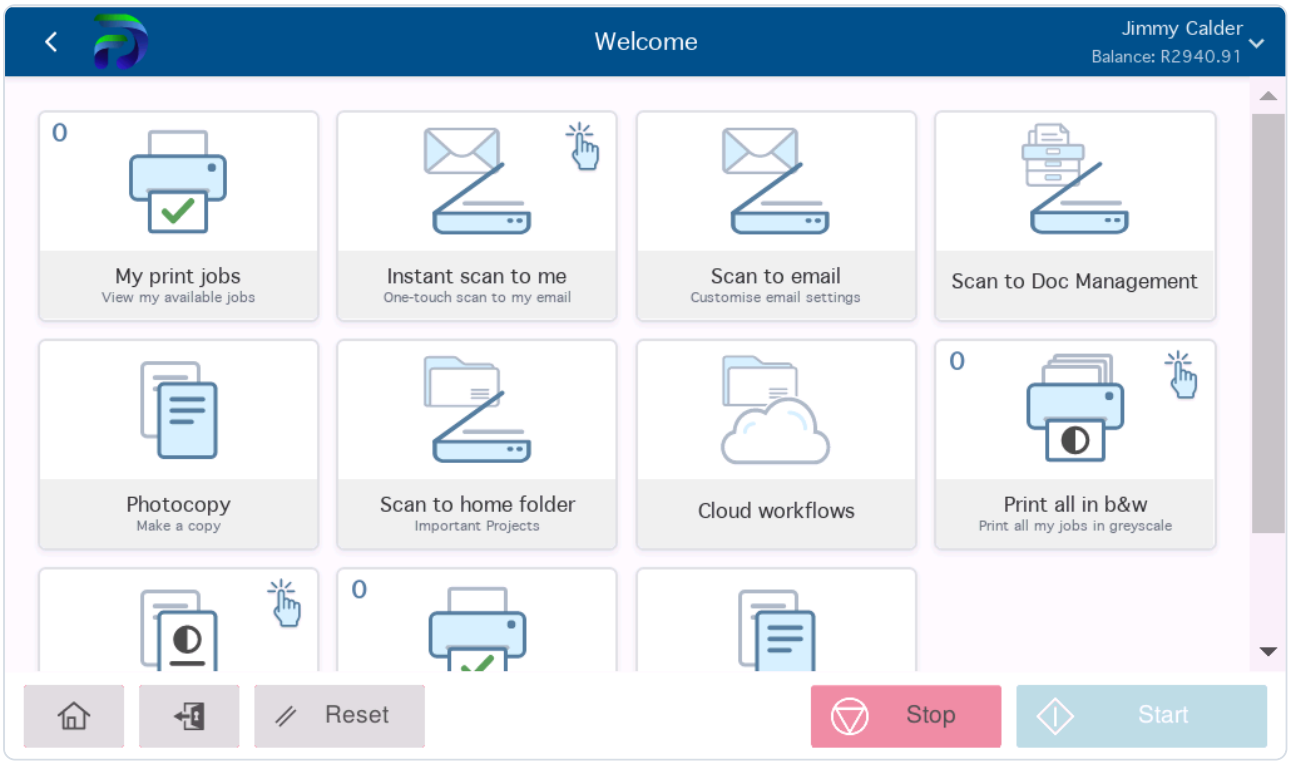
Configuring PD Workflows

What is a Print Director workflow?

Workflows are pre-configured actions that can be performed on a printer within the PD Workflow application: scanning to various destinations (email, cloud, folders), printing from cloud providers, releasing held print jobs, and making copies. Workflows are then added to Profiles that define how they look on the printer panel (the order in which they appear, border and background colours, and whether they are grouped in folders). Workflow Profiles are then assigned to specific printers.



For a list of available workflows and what each one does, see *PD Workflow Types*. For instructions on building a Workflow Profile, where workflows are arranged into tiles, coloured, and grouped into folders, see *How to configure PD Workflow Profiles*.

What affects the visibility of a workflow on the printer?

Certain workflows have configurations that should only be used by certain departments or users. For example, the marketing department might have their default scanning resolution set to Highest, while other departments are defaulted to just High. Or perhaps there are users who can scan to specific server folders, with specific metadata included. Or perhaps there are certain printers that shouldn't allow scanning to Google Drive (e.g. library printers), while others should (e.g. student labs).

Several things determine whether a given workflow appears on a given printer:

1. **Workflow Profile assigned to the printer**. If the printer doesn't have a Workflow Profile assigned, the PD Workflow app will not be available on the printer, and no workflows will be available (only the printer's native workflows).
2. **Workflow added to the Profile assigned to the printer**. The workflow must be added to the Workflow Profile that is assigned to the printer.
3. **Workflow with "Allow advanced features" enabled**. If the workflow has advanced features enabled, it will only be displayed if the printer has an advanced workflow licence allocated. You can assign Profiles containing Workflows with advanced features enabled to any printer. If you run PD Workflow on a printer without an advanced workflow licence allocated, you'll only see those workflows without the advanced features enabled.
4. **Workflow user access**. By default, the workflow access is allowed for all users. This can be enabled or disabled by user, by department or even Active Directory or Entra ID groups.
5. **Workflow disabled**. If the administrator checks the **Disable the workflow** checkbox, the workflow will not be visible.

Built-in workflows

Print Director ships with a set of **built-in** workflows that are seeded into the database when PDServer is installed, for example *Scan to Email*, *OneDrive*, *Google Drive*. The word "built-in" here just means *"shipped with" or "pre-installed"*. Built-in workflows cannot be deleted and certain settings cannot be changed, like the workflow name and the workflow type. This is because future updates to PD might include updates to the functionality of the built-in workflows, and these workflows must exist with the same name and type to be upgraded. All other settings, however, can be changed.

You can still duplicate the **built-in** workflows, and change any setting (including the name and type). The duplicated workflow will not be marked as built-in. You can also add new workflows of any type. Any workflow can be added to any Profile, built-in or not.

If a future update of PD includes updates to workflows, only the **built-in** ones will be altered.

Duplicate a workflow

If you want to create a new workflow that inherits the same settings of an existing workflow, simply right click the item in the Workflows list and choose **Duplicate**.

You'll find the Workflows list under **Resource Manager > Print Management > Workflow Management > Workflows**.

Create a new workflow from scratch

In the Workflows list, click the **Add** button. Choose the type of workflow to create from the menu.

Edit a workflow's settings

The workflow settings control what the workflow does, how it looks to the user, and what questions it must ask the user. Defaults can be set and many settings can be shown or hidden from the user.

Variables

Most text items like labels or default values for editable fields (e.g. file names, folder paths, email addresses) can contain literal text as well as variables or combinations thereof. These variables are replaced by actual values when the workflow is executed. For example, if the **File name pattern** of a scan-to-folder workflow contains `scan_%UserLoginName%_%PanelLoginAccountCode%` and a lawyer with a login name `johnsmith` logs in to a printer and specifies the billable account code `MAT123`, the resulting scan file name would be `scan_johns_MAT123.pdf`. Only the text fields that have the green + symbol support variables.

To insert a variable into a text field, click the + symbol or right click and choose **Insert Variable**. A form will be displayed with a list of available variables including descriptions of what they are. Either double click or select the desired variable. The variable tag will be inserted at the cursor position.

To remove a variable, right click on it and choose **Remove Variable**.

General tab

- **Workflow name**. This is how the workflow is identified in the list of workflows and must be unique. It is not necessarily the label the user will see on the printer.
- **Disable the workflow**. This will hide the workflow on all devices if checked.
- **Main label pattern**. This is the main label the user will see on the printer. Each workflow box has an image, a main label and an optional sub label. The main label is required and its text size is larger than the sub-label. Variables can be included in this text. By default, it contains `%WorkflowName%` which means the text will be replaced with the Workflow name when displayed on the printer.
- **Sub label pattern**. Optionally, additional text can be shown beneath the main label.
- **Panel image**. The picture on the workflow's tile, chosen from the drop-down. Click **…** to open the **Search for Workflow Image** window, where **New**, **Edit** and **Delete** manage the images; the images that ship with Print Director show **Built-in** *Yes*. Cloud workflows can tick **Use default provider image** to show the cloud provider's own logo.
- **Type**: This will change the type of the workflow. This can affect which settings are kept between changes so be careful when changing this setting. For example, both the scan-to-email and scan-to-folder types have **Scan settings** so these settings won't be lost when switching the **Type**. But only the **Email settings** are relevant for the scan-to-email **Type** so switching to scan-to-folder will lose these settings.

- **One-touch execute (no user options).** This will cause the workflow to execute without showing any workflow screen to the user. So a scan-to-email workflow will immediately scan any documents in the document feeder (or on the flatbed) and email it to the user. Similarly, a scan-to-folder workflow immediately scans and saves the scan to the configured folder. Note that some workflows do more than just scan. The cloud workflows can scan to your cloud storage (e.g. Google Drive, OneDrive etc) but you can also print from your cloud storage. However, if **One-touch execute** is enabled, only the scan function will be immediately executed.
- **Allow advanced features:** If your licence includes some advanced workflow licences, this checkbox will be enabled. If enabled, extra settings will be available, such as **Additional Fields** and **Post processing**. Be careful when enabling this. When enabled, only printers that have an advanced workflow licence allocated will display this workflow. To allocate a licence to a printer, go to **Print Management > Shared Devices**, double-click the printer, click **Controller** in the list on the left and then **General**, and check the **Allocate advanced workflow licence** checkbox.
- **Default user access.** Sets whether users without an access setting will have access to the workflow or not. Once they have an access setting, this setting will have no effect. See the user access settings on the **User access** tab.

Scan settings tab

This tab will only show in workflow types with a scan function, such as **Scan to email**, **Scan to folder**, and all the cloud workflows (e.g. **OneDrive**, **DropBox** etc).

The **Scan settings** tab controls the default scan settings for the workflow as well as the visibility and whether the user may change each of them at the printer.

- **Allow the user to enable the printer's native scan setting.** An admin opt-in. When ticked, the workflow's scan settings screen shows an **Adjust settings on printer** toggle. If the user turns that toggle on and taps **Start Scan**, the printer's own native scan-settings screen opens. The user adjusts the scan options there, closes the screen, and Print Director continues the scan with the chosen settings and delivers it per the workflow (email/folder/cloud) exactly as normal. Use this to give power users the full set of device scan options without exposing every vendor-specific option in the Print Director UI; leave it off to keep locked-down workflows tight. The toggle is off by default and is a per-scan choice, it is not remembered between scans.
- **File Format**: Note that the formats PDF, JPEG and TIFF are supported on both Konica Minolta and Lexmark. If Compact PDF or PPTX is selected on Lexmark, it will be changed to PDF because Lexmark doesn't implement these formats.
- **Searchable PDF (printer OCR)**: When set to **Searchable PDF**, the printer runs its own OCR on the scan and delivers a PDF whose text can be searched and copied. This uses the printer's built-in OCR, not a Print Director server component, so it needs no advanced workflow licence. Printers without OCR (for example a Lexmark model without the OCR option) simply deliver a normal PDF. Set the value to **Searchable PDF** and the visibility to **Hidden** to make every scan from the workflow searchable without the user having to choose; set it to **Editable** to let the user switch it off per scan. It applies to the PDF and Compact PDF formats.
- **File name pattern**: The name of the scan file. Variables can be included. Do not append the file extension, this is done automatically based on the file format.

- **Scan duplex**: Whether both sides of the paper must be scanned.
- **Merge originals**: After scanning a page, ask for more pages before completing the process and generating the scan file. This is normally used for creating a multi-page PDF using the flatbed. Note that if the JPEG file format is chosen for a multi-page scan, it will result in multiple .jpg files with a numbered postfix (e.g. scan_0001.jpg, scan_0002.jpg etc). When scanning to email, all jpg files will be attached to the same email.
- **Resolution**: How finely the document is scanned, the higher the resolution the larger the scan file. The four tiers map to a vendor-native dpi on each device family:

Tier	Effective dpi
Normal	200 dpi
Fine	300 dpi
High	400 dpi
Highest	600 dpi

  - Lexmark devices also expose 75 dpi and 150 dpi options on their native scan panel. To make those reachable, enable **Allow the user to enable the printer's native scan setting.** The device's own scan-settings screen will appear when the user taps Start Scan, and any value they pick there (including 75 or 150 dpi on Lexmark) will be applied to the job.
- **Blank removal:** If enabled, blank pages will not be included in the output file.
- **Scan size:** Normally, this is left on **Auto.** The scanner will determine the appropriate size based on the document in its feeder or on the flatbed. However, when scanning something with a non-standard size (like an ID card), the printer might ask the user to choose the scan size if it can't automatically determine it. If you select a size other than Auto, the printer will skip this step and only scan the size selected.
- **Colour**: The default is **Auto** where the MFP inspects each page and picks colour, greyscale, or black-and-white per page, which keeps file sizes down on mixed batches.
  - Tip. If scan quality matters more than file size, consider setting this to **Full Colour** even for documents you know are black and white. When the MFP decides a page is greyscale or black, it switches to a more aggressive compression path and the output is often visibly worse: softer text edges, banding on photographs, and loss of faint pencil marks or stamps. Full Colour keeps the same encoder for every page, at the cost of a larger file.

Folder settings tab

This tab will show for the **Scan to folder** workflow type. It specifies where the scan files are saved on the server and whether the user can change the folder path.

- **Folder path pattern**: This is the path to which scan files will be saved. If the user is allowed to browse folders, they will not be able to navigate to the parent of this folder. Variables are accepted. If the folder does not exist on the server, it will be created.
- **Display label pattern**: The text label for the folder path. Variables are accepted.
- **Visibility & user edit**: When set to **User can edit** the user can browse folders. If set to **Visible but not editable** they can see the folder path, and when set to **Hidden** they won't.
- **If file exists**: what happens when a file of the same name is already in the folder: **Append number to file name** or overwrite the existing file. A scan saved as several files always gets a numbered suffix, for example *file_0001.jpg*, *file_0002.jpg*.
- **Allow create folders**: If the user is able to browse folders, they can create new folders if this setting is checked.

Email settings tab

This tab will only show in workflows with an email function, such as **Scan to email**. It governs what the user can see or edit for the email recipients, email subject and body.

- **Email template**: Choose (or create) an email template that has the **Scan workflow** context. The template has the Subject and Body that will be used for the emails as well as settings such as the email send account and body format. It also lists the available variables that can be used in the subject and body that are valid for the scan workflow context.
- **Subject visibility & user edit:** Whether the subject is visible and, if visible, whether the user can edit it.
- **Body visibility & user edit:** Same as above.
- **Address book mode:** If any of the recipient fields are visible and editable, we can specify whether the user can manually enter addresses, or choose from an address book, or both. If they can choose from an address book, a pre-configured address book can be selected from the drop-down menu.
- **To pattern:** This will hold a pre-populated value for the To recipient box. It could be a literal email address, or a variable to always load the user's email address. If needed, the label the user sees next to the recipient box can be edited in the **Display label pattern** box. It also supports variables. In the **Visibility & user edit** drop-down, choose the visibility and editability of the **To** recipients. If it is set to **Hidden**, the user won't see the To box at all, and if an address is contained in the **To pattern**, scans will always be sent to this address.
- **Cc, Bcc, and From patterns**: Same as above.

Cloud settings tab

This tab will only show in cloud workflows (OneDrive, SharePoint, Google Drive, Dropbox, Box and Google Workspace). It governs what the user can do with their cloud storage at the printer.

- **File browser**: **Browser visibility** sets whether the user sees their cloud storage: **Show browser with folders**, **Show browser without folders**, or **No cloud browser (print not possible)**. **Root folder path** is the folder the browser starts in; the user cannot go above it. Tick **Allow create folders** to let the user create folders.
- **Scan to cloud**: tick **Allow scan to cloud**. **If file exists** sets what happens when a file of the same name is already there: **Append number to file name** or **Overwrite the file**.
- **Print from cloud**: tick **Allow print from cloud** (this needs the file browser to be visible). **Colour default On** and **Duplex default On** set the starting print options, **Paper source tray** the tray, and **Print via PDAgent** the PDAgent that sends the job.
- **Cloud sign-in**: **Saved cloud sign-in** sets whether the user's sign-in is kept for later visits: **Save by default (user can decline)**, **Don't save by default (user can opt in)**, or never save, so the user signs in again every session. **Sign-in QR timeout (min)** is how long the sign-in QR code stays valid. Google Workspace workflows do not use a saved sign-in.
- **Google Workspace app**: for Google Workspace workflows only, the **Workspace app** configuration the workflow uses. The workflow cannot be saved without one.

Release settings tab

This tab will only show in **Release print jobs** workflows. It governs whether jobs will have their colour, sides or copies altered when they are released.

- **Colour**: **Allow print in colour** leaves each job's own colour setting; **Convert to black & white** prints every job in black and white.
- **Sides**: **Allow print single sided** leaves each job's own setting; **Convert to double sided** prints every job double sided.
- **Alter job copies**: whether the user can change the number of copies of a job at the printer.

Each setting has a **Visibility & user edit** drop-down: **Hidden**, **User can edit**, or **Visible but not editable**. Jobs are only ever changed one way: colour to black and white, and single sided to double sided.

Copy settings tab

This tab will only show in **Copy** workflows, which make photocopies at the printer. Each setting has a **Setting value**, a **Display label pattern** (the label the user sees) and a **Visibility & user edit** drop-down, as on the **Scan settings** tab. The settings are **Number of copies**, **Colour**, **Original sides**, **Output sides**, **Paper**, **Scale (%)**, **Darkness**, **Collate** (**Collate multi-copy sets**), **Pages per side**, **Original size** and **Content type**.

- **Allow the user to enable the printer's native copy settings.** When ticked, the user can open the printer's own copy settings screen before copying, as with the native scan setting on the **Scan settings** tab.

User access tab

This is where workflow access can be specified on a per-user basis. The **Workflow access** column shows whether the user has access or not. If they do not have access, they won't see the workflow on any printers with profiles that contain the workflow. If access has not been set, the **Set access method** will show **Workflow default**. This means their access depends on the workflow's **Default user access** setting. Once their access has been set, either manually on this tab or via a user sync (LDAP or Entra ID), the workflow's **Default user access** setting won't affect the users' access. To manually change the access, you can double click or multiselect users and click **Edit access**.

Department access tab

When a user is created in a Department, they inherit that Department's workflow access. This tab specifies the workflow access new members of each Department will inherit. Select the Departments and click **Edit access**. These settings won't affect the Department's current members. Your site may use a different name for Departments, and the tab is named to match.

When several workflows are selected, tick **Change the Department access defaults for all selected workflows** to apply the change to all of them. The **User access** tab has a matching **Change the user access for all selected workflows** box.

Additional fields

Additional fields ask the user for extra information at the printer when they scan, for example an invoice number, a credit type or a sales territory. The values travel with the scan: they can be used in the workflow's patterns (the file name, the folder path, and the email recipients, subject and body) and they are written into the metadata file (see Post processing below). This is how a scan is prepared for a document management system. Additional fields are an advanced feature: the workflow needs **Allow advanced features** ticked, and the printer needs an advanced workflow licence.

Additional fields are created once and can then be assigned to any number of workflows.

Create an additional field

1. In Resource Manager, go to **Print Management** > **Workflow Management** > **Additional fields**. The list shows each field's **Tag ID**, **Value entry method**, **Display label**, **Editability**, **Default value** and how many workflows it is assigned to.
2. Click **Add**. The **Additional field** window opens on its **General** tab.
3. Fill in the field:
   - **Tag ID**: the field's name, for example *InvNo*. It identifies the value in the metadata file.
   - **Display label pattern**: the label the user sees on the panel, for example *Invoice number*. Variables are accepted.
   - **Required (empty value not allowed)**: tick it if the user must enter a value before scanning.
   - **Entry method**: how the user gives the value (see below).
   - **Default value**: the value the field starts with.
   - **Visibility & user edit**: **Hidden**, **User can edit** or **Visible but not editable**.
4. Click **OK**.

The **Entry method** decides what the user does at the panel:

- **Text value**: the user types the value, for example an invoice number.
- **Boolean**: a yes or no choice. A **Boolean values** tab appears: under **Enter the values that will be returned below**, set the **True value** and **False value**, for example *Send* and *Do not send*. **Default value** then offers true or false.
- **Drop-down options**: the user picks one value from a drop-down list. A **Drop-down options** tab appears. Click **Add** for each option and enter its **Display label** (what the user sees) and **Return value** (what is recorded), for example *30 day* for both. To make one option the default, right-click it and choose **Set as Default**; **Is default** then reads *yes*, and the **Default value** on the **General** tab shows it. The same right-click menu has **Edit**, **Add Option**, **Select All** and **Delete**.
- **Radio options**: the user picks one value from a set of buttons, for example a territory. A **Radio options** tab appears and works the same way as **Drop-down options**.

Assign additional fields to a workflow

1. Go to **Print Management** > **Workflow Management** > **Workflows** and double-click the workflow.
2. On the **General** tab, make sure **Allow advanced features** is ticked.
3. Open the **Additional fields** tab. **Available fields** on the left lists the fields not yet assigned; **Assigned to workflow** on the right lists the ones the workflow uses, in the order the user sees them.
4. Select a field on the left and click **Assign >>**. To remove one, select it on the right and click **<< Unassign**. Use **Move up** and **Move down** to change the order.
5. Click **OK**.

Post processing

The **Post processing** tab creates a metadata file next to each scan, for a document management system or another application to read. It is an advanced feature, like additional fields.

- **Create Json metadata file**: writes a JSON file.
- **Create Xml metadata file**: writes an XML file.

Tick **Same as scan file name** to give the metadata file the scan's own name (with *.json* or *.xml* in place of the scan's extension), or untick it and enter a file name pattern in the box beside it. Variables, including the values of the additional fields, are accepted.

The metadata file records the printer, the user who scanned, the job, the scanned file names, the email settings for an email scan, and the **Tag ID** and value of every additional field. For a scan to folder, set the destination on the **Folder settings** tab; the metadata file is saved in the same folder as the scan.

Searchable PDF is not a post-processing option: it is the printer's own OCR and lives on the **Scan settings** tab.

Advanced workflow licence

Workflows that use advanced features (Additional Fields or Post-processing) require an **advanced workflow licence** on the device they are run from.

The licence model is **device-count-based**: Print Director's licence file contains a count of permitted "advanced workflow devices". You decide which devices use up an advanced workflow licence: devices that don't use advanced features don't need to consume a licence.

How to allocate a licence to a device

On the device's **Controller** > **General** page (see *Konica Minolta Integrated controller settings* or *Lexmark Integrated controller settings*), tick the **Allocate advanced workflow licence** checkbox. Each ticked device consumes one advanced workflow licence from the licence pool.

What happens if a device doesn't have an advanced workflow licence allocated

If a Workflow Profile is assigned to a device and the profile contains workflows with **Allow advanced features** enabled, those workflows will be **hidden at the panel** for users at that device

- they will not appear in the workflow tiles.

This means a device without an advanced workflow licence can still safely run a profile that contains advanced workflows; the user just won't see the advanced ones. This makes it possible to assign a single profile across an organisation and have advanced workflows appear only on the devices that have been licensed for them.

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