Print Director Installation Guide

This guide covers planning a Print Director installation and installing it. For hardware, operating systems, SQL Server versions and ports, see *Print Director Technical Requirements*.

Plan the installation

Check the network and servers

Print Director works with Windows print servers, and with users printing directly to printers from their computers. Jobs from Mac, Linux or other computers that print to a Windows print server are tracked too. Networks spanning several sites (WANs) are supported, and the software keeps working if a site loses its link to the database.

Choose the database server

Print Director's database runs on Microsoft SQL Server, full or Express edition. If your organisation already has a SQL Server, it may be the best place for the database: it may already be tuned and backed up. Ask its administrator whether the Print Director database may go there, and for enough rights to create it.

Otherwise, choose a computer for SQL Server Express. This can be the main print server.

Check the printers

Send the printer models to your Print Director partner, to confirm the Print Director app supports them.

Decide what must be tracked, and where modules go

- **PDServer:** talks to the printers and runs scheduled tasks (such as emailed reports and user syncs). One is usually enough. A site with branches that connect to a central database over a WAN should have a PDServer at each branch, so users there can still log in at the printers if the WAN goes down.
- **PDAgent:** controls print queues. It is needed on every print server and every computer with its own print queues (printing directly to printers, or to a USB printer). Users who print through a print server need it only for popups (account billing, signing in, Rule messages). No restart is needed, and it can be deployed with Group Policy or Microsoft Intune (see *Group Policy deployment of PDAgent*).
- **Resource Manager:** for administrators who set up Print Director (pricing, users, accounts).
- **PD Reports:** for anyone who opens reports.

For help choosing how users print, see *Choosing a deployment model: workstation PDAgent, print-server-only or Universal Print*.

Prepare in advance

About a week before installing:

- Get administrator access to every computer that needs a module, and to the database server if SQL Server Express is to be installed. For Group Policy deployment, get rights to edit Group Policy.
- Ask the network administrator to open the ports Print Director needs on any third-party firewalls (see *Print Director Technical Requirements*). Windows Firewall is set up for the PDAgent automatically.

Install

1. Download and extract the full Print Director installation files, and run *PrintDirector.EXE*.
2. Read the licence agreement, tick **I accept the terms of the licence agreement.**, and click **Next**.
3. Choose the modules to install on this computer: **DBTools**, **PDServer**, **PDAgent**, **PDReports** and **Resource Manager**. To create the database here too, tick **Create database**. Under **Database server**, choose **Use an existing SQL instance**, or **Install SQL Server Express**.

SQL Server Express

If you chose **Install SQL Server Express**, its settings follow:

- **Installer path:** SQL Server 2022 Express, included in the installation files. Click **…** to use a different version.
- **'sa' password:** a strong password that meets your domain's password policy, or the installation fails. Keep a record of it.
- **SQL Server Instance Name:** choose **Default instance (MSSQLSERVER)** unless the computer already has a default instance of SQL Server (look for **SQL Server (MSSQLSERVER)** in Windows Services). Then you do not need the SQL Browser service, and other computers connect with just the computer name. Use a **Named instance** (*PD*) only if an existing default instance cannot be used.
- Leave the **Installation file paths** as they are, unless the administrator wants them elsewhere.

Check the summary, then click **Install**.

Create the database

If you ticked **Create database**, DBTools asks where to create it:

1. Enter the SQL Server's name in **Server Name**: the computer name for a default instance, or `ComputerName\InstanceName` (for example `PDSERVER\PD`) for a named instance.
2. Leave **Trusted Connection** ticked, unless SQL Server is on another computer and your Windows account cannot create databases there. Click **OK**.
3. In **New database settings**, check the **Database name** and the **PD user name** and **PD user password**: the limited SQL login the Print Director modules connect with. Click **Create PD database**.
4. Apply the licence you received from your Print Director partner: from the licence file, by entering the 12-character licence code, or from the encrypted text in the licence email (see *How to update the Print Director licence*).
5. The licence's **System ID** must match the database server's computer name. A new licence is issued before that name is known, so the first time, Print Director asks the online licence server for permission to update it. Confirm when asked; this needs internet access. If it is not allowed, contact your Print Director partner.

If you chose to, Resource Manager opens when the installation is finished.

Installing modules on other computers

When a module is installed on a computer other than the database server, it asks for the database connection settings: the server name, the database name (*PDDB2*), and the user name and password (*PDUser*, unless they were changed). See *How to install PDAgent, Resource Manager or PD Reports*.

Related articles

- *Print Director Technical Requirements*
- *Choosing a deployment model: workstation PDAgent, print-server-only or Universal Print*
- *How to install PDAgent, Resource Manager or PD Reports*
- *Group Policy deployment of PDAgent*
- *How to back up the Print Director database*

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