How to configure PDAgents for user login

By default, PDAgent client applications will authenticate based on the user account of the logged-in user (i.e., the environment username). When all PCs are joined to a domain, this is not a problem because the environment username is guaranteed to be unique.

However, this could present a problem in the following cases:

- There is no domain, or some PCs are not joined to the domain. In these cases, the environment username is not guaranteed to be unique and may be unrelated to the actual user's name (e.g. USER or Administrator).
- There are some PCs that are logged in with the same domain account and shared between users (e.g. labuser).
- The IT administrator added print queue connections to a print server from non-domain PCs. When these connections are created, Windows credentials will be requested. Afterward, all jobs sent from these PCs will arrive at the server under the username that was entered when Windows credentials were requested (e.g. admin).

We can configure the PDAgents to require the user to login. Once the user is logged in, popups for telephone call billing will appear for extensions assigned to that user. Also, print jobs will be authenticated as this user if the print server is configured to request authentication from the client.

Set the print server PDAgent (or user PDAgents if serverless) to request authentication from the client

If a site is using a print server (as opposed to direct-IP local print queues), we will need to set the print server PDAgent to request authentication from the client. Otherwise, it will always use the 'job owner' field to authenticate the jobs. In this case, we must open the print server PDAgent. If the site is serverless, we must change the setting on the **<default settings>** PDAgent so new PDAgent installations will inherit this setting.

- In Resource Manager, click **PD Agents**.
- If you have a print server, double click it on the right. In serverless environments, open the **<default settings>** PDAgent so new PDAgents inherit this setting. You can also multiselect PDAgents to change the setting for many existing PDAgents.
- Click the **Print services** tab and change the drop-down in the **Print job user authentication** frame to **Require authentication from PDAgent Client**.

- Click **OK**.

Set the client authentication method to require login

Now that we have set the print server (or user PDAgents in serverless environments) to request job authentication from the client, we must set the client authentication method to require login.

- In Resource Manager, click **PD Agents**.
- Multi-select the PDAgents that must require users to log in (be sure to include **<default settings>** if new PDAgent installs must have this setting) and click **Edit**.
- Click the **Client app** tab.
- If multi-editing, tick the checkbox next to the **User auth method** label.
- Change the drop down to **Require login to PDAgent Client**.

At this point, you could click **OK + Refresh** and the selected PDAgents will require users to log in. Note, existing PDAgent clients that had the old setting (session account from operating system) will only show the login once they reboot (or if they right click the system tray icon and choose **Sign out**).

Below is a description of each of the client app settings.

Show the PDAgent client system tray icon

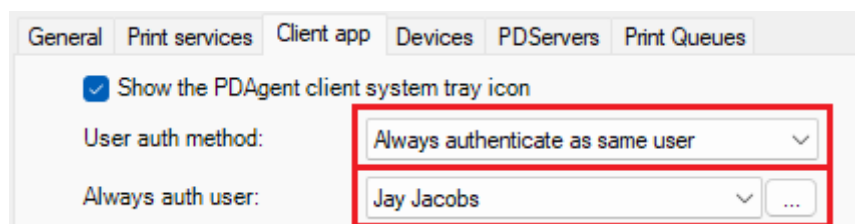This must be ticked to allow for users to log in (or access client settings). It should only be unticked if you don't want users to know that PDAgent is installed (for example, if you are running a printing audit and you don't want users to alter their behaviour).

Option - Always authenticate as same user

Perhaps you don't want a particular user to self-register or log in. You may already know who sits at that PC and a record for the user already exists. In this case, you could set the **User auth method** to **Always authenticate as same user** and then specify the user in the drop down.

Option - Auto-create unrecognised OS user accounts

This setting is only valid if the **User auth method** is set to **OS environment user**. If a user record cannot be matched to the environment user, a user will be auto-created if this checkbox is ticked. Otherwise sign-in will still be required.

Default Department

When a user registers, this Department will be used as the default. So if the Department field is not ticked in the **Enabled fields for self-registration or user profile edit** frame, they will be created in this Department. If it is ticked, the Department drop-down in the user registration form will default to this Department.

Authentication fields

By default, logging in to PDAgent Client requires a Login name and password to be entered in the login form. However, we can change this to use the same PIN that is used for logging in to the printers. To do this, change the **Authentication fields** drop-down to **PIN only (Controller user ID)**.

Login frequency

These settings relate to how often a user will need to log in.

Login at startup if not remembered

If ticked, the login form will show as soon as the user signs-in to their PC. If they had previously logged in (and **Remember logins** was ticked) the login form won't be displayed because it will login automatically as the previous user.

If unticked (and no previous login was remembered), the user will need to right click the system tray icon and choose **Sign in**.

Remember logins

If ticked, the user will only need to sign-in once. After that, PDAgent Client will always log in as the same user until the user manually signs out.

Allowed login functions

Allow self-registration

If ticked, the Register button will appear on the login form allowing users to register.

Send welcome email

If ticked, an email will be sent to any new user that registers. This could contain useful information like the users auto-allocated PIN, or instructions on how to log in to a printer.

To specify which email template is used for this email:

- In the menu bar, click **Tools** > **System Configuration**.
- Click the **PDAgent Client** tab.
- Check the template in the **New user welcome** drop-down.

To edit the template:

- Navigate to **Email Management** > **Email Templates**.
- Find the **New user welcome** template in the list and double click it.
- Make your changes and click **OK**.

Auto create PIN

If ticked, a printer PIN number will be auto generated for new registered users. This new PIN will be included in the welcome email if the template contains the %PIN% tag.

To change the length of auto created PINs:
- In the menu bar, click **Tools** > **System Configuration**.
- Under the **General** tab, go to **Auto setting user PINs**.
- Change the value in the **Auto PIN length** control and click **OK**.

If unticked, the PIN will be the same as the user's login name (which will be their email address if **Login name** is unticked in the **Enabled fields for self-registration or user profile edit** frame).

Allow 'forgot password'

If ticked, the **Forgot password** button will be visible in the login form. If the user cannot remember their password, they can click this button to reset it. They will need to enter their email address in the **Reset your password** window and choose a new password that meets the complexity requirements. If the email address can be matched to a user record, they will receive a verification code in their inbox. After entering this in the **Email verification** form, their password will be set to their chosen password and they will be logged in.

Enabled fields for self-registration or user profile edit

These are fields that will be shown to the user when they register or if they edit their profile (by right clicking the icon and choosing **Edit my profile**).

Note that for the user to edit their profiles the setting must be enabled on their user record:

- Navigate to **User Management** > **Users**.
- Double click the user on the right.

- Click the **Billing** tab.
- Click the **Client app** tab.
- Ensure the **Allow edit user profile** checkbox is ticked.
- Click **OK**.