RM Unify

Administrators – follow these steps WITH EACH OF YOUR USERs to ensure they can access RM Unify & RM Integris+ (SSO) as expected.

Go through the set-up steps (as you have done for yourself in Stage 1) so that users are confident with accessing Integris through RM Unify.

Please give out a copy of RM UNIFY End Users Helpsheet to each of your users as a guide/aide memoire.

Stage 1 - Setting RM UNIFY up as a shortcut

With your user, identify their preferred method for setting up a shortcut to RM Unify on their device.

You can do this as **either 1)** a shortcut on the Windows desktop **and/or 2)** a shortcut within a browser screen

1) Creating a Windows desktop shortcut for RM Unify

RM Unify URL https://www.rmunify.com

On a Windows desktop screen:

1. Right-click the desktop icon and choose **New**, **Shortcut**. The Create Shortcut window is displayed. (To reveal the desktop background you may first need to minimise any open program windows.)

2. If you want to specify a particular browser (e.g. Chrome or Firefox etc.), click **Browse** and browse to the folder where your chosen browser is installed (see ***blue Note below). Look for and select the executable (.exe) file (e.g. **chrome.exe**) and click **OK** to return to the Create Shortcut window.

3. In the *Type the location of the item* field, enter the RM Unify URL *(**not** including the http:// or https:// part)* at the end of the path you selected in step 2 and separated by a single space.
For example, the completed line might be
"C:\Program Files(x86)\Google\Chrome\Application\chrome.exe" rmunify.com

4. If you skipped step 2 and there is no path in quotation marks, then the completed line should be **rmunify.com**

5. Click **Next**.

6. In the *Type a name for this shortcut* field, enter a suitable name, e.g. **RM Unify**.

7. Click **Finish**.

This shortcut will open the selected browser (Chrome in this example) and load the RM Unify login page.

Note: if the user had accessed RM Integris before, you would not need to then enable pop-ups and prevent cached pages on the browser.

***If you use more than one browser, it's convenient to specify which browser you want your shortcut to use for opening Rm Unify. To do this, in step 2 below you'll need to know where your chosen browser is installed.
🔷 For Firefox this is normally **C:\Program Files(x86)\Mozilla Firefox** for 64-bit computers, or **C:\Program Files\Mozilla Firefox** for 32-bit computers.
🔷 For Chrome this is normally **C:\Program Files(x86)\Google\Chrome\Application** for 64-bit computers, or **C:\Program Files\Google\Chrome\Application** for 32-bit computers.
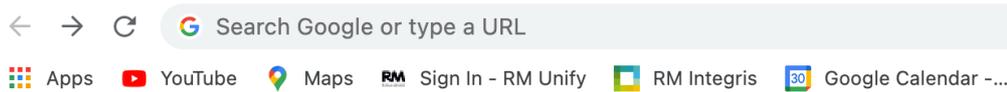
RM Unify

2) Set up RM UNIFY as a bookmark (Shortcut) in a browser screen

Open your preferred internet browser (i.e. Chrome, Firefox, Internet Explorer etc.)

1. In the URL address line, type in https://www.rmunify.com and press <return> key
   You should see the RM Unify login screen

2. If using Chrome, check that your bookmark bar is visible – if not, click on the
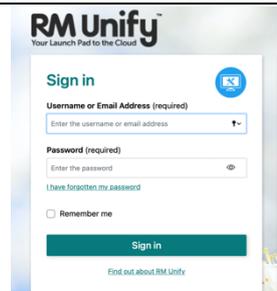
   ⋮ (*top right*) and in the menu, select **Bookmarks > Show Bookmark Bar**

To add the RM Unify Login screen as a bookmark, click on the star ⭐ (*top right*) > click on **Add Bookmark** > ensure in the *Folder* box you can see **Bookmark Bar** > click OK. You should then see a RM Unify link appear.

For other browsers such as Internet explorer or Firefox, follow the usual browser specific procedure for creating bookmarks/shortcuts/favourites.

Now using the user's username and password you have for them, ask them to log in to RM Unify for the first time

1. **Enter your username and password** (as allocated to you) and then click **Sign in**

   [Note: The account will be locked for 4 minutes after 5 failed attempts at login. After the 4 minutes, a further failed attempt will lock the account for 16 mins, the next failure 1hr and 4m, and the next for 4hrs 16mins.
   *If your account is locked, please ask your RM Unify Admin to reset your password **via the RM Unify Management Console** which will unlock your account.*

   The user should view either the 'My Launch Pad' screen which will be blank (for RM Finance schools only) OR
   the user should see the **Home Launch Pad** screen with the tiles displayed
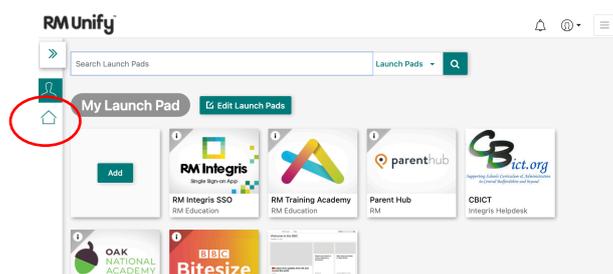
Now check that the user can access RM Integris+

2. Ensure the user can click the **Home** ⌂ icon if not in view
   You should see an **RM Integris (SSO)** tile here.

3. Click on the **RM Integris+ SSO** tile and the normal RM Integris screen they are used to seeing should appear.

4. Proceed to access Attendance etc. as per their 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.

   You may have set up additional tiles on the Home launch pad for your user to use – go through them as appropriate.

Set up their password recovery

Ensure that an email address for their account to reset their own password is set up at this point:

1. Click on the **My Profile** icon (*top right)* and select **My Profile** from the menu

2. Select **Password Recovery**
3. Enter an email address in the *Password Recovery Email Address* box

   An email will be sent to your password recovery email address shortly to allow you to confirm your email address. When it arrives, click on the confirmation link 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.

Change your RM Unify password (optional) – you user may want to change their password to one of their own choosing

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**

Logout of RM Unify – ensure your user understands that they have to log out of Integris and then 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 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

It is extremely useful for your user to Login to RM Unify again and access RM Integris+ again on their own to ensure all is working perfectly!