



## Remote Desktop setup procedures

*This document provides detailed instructions for setting up a Windows 10 machine to act as the Remote computer that hosts CharityMaster.*

*It is recommended that you have one computer dedicated to running CharityMaster on a Remote Desktop. The reason for this is that when someone wants to access the Remote Desktop computer over the internet, anyone using the Remote Desktop computer will be booted off. This implies that you will have a minimum of two computers on your network.*

### Before you start

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In order to implement the steps detailed below, you will require the following:

1. The user name (e.g. Microsoft Account user name) and password for an *Administrator* account on the computer that will be hosting CharityMaster – i.e. the **Remote** computer to which various **client** computers will be connecting.
2. The user name and password for your router<sup>1</sup>.

### Remote computer setup

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#### Network setup

All computers on your network that are running CharityMaster should be connected to the router by wire. Creditech Solutions will not support installations where the CharityMaster program communicates with the “back end” data file over a wireless connection.

#### Install software

Install both CharityMaster and Microsoft Office (CharityMaster requires that at least Microsoft Word be installed). It is essential that the CharityMaster “build” number be the same for all copies of CharityMaster on your network.

After you install CharityMaster, whenever you set up a new user on this machine, the CharityMaster icon will be available on the new user’s desktop.

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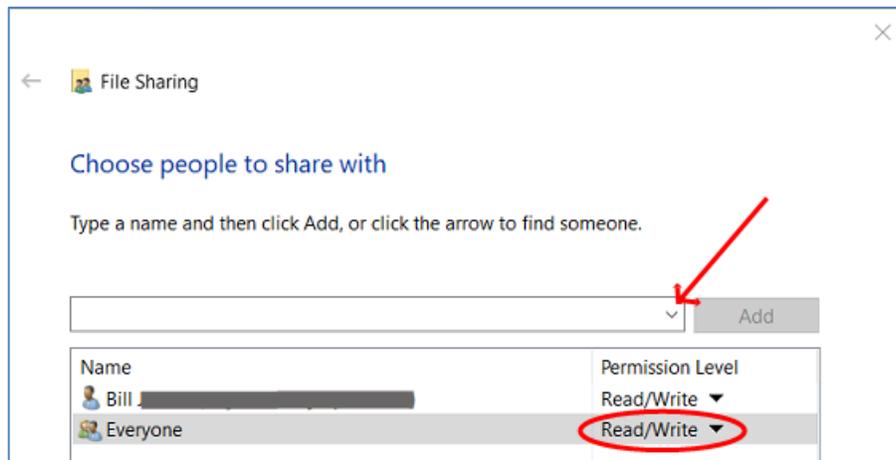
<sup>1</sup> This device is also called a “modem” because, in most small networks, both a modem and a router are built into the same device. A **router** is a networking device that forwards data packets between computer networks. Routers perform the traffic directing functions on a network and on the Internet. A data packet is typically forwarded from one router to another router through the networks that constitute the internetwork until it reaches its destination node.

Obtain a license key for this installation of CharityMaster and activate CharityMaster.

When you install CharityMaster, it puts the “back end” files (the file containing your data and the Word templates) into the **C:\CharityMaster** folder. If this folder is where you are going to keep your “live” data then you must ensure that this folder is “shared” with all users of the Remote computer and with other computers on your network.

### Sharing C:\CharityMaster

3. Right click the C:\CharityMaster folder.
4. Click **Properties** on the pop up menu.
5. Click the **Sharing** tab.
6. Click the **Share** button.
7. Click the v symbol and select “Everyone”
8. Click **Add**.
9. Click the down arrow to the right of “Everyone” and set the Permission level to “Read/Write.”



### Disable “sleep” mode

**Step 1:** Open the **Settings** app. To do so, click on the Settings icon on the Start menu or simultaneously press Windows and I keys.

**Step 2:** Click the **System** button.

**Step 3:** On the resulting page, click **Power & Sleep**.

**Step 4:** Now, under the **Sleep** section, you will see two options:

- On battery power, PC goes to sleep after
- When plugged in, PC goes to sleep after

For both options, expand the drop-down menu and select **Never**.

### Set up user accounts

By default, the only people who can access the **Remote** computer are those with an “Administrator” user account on the **Remote** machine. This means that Remote Desktop users with Administrator accounts can access and change *everything* on the **Remote** computer – not just CharityMaster.

In general, people with Administrator accounts should *not* be allowed to access the Remote Desktop.

You should set up a *standard* (non-Administrator) account for each person that is going to remotely access the **Remote** computer and also ensure that each of them are provided with a very strong password.<sup>2</sup>

**Step 1:** Open **Settings app**. To do so, click on the Settings icon on the Start menu or simultaneously press Windows and I keys.

**Step 2:** Click the **Accounts** button.

**Step 3:** On the resulting page, click **Family and Other People**.

**Step 4:** Now, under the **Other people** section, click “Add someone else to this PC.”

**Step 5:** How you set up a new users account depends on whether they already have a Microsoft account.

If they DO have such an account, you must find out how they log into that account (both user name and password.) On the Microsoft account screen which is now displayed, enter their Microsoft account user name - generally an e-mail address. Click Next and enter their password.

If they DO NOT have a Microsoft account, click “I don’t have this person’s sign-in information.” Now you are given the option of creating a Microsoft account for this new user. If you don’t want to create a Microsoft account, click “Add a user without a Microsoft account.” Then click **Next**. On the next screen enter the user name, password and password hint you want to assign to this user.

*It is very important to create strong passwords. Remember that the **Remote** computer can be accessed by anyone on the internet so users must ensure that they safeguard their passwords and that they use only strong passwords. (Users can change their own passwords.)*

**Step 6:** By default, the above procedure sets up a “Standard User.” However, after you have set up the new account be *absolutely* sure that the account type is “Standard user”<sup>3</sup> and NOT “Administrator.” To check this, proceed as follows:

1. Open Control Panel.
2. Click User Accounts.
3. Click “Manage another account.”
4. A list of user accounts will be displayed. Only if the account type is “Administrator” will the word “Administrator” be displayed.

**Step 7:** After the new user account has been set up, be sure to log into the new account (as the new user) to allow Windows to complete the setup of the new account (a process that will take a couple of minutes). If you do not perform this step, the user will have difficulty logging in when they try to access the account using Remote Desktop.

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<sup>2</sup> According to traditional advice a strong password has a minimum of 10 -12 characters including at least one number, one symbols, one capital Letters, and one lower-case letter. Use a mix of different types of characters to make the password harder to crack.

<sup>3</sup> **Standard User:** Standard user accounts are good for everyday usage, and can be a [local account](#) or [Microsoft account](#). Standard user accounts can use most apps and change system settings that do not affect other users. If any action that requires elevated rights is attempted while signed in as a standard user, Windows will display a User Access Control ([UAC](#)) prompt for the password of an administrator for approval. If UAC is set to "Never notify", then a standard user will automatically just be denied the elevated action.

**Step 8:** Register the CharityMaster license for each user account using the same key that activated CharityMaster when you first installed CharityMaster on this machine.

## Allow Remote Access

In order to be able to use Remote Desktop Connection you'll first have to allow remote access to your **Remote** PC (the one running CharityMaster.) This is a one-time step and you won't have to repeat this to set up additional users.

To do this, open **File Explorer**, find **This PC** and right-click to bring up the contextual menu. Now select **Properties** > **Remote Settings** and in the "Remote Desktop" section make sure that the *Allow remote connections to this computer* option is selected and tick the *Allow connections only from computers running Remote Desktop with Network Level Authentication*. Now click **Apply** and **OK**.

## Grant access to non-Administrator accounts

Change the Windows 10 settings to allow non-Administrator users to access the Remote machine. (You will have to *specifically state* which non-Administrator user accounts have access to the Remote Desktop service.)

To do this, open **File Explorer**, find **This PC** and right-click to bring up the contextual menu. Now select **Properties** > **Remote Settings** and click **Select users** to open the **Remote Desktop Users** screen.

Any accounts in the Administrators group will already have access. To grant Remote Desktop access to any other user, just click "Add" and type in the username you want to add.

Click "Check Names" to verify the username is typed correctly and then click OK. Click OK on the System Properties window as well.

More information is in this article: [How to enable and secure remote desktop on Windows](#).

## Restrict access to connected network drives

It is important to note that anyone accessing the **Remote** computer can also access any connected network drives that are not secured. If you have a network drive that will (or already does) contain sensitive or private data, protect the drive from access by unauthorized users by configuring the security settings for the folders that are on each network drive.

You could also set up the connected network drive to require log in credentials whenever someone tries to access it. Unless users have these credentials, they will not be able to access the network drive.

You can also restrict access to the various drives on the **Remote** computer as outlined in this article: [How to Restrict Access to Drives in My Computer in Windows](#).

## Firewall

Next, you'll need to make sure the Windows firewall isn't blocking Remote Desktop communications. You can check this by opening up the Windows Firewall section of the Control Panel and selecting *Allow apps to communicate through Windows Firewall*. Of course, if you are using a different firewall program such as McAfee, the procedure is somewhat different.

## Other security considerations

Mitigate the risks by having one computer dedicated to running Remote Desktop which has just CharityMaster and Microsoft Word installed.

You may also wish to restrict access to specific folders on the **Remote** computer by the "Local users" who are logged in using Remote Desktop.

## Allow access to the Remote computer over the internet

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### Setup dynamic DNS

It's important to note that if you intend to use the internet to connect to the Remote PC on a regular basis, the external Wide Area Network (WAN) IP address is subject to change unless you have paid for a *static* IP address from your internet service provider. To avoid having to rediscover the external IP address every time this happens, subscribe to a dynamic DNS<sup>4</sup> service such as [Dyn.com](http://Dyn.com) or [no-ip.com](http://no-ip.com), as this gives you a memorable domain name to which you can connect. There is a small annual fee for this service unless you want to renew the host name every month.

To ensure that the DNS service that you have subscribed to knows about any changes to your external IP address, you will have to either:

- Set up your router to automatically update any changes to your external IP address. Many routers have built-in support for dynamic DNS, so have a look in your manual and select one of the services supported by your router.
- Download a small program from your DNS service provider that will keep your DNS service provider up to date. This program will be installed on the **Remote** computer.

### Configure your router

In most cases, your **Remote** computer will be one of several devices on your LAN. This means that you have a router between the internet and your **Remote** computer.

When your router detects an incoming data packet from the internet, it "knows" that this is a request to access the **Remote** computer because the incoming communication provides your router with a "port" number. The default port number for Remote Desktop Communications is **3389**.

Now you'll need to configure your **router** so that it knows which of the computers on your LAN is set up to handle Remote Desktop. To do this you must create a Port Forward setting for Port 3389 so that the router points to your **Remote** computer.

In order to set up your router, you must know the IP address of the **Remote** computer on your local area network. To do this, log into the **Remote** computer then hold down the Windows key and press **R**. In the box that appears type *cmd* and press **enter**. In the terminal window that appears type *ipconfig* and press **enter**. You'll see a range of information appear, but the one you want is IPv4 Address. Note this down (it's a few numbers and full stops) and also write down the Default Gateway IP address.

As router settings are different on every router, you can go to a fabulous website dedicated to helping you with this step: <https://portforward.com>

## Access Remote computer from within your LAN

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This section deals with setting up **Client computers to access the Remote computer over your LAN (local area network.)** Before **Client** computers can connect to the **Remote** PC they need to know its IP address.

Once you've set up the **Remote** PC to allow access and have the IP address all you need to do to connect is open the Windows Start Menu, search for Remote Desktop, select Remote Desktop Connection, then in the box that appears type the IP address and click Connect. You should be prompted for your username

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<sup>4</sup> Definition of: DNS. DNS. (Domain Name System) The Internet's system for converting alphabetic names into numeric IP (Internet Protocol) addresses. For example, when a Web address (URL) is typed into a browser, DNS servers return the IP address of the Web server associated with that name.

and password that you set up on the **Remote** PC, then the **Remote** PC should be available to you as if you were sitting in front of it.

## Summary of steps to set up additional Remote Desktop users

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1. Add a new user account.
2. Ensure the new user account is a Standard user.
3. Add the new user to the Windows 10 settings to allow non-Administrator users to access the Remote machine.
4. Log into the new user's account.
5. Activate the CharityMaster license for that account.
6. Start CharityMaster and add the new user to the CharityMaster list of users.
7. Send the user:
  - a. The Remote computer user name and password.
  - b. The CharityMaster user name and password.