

RM UNIFY

Administration Guide

Access the Management Console dashboard

1. Grant Admin access rights to a user
2. Change user passwords
3. Unlock a RM Unify user account
4. Password Policy (determining password strength)
5. Create a new Unify user account
6. Change Username in RM Unify
7. Changing Username in RM Integris+
8. Branding
9. Publishing Notification messages

For schools in Federations or MAT/Trusts

10. Linking RM Unify Account
11. RM Unify linked to Microsoft Teams or Google Classroom

Stage 5 – Super Admin tasks

This handout covers important admin tasks for the maintenance of user accounts and access to RM Unify and RM Integriss+.

Administrator access levels in Unify (see [RM Unify Administrator Access levels information sheet for more details](#))

There are three types of admin rights available:

- **Super Admin** - can perform **all** administrative tasks.
- **Password Admin** - can reset the passwords for all non-administrative users.
- **Launch Pad Admin** - can set up and reorganise Launch Pads.

The Super User admin (only) can assign these rights to any user with a role of Teaching Staff or Non-Teaching Staff. This is done through the Management Console dashboard.

Management Console dashboard

Many of the Unify admin tasks are actioned through the Unify **Management Console** dashboard.

Access the Management Console dashboard

1. Click on **Management Console** (top menu bar).


 Launch Pad

 App Library

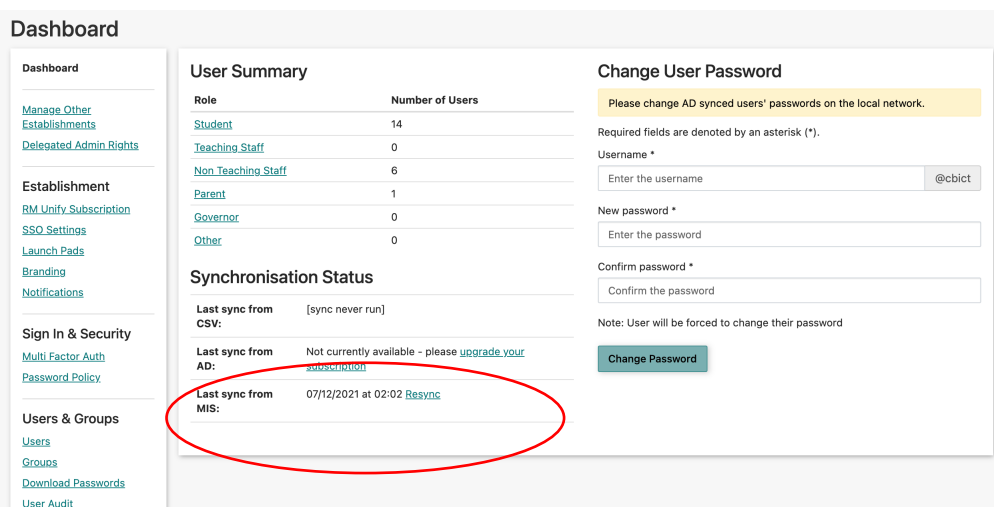
 Management Console

The **Management Console dashboard** enables management of user accounts and access as well as providing information about when the synchronisation process between RM Unify and RM Integriss+ has taken place.

The synchronisation (when RM Unify talks to RM Integriss+) occurs overnight as a regular routine – you can see the last time the synchronisation place by looking at the details on the **Last sync from MIS** line.

If you make changes to staff details (adding a new staff member) and any user accounts in RM Integriss, you can enforce an immediate synchronisation by clicking on the Resync button (See section **Creating User Accounts** for more details)

This is the **Dashboard** (click on the Dashboard link to return to this screen at any time)



The screenshot shows the Management Console Dashboard. On the left is a sidebar with links: Dashboard, Manage Other, Establishments, Delegated Admin Rights, Establishment, RM Unify Subscription, SSO Settings, Launch Pads, Branding, Notifications, Sign In & Security, Multi Factor Auth, Password Policy, Users & Groups, Users, Groups, Download Passwords, and User Audit. The main content area is divided into three sections: User Summary, Synchronisation Status, and Change User Password. The User Summary section shows a table of roles and user counts. The Synchronisation Status section shows the last sync from CSV, AD, and MIS. The Change User Password section has a form to change passwords. A red circle highlights the 'Last sync from MIS' row in the Synchronisation Status table, which shows the date '07/12/2021 at 02:02' and a 'Resync' link.

Role	Number of Users
Student	14
Teaching Staff	0
Non Teaching Staff	6
Parent	1
Governor	0
Other	0

Synchronisation Status	
Last sync from CSV:	[sync never run]
Last sync from AD:	Not currently available - please upgrade your subscription
Last sync from MIS:	07/12/2021 at 02:02 Resync

Stage 5 – Super Admin tasks

1. Grant Admin access rights to a user

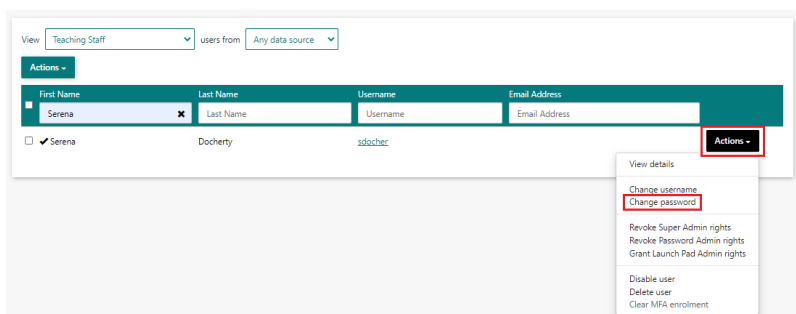
In RM Unify, access the **Management Console** dashboard

1. Select **Users** option (in left hand menu) – this will display a list of user accounts according to the user category type appearing in the **View** box
2. Change the **View** drop-down to either **Teaching Staff** or **Non-Teaching Staff** to find the user.
3. Click on **Actions** box next to the user
4. From the menu, select either **Grant Super Admin** rights, **Grant Password Admin** rights or **Grant Launch Pad** Admin rights. View the separate Admin Rights handout for further information

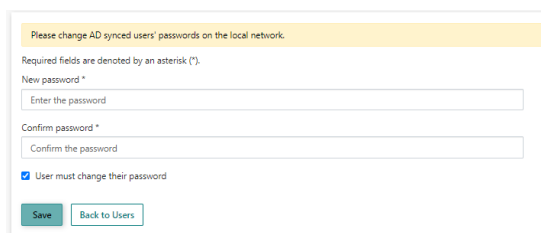
2. Change user passwords

In RM Unify, access the **Management Console** dashboard

1. Select **Users** option (in left hand menu) – this will display a list of user accounts according to the type appearing in the **View** box
2. Change the **View** drop-down to either **Teaching Staff** or **Non-Teaching Staff** to find the user.
Note: You can also find the user by searching via the First Name, Last Name, Username or Email Address search fields.
3. Click on **Actions** box next to the user



4. Select **Change password** option
5. Enter a new password in the **New password** and **Confirm password** fields.
The User must change their password box is ticked by default. If you don't want the user to change the password, then untick the box.



6. Click **Save**

Stage 5 – Super Admin tasks

3. Unlock a RM Unify user account (*note: there is no unlock facility – simply reset the password*)

**** see note below**

1. In RM Unify, access the **Management Console** dashboard
2. Select **Users** option (*in left hand menu*) – this will display a list of user accounts according to the type appearing in the **View** box
3. Change the **View** drop-down to either **Teaching Staff** or **Non-Teaching Staff** to find the user.
4. Click on **Actions** box next to the user
5. Select **Change password** option
6. Enter a new password in the **New password** and **Confirm password** fields.
The User must change their password box is ticked by default. If you don't want the user to change the password, then untick the box.
7. Click **Save**

*** Sometimes, it is the browser settings that are preventing a user from logging into Unify whereby cache and cookies are retained and not cleared after each open login session is closed.

If Chrome is the browser, follow these steps:

1. Click the three dots icon in the top right of the browser screen and select **Settings** from the menu.
2. Click on **Privacy and Security** link (on left) and select **the Clear Browsing data** option
3. Ensure **Time range** is set to 'All time'
4. On the **Basic** list, ensure all three tick box options are ticked
5. On the **Advanced** list, ensure top four tick boxes are ticked
6. Then click **Clear Data**.
7. Close the browser screen and restart it. Try logging into RM Unify again.

If Edge is the browser, follow these steps:

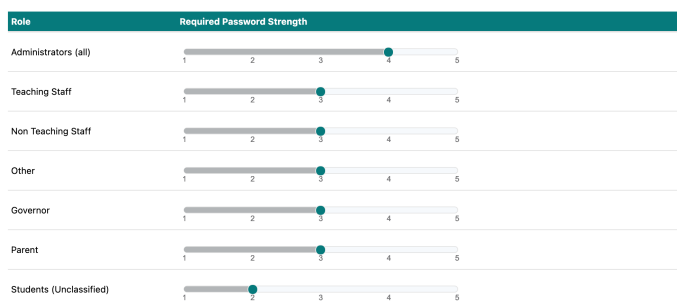
1. Open Microsoft Edge, select Menu (3 dots icon on top right corner of the browser) > Settings > Privacy & services.
2. Under Clear browsing data, select **Choose what to clear**.
3. Select "**Cached images and files**" and "**Cookies and other site data**" check box and then select **Clear**.
4. Close the browser screen and restart it. Try logging into RM Unify again.

4. Password Policy (determining password strength)

There is a default **minimum strength** setting for passwords for each of the different user category groups. You will not be able to reduce the default strength level but you can increase the strength from the minimum position (shown as the grey indicator).

In RM Unify, access the **Management Console** dashboard

1. Select **Password Policy** option (*in left hand menu*)



2. To make a change, click on the strength number to extend the colour on the bar for a particular user group.

5. Create a new Unify user account

If a new RM Unify user account is required for **RM Unify only**, then:

- a record has been added into **Staff Details** in RM Integris+ – check that the correct **Staff Type** has been assigned. If the staff member is a teacher, go to the **UDI** tab and set the **Provision as a Teacher** UDI to Yes

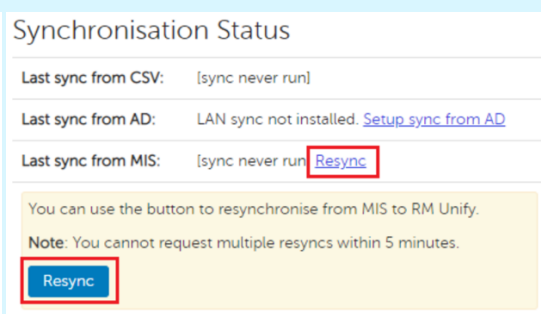
If a new RM Unify user account is required for **RM Unify access and for RM Integris+ access**, then:

- a record has been added into **Staff Details** in RM Integris+ – check that the correct **Staff Type** has been assigned. If the staff member is a teacher, go to the **UDI** tab and set the **Provision as a Teacher** UDI to Yes AND a **user account** has been created in RM Integris with the required roles (Modules > System Management > User Management)

Once the above has been completed in RM Integris+, then the new RM Unify account will be created overnight – **follow from step 4 below** to download the username and password on the following day (*strongly recommended practice*).

If however, the new user account is required urgently, then you can enforce the creation of the user account to occur immediately (within the next 30 minutes) through the use of the sync button as follows:

- Login to RM Unify and access the **Management Console** dashboard
- Under the **Synchronisation Status** section of the page, click on **Resync** link for the **Last sync from MIS**
You should now see a cream box pop up detailing the last date/time when the last synch took place and a new Resync button appear.

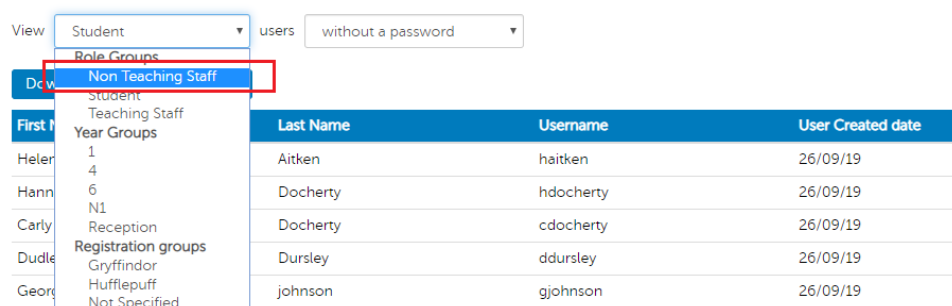


- Click **Resync**
Once this button is clicked, synchronisation will take place and should be complete within a few minutes to a maximum of 30 minutes
Note: This Resync option also syncs any changes to pupil/parents and staff data that have occurred in Integris since the last automatic or manual sync took place.

After a few minutes, follow from step 4 below

- Access the **Management Console** dashboard and under **Users and Groups** (in left pane) click **Download Passwords**
- Select the correct staff role group (e.g. *Non-Teaching Staff* and/or *Teaching Staff*) from the **View** drop-down menu and keep the second drop-down set to **without a password**.
This screen will list by default all new accounts (in the role group selected) where a password has not been created

Stage 5 – Super Admin tasks



Last Name	Username	User Created date
Aitken	haitken	26/09/19
Docherty	hdocherty	26/09/19
Docherty	cdocherty	26/09/19
Dursley	ddursley	26/09/19
johnson	gjohnson	26/09/19

- Click on **Download New Passwords CSV** and then **OK**.
A password will be created for each new user account listed and extracted into a spreadsheet with filename User Passwords
- Save this file accordingly – and inform the new user(s) of their login username and password in the most appropriate way.
Now, if you change the second drop-down from **without a password** to **that have never signed in**, you will see the user(s) accounts you have just created passwords for.

6. Change Username in RM Unify (RM Unify Authentication method)

- In RM Unify, access the **Management Console** dashboard
- Select **Users** option (in left hand menu) – this will display a list of user accounts according to the type appearing in the **View** box
- Change the **View** drop-down to either **Teaching Staff** or **Non-Teaching Staff** to find the user you wish to rename
Note: You can also find the user by searching via the First Name, Last Name, Username or Email Address search fields.
- Click on **Actions** box next to the user and then select **Change username**
- Enter the new username in the **Username** field.
- Click **Save**.
The username will be updated within a 30-minute period.
Remember to inform the user of their new username as the old one will no longer be recognised!

7. Changing Username in RM Integriss+ (RM Integriss+ Authentication Method)

Changing a username in RM Integriss+ is not absolutely necessary if the username has been changed in RM Unify (as above) as the Unify login will automatically access Integriss through Single Sign On (SSO) and link to the Integriss user account.

However, administrators may wish to keep staff usernames consistent on both systems.

- In RM Integriss, go to **Modules > Administration > Utilities > Change Username** > find and select the user and click **Change Username** > enter the new username (reflecting name change) > click **OK** > Click **Close**.

Stage 5 – Super Admin tasks

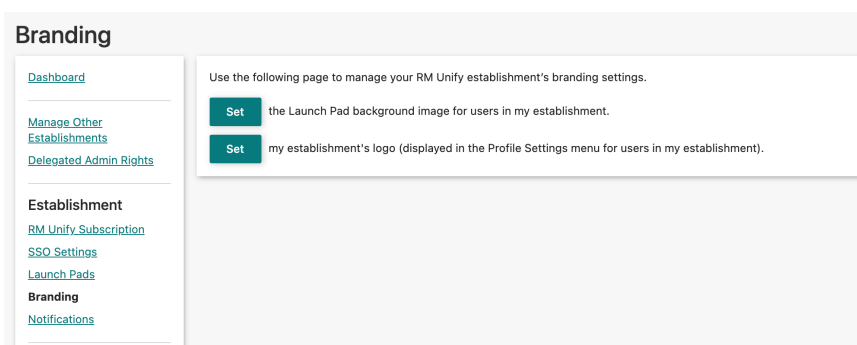
8. Branding - You can set the background of the launch pad and/or the user's profile menu to show your school's logo.

You need to have a separate image file (i.e. not an image in a Word document).
The image file can be a PNG, JPEG or GIF type file.

Note: for the Launch Pad background, the filesize of the image file should not be larger than 200Kb. For the User Profile menu, the filesize limit is 50Kb.

In RM Unify, access the **Management Console** dashboard

1. Click **Branding** (in the left pane)




The first SET button is to add a background to the Launch Pad

The second SET button is to add a background to your user's Profile menu

2. For **Launch Pad** background, click first **SET** button and then in Step 1, click **Browse** to locate and select the image file
3. In Step 2, select either the **Tile** or **Fill** option
4. Click **Save** to apply
5. Click **Launch Pad** (*top of screen*) to check what it looks like.
6. For **User Profile** menu, click the second SET button
7. Click **Browse** to locate and select the image file (50kb max file size limit)
8. Click **Save** to apply
9. Click **User profile** to check what it looks like.

To **remove an image** from the either background:

On the Branding screen, click the appropriate SET button and click on the red delete button next to the image filename at the top of the screen.

Current establishment logo image cblogo11Vsm1.jpg 

9. Publishing Notification messages

You can ‘publish’ messages to all or separate categories of users.

A user receiving a posted message will see a red dot on their alarm bell icon (on the top right) as a



Notification alert

Simply click on the Alarm bell icon to view the message.

To post a notification/message

In RM Unify, access the **Management Console** dashboard

1. Click **Notifications** (in the left pane)

Dashboard

Manage Other Establishments

Delegated Admin Rights

Establishment

RM Unify Subscription

SSO Settings

Launch Pads

Branding

Notifications

Sign In & Security

Multi Factor Auth

Password Policy

Users & Groups

Users

Groups

New Notification [More Information](#)

Message *

Enter message text, max 300 characters

Link

e.g. <https://stmarysschool.com/news>, or, <mailto:admin@stmarys.sch.uk>

Roles *

☐ Student
 ☐ Teaching Staff
 ☐ Non Teaching Staff
 ☐ Parent
 ☐ Governor
 ☐ Super Admin
 ☐ Other

Dates *

07/12/2021

To

07/12/2021

Published By

RM Unify Administrator

Publish

Published Notifications

From	To	Message	Roles	Published By
07/12/2021	17/12/2021	Hello Welcome to Unify ! From your Super Admin person!	NT	rmunityadmin

2. Type in your message
3. You can add a URL address if you want your recipients to view a web page
4. Select the category(ies) of users the message applies to
5. The *Published by* box defaults to your username – you can overwrite this (particularly if it is for students or parents)
6. Click **Publish** to post the message to the selected users.

For schools in Federations or MAT/Trusts

10. Linking RM Unify Account (i.e. one user account can access more than one school Unify account)

1. Login to one of your RM Unify accounts
2. Click on the top right hand corner **Profile Settings** option and from the drop-down menu, select **My Profile**
3. In the left pane, select **Linked accounts** option
4. Click the **+ Link an account** option and a popup screen will appear.
5. In Step 1 enter the password for the account you are currently logged in with
6. In Step 2, enter the other username and password for the account you want to link.
7. Tick the **I understand the implications of linking my account and wish to continue** option
8. Press **Link Account** option

Once the passwords have been authenticated, the accounts will be linked (until such time as one is deleted or you choose to unlink them).

Note on Passwords

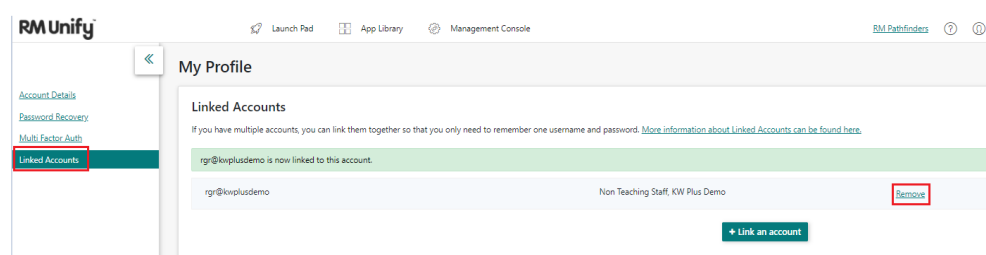
Because you are linking two accounts together, the password become synced. The password of the account you're logged on as gets applied to both accounts and you must change your password at next log on. *It would normally be the case that a user would be linking another user account based on the same user category (e.g. non-teaching or teacher) so the password strength level would be the same. If the user categories were different, then the more stringent password level would apply to both accounts.*

Unlinking accounts

1. Log on to RM Unify using your primary linked account

Note: This will be the first account to which you linked your other account(s).

2. Click your username (top right) and select **My Profile**
3. Select the **Linked Accounts** option (in the left pane)
4. Find the linked account in the list and click on the **Remove button**, as shown in the image below:



11. RM Unify linked to Microsoft Teams or Google Classroom

RM Unify can manage the accounts created for both Microsoft Teams and Google Classroom as an automated process which means teaching staff no longer need to be manually added to Microsoft Teams or Google Classroom. RM Unify will delete any staff who are removed from classes in RM Integrator.

To activate this, go to Modules > System Management > RM Integrator Datashare > click onto the RM Unify app tile and accept the new permissions. The following instructions will help if you are unsure of what to do: <https://help.rmintegrator.com/updates-datashare-api-permissions>