 **Doc.Custom.PostalCode**.
 - 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 an **EmailDocuments** step to the branch for child jobs with pulled documents. The step sends each document as a PDF file to the email address for the customer.

- The value of **Recipient address** is \${Doc.EmailAddress}.
- The value of **Subject line** is Policy for \${Doc.Custom.CustomerName}.
- The value of **Message** is Because mail service to postal code \${Doc.Custom.PostalCode} has been interrupted, we have attached a PDF copy of your policy.
- The value of **Attach document** is Yes.
- The value of **Name of attachment** is \${Doc.Custom.CustomerName}.pdf.
- Rejoins the two branches by connecting them to a **WaitForRelatedJobs** step.
- Creates a pull list and uploads it to the /aiw/aiw1/clientfiles/pull directory. The pull list contains two postal codes: 8045580540

The administrator enables the workflow and submits a job to it.

The job goes through the workflow branch for parent jobs and moves to the **SetDocPropsFromList** step. RICOH ProcessDirector :

- Retrieves the pull list from the /aiw/aiw1/clientfiles/pull directory.
 - Examines the values for the **Doc.Custom.PostalCode** 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.Custom.PostalCode** property matches one of the two postal codes in the pull list, 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 **EmailDocuments** step, and RICOH ProcessDirector emails each policy as a PDF file to the customer. A customer named John Doe receives this email:

To: John.Doe@mymail.com
 Subject: Policy for John Doe
 Attachment: John Doe.pdf _____
 Because mail service to postal code 80455 has been interrupted, we have attached a PDF copy of your policy.

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.

After mail delivery resumes to postal codes in the pull list, the administrator removes the pull list from the /aiw/aiw1/clientfiles/pull directory.

RICOH ProcessDirector prints all documents in the jobs that go through the workflow until the administrator places another pull list in the pull directory.

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