

Configuring

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Defining document properties for use with a preferences file

Before RICOH ProcessDirector can use data about documents, you must define the data as RICOH ProcessDirector document properties.

To define document properties for use with a preferences file:

1. Identify data that you need document properties for.

Examples:

- o You want to extract account number, customer name, and statement date from each document in the job. You need to define three document properties.
As a job goes through the workflow, the **IdentifyPDFDocuments** step (PDF files) or **IdentifyDocuments** step (AFP files) extracts the data from each document in the job.
- o You want to extract two columns of data from an external preferences file so you can insert the data into the job. The columns have the headings **Output Type** and **Awards**. You need to define two document properties.

2. For each document property, choose a user interface name and a database name.

You can use existing RICOH ProcessDirector document properties, or you can define your own custom document properties.

Examples:

- o You can use the **Output type** document property (database name **Doc.Pref.Output**), which is supplied with the Preference Management feature.
- o Instead of using the **Output type** document property, you can define your own custom document property. You might give the document property the user interface name **Delivery choice** and the database name **Doc.Custom.DeliveryChoice**.
- o You can define your own custom document property with the user interface name **Award level** and the database name **Doc.Custom.AwardLevel**.

3. Use the **Administration ⇒ Objects ⇒ Custom properties** page to define and activate the custom document properties you need.

For example, you might add document properties with these attributes:

- o **Field name:** Account number
 - **Description:** Customer account number
 - **Data type:** Number
 - **Database name:** Doc.Custom.AccountNumber
- o **Field name:** Award level
 - **Description:** Customer award level
 - **Data type:** String
 - **Database name:** Doc.Custom.AwardLevel

 **Note:** You can define all the properties then activate them all at once.

4. If you are working with PDF files, load the updated RICOH ProcessDirector document properties to RICOH ProcessDirector Plug-in for Adobe Acrobat.

5. Specify the data that the **IdentifyPDFDocuments** step (PDF files) or **IdentifyDocuments** step (AFP files) extracts from each document in the job:

- o If you are working with PDF files, use the **Define Document Property** function in RICOH ProcessDirector Plug-in for Adobe Acrobat.
- o If you are working with AFP files, use the Document Property Designer (DPD) mode of RICOH Visual Workbench.

 **Note:** If the AFP files do not have index tags defined for the document data that you want to extract, use the AFP Indexer mode to add the tags. AFP Indexer is not supplied with RICOH ProcessDirector. You must purchase the feature.

6. Save your document property definitions in a control file for use with the **IdentifyPDFDocuments** step (PDF files) or **IdentifyDocuments** step (AFP files):

- o If you are working with PDF files, use the **Save control file** function in RICOH ProcessDirector Plug-in for Adobe Acrobat.
- o If you are working with AFP files, use the **Save control file** function in RICOH Visual Workbench.

7. Send the control file to the RICOH ProcessDirector server in a directory that the RICOH ProcessDirector system user has access to.

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