

## Configuring

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## Defining a rule

You can define rules that specify conditions for markup. You can also define rules to set media and finishing options, or to extract data.

Before you define a rule, make sure you have defined each custom rule, document property, and conditional trigger that you want to use as conditions in the rule.

To define a rule:

1. Click **Ricoh** ➔ **Manage Rules**.

2. Click the  icon.

Rules are shown alphabetically by name.

 **Tip:** In a markup dialog, you can define a rule by clicking the  icon and edit a rule by clicking the  icon.

3. Type a **Name** for the rule. You can use alphanumeric characters, periods, underscores, spaces, and special characters (such as @, #, \$, or %).

4. Optional: Type a **Description**.

5. Specify whether RICOH ProcessDirector Plug-in for Adobe Acrobat should apply the rule when any or all of its conditions are met.

6. Specify the first condition.

1. Click the down arrow for the **Not set** drop-down list.

2. Click the  icon next to **Predefined Rule**, **Custom Rule**, **Trigger**, **Job Property**, **Document Property**, or **Statistic** and select the item you want for the first part of the condition.

If a choice (such as custom rules, conditional triggers, or document properties) does not have any items, the choice is grayed out.

 **Note:** To display all items with a word in their names, type the word and press the down arrow key on your keyboard. You can also type the word and click the down arrow for the drop-down list.

3. Select a mathematical symbol, such as **=** (equals) or **≠** (does not equal), to compare the two parts of the condition.

4. Specify the second part of the condition:

- For a rule, select **True** or **False**.
- For a conditional trigger, verify that the condition has the value you want. If not, select a new conditional trigger.
- For a job property, document property, or statistic, type a value. You can also select any job property, document property, or statistic.

7. For a rule with multiple conditions, click the  icon and specify the next condition.

Repeat this step until you have defined all the conditions in the rule.

8. Click **OK** to create the rule and add it to the **Rules Manager**.

## Examples

### **Rule with one condition: a pre-defined rule**

To place markup on the first front page of each document, define a rule with a pre-defined rule as its only condition: **First Front Only = True**

### **Three rules that each have one condition: a document property**

A job contains sales statements for members at three different levels based on sales performance: Bronze, Silver, and Gold. You want to identify each membership level.

- In RICOH ProcessDirector, define a document property: **doc.member.level**.

- In RICOH ProcessDirector Plug-in for Adobe Acrobat, define three rules:

- **Gold Level**

```
doc.member.level = GOLD
```

- **Silver Level**

```
doc.member.level = SILVER
```

- **Bronze Level**

```
doc.member.level = BRONZE
```

### **Rule with multiple conditions**

A job contains sales statements for members at three different levels based on sales performance: Bronze, Silver, and Gold. You want to print a reward coupon on the first page of each statement for Gold and Silver members. This example uses three rules defined in the

previous examples:

- First Front Only
- Gold Level
- Silver Level

First, define a **Top Sales** rule with two conditions, which you apply when any condition is met:

- Gold Level = True
- Silver Level = True

Next, define a **Top Sales — First Front** rule with two conditions, which you apply when all conditions are met.

- First Front Only = True
- Top Sales = True

Finally, select the **Add Image** option. Apply settings by clicking **Pages/documents based on conditions** and selecting the **Top Sales — First Front** rule. Specify the path to the image.

#### *Rule with one condition: a job property*

To print **VOID: DO NOT MAIL** on each page of a test job:

- Define a **Test Job** rule with a job property as its only condition: **Job.TestJob = Yes**
- Select the **Add Text** option. Apply settings by clicking **Pages/documents based on conditions** and selecting the **Test Job** rule. Select **Text** as the **Content Type** and type **VOID: DO NOT MAIL** for the value.

#### *Rule with a condition that uses dynamic data*

When a statement has different addresses for billing and shipping, you want to print **Order sent to shipping address** on the statement:

- Define two document properties: **doc.shipping.address** and **doc.billing.address**.
- Define a **Sent to Shipping Address** rule with this condition: **doc.shipping.address ≠ doc.billing.address**
- Select the **Add Text** option. Apply settings by clicking **Pages/documents based on conditions** and selecting the **Sent to Shipping Address** rule. Select **Text** as the **Content Type** and type **Order shipped to shipping address** for the value.

Parent topic: [Working with rules](#)