Using the "Microsoft Remote Desktop" on non-Windows devices

You can use the free Microsoft Remote Desktop Client to connect to the DGLPM Server from virtually any Apple Mac, iPhone, iPad, or Android device as long as it has an internet connection.

Stage 1: Installing the Remote Desktop Client for your device

Remote Desktop Client for the Apple Mac (OS 10.9 or higher)

- Open the App Store, click into the "search" in the top right corner and type in "Microsoft Remote Desktop" and press [enter]
- The orange "Microsoft Remote Desktop" app should be listed in the search results. Click it, then click "Install". You may be prompted to enter your App Store username and password.
- Click the "Launchpad" icon on the toolbar. If the Microsoft Remote Desktop icon is not shown, type "Microsoft" into the search area. Once located, drag the icon either onto the desktop, or down onto the toolbar, whichever you prefer.

**Installing the Remote Desktop Client for the iPhone or iPad**

- Open the App Store, tap the "search" icon, and type in "Microsoft Remote Desktop" and tap "Search"
- The orange "Microsoft Remote Desktop" app should be listed in the search results. Tap it. Tap the "Free" button, then tap "Install". You may be prompted to enter your App Store username and password.
- The "Microsoft Remote Desktop" will be added to your installed apps and will show as an orange icon titled "RD Client".

Installing the Remote Desktop Client for Android

- Open the Play Store, go into "Apps" then tap the "search" icon and type in "Microsoft Remote Desktop"
- The orange "Microsoft Remote Desktop" app should be listed in the search results. Tap it, then tap "Install". If shown a "This application has access to…" warning, tap "OK" to accept.
- The Microsoft Remote Desktop icon should now be accessible from your main screen.

## Stage 2: Adding the correct connection settings

The process for setting up a connection to the servers is very similar regardless of which device you are connecting from, however some of the settings may appear in a different order to those shown in these instructions. Also, the terms "click" and "tap" are used interchangeably, depending on your device type.
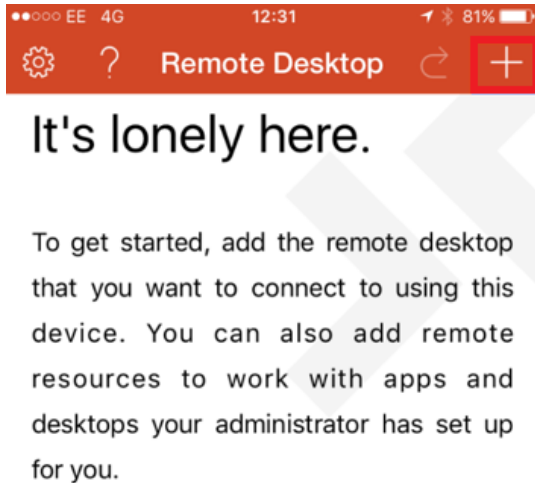
Open the "Microsoft Remote Desktop" (which may be abbreviated to just "RD Client" on some devices) Then Click "**+**".
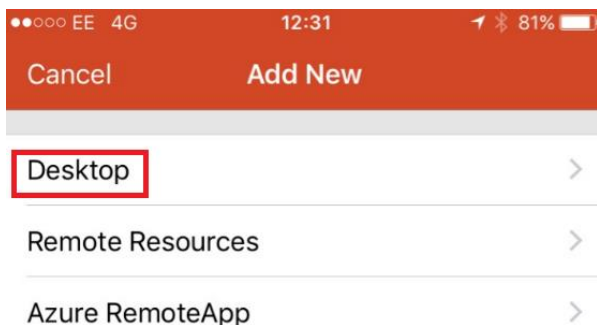
Click on "Desktop"
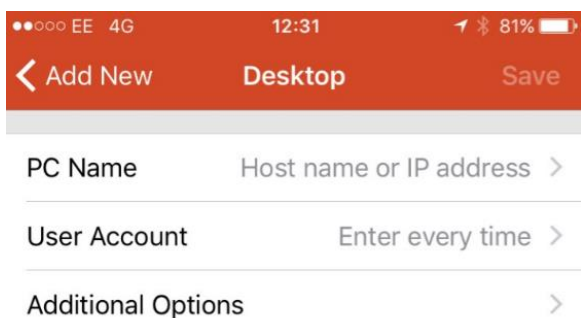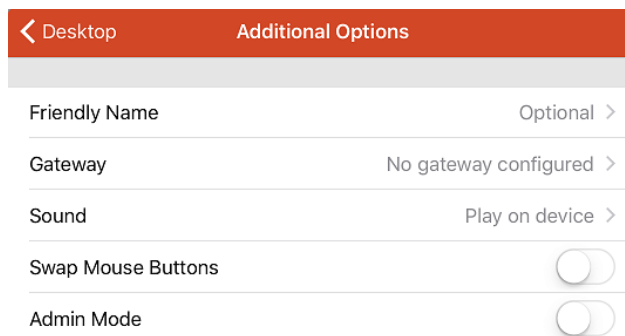
Then enter in the below details

- **PC Name:** Enter "customername.pm.dgl-solutions.com" The "customer name" will be the first part of your username before the full stop e.g. JSmith.John.
- **User Account:** Click on "Add User Account" then enter your "User Name" prefixed with "DGLPM\" (i.e., "DGLPM\JSmith.john") and enter your password into the "Password" box. If this is a shared computer/device, leave the credentials blank and you will be prompted to enter them every time you connect. (On mobile device, tap "Save")
- *Additional Options: You can then click on additional Options and enter in* set these optional settings *if you wish*

‹ Desktop	**Additional Options**
Friendly Name	Optional ›
Gateway	No gateway configured ›
Sound	Play on device ›
Swap Mouse Buttons	⚪
Admin Mode	⚪

- o **Friendly name:** *An easy-to-remember name for the PC you are connecting to.* Enter "DGLPM Server" *, if you do not specify a friendly name, the PC name is displayed*
- o **Gateway** : Leave as "No gateway configured"
- o **Sound**: Select "Play on device"
- o **Swap mouse buttons:** Whenever a mouse gesture would send a command with the left mouse button, it sends the same command with the right mouse button instead. This is necessary if the remote PC is configured for left-handed mouse mode.
- o **Admin:** Leave this off
- **Folder redirection**: *On a Mac, click on the "Redirection" button along the top of the window. This* enables access to local folders during the remote session. Click the + button at the bottom of the dialog and choose a folder you want to have redirected. If you want to be able to access files stored on your Mac from within the remote session (such as documents, voice files, images, etc.), you will need to list the folder(s) you want access to. If you don't require access to your local files, skip these steps.

a. Tick the "Enable folder redirection" box.

b. Click the + button.

c. In the Add Local Folder window, enter the following information:
- o **Name**: Set a name for the folder to be available during the remote session.
- o **Path**: Select the path to the folder to be available during the remote session. Either type the name of the path, or click the drop-down arrow and click "Browse"

For example, to be able to access the contents of your "Documents" folder, add a name such as "Documents", then browse to your "Documents" folder, click "Choose" then click "OK".

![Clanwilliam Health logo]

- Either tap the "Save" button, or on a Mac click the red exit button to save the new settings.

Stage 3: Using the Remote Desktop Session

To connect to your remote desktop in future, open the "Microsoft Remote Desktop" application (or "RD Client"), then tap or click on the name of the server you want to connect to.

You will see "Connecting RDP…", then "Connecting Network…", then the RSA login screen. If there is a long pause, try clicking "Cancel" and connecting again. From this point on, log in as you would normally. (i.e., enter your username (there is no need for the "DGLPM\" at the start of the username.

Once you connect to the server you will see the below screen
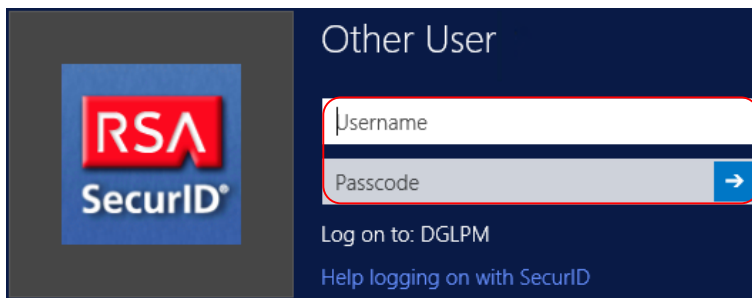
Type your *username* in the "Username" box. (This time it does not require the "DGLPM\" at the beginning like it did in the previous step).

Click into the "Passcode" box. Normally in this box you will enter a PIN followed by the 6-digit Tokencode shown on your RSA SecurID Keyfob. However, if this is the first time you have logged in you will not yet have a PIN set up, so instead just *enter the 6-digit Tokencode* by itself and click "*Enter*" or the Blue square with the White arrow.

If this is the first time you have logged on, you will be shown the "*New PIN Wizard*". Here, you must enter a *new PIN* of your choice. It must be between 4 and 8 digits long, and can contain any combination of numbers or letters. Choose something memorable but not easily guessable. *(A four digit PIN number is usually ideal).*

Need Help? Call 08450 664999

REGISTERED OFFICE: Clanwilliam Health (DGL) Ltd., Aurora House, Deltic Avenue, Rooksley, Milton Keynes, Buckinghamshire, MK13 8LW, United Kingdom. Phone: + 44 (0)1280 824600. Registered in the UK, No: 3020555. VAT Number: 623 9389 15. DIRECTORS: E. Byrne (Managing), H. Beggs, D. O'Sullivan, G. Lindberg.

As your PIN is not displayed on-screen, enter it a second time into the "Confirm SecurID PIN" box. Click "**Finish**". You now MUST wait for the numbers on the keyfob to change (this will take up to a minute) then enter PIN + Tokencode and click "OK".

From this point on, whenever you are asked to enter your "Passcode", you must enter your PIN immediately followed by the numbers shown on your keyfob.

If this is the first time you have logged in, you will be prompted to enter your "Windows Password". Your password will be on your compliment slip. Once you have logged in successfully you should rarely be asked to enter your Windows password in the future.

IMPORTANT: If you mistype your Windows password three times you will be disconnected and must start the connection process again. If this happens you MUST wait for your RSA Keyfob to change to show a FRESH number before attempting to log in again.

Once your Windows password has been accepted, you will be presented with your Remote Desktop screen on the DGL PM Server. From this point on, you should be able to double-click the Practice Manager icon and start using Practice Manager.

iPhone/iPad/Android Users

The "Connection Bar" at the top of the screen gives access to the "Pan Control" (which enables the screen to be enlarged and moved around) and also to the "on-screen keyboard".

- Pan control: Tap the "pan" icon ⬖ in the connection bar to display the pan control and zoom the screen.

Need Help? Call 08450 664999

REGISTERED OFFICE: Clanwilliam Health (DGL) Ltd., Aurora House, Deltic Avenue, Rooksley, Milton Keynes, Buckinghamshire, MK13 8LW, United Kingdom.
Phone: + 44 (0)1280 824600. Registered in the UK, No: 3020555. VAT Number: 623 9389 15.
DIRECTORS: E. Byrne (Managing), H. Beggs, D. O'Sullivan, G. Lindberg.

- Use the pan control: Tap and hold the pan control ⊕ and then drag in the direction you want to move the screen.
- Move the pan control: Double tap and hold the pan control ⊕ to move the control on the screen.
- Disable the pan control: Tap the pan icon in the connection bar to return the screen to its original resolution.
- On-Screen Keyboard: The keyboard can be displayed, or hidden by tapping the keyboard icon ⌨ . The pan control is displayed automatically when the keyboard is displayed.

If a Bluetooth keyboard is connected to your device, most keys should work as normal, however others may not.

Mac Users

If running on a Mac in full screen mode, the menu bar at the top of the screen will be hidden. Move the mouse up to the top of the screen to make it visible. This remote connection menu bar includes tools you can use to navigate the session.

Mac keyboard layouts differ from the Windows keyboard layouts.

- The Command key on the Mac keyboard equals the Windows key.
- All actions, which you perform using the Command button on the Mac, you need to use the control button in Windows (e.g.: Copy = Ctrl + C).
- The function keys can be activated in the session by pressing additionally the FN key (e.g.: FN + F1).
- The Alt key to the right of the space bar on the Mac keyboard equals the Alt Gr/right Alt key in Windows.
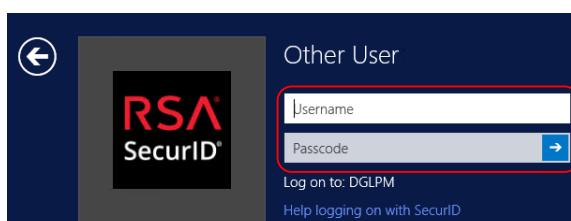

Future Connections

Most of the steps listed above only apply the FIRST time you connect. After that, you simply need to do the following:

Open the "Microsoft Remote Desktop" app (which may be abbreviated to just "RD Client" on some devices) then select DGLPM Server
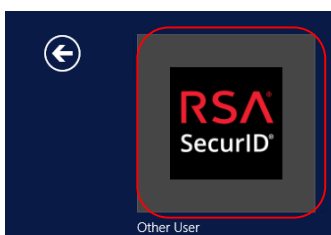
Single left click on *RSA SecurID.*

Enter your "*Username*" (user.name). Enter your Passcode (which is your **PIN followed by the 6 digit Tokencode number** from your keyfob).
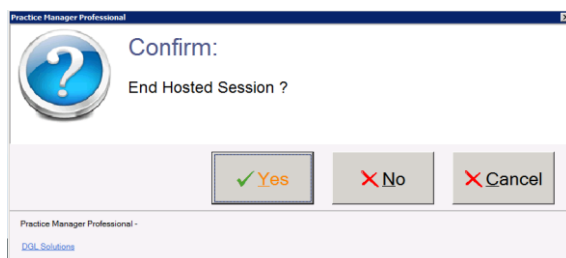
This will take you in to your DGL PM Server where you will see the Practice Manager icon. Login is using your username and password.

How to log off
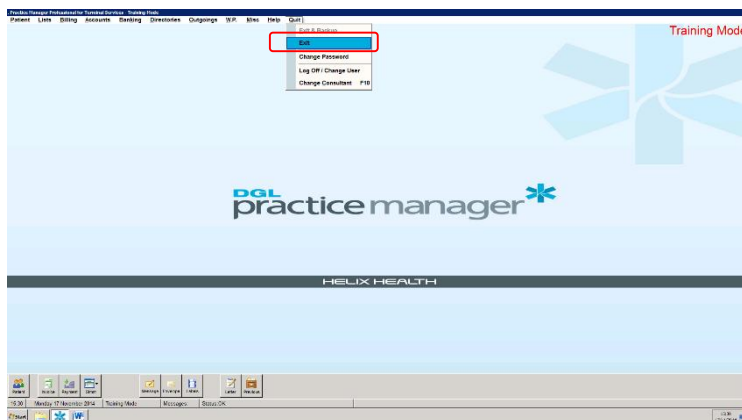
Click **Quit** and then **Exit** from the Main Menu of Practice Manager.

On the above screen you now have a choice. If you click *Yes* it will log you off of **Practice Manager and the** DGL PM Server taking you back to your PC desktop.
If you click *NO* it will **only** log you off **Practice Manager** and take you to the desktop. To log off click the red button on your desktop called "Log Off."