How to configure PDAgents for user login

By default, the PDAgent client identifies the user by the Windows account they are logged in to the computer with. On computers joined to a domain this is reliable, because every user has their own account. It is not reliable when:

- there is no domain, or some computers are not on it, so the account name may be shared or meaningless (for example *USER* or *Administrator*);
- several people share a computer logged in with one account (for example *labuser*);
- print queues were added from computers that are not on the domain, so every job reaches the print server under the user name entered then (for example *admin*).

In these cases, make users sign in to the PDAgent client. Their print jobs are then matched to them (where the print server asks the client who printed), and phone call popups for their extension reach them.

Make the print server ask the client who printed

With a print server, the print server's PDAgent must ask the PDAgent client who printed, instead of trusting the job owner. Without a print server, change the **<default settings>** PDAgent, so new PDAgents get the setting (and any existing ones).

1. In Resource Manager, click **PD Agents**, and double-click the print server's PDAgent (or **<default settings>**, or select several).
2. On the **Print services** tab, under **Print job user authentication**, choose **Require authentication from PDAgent Client** (or **Allow Job Owner until client auth received**, see below).
3. Click **OK**.

How the job owner and the client sign-in work together

When a PDAgent receives a job, it gives it a job owner: the owner Windows reports for a queue it watches, the LPR user name for a job sent to its LPD service, or the requesting user name for a job sent to its IPP service. Under **Print job user authentication**:

- **Initial user (job owner):** the job belongs to its job owner. Only the job owner can release it, and it is recorded against them.
- **Require authentication from PDAgent Client:** the PDAgent asks the PDAgent client on the computer that printed who the user is. Until the client answers, nobody can release the job. A job from a computer without the PDAgent client, or from another system such as SAP, can then never be released.
- **Allow Job Owner until client auth received:** the job owner can release the job until a PDAgent client answers. Use this where some computers have the PDAgent client and others do not, for example users printing to Windows shared queues without the PDAgent.

Each user's **Print auth requirement**, on their **Advanced** tab under **Print job re-authentication**, is normally **Use print server PDAgent setting**. Set it to **Use print job owner** or **Request from client app** to treat one user differently.

Make the client ask users to sign in

1. In **PD Agents**, select the PDAgents whose users must sign in (include **<default settings>** for new installations), and edit them.
2. Click the **Client app** tab.
3. Set **User auth method** to **Require login to PDAgent Client**. (When editing several PDAgents, first tick the box next to it.)
4. Choose the other settings (below), and click **OK + Refresh**.

Computers already running the client show the sign-in after a restart, or when the user right-clicks the Print Director icon and clicks **Sign out**.

Client app settings

- **Show the PDAgent client system tray icon:** must be ticked for users to sign in. Untick it only if users must not know the PDAgent is there, for example during a printing audit.
- **User auth method:** besides **Require login to PDAgent Client**, **OS environment user** uses the Windows account (the default), and **Always authenticate as same user** always uses the user chosen in **Always auth user**, for example for a computer that only one known person uses.
- **Auto-create unrecognised OS user accounts:** with **OS environment user**, creates a user for a Windows account that matches no user. Otherwise the user must sign in.
- **Default Department:** the department new users are created in when they register. If users may choose their department when registering, this is the one selected to start with.
- **Authentication fields: Login name and password** (the default), or **PIN only (Controller user ID)** to sign in with the same PIN as at the printers.

Login frequency

- **Login at startup if not remembered:** the sign-in window opens when the user logs in to the computer. Otherwise they right-click the Print Director icon and click **Sign in**.
- **Remember logins:** the user signs in once, and stays signed in until they sign out.
- **Popup authenticate every print job:** the user must sign in for each print job.

Allowed login functions

- **Allow self-registration:** shows a **Register** button, so users can create their own user (see *How to sign in to the PDAgent client or register*).
- **Send welcome email:** emails new users when they register, for example with their PIN. The template is chosen in **Tools** > **System Configuration**, on the **PDAgent Client** tab, in **New user welcome**, and edited in **Email Management** > **Email Templates**.
- **Auto create PIN:** creates a printer PIN for new users. It is included in the welcome email if the template has the *%PIN%* tag. The PIN length is set in **Tools** > **System Configuration**, on the **General** tab, in **Auto PIN length**. If this is not ticked, the PIN is the user's login name (up to 2.5.15).
- **Allow 'forgot password':** shows a button for users who forget their password (or PIN). They enter their email address, choose a new password, and enter the verification code emailed to them.

Enabled fields for self-registration or user profile edit

The fields users fill in when they register, or when they edit their profile (right-click the Print Director icon and click **Edit my profile**). To edit their profile, a user also needs **Allow edit user profile** ticked on their **App settings** tab.

Related articles

- *How to sign in to the PDAgent client or register*
- *How to manually create a User*
- *SAP Printing: SAP username in document name*

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