How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

Author: Joel Kristenson
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Overview

This article walks through the steps to transfer files between **your local PC**, and the **Trail Blazer** **remote desktop** 'app server':

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For Mac users this is a common thing that gets configured during the initial setup, but for PC users it mainly comes into play if you need to run a large mass import of data from a spreadsheet.

💡 **Tip:** This process helps with speed and stability of running large mass imports because you won't need to rely on a steady internet connection, once the file is prepped and placed on the remote server, you could start the important and not worry about the internet going out in your local environment.

Outline

#1 Setup and Log into your Trail Blazer Remote Desktop (on PC)
#2 Map your Disk Drives on RDP to Allow for Importing of Files (Spreadsheets, Images, Attachments, Etc.)
#3 Enable your Clipboard to Copy-and-Paste 'Text' into the Remote Desktop Connection
#4 Related Resources

#1 – Setup and Log into your Trail Blazer Remote Desktop (on PC)

IMPORTANT: If this is your first time logging into your remote desktop you'll need to request the **credentials** from our **Support Team** by either calling (**1-866-909-8700**) or email (support@trailblz.com) – these credentials will be shared by *all* users logging in this way, once logged in you'll use

your own *unique* credentials to log into the database itself. *If you don't have your own user account setup yet you'll need one of your database admins to create an account for you, and provide you the credentials/DB Name.*

Launch the **Microsoft Remote Desktop** application by clicking on the **Start Button** > **All Programs** > **Accessories** > **Remote Desktop Connection**

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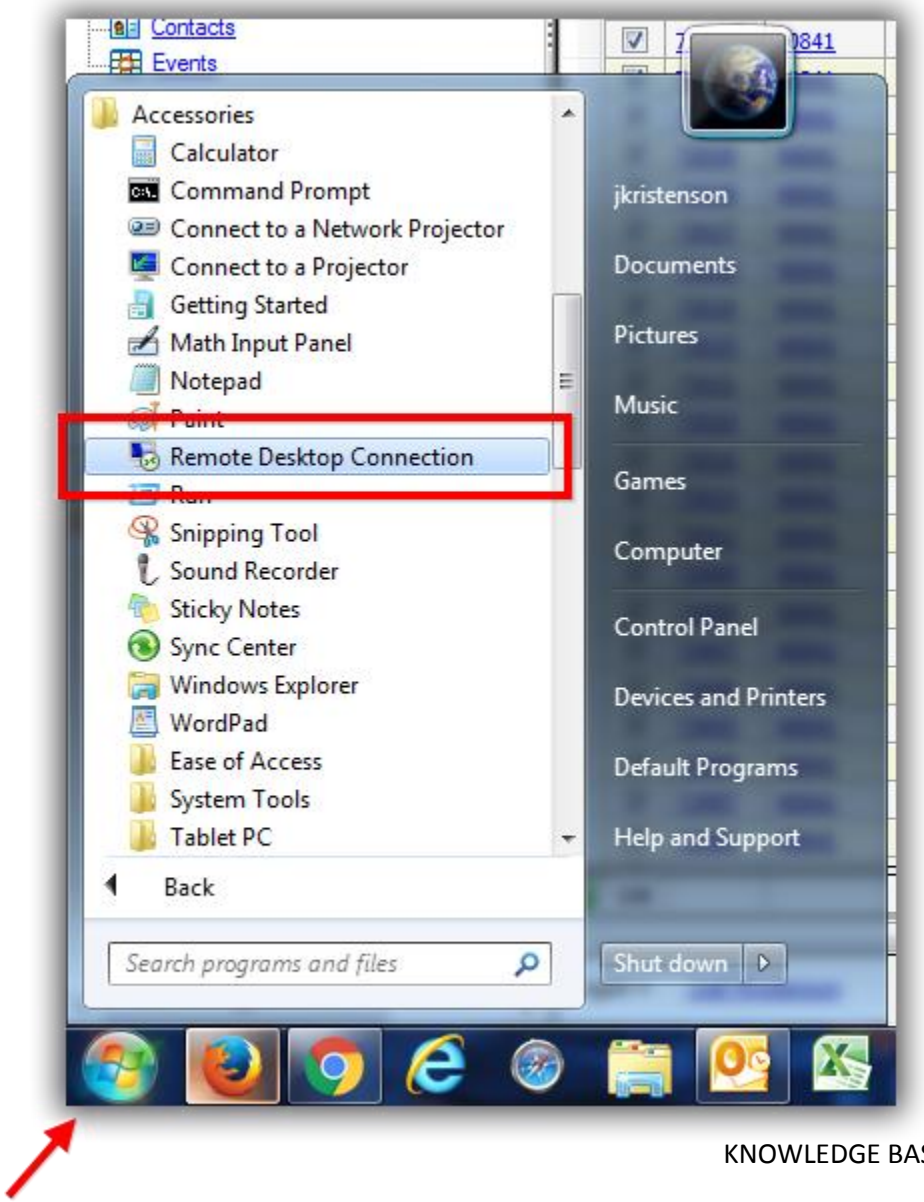
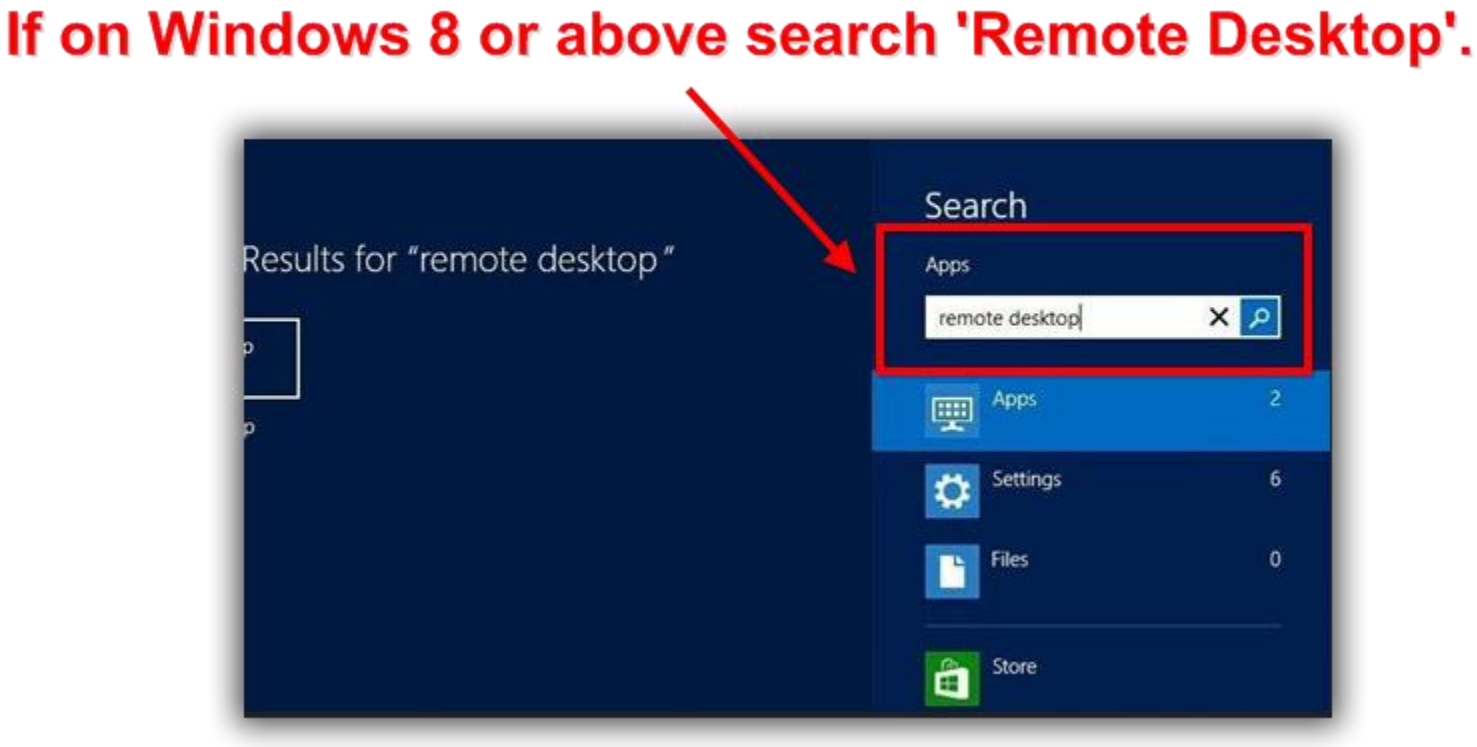


If you're on **Windows 8 or above** you can launch the app by searching for the keyword 'Remote Desktop' in the Windows search box (*image below*).



Under the **General** tab enter the **Computer** (*server*) **Name**, **Username** (*same as your Database Name*), and click **[Connect]**.

- The **Computer/Server Name** will always be **appserver1.trailblz.net**

- The **UN** is the *same* as your Database Name (*contact us or one of you Database Admins if you don't know it*)
- The **PW** will be shared by everyone at your organization connecting this way (*contact us if you don't have it*)

My *example* configuration is below:

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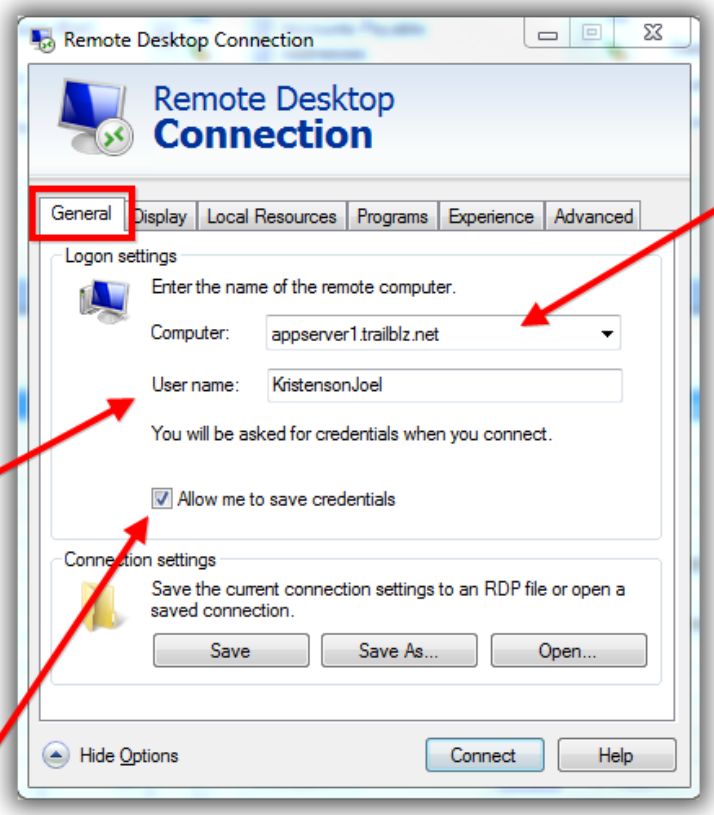

Enter the Compter 'Server' Name which will always be: appserver1.trailblz.net

Enter the UN for your remote desktop (same as your Database Name).

Check this box if you want your computer to remember your RDP credentials.

Enter your **Password**, check the box the **'Remember my credentials'**, and click **[OK]**.

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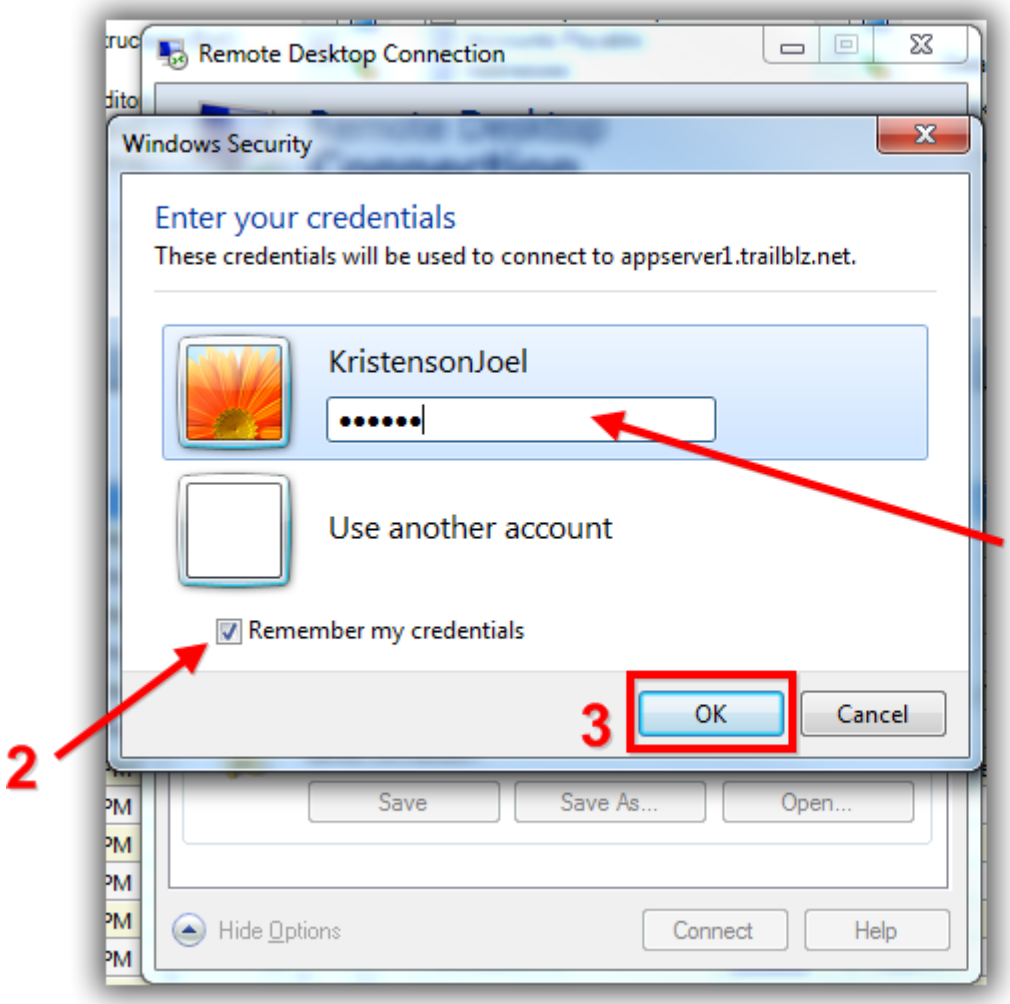

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Once logged in you can launch the **Trail Blazer** application and log in with your *unique* UN & PW.

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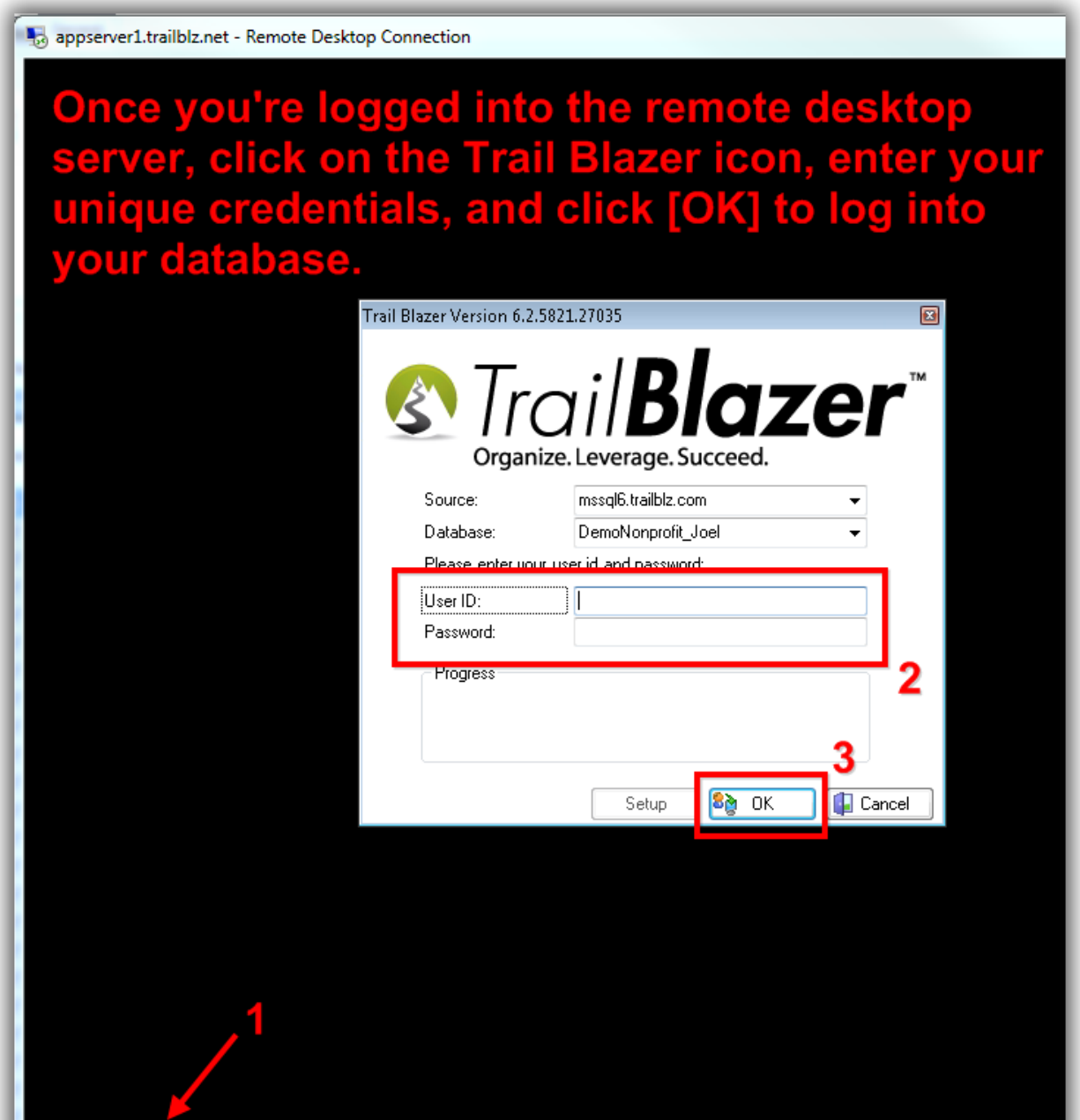

When you're finished working in the remote desktop or the day you should **close down** your database, and completely **log off** of the remote connection.

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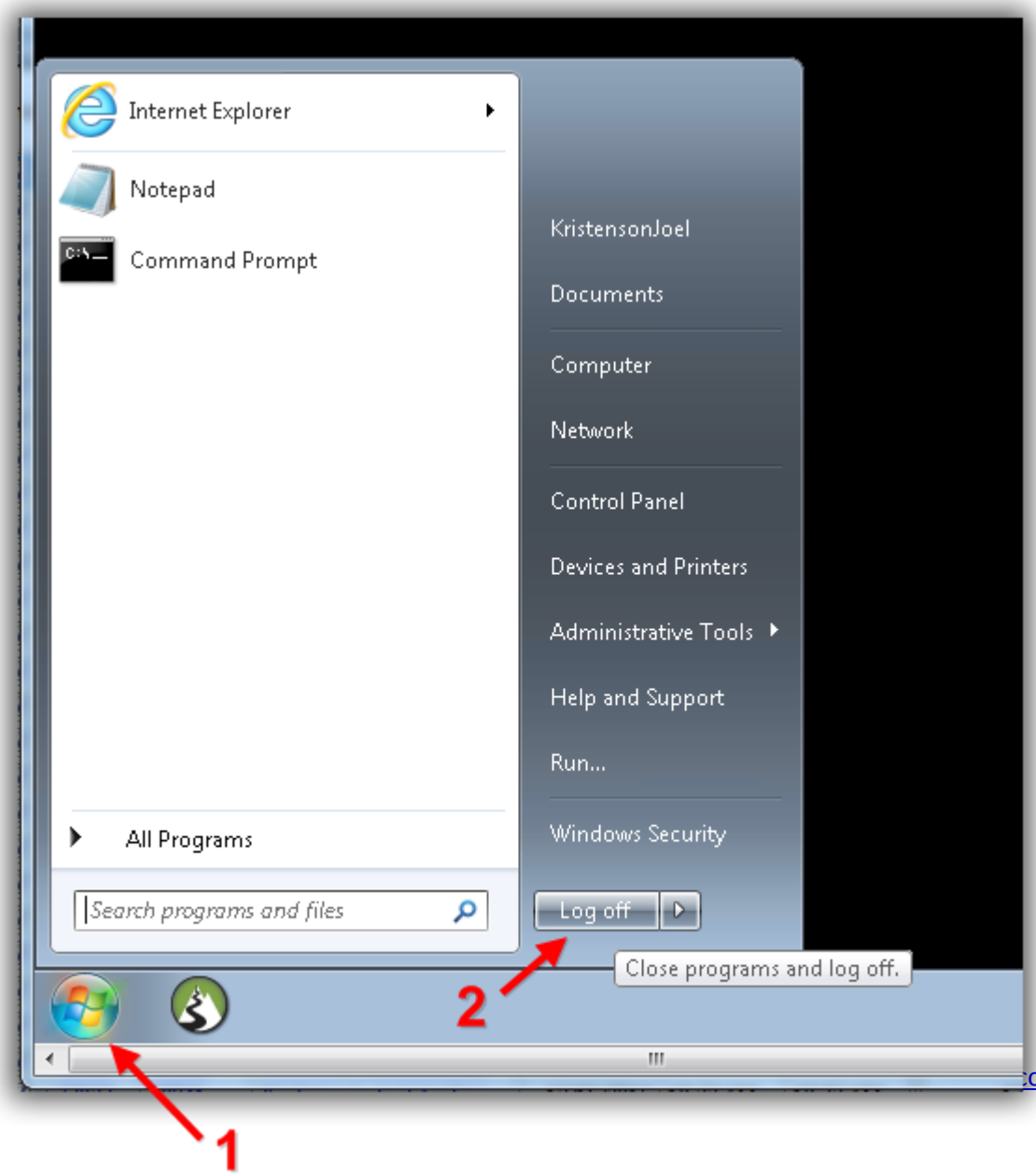

The next section will walk through the steps to map your **local PC disk drives** on the RDP configuration so that you can **import/export spreadsheets** & **images**.

#2 – Map your Disk Drives on RDP for Easy Importing/Exporting of Spreadsheets & for Uploading Images to your Database

IMPORTANT NOTE: *This section was document using* ***Windows 7*** *– your screen may look slightly different if you're on an older version of Windows such as XP.*

Launch the **Remote Desktop Connection** program, expand **Options** (*if it isn't already*), and navigate to the **Local Resources** tab.

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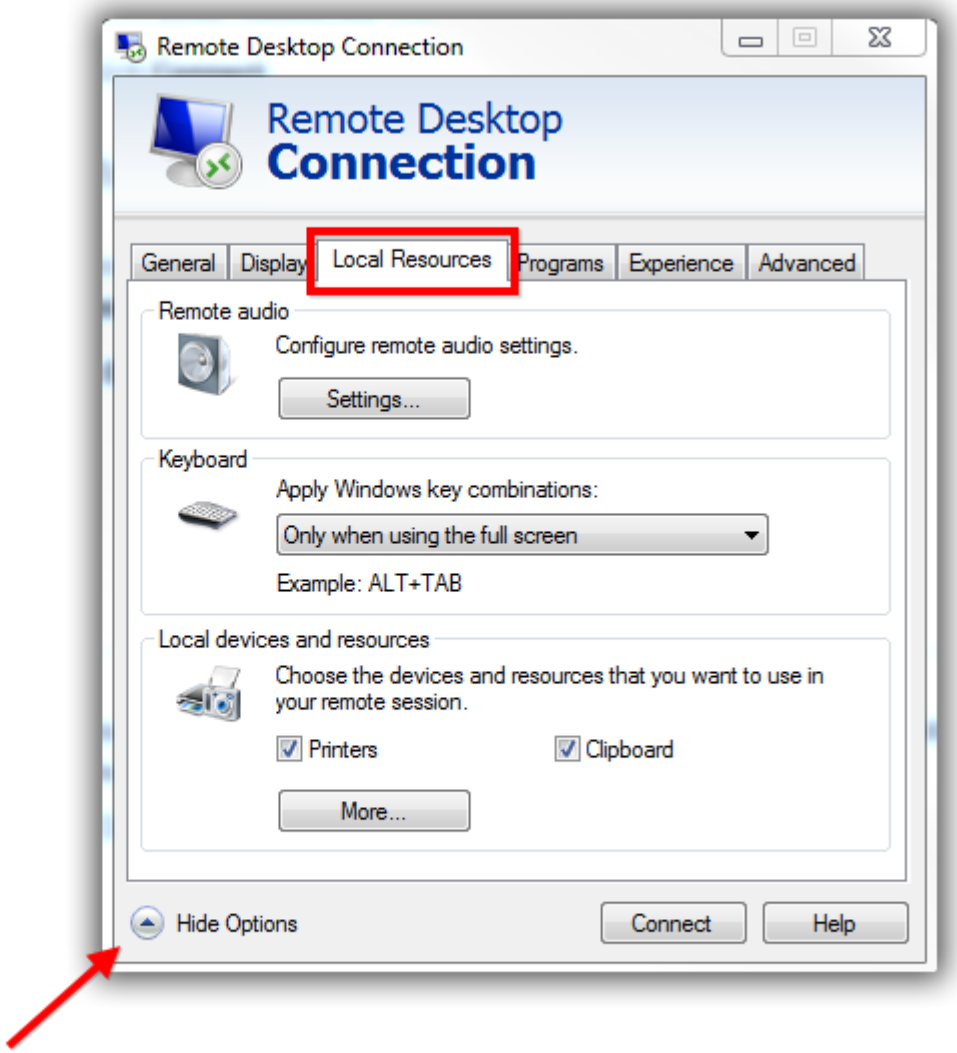

Make sure that 'Options' expanded.

Click on the **[More…]** button.

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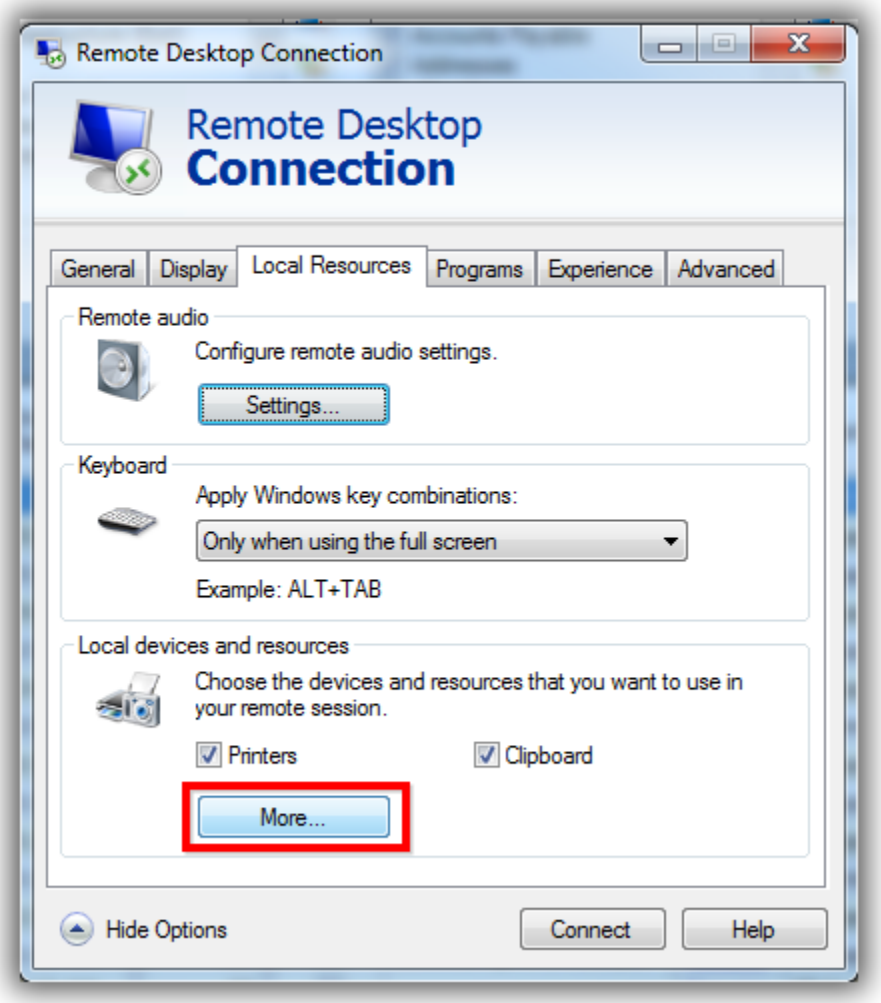
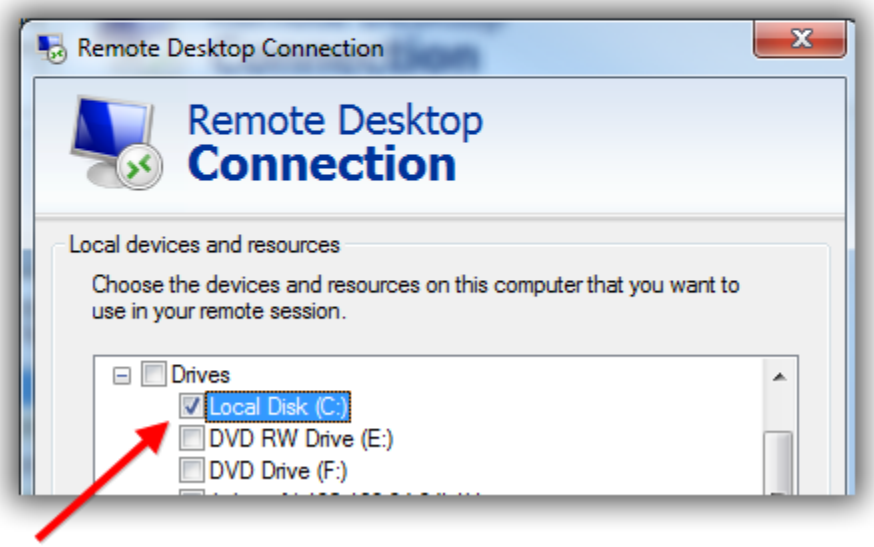


Expand the different *branches* to display the options within. *On my version of Windows 7 it provided 4 main categories:*

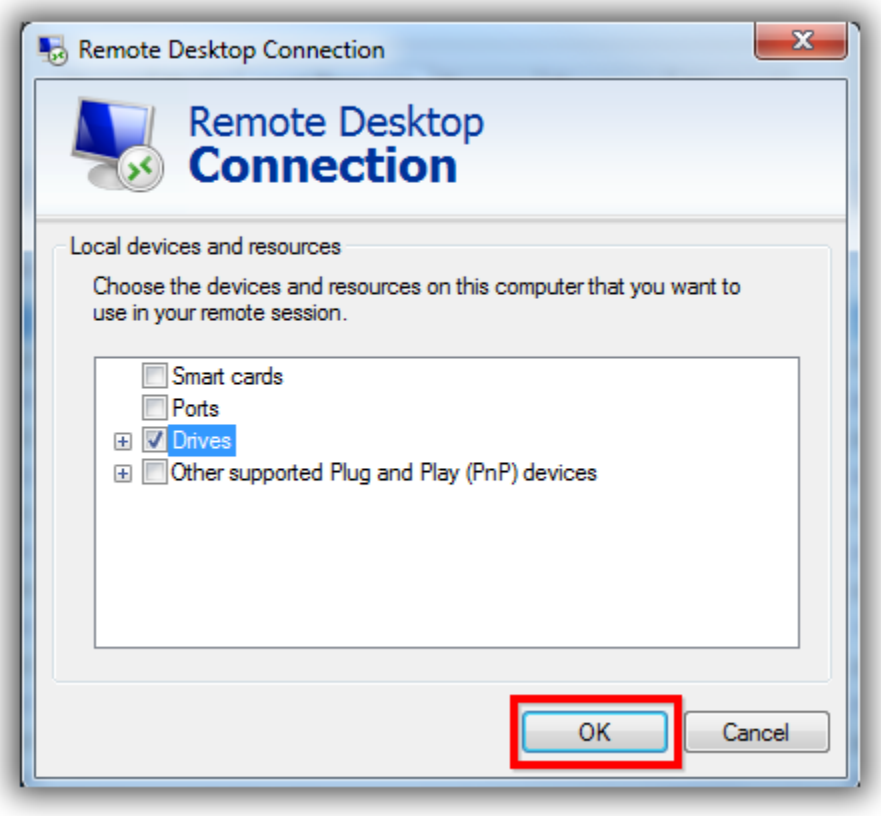
- ***Smart cards***
- ***Ports***
- ***Drives***
- ***Other supported Plug and Play (PnP) devices***

My *example* configuration options are below – I only provided access to my '**C Drive**'.

Check the boxes for which drives, ports, etc., you want to provide access to from the remote desktop connection.



Click **[OK]** once you're drives, etc. are mapped.



Click **[Connect]** to log into the remote server.

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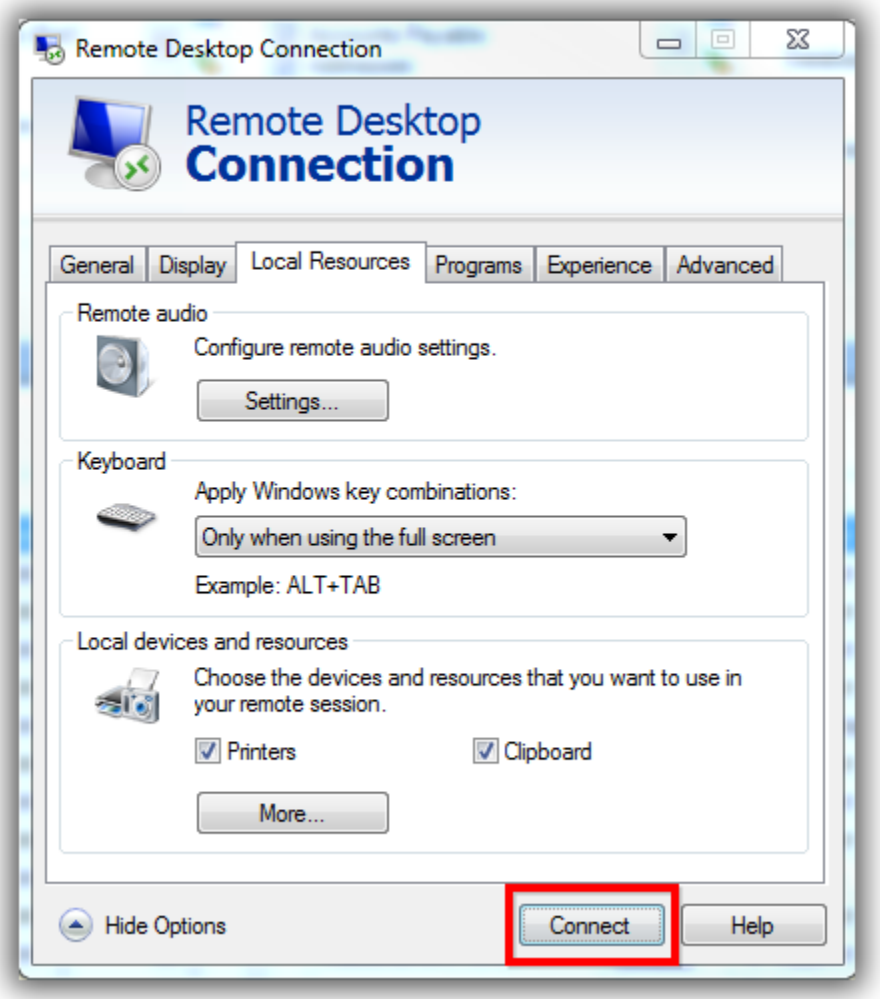

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

After you have configured your settings to allow access to things like your disk drives, you'll likely get a **warning message** asking if you want to proceed, click **[Connect]** to finish the log in process. *As shown in the image below, for my sample configuration, you can *optionally check a box allowing your computer to remember your settings for next time.*

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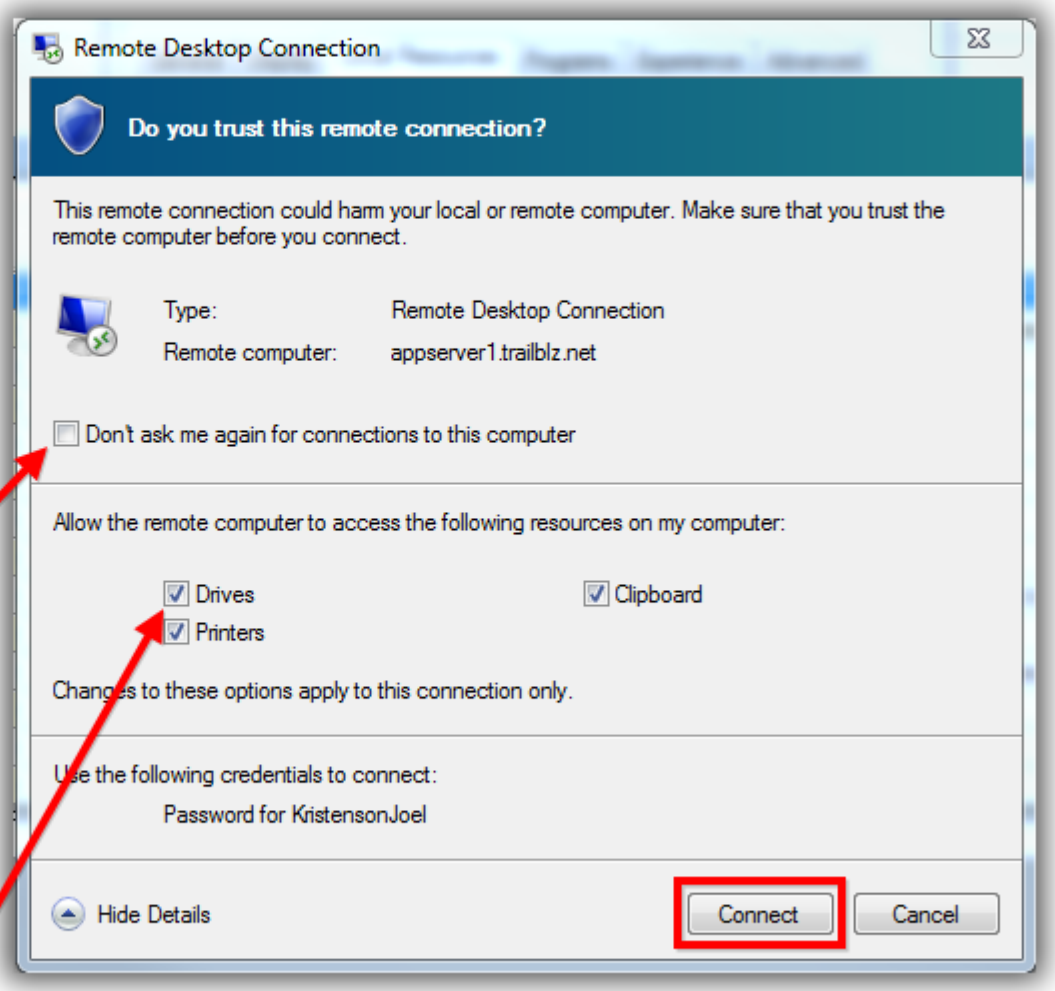
After you map your disk drives, you'll get a warning message when connecting to the remote server, click [Connect] to proceed.



***Optionally you can check this box if you want to bypass this warning the next time you log in.**

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

Once you're logged into the remote server, log into your **Trail Blazer** database.

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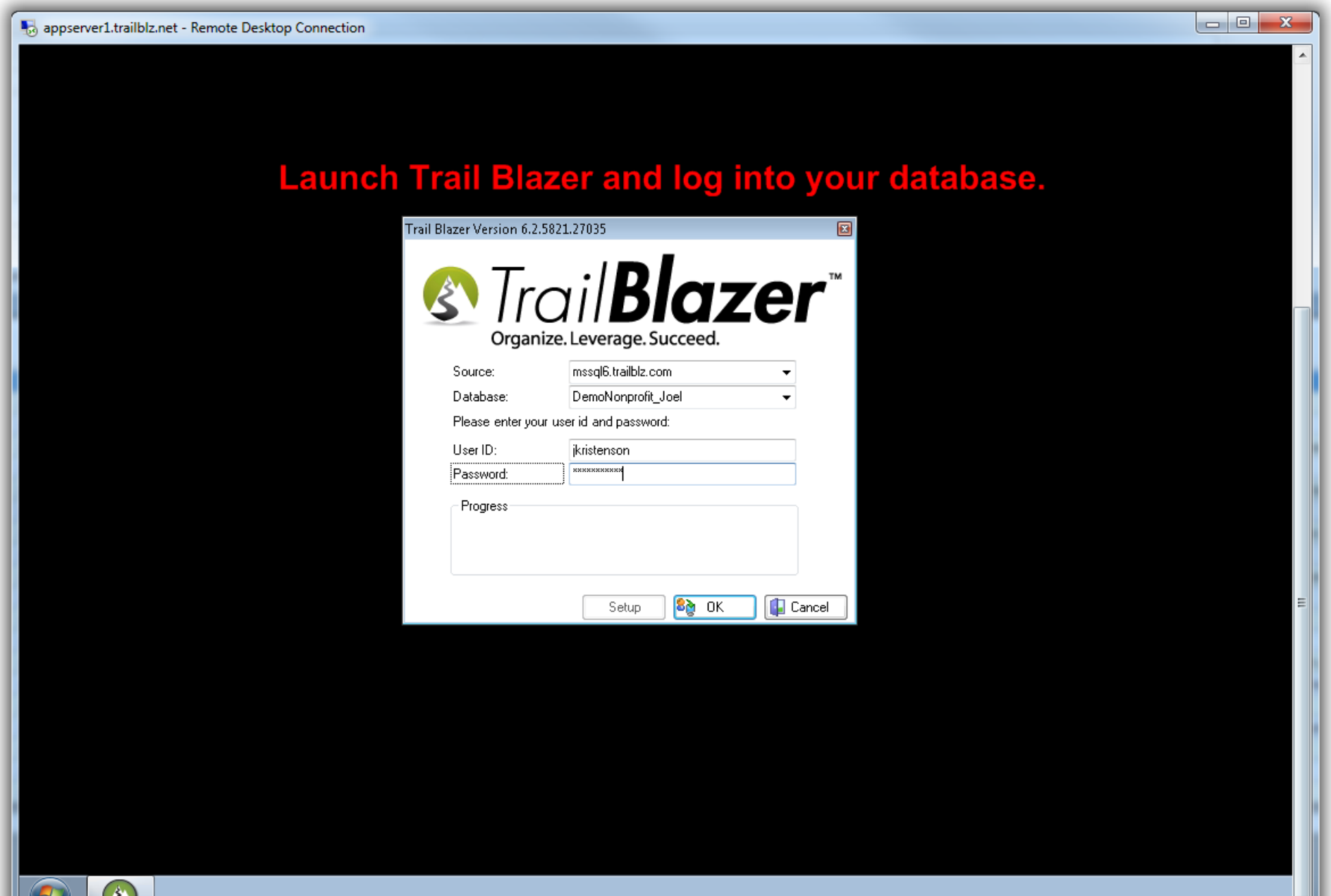

Once you're in your database, you can run a query, click **[Export]**, and your newly mapped disk drives will be available. *In my example I queried for 'all contributions' in my nonprofit database, and was able to export to the 'Temp' folder on my local machine.*

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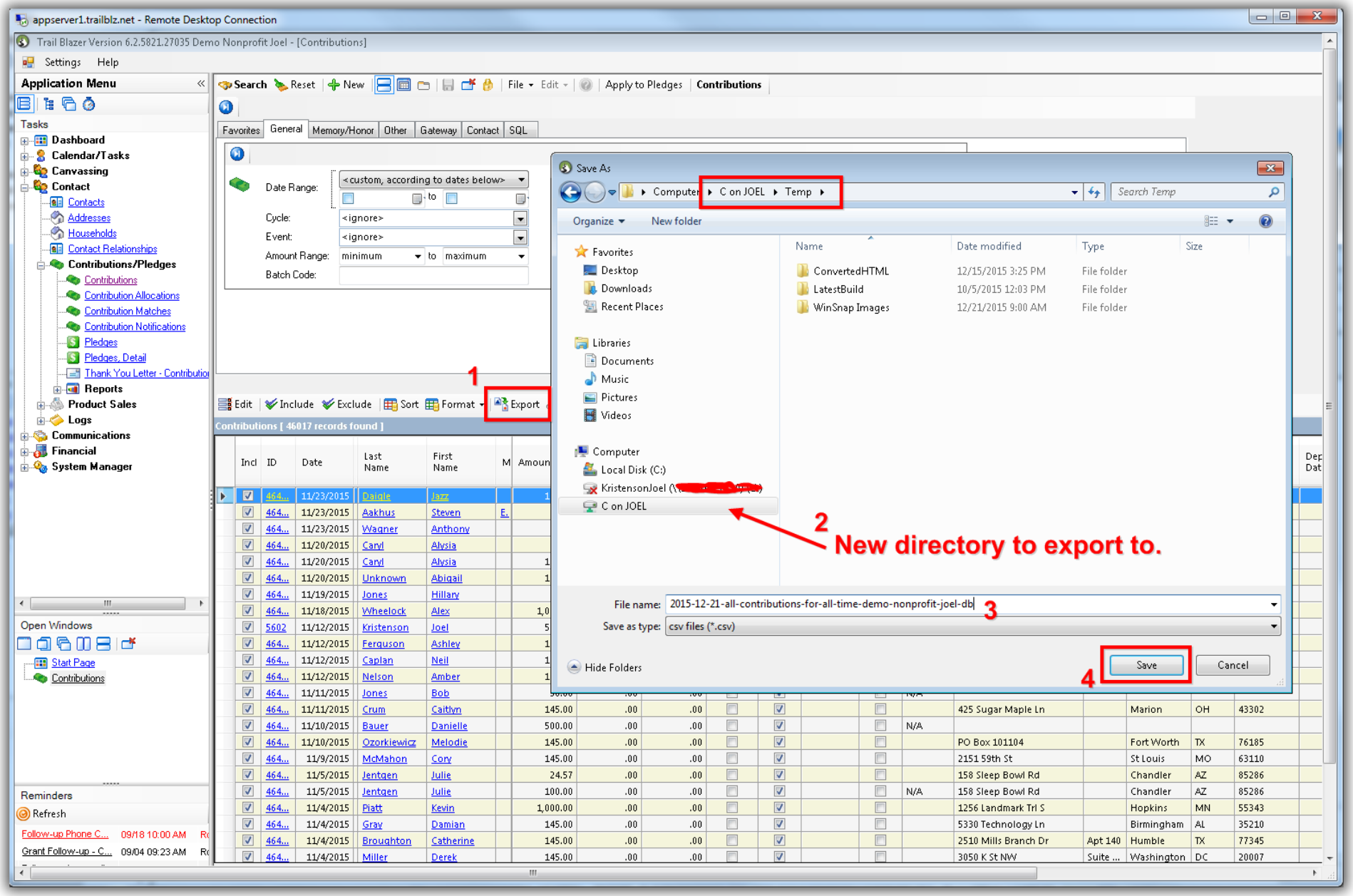
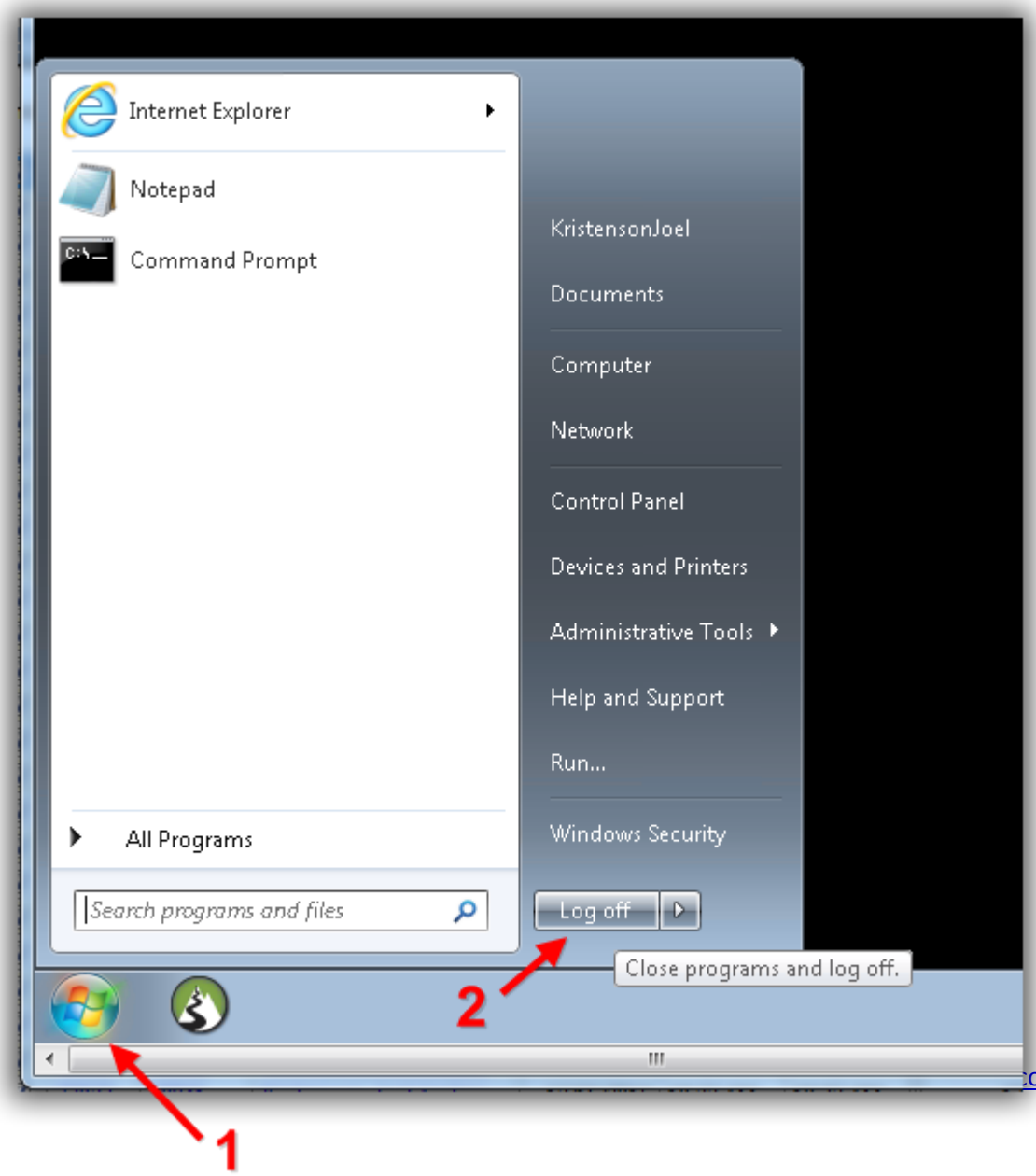


As mentioned in section #1, when you are finished working for the day make sure you completely **close down** your database, and **log off** of the remote desktop connection.

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives



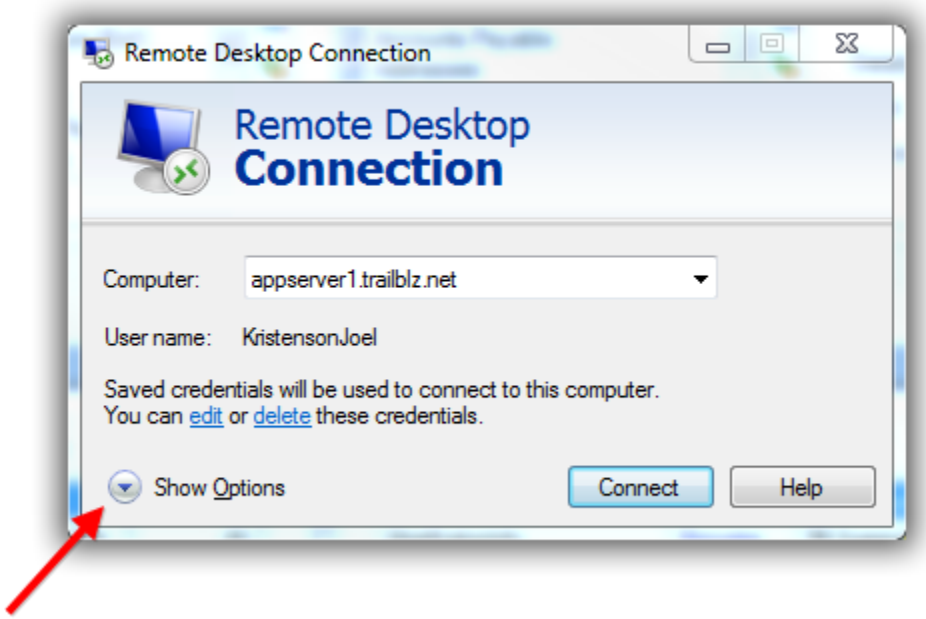
The next section shows how to quickly configure the RDP program to allow for copying-and-pasting of text using the Clipboard.

#3 – Copy-and-Paste a .csv File to the Remote Desktop for Importing

IMPORTANT: As of the time this article was put together, **Trail Blazer's** Remote Desktop App Server is locked down to **prevent copying-and-pasting of files** (*such as spreadsheets*) from your local machine to the remote connection. It can still be useful to enable your **Clipboard** for copying-and-pasting text while performing tasks like data entry, and when creating email/letter templates.

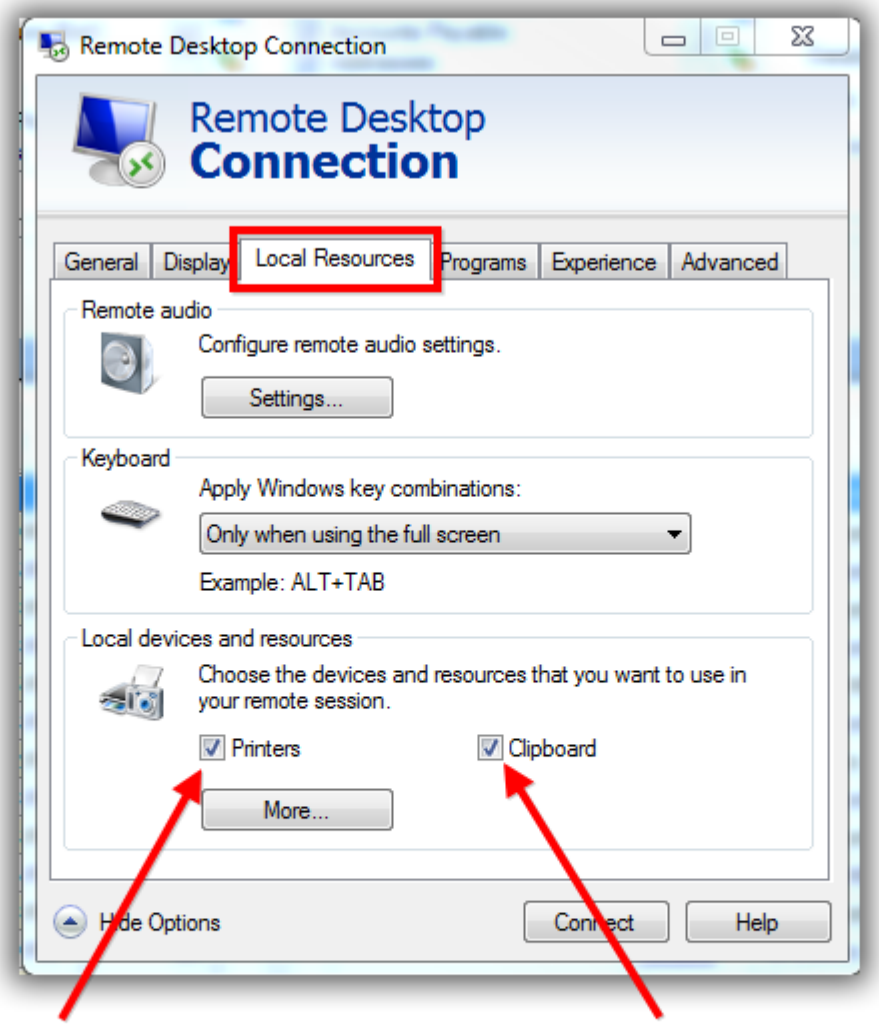
Launch the **Remote Desktop Connection** program, and click on the **Show Options** drop-down (*if it isn't already expanded*).

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives



Navigate to **Local Resources**, and check the box near the bottom-right for '**Clipboard**'. *You can also check the box for '**Printers**' if you would like to be able to **print** from the remote desktop to your local printers.*

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

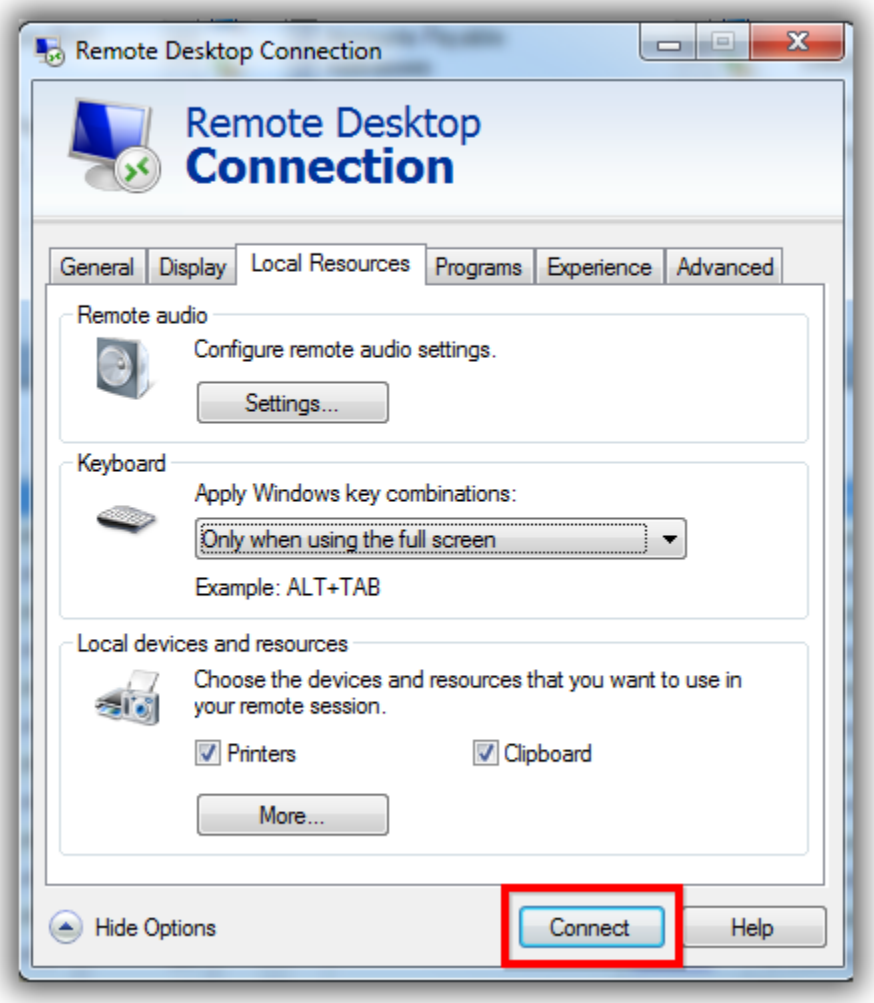


Check the 'Printers' box in order to print to your local printers.

Check the 'Clipboard' box in order to copy-and-paste files.

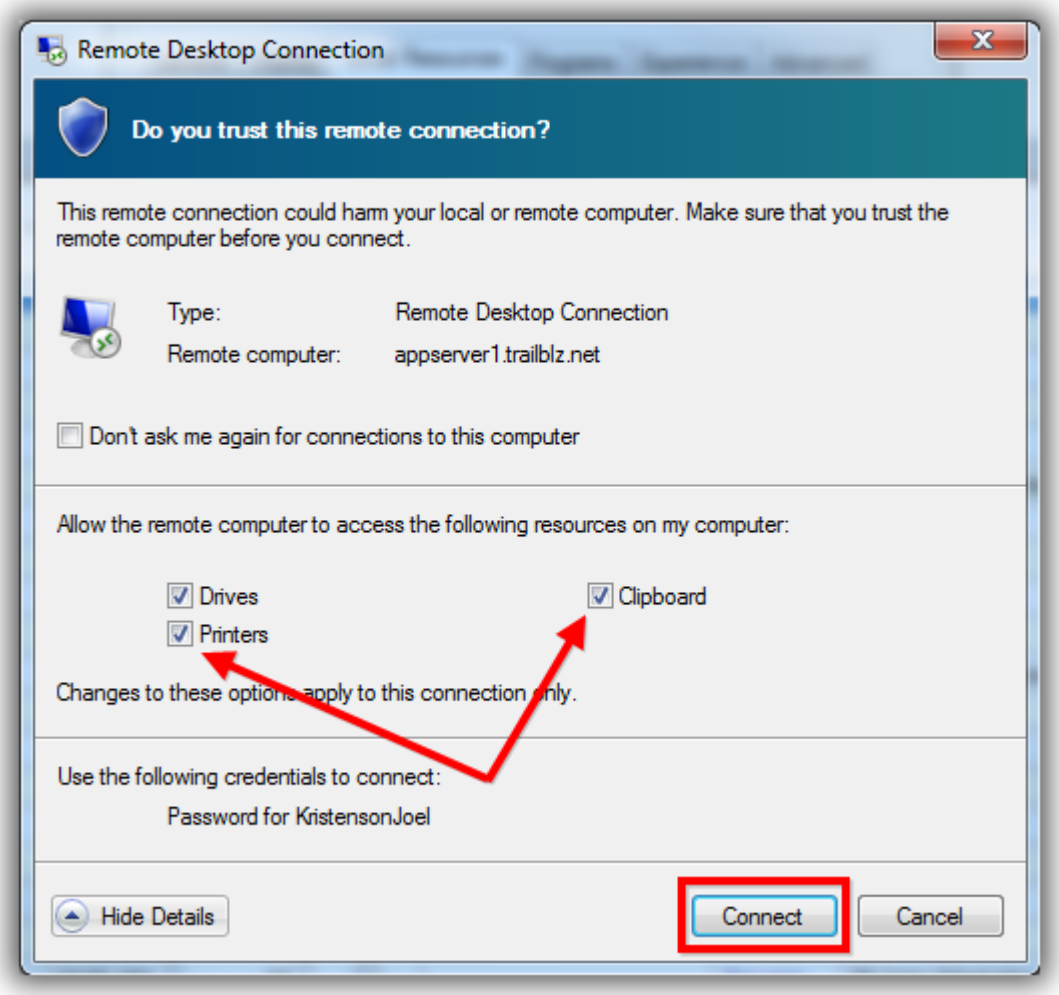
Click **[Connect]** to log into the remote app server.

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives



You'll likely be warned again with a security prompt, click **[Connect]** again to finish the log in process.

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives



How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

Once you're logged into the Remote Desktop Server, return to your **local machine**, and **copy** the text you need into your Clipboard (*such as an html code for an email template, or text for the body of a letter/email template*). *In my example I copied text for a mail-merge letter template as shown in the images below.*

Img 1 – Copy the text from your local machine into your **Clipboard**

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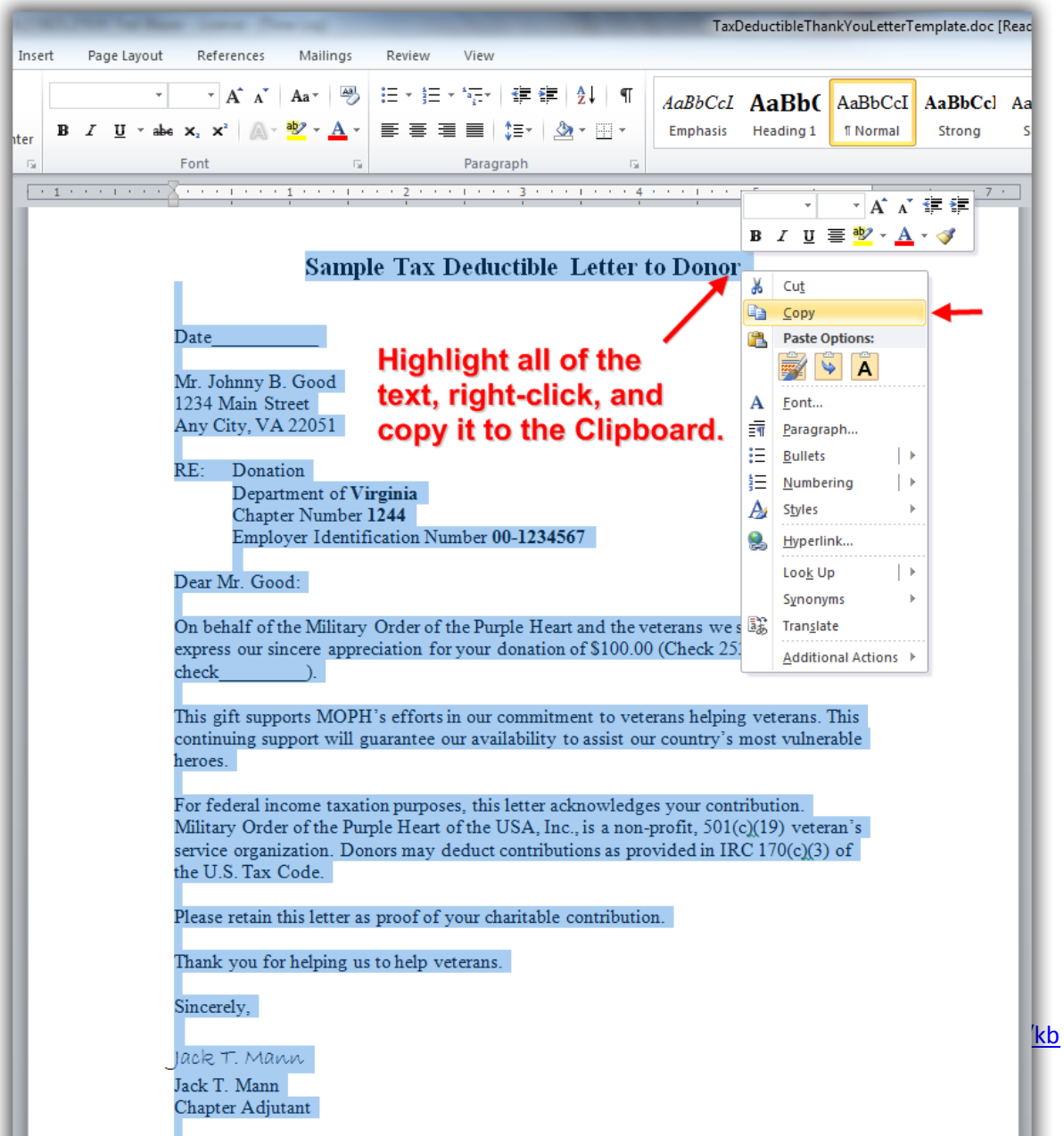
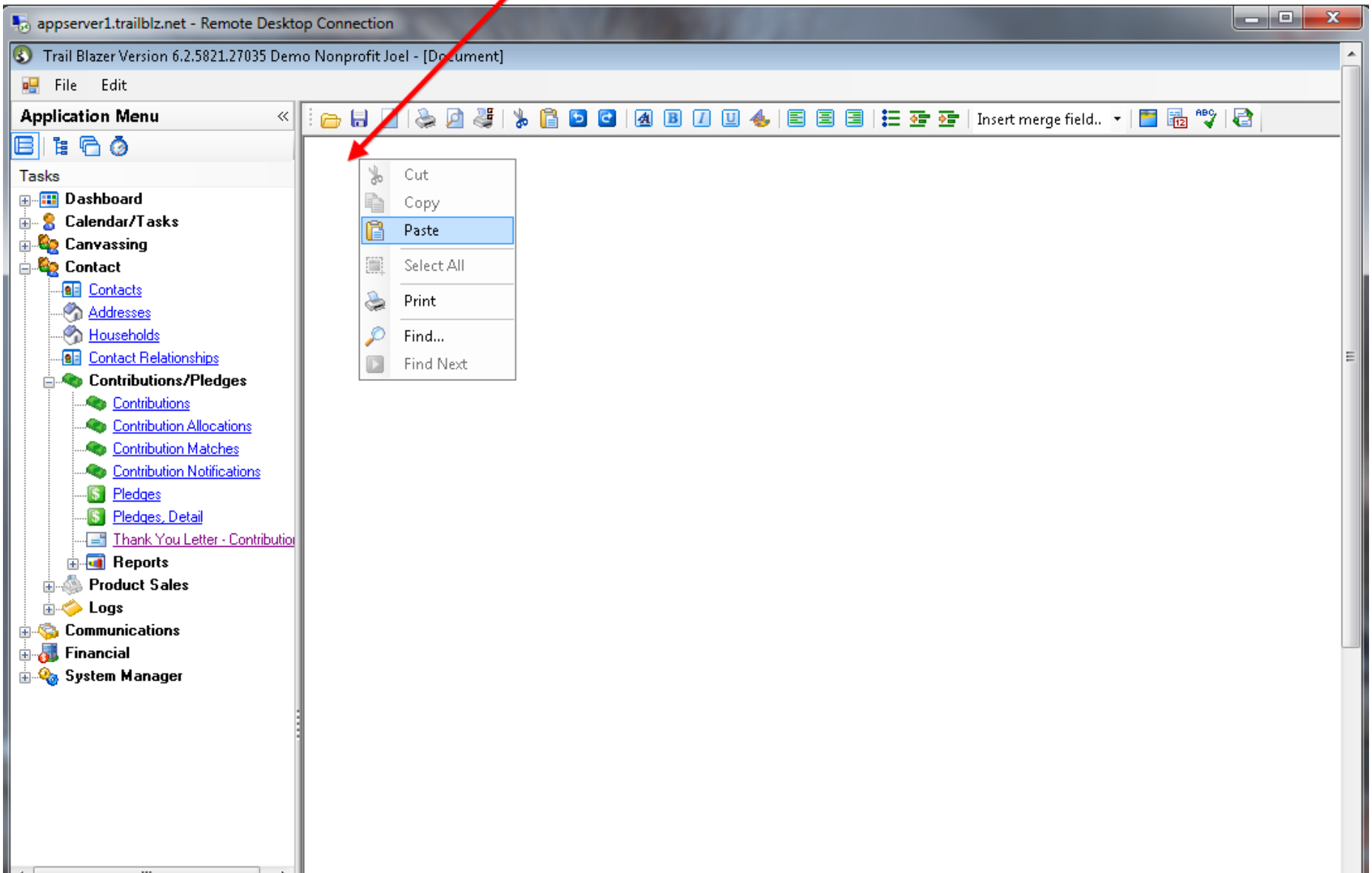


Img 2 – **Paste** the text into the Remote Desktop Connection (*I pasted it as a letter template*)

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

Right-click and 'Paste' in the text from the Clipboard that was copied from the local PC.



Img 3 – My *Example* of how it looks after the text has been inserted from the **local machine** into the **Remote Desktop Connection**

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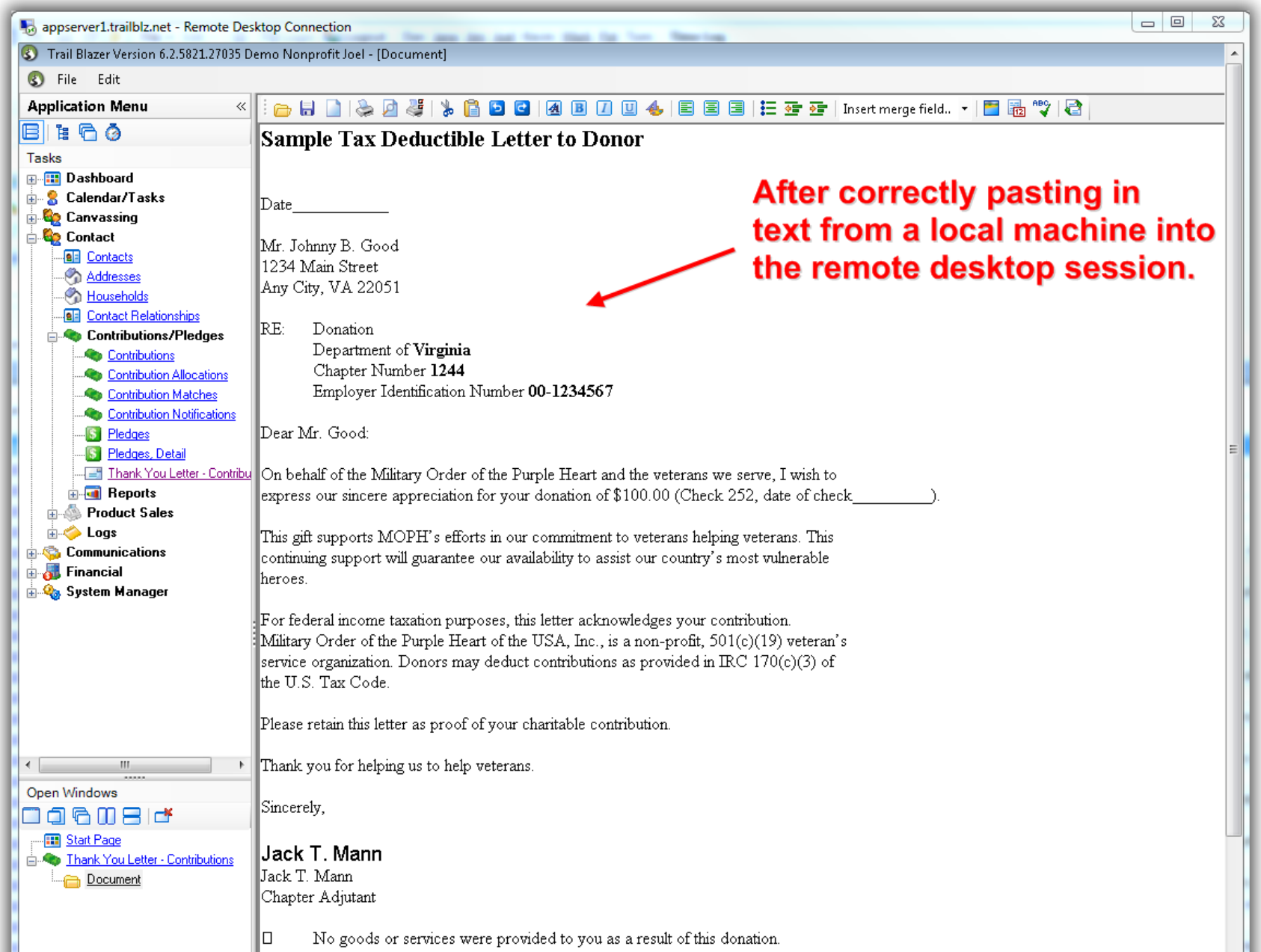

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

If you want to print to your local print (*and you checked that box when configuring your RDP*) you can queue up your print preview, and print to one of the local printers. *My example is below.*

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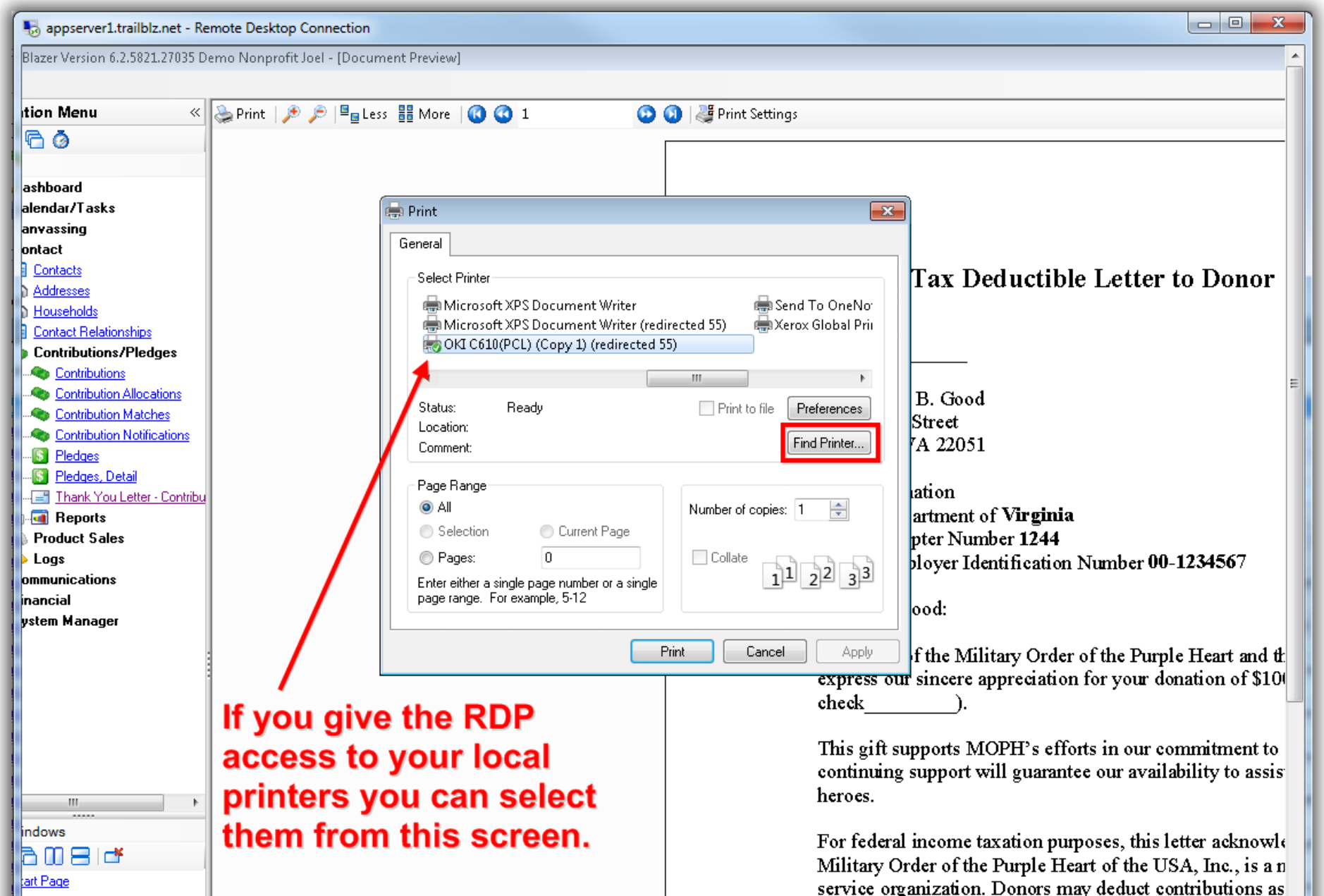

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Take a look at the **Related Resources** below for quick links to articles and videos on importing, mail-merge, etc. Call our live help support if you have any questions.

#4 Related Resources

Articles: List of Articles on Importing to Trail Blazer
Article: Configure Microsoft Remote Desktop – For Mac Users
Article: End of Day Best Practices – Included Notes for RDP Users
Article: Configure 2X Client RDP Connection on your iPad (or any mobile device)
Article: Copying Files from Macintosh to Remote Desktop
Article: Trail Blazer on PC vs Trail Blazer on Any Other Device
Article – 3rd Party Resource: Copy and paste from a remote computer
Article – 3rd Party Resource: How to gain access to local files in a remote desktop session
Article – 3rd Party Resource: Copy and paste a file from a remote computer to a local computer
Videos: YouTube Video Playlist on Importing
Video: 2X iPad Install and Configure

Trail Blazer Live Support

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Email: support@trailblz.com
Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
Twitter: https://twitter.com/trailblazersoft

** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

Click here to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

** After registering you'll receive a confirmation email with the instructions for how to log into the GoToMeeting session where we host our live interactive trainings.*

** This service is included in your contract.*