



## Remote Desktop Manager Startup Checklist for Individual Users Enterprise edition



### WHAT IF YOU'RE A SINGLE USER ? WE HAVEN'T FORGOTTEN ABOUT YOU !

Last week we shared the [Remote Desktop Manager Startup Checklist for Teams](#). But what if you're a single user? Don't despair, we haven't forgotten about you! Behold: the **Remote Desktop Manager Checklist for Individual Users!**

(Please note that this checklist is also ideal if you're setting RDM up for small groups of up to 3 users who don't need to implement security.)

#### CHECKLIST FOR TEAMS

Step 1 – Register your License	
Step 2 – Choose your Data Source	
Step 3 – Select your Security Provider	
Step 4 – Setup Devolutions Online Backup	
Step 5 – Create your Default Settings	
Step 5 – Import Your Data	




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## **STEP 1** **REGISTER YOUR LICENSE**

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Start by registering your version of Remote Desktop Manager. Go to **Help – Register Version**, and enter your user name, email address and serial number.

Please note that you need to enter the information exactly the way it is listed in the email that you received.

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## **STEP 2 CHOOSE YOUR DATA SOURCE**

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Choose your data source type. Here is a table to help you choose the right data source to meet your requirements:

	 Local	 Self-Hosted	 Cloud-Based	 Shared Between your Computers	 Works Offline	 Multi-User
SQLite	✓	✓	✓	✓	✓	✓
XML	✓	✓	✓	✓	✓	✓
Devolutions Online Drive	✓	✓	✓	✓	✓	✓
Dropbox [Note 1]	✓	✓	✓	✓	✓	✓
Amazon S3	✓	✓	✓	✓	✓	✓
FTP and SFTP	✓	✓	✓	✓	✓	✓
Web	✓	✓	✓	✓ READ ONLY	✓	✓ READ ONLY
Devolutions Online Database	✓	✓	✓	✓	✓	✓

**Note 1 :** Our Dropbox integration uses the API to directly access your online account. If you keep the file in a dropbox synchronized folder on your machine it becomes a simple XML or SQLite data source



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## STEP 3 SELECT YOUR SECURITY PROVIDER

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It's important to select your security provider before importing or creating any data in your database so nobody can read your entry configuration data, even when people have a direct access to your database. Regardless of the security provider you select, the passwords stored in your database are always encrypted using AES 256 bit encryption.

- Go to **Administration – Security Provider – Change security settings**
- Select your preferred Security Provider type
- Click on **Apply** to save and apply the changes made to your Security Provider



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## STEP 4 SETUP DEVOLUTIONS ONLINE BACKUP

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Devolutions Online Backup allows you to backup information from the following data sources: [Devolutions Online Drive](#), [SQLite](#), [XML](#) or [Microsoft Access](#). We strongly recommend that you backup your data “just in case”. Here's what to do:

- Create your [Devolutions Cloud account](#).
- Go to **File – Backup** and sign in with your Devolutions Cloud account.
- Go to **View Subscription**.
- Enter your Backup name and click on **Create** to automatically create your online backup.

The backup is executed 30 seconds after any modification to the data source content. If you're using any other type of data source(s), please follow this link for further guidance.



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## STEP 5 CREATE YOUR DEFAULT SETTINGS

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To create your default settings template, follow [File – Templates – Default Settings](#) and select the default settings template you wish to create. You must perform this for all types individually.

You can also create, edit or reset your default settings whenever a new entry is created. Each entry type is supported and can have a default template defined.

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## 01 STEP 6 10 IMPORT YOUR DATA

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The last step is to import your data into RDM. There are a few simple ways that you can do this:

### Excel/CSV

Don't feel bad if your data is in Excel – you're not alone. But soon you'll stop waking up at 3am from spreadsheet-induced nightmares. Here's what to do:

- Ensure the column headers match with fields of RDM, please refer to [Import Strategies file format](#) for more details.
- Save the file in the CSV format
- Go to **File - Import – Import Entries**
- Select your CSV file and click **Open**

And that's it. All your entries will be automatically imported into RDM.

Also, if your preferred import method isn't listed above, there are many ways to get your sessions, logins and contacts into RDM. [Click here for more information](#). As always, please let us know your thoughts by using the comment feature of the blog. You can also visit our forums to get help and submit feature requests, you can find them [here](#).