

RM Unify

Administration Guide

Contents		Pg
	Access the Management Console dashboard	1
<i>User Account Management</i>		
1	Grant Admin access rights to a Unify user	2
2	Change user passwords (reset user account following a 'lock' scenario)	2
3	Create new Unify user account	3
4	Change Username in RM Unify	3
5	Changing Username in RM Integris+	4
<i>Additional features</i>		
6	Password Policy (determining password strength)	4
7	Branding	4-5
8	Publishing Notification messages	5
9	RM Unify linked to Microsoft Teams or Google Classroom	6
10	User accounts for pupils	6
<i>For schools in Federations or MAT/Trusts</i>		
11	Linking RM Unify Account (to more than one school)	6
	Annex 1 – Administrator Access Levels	7-8
	Annex 2 – Launch Pad administration	9
	Annex 3 – RM Unify User Helpsheet (logging on, setting profile, My Launch Pad)	10-11

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

Administrator access levels in Unify (see Annex 1)

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.

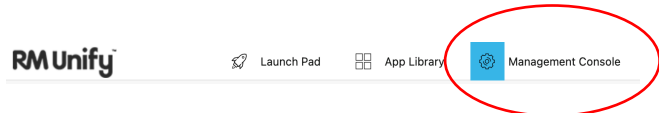
The Super User admin (only) can assign these rights to any user with a role of Teaching Staff or Non-Teaching Staff. This is done through the Management Console dashboard.

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).



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 Integris+ has taken place.

The synchronisation (when RM Unify talks to RM Integris+) 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 Integris, 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 image shows a screenshot of the 'Dashboard' in RM Unify. On the left is a navigation menu with categories like 'Dashboard', 'Establishment', 'Sign In & Security', and 'Users & Groups'. The main content area is divided into three sections: 'User Summary', 'Synchronisation Status', and 'Change User Password'. The 'User Summary' section contains a table with columns 'Role' and 'Number of Users'. The 'Synchronisation Status' section shows 'Last sync from CSV' as '[sync never run]' and 'Last sync from AD' as 'Not currently available - please upgrade your subscription'. The 'Last sync from MIS' entry is circled in red and shows '07/12/2021 at 02:02 Resync'. The 'Change User Password' section has a yellow warning banner and input fields for 'Username', 'New password', and 'Confirm password', along with a 'Change Password' button.

RM Unify

Administration Guide

1. Grant Admin access rights to a Unify user account

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

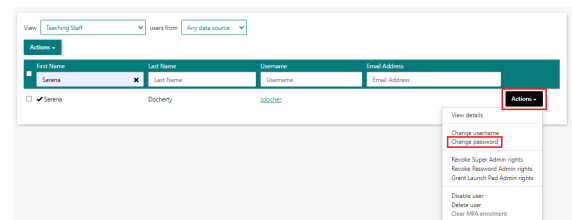
1. Select **Users** option (in left hand menu) – this will display a list of user accounts according to the user category type appearing in the **View** box
2. Change the **View** drop-down to either **Teaching Staff** or **Non-Teaching Staff** to find the user.
3. Click on **Actions** box next to the 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 (reset user account following a 'lock' scenario)

(note: there is no unlock facility – simply reset the password. If changing password does not allow user access, then see ** note below)

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.

A screenshot of the password change form. At the top, a yellow banner says 'Please change AD synced users' passwords on the local network.' Below this, there are two input fields: 'New password *' and 'Confirm password *'. Below the fields is a checkbox labeled 'User must change their password' which is checked. At the bottom, there are two buttons: 'Save' and 'Back to Users'.

6. 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.


3. Create a new Unify user account

1. **Create a new staff record in Integris via Modules > General > Staff Details as normal. On the UDI screen, assign Yes or No to the 'Provision as a Teacher' field (if Yes, user will be grouped into Teacher category in Unify – if no (or left blank) the user will be grouped into the non-teacher category)**
2. If staff member is to access Integris, then create user account in Integris by going to **Modules > System Management > User Management** > click + and select new user from the list > then add **Desktop** setting and **add the required roles** for the user and **Save**.
3. Unify will create a new Unify account for new user overnight – however, if the Unify account is needed immediately, then go to **Unify > Management Console** > click **Resync** link for the **Last sync from MIS** and click **blue Resync** button. Allow for 2-3 minutes to elapse before proceeding with next step.

- otherwise, if the user account is needed the next day, then progress with next step on the following morning
4. Staying on the **Management Console** screen, click the appropriate **Teaching Staff** or **Non-Teaching Staff** link under **User Summary** – you should find the new user has been added to the list.
5. **Make a note of the Unify username**
6. Click the **Actions** button for the new user and click **Change Password** > **enter a default password** in the **New password** and **Confirm password** fields for the user to use (*to first login to Unify after which the new user will be prompted to change their password to one they set themselves*) and click **Save**.

Administrators: Notify new user of their username and password and ensure that they can login to Unify, have changed their password and have entered their email address for any future 'forgot password' situations.

Ensure all users set up password recovery (email address set up to enable user to reset their own your

password). User needs to click on the **My Profile**  icon (*top right*) and select **My Profile** from the menu > select **Password Recovery** and enter an email address in the **Password Recovery Email Address** box. When this is created, *an email will be sent to the recovery email address allowing user to confirm email address. Click on the confirmation link in the email to confirm that the password recovery email address has been set correctly.*

Note: if the email is not confirmed, the password recovery email will not be set and the user will not be able to use this method to reset their password.

4. Change Username in RM Unify (*not for schools using Active Directory authentication method*)

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 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.
4. Click on **Actions** box next to the user and then select **Change username**
5. Enter the new username in the **Username** field.
6. 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!

5. Changing Username in RM Integris+ (RM Integris Authentication Method)

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

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

1. In RM Integris, 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**.

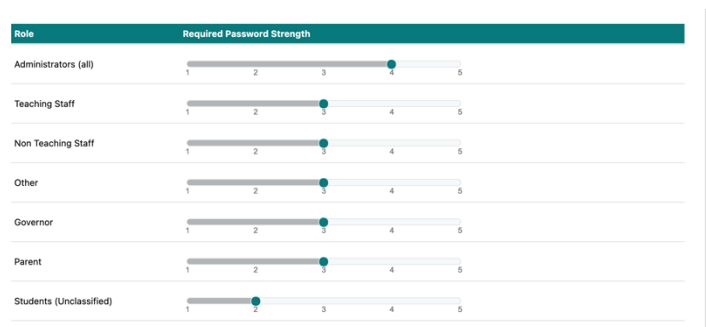
Additional features

6. 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.



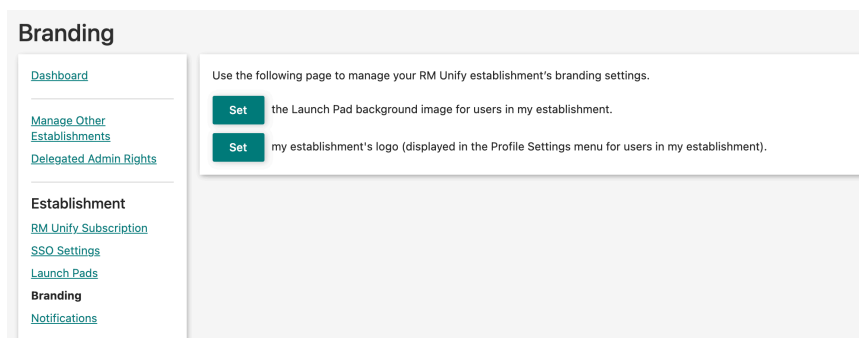
7. Branding - You can set the background of the launch pad and/or the user's profile menu to show your school's logo.

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

- For **Launch Pad** background, click first **SET** button and then in Step 1, click **Browse** to locate and select the image file
- In Step 2, select either the **Tile** or **Fill** option
- Click **Save** to apply
- Click **Launch Pad** (*top of screen*) to check what it looks like.
- For **User Profile** menu, click the second SET button
- Click **Browse** to locate and select the image file (50kb max file size limit)
- Click **Save** to apply
- 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 cblago11Vsm1.jpg



8. Publishing Notification messages

You can 'publish' messages to all or separate categories of users in your school (*or group of schools see pt 10*)

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

- Click **Notifications** (in the left pane)

Notifications

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 *

Link

Roles * Student Teaching Staff Non Teaching Staff Parent Governor Super Admin Other

Dates * To

Published By

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	rmunifyadmin

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

9. 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 Integris.

To activate this, go to Modules > System Management > RM Integris 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.rmintegr.com/updates-datashare-api-permissions>

10. User accounts for pupils

RM will have created user accounts for your pupils (at the time your school was transitioned to Unify) and will have continued to do so based on your current pupil records in RM Integris.

When dealing with issuing pupil user accounts for Unify, the easiest way is to generate and download passwords for these pupil accounts into a csv file and then distribute them.

Click on **Management Console** > click **Download Passwords** (under **Users and Groups** in left pane) > ensure **Student** is selected in the **View** drop-down menu and keep the second drop-down set to **without a password** > then click on **Download New Passwords CSV** and then **OK**. A 'user passwords' csv file is created listing each user with their password.

For schools in Federations or MAT/Trusts

11. 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.

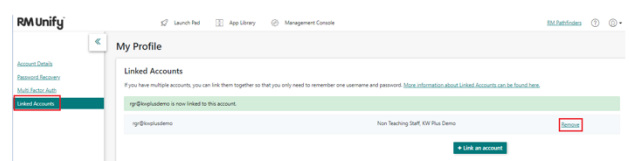
It would normally be the case that a user would be linking another user account based on the same user category (e.g. non-teaching or teacher) so the password strength level would be the same. If the user categories were different, then the more stringent password level would apply to both accounts.

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



Administrator access levels in RM Unify

Super Admin

The Super Admin is the **main** Unify administrator with full access to a range of administration tasks within Unify. It is expected that the Super Admin manages the sharing of data with third party services/providers as well as:

- User account creation, modification and deletions via the web form or CSV upload.
- Granting of administrative rights to other users.
- Installing apps (connectors to online services) which can share data with third party services.
- Managing Launch Pad tiles, i.e., adding, removing and reordering.
- Managing bulk group synchronisation to GOPS.
- Managing branding settings, i.e., setting Launch Pad image and establishment logo.
- AD (Active Directory) Sync configuration, where appropriate.
- MIS Sync configuration, where appropriate.

Password Admin

The Super Admin can share or delegate password management tasks to another user within the school.

The following table shows the user types that a password admin user can manage passwords for:

While logged in as:	Student	Staff	Governor or Other	User with the password admin rights	User with the super admin rights
Student	N/A	N/A	N/A	N/A	N/A
Staff	Y	N	N	N	N
Governor or Other	N	N	N	N	N
User with the password admin rights	Y	Y	Y	Y	N
Users with the super admin rights.	Y	Y	Y	Y	Y

Note: All Teaching Staff users retain their ability to reset Student user passwords in Unify.

Launch Pad Admin

The Launch Pad Admin user can manage the 'look and feel' and default App tiles on different staff role Home Launch Pads:



- Manage branding settings - setting Launch Pad school image and/or logo.
- Manage the Launch Pad for other roles - the tiles that are visible and the order of them in the grid.
- Add any simple link App tiles - these are just hyperlinks to web content.
- Add any SSO (single sign-on) App tiles where the Super Admin has switched on data share

Administrator Rights table


Access Right	Action	Super Admin	Launch Pad Admin	All Other Users	Notes
App Library	Manage Shared Link apps Install for roles and add to Shared Launch Pads	✓	✓	✗ (VIEW only)	Previously, staff users were able to do this by default.
	Add new Shared link apps to App Library [Add Tile] button	✓	✓	✗	Previously, staff users were able to do this by default.
	Setup Saved Password apps [Setup] button on app details 'Other Settings' tab	✓	✗ (VIEW only)	✗ (VIEW only)	
	Manage Saved Password apps Install for roles and add to Shared Launch Pads	✓	✓	✗ (VIEW only)	
	Install SSO apps Setup the app (if required) and install for roles	✓	✗ (VIEW only)	✗ (VIEW only)	If the vendor has provided price data for the app, then Staff uses can 'see prices' instead of View.
	Manage installed SSO apps Add to Shared Launch Pads (the role app already installed for)	✓	✓	✗ (VIEW only)	
Shared Launch Pads	Add tile (new Shared app or app from library) [Add] button/tile on Shared Launch Pad	✓	✓	✗	Previously, staff users were able to do this by default.
	Edit Shared Launch Pad [Edit Launch Pads] button	✓	✓	✗	Management (tile arrangement) of all shared Launch Pads (roles and Year Groups)
Personal Launch Pads	Add Shared link app Via the tile in App Library	✓	✓	✓	[Add to my Launch Pad] [Remove from my Launch Pad]
	Add installed Saved Password apps Via the tile in App Library	✓	✓	✓	[Add to my Launch Pad] [Remove from my Launch Pad]
	Add installed SSO apps Via the tile in App Library	✓	✓	✓	[Add to my Launch Pad] [Remove from my Launch Pad]
	Add new Personal link add [Add] button/tile on Personal Launch Pad	✓	✓	✓	[Add to my Launch Pad] [Remove from my Launch Pad]

Launch Pad Administration

Types of Launch Pads:

- **Home Launch Pad**  – this is configured for each specific staff type role group (i.e. Teaching Staff, Non-Teaching Staff etc.) so that a staff type user can access the same launch pad as other users in the same group
- **My Launch Pad**  – each user can personalise their own launch pad

When logging into RM Unify, the default view is the **My Launch Pad** view (*although this can be turned off by the Super Admin user by going to **Management Console**> **Launch Pads** (In the **Establishment** section) >*

Settings  button > remove tick for *Enable Personal Launch Pads* > click **Save** > click **Launch Pad** to return to the Home launch pad screen

The **My Launch Pad** view will be blank when the user logs into RM Unify for the first time and subsequently until they personalise their own launch pad.

If the **My Launch Pad** view is switched on, users can choose to use either their Home Launch Pad or their own 'My Launch Pad'.

Installing Tiles

The Super Admin user (and any user assigned with Launch Pad Admin rights) can configure the shared Home Launch Pad by adding tiles whilst viewing the Home Launch Pad so that all users within a staff type group of users view the same shared Home Launch Pad.

Tiles can be a:

Shared Tile – for Internet shortcuts (e.g. the school website)

App from the Library – Apps (software/services) available within the App Library.

App Library – different App types

The blue corner banner across each tile indicates the status of the app or service.

- **MANAGE** – where an app is already installed (e.g. RM Integris SSO) and you can change which staff group types can access it
- **BUY** - Apps that are chargeable and can be ordered from RM directly
- **INSTALL** or **SETUP** - Free apps or chargeable apps **that you have subscribed to**. Once installed or setup, apps are then marked as Manage so that you can then decide on which user groups can access it.
- **SETUP** - for 'Saved Password' Apps which are identified by a 'key' icon. These are apps in RM Unify that don't support full Single Sign-On (SSO) from RM Unify, but instead RM Unify stores the URL, username and password on behalf of the user and sends these details to the app at logon time.

App Missing from App Library

If you are wanting to add a commonly used service/software onto the Launch Pad and it is not available in the App Library, approach the service/software provider and ask them whether they can integrate with RM Unify and enable SSO from the RM Unify platform.

RM Unify supports international standard SSO interfaces, and the process for integrating with RM Unify entirely rests with the app vendor as a self-service process. While RM is happy to provide technical support and a level of oversight to ensure the process is secure, the integration tasks are totally in the hands of the app vendor and not RM. You can direct the vendor to this webpage for further details: <https://dev.rmunify.com/getting-started>


RM Unify

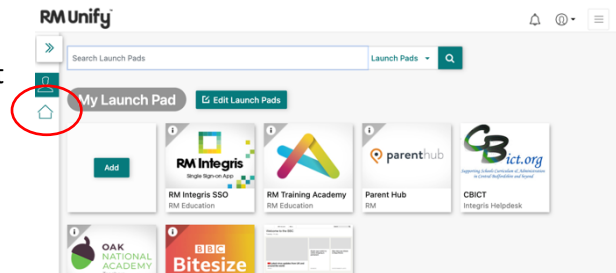
Administration Guide

RM UNIFY USER Helpsheet

Logging into RM Unify


1. Locate and click on your shortcut link to RM Unify (*the shortcut should be going to www.rmunity.com*)
2. Once logged in, check that you are viewing the **Home**

Launch Pad screen by clicking the **Home**  icon if not in view



3. Click on the **RM Integris+ SSO** tile to access Integris
4. Proceed to access Attendance etc. as per your normal routine.
5. Log out of RM Integris+ in the normal way through the **Logout** option in the top right menu. You will return to the RM Unify Home Launch Pad.


Set up your password recovery email (email address set up to enable user to reset their own your password). In

In Unify, click on the **My Profile**  icon (*top right*) and select **My Profile** from the menu > select **Password Recovery** and enter your email address in the **Password Recovery Email Address** box. When this is created, an *email will be sent to your recovery email address allowing you to confirm email address. Click on the confirmation link in the email to confirm that your password recovery email address has been set correctly.*


Note: if you do not confirm, the password recovery email will not be set and you then will not be able to use this method to reset your password.

Logout of RM Unify

Note: If using **RM Integris+**, ensure you are logged out of RM Integris+ before you attempt to logout of RM Unify. You will see *'You have attempted to refresh the RM Integris page or you have attempted to open multiple RM Integris+ sessions from a desktop shortcut or a hyperlink'* error message appear if still logged in in RM Integris+



1. Click on the **arrow** next to the **Profile Settings**  icon in the top right
2. Click **Sign Out**
3. Then click **Complete Sign Out** to sign you out of all the apps listed on the screen
The next window confirms the apps in which you have successfully signed out

Change your RM Unify password if you need to

1. Click on the **My Profile**  icon (*top right*) and select **Change Password** from the menu
2. Enter your current password and then enter your new password in the **New password** and **Confirm password** boxes
3. Click **Change password**

RM UNIFY USER Helpsheet - Set up your own My Launch Pad



1. Adding a software application

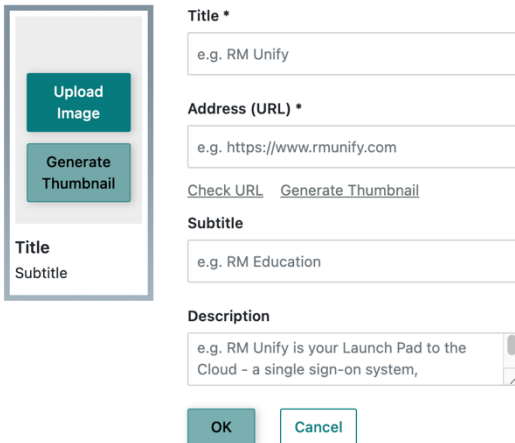
1. Click on **My Launch Pad**  icon to access this dashboard > click on **Add** button in the first tile listed 
2. Select **App from Library** > from the range of different apps available, select those you wish to add to your personal launch pad > click **Save**

Note: if you are already a user of the software app, then by selecting the app to appear on your Launch Pad, you should have direct access to it (if it is single sign-on enabled). Obviously, if apps/software require purchase/subscription and you are not a licensed user, you will not be able to access the app/software.

Note: Apps available in the App Library are either Single Sign on (SSO) or Saved Password Apps (needing username/password for first time only) only

2. Adding a link to a website

1. Click on **My Launch Pad**  icon to access this dashboard > click on **Add** button in the first tile listed 
2. Select **Shared Tile**



The screenshot shows a form for creating a shared tile. On the left, there are two buttons: 'Upload Image' and 'Generate Thumbnail'. Below them are labels for 'Title' and 'Subtitle'. The main form fields are: 'Title *' with the example 'e.g. RM Unify'; 'Address (URL) *' with the example 'e.g. https://www.rmunity.com'; 'Check URL' and 'Generate Thumbnail' links; 'Subtitle' with the example 'e.g. RM Education'; and 'Description' with the example 'e.g. RM Unify is your Launch Pad to the Cloud - a single sign-on system,'. At the bottom are 'OK' and 'Cancel' buttons.

Title – enter your school’s name for the tile

URL – enter the web address for the website (e.g. www.bbc.co.uk)

Use the **Check URL** link to make sure that it is correct and will take you to the required website

Generate Thumbnail will create a small picture representing the URL if the address is publicly available on the internet (e.g. BBC)


or alternatively you can use **Upload Image** to locate and attach a picture/school logo to the tile

Subtitle – an optional additional supporting title if required

Description – supporting information

3. Finally, click **OK** to save the tile
Repeat steps for 2.3 for any additional website shortcut tiles you wish to add to the Home Launch pad – you can add additional websites at any time later in the rollout.

3. Re-arrange tiles on My Launch Pad

1. Click the **Edit Launch Pad** button 
2. **To re-arrange tiles**, click on the tile and drag and drop into a new position on screen or click in the top left of each tile icon and select the ‘sort order’ number
3. Click **Save Changes** button
4. **To delete a tile**, select the tile and click the **X** in the top right corner of the tile to remove it and then click **Save Changes**