Print Director Workflow Types

This article describes the workflows available in Print Director and explains how each one is used. See *How to configure Print Director Workflow Profiles* for how these workflows are arranged into tiles and assigned to devices.

Print Director's workflows fall into these categories:

- **Scan workflows**: direct scan-to-destination workflows that use the logged-in user's Print Director identity and don't require any account linking at the printer.
- **Cloud Providers**: workflows that connect to a third-party cloud storage service (OneDrive, SharePoint, Google Drive, Dropbox, Box, Google Workspace). These require a one-time account-linking step the first time the user runs the workflow.
- **Release print jobs**: secure release of the user's held print jobs from a workflow tile.
- **Copy**: photocopying at the printer with settings chosen by the administrator.

Scan workflows

Instant Scan to Me

The user taps the **Instant Scan to Me** tile and the printer scans immediately to their own email address. There is no settings dialog and no destination selection, the workflow is one tap.

This workflow uses the email address recorded on the user's Print Director account. If the user has no email address recorded, the workflow displays an error.

Use this for situations where users frequently scan documents to themselves and don't want to set up scan options each time.

Scan to Email

The user taps the **Scan to Email** tile and the standard scan dialog opens with their own email pre-filled as the recipient. They can edit the recipient list, subject, message body, and scan settings before tapping **Start scan**.

This workflow is suitable when users need to scan to themselves *or* to other recipients, with the option to adjust scan settings each time.

Scan to Home Folder

The user taps the **Scan to Home Folder** tile and the printer scans directly into the user's home folder on the network.

The home folder location is configured per user in Resource Manager (on the **User** form, **Home folder** field). It can be populated manually or via an LDAP / Microsoft Entra ID sync.

If the user has no home folder configured, the workflow displays an error.

Cloud Providers

Each Cloud Provider workflow allows the user to scan documents directly into a folder in their cloud account, and to print files directly from that account, all from the printer panel.

The first time the user runs a Cloud Provider workflow on any printer, they are asked to link their cloud account (see Cloud Provider authentication below). After that, the account is available at every Print Director-enabled printer on the network, no re-linking required.

OneDrive

Connects to Microsoft OneDrive (personal or business). Users can scan into any folder of their OneDrive, and print any printable file (PDF, Office documents, images) directly from OneDrive.

SharePoint

Connects to Microsoft SharePoint. Users can browse their SharePoint sites and document libraries, scan into a document library, or print printable files from SharePoint.

Google Drive

Connects to a personal or work Google account's Drive. Scan-to-folder and print-from-Drive both supported.

Dropbox

Connects to Dropbox (personal or business). Scan-to-folder and print-from-Dropbox both supported.

Box

Connects to a Box account. Scan-to-folder and print-from-Box both supported.

Google Workspace

Connects to a Google Workspace shared drive, useful where an organisation wants users to scan into shared workspace drives rather than personal Drives. See the related KB article *How to create a Google Workspace OAuth app* for the back-end setup required.

Cloud Provider authentication

Cloud Provider workflows authenticate via a QR-code flow at the printer panel. The administrator does not configure individual users' cloud accounts, each user links their own account the first time they use the workflow.

How the QR-code flow works

1. The user taps a Cloud Provider tile (e.g. **OneDrive**) at the printer panel.
2. If the user has not linked this provider before, the panel displays a QR code.
3. The user scans the QR code with their phone's camera. This opens the cloud provider's sign-in page on the user's own device.
4. The user signs in on their phone using their normal credentials, including MFA if enabled.
5. Once sign-in succeeds, the printer panel automatically continues to the folder browser. The user is asked to give the linked account a friendly name (e.g. *"My work OneDrive"*) so it's easy to recognise next time.

Where tokens are stored

The cloud account token is stored centrally on PDServer (encrypted at rest), linked to the user's Print Director account. **Tokens never live on the printer itself.** This has three consequences:

- **The user's cloud accounts follow them.** Once linked, they're available at every Print Director-enabled printer on the network, the user doesn't re-link when they walk to a different floor or branch.
- **Tokens stay on the customer's own server.** Print Director does not send tokens to any third-party SaaS service.
- **A printer being replaced or wiped does not lose any user's cloud accounts.** The next printer reads the same tokens from PDServer.

Linking multiple accounts to the same provider

A user can link more than one account to the same provider, for example, a personal OneDrive and a work OneDrive. The friendly name given at link time helps the user pick the right account on subsequent visits.

Re-authentication

Cloud Provider tokens have an expiry date set by the provider (typically 90 days for OneDrive/SharePoint, longer for Google). When a token expires, the user is shown the QR code again the next time they run the workflow and re-link in the same way. All other linked accounts remain valid.

Removing a linked account

A user can remove a linked account from the panel by navigating into the cloud workflow, selecting the account, and choosing **Unlink**. The account remains in the user's cloud provider, only the link from Print Director is removed.

Using a Cloud Provider workflow for the first time

This example uses OneDrive on a Konica Minolta device, but the flow is identical for the other providers.

1. **Sign in at the printer.** The user walks up to the printer. The login screen is showing. They sign in using their PIN, card swipe, or username and password (depending on how the device is configured).
2. **Open PD Workflow.** If the workflow profile has **Auto-start** enabled, the PD Workflow app opens automatically as soon as the user is signed in. Otherwise, the user taps the **Apps** button on the home screen and then taps **PD Workflow**.
3. **Choose Cloud Workflows.** The user sees the workflow tiles configured for their device. They tap **Cloud Workflows** (a folder tile) to open the cloud providers screen.
4. **Choose OneDrive.** The user taps the **OneDrive** tile.
5. **Link their account (first time only).** The panel displays a QR code. The user scans it with their phone's camera. The OneDrive sign-in page opens on their phone. They sign in with their work email and password, complete MFA if prompted, and consent to the access request.
6. **Name the account.** After sign-in succeeds, the printer panel shows a screen asking the user to give the account a friendly name (e.g. *"My work OneDrive"*). They type a name and tap **Save**. They can choose **Only this session** instead, so the account is not kept after they log out. The workflow's **Saved cloud sign-in** setting decides which choice is selected to start with, or makes every sign-in last only for the session.
7. **Browse and scan.** The user is now in their OneDrive folder browser on the panel. They navigate to the destination folder. To scan, they tap **Scan here** at the bottom of the screen. The scan settings panel opens, they choose format, colour mode, resolution, and other options, then tap **Start scan**. The printer scans the document and uploads it into the chosen folder.
8. **Print a file.** Instead of scanning, the user can tap any printable file (PDF, Office document, image) in the browser. The print panel opens. They choose copies, colour, and duplex, then tap **Print**. The printer downloads the file and prints it.

On every subsequent visit

When the user comes back to the printer (or any other Print Director-enabled printer), Step 5 (the QR code) is skipped. They go straight from Step 4 to Step 7, picking the previously-named OneDrive account, browsing to a folder, and scanning or printing. This applies only to an account they saved; an account used for **Only this session** needs a new sign-in.

Release print jobs

The **Release print jobs** workflow lists the user's held print jobs on the panel so they can release them. Its **Release settings** can make every released job black and white or double sided, and set whether the user can change colour, sides or copies for a job before releasing it. Jobs are only ever changed one way: colour to black and white, and single sided to double sided. See *Configuring PD Workflows*.

Copy

A **Copy** workflow makes photocopies at the printer with settings the administrator chooses, such as the number of copies, colour, sides, paper and scale. Each setting can be hidden, shown, or left for the user to change. Print Director ships with a built-in **Photocopy** workflow; a copy that always prints in black and white, for example, is another Copy workflow with its **Colour** set and hidden. See *Configuring PD Workflows*.

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