

## Configuring

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## PDF workflows for the Inserter feature

The full Inserter feature provides sample workflows that contain the steps required to receive and prepare jobs for insertion, print them, send inserter control files to the inserter controller, read inserter results files, and reconcile jobs after they have completed insertion. You copy and edit these workflows for your environment, or you add the steps in the sample workflows to your existing workflows.

 Note:

- If you have customized phase names in your system, the phase names in this topic might not match the names in your system.
- If you have the Quadient Inserter Express feature, sample workflows are provided. To run the sample workflows, see [Running the QuadientInserterSample workflow](#).

If the inserter controller specifies the open-loop reprint method, two workflows are required:

- **Original workflow:** This workflow is assigned to jobs entering the system. It contains steps in the Receive and Prepare phases.
- **Production workflow:** This workflow contains steps in the Assemble, Print, Insert, and Complete phases.

Two workflows are required when you use the open-loop reprint method because RICOH ProcessDirector creates a child job that contains the documents to be reprinted. The child job starts processing at the beginning of the production workflow. Therefore, the production workflow should contain only the steps that are needed to process the child job.

If the inserter controller specifies the closed-loop reprint method, only one workflow is required. The workflow includes all steps from the Receive phase through the Complete phase. Using two workflows is an option. For example, use two workflows if many jobs use common processing steps in the Receive, Prepare, and Assemble phases, but different processing steps in the Print, Insert, and Complete phases.

The Inserter feature provides these PDF workflows:

- **ReceivePDFInsert\_I:** Contains steps in the Receive and Prepare phases. In the Assemble phase, it changes to the **PrintPDFInsert\_I** workflow.
- **PrintPDFInsert\_I:** Contains steps in the Assemble, Print, Insert, and Complete phases. It does not contain steps to write and send inserter control files.
- **ReceivePDFInsert\_II:** Contains steps in the Receive and Prepare phases. In the Assemble phase, it changes to the **PrintPDFInsert\_II** workflow.
- **PrintPDFInsert\_II:** Contains steps in the Assemble, Print, Insert, and Complete phases. It contains steps to write and send inserter control files (required for file-based inserters).

 Note:

- Use the **ReceivePDFInsert\_I** and **PrintPDFInsert\_I** workflows only for inserters that do not require inserter control files.

The table [Steps in the original workflow](#) lists the required and optional steps related to insertion in the original workflow.

### Steps in the original workflow

Step template	Required	Brief description	Notes
Receive phase			
SetJobPropsFromTextFile	Yes	Set job properties using a text file that accompanies the input file.	
DetectInputDataStream	No (see Notes)	Detect the format of the input data stream.	This step is required if the <b>SetJobPropsFromTextFile</b> step does not specify the format of the input data stream.
Prepare phase			
CountPages	Yes	Map pages to physical sheets.	

Step template	Required	Brief description	Notes
IdentifyPDFDocuments	Yes	Identify documents, map document data to document properties, and create the document properties file.	
WriteDocumentsToDatabase	Yes	Write the documents in the job to the database.	This step assigns the unique Document ID that is used to track the document.
<b>Assemble phase</b>			
ChangeJobType	Yes (see Notes)	Change to a new workflow.	If you create only one workflow, do not include this step, and include all steps shown in the production workflow in this workflow.
<b>Print phase</b>			
<b>Insert phase</b>			
<b>Complete phase</b>			
RemoveJobs	No		Jobs do not go through this step if the <b>ChangeJobType</b> step is in the workflow.

[Steps in the production workflow](#) lists the required and optional steps for insertion in the production workflow.

#### Steps in the production workflow

Step template	Required	Brief description	Notes
<b>Receive phase</b>			
SetJobPropsFromTextFile	Yes	Set job properties using a text file that accompanies the input file.	Job properties that the original workflow set remain set. A step or rules processing in the production workflow can set new job properties. However, it cannot change the values of job properties that were set in the original workflow.
<b>Prepare phase</b>			
<b>Assemble phase</b>			
SetInsertProperties	Yes	Set inserter document properties.	
BuildPDFFromDocuments	Yes	Build a PDF job. Also, apply modifications in the RICOH ProcessDirector Plug-in for Adobe Acrobat control files.	The RICOH ProcessDirector Plug-in for Adobe Acrobat control files can hide existing inserter control information (such as OMR marks) and create new barcodes and OMR marks for insertion.
<b>Print phase</b>			
CountPages	Yes	Map pages to physical sheets.	
CreatePageRanges	Yes	Enable reprinting of a portion of the job.	
PrintJobs	Yes	Send the job to the printer.	
<b>Insert phase</b>			
WriteInserterControlFile	No (see Notes)	Write an inserter control file for the job.	This step is required for file-based inserters. If the inserter operator loads jobs before they have finished printing, move the <b>WriteInserterControlFile</b> and <b>SendInserterControlFile</b> step before the <b>PrintJobs</b> step.
SendInserterControlFile	No (see Notes)	Send the inserter control file to the inserter controller.	This step is required for file-based inserters.

Step template	Required	Brief description	Notes
InsertJobs	Yes	Process the job for insertion.	Select the inserter controller in this step. Also, specify the inserter job name if it is different from the RICOH ProcessDirector job number.
Reconcile	Yes	Determine which documents to reprint.	Select manual or automatic reconciliation in this step. Also, select the printer to reprint any documents that are damaged after insertion.
CreateInserterReprints	Yes	Reprint documents in the same job (closed-loop reprint method), or create a child job that contains the documents to be reprinted (open-loop reprint method).	
<b>Complete phase</b>			
RetainCompletedJobs	No	Keep the job in the system for the specified retention period.	
RemoveJobs	Yes	Remove the job from the system.	

Parent topic: [Configuring the system to use inserters](#)