

RM Finance Online

RM Unify

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Contents

Introduction	2
RM Unify and RM Finance Online	2
Setting Up Process	2
Step 1 - Administrator Log In	2
Password Recovery – IMPORTANT	2
Step 2 – Create Users.....	3
Step 3 – Adding the RM Finance Online Tile.....	3
Step 4 - Data Migration.....	3
Logging Out – IMPORTANT	3
Step 5 – Activating and Giving Permissions to Users.....	4
Step 6 – Setting Up RM Finance Online.	4

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Introduction

This bulletin is to guide schools through the RM Unify activation process and subsequently access to RM Finance. Thought should be given to ensure that appropriate staff are given access to appropriate areas at the appropriate levels.

RM Unify and RM Finance Online

RM Unify is a single sign on site to online services. Currently many schools in Hertfordshire do not use any online services through RM Unify but this will change because RM Finance Online is one of the online services. The other applications that are available to use, once activated may contain sensitive data. The Schools' Data Controller will control access to RM Unify and any applications used by the school.

It is critical that the users of RM Finance Online are kept up to date at all times. This is because RM Finance Online is, as the name suggests an online system and users can gain access to the software anytime, anywhere.

Setting Up Process

Below are the steps that schools will follow to gain access to RM Unify and subsequently RM Finance Online.

- Administrator Log In
- Adding Users to RM Unify
- Migrate the RM Finance Data
- Give Permissions and Levels to Users

Before commencing the processes described below please ensure you have access to the following RM documents,

- Adding Users to RM Unify
- Uploading You Data into RM Finance

Please also ensure that you have access to and have read Financial Services' Bulletin 001.

Step 1 - Administrator Log In

Below are the steps that schools will follow to gain access to RM Unify and subsequently RM Finance Online.

Please refer to the RM document "Adding Users to RM Unify"

Log in using the user name and password supplied by RM.

The user name will be in the format of "RMunifyadmin@yourschoolname"

The administrator must enter a recovery email address.

This is covered by steps 1 to 5 in the RM document.

Password Recovery – IMPORTANT

RM Unify will not accept duplicate email addresses for password recovery. The recovery email for the administrator cannot be the same email address as another user.

For example if the School Business Manager were the administrator for the school and entered the SBM.yourschoolname@herts.sch.uk email address for recovery of the administrator log in, the SBM could then not use the same email address to recover the password for his/her personal login to RM Finance. It is also not appropriate that a personal email address be used for recovery.

Step 2 – Create Users

The next step is to create the users for RM Finance Online.

Instructions are in “Adding Users to RM Unify” document, steps 6 to 7.

Step 3 – Adding the RM Finance Online Tile

The RM document “Uploading Your Data into RM Finance” describes the process of adding the RM Finance tile.

Please follow pages one to two.

Step 4 - Data Migration

Before attempting the migration, schools should read and follow the instructions contained in Financial Services upgrade bulletin RM Finance Online 001. It contains pre upgrade checks; the migration process and post upgrade checks. The bulletin refers to a tick list, which once completed should be signed and kept along with the system generated migration report. These should be filed with your financial documents for audit purposes.

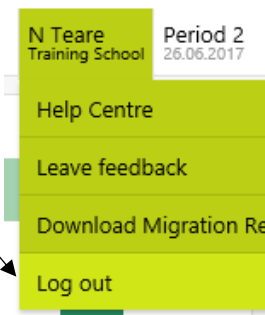
The RM document “Uploading Your Data into RM Finance” describes the migration process.

It is crucial to select the correct data to migrate. If schools are migrating the data, please speak to your RM Finance user to ensure you select the correct file. The migration process cannot be reversed.

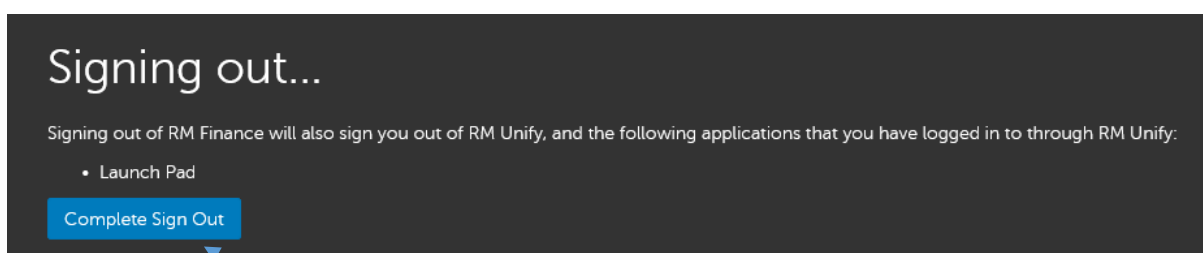
The administrator can now log out of RM Unify.

Logging Out – IMPORTANT

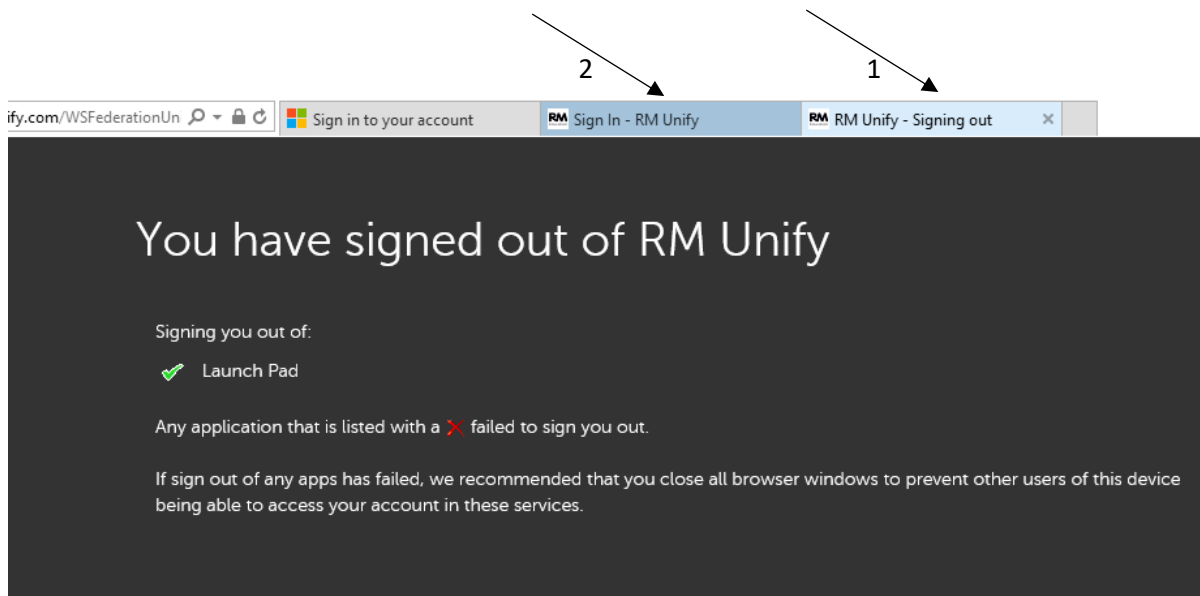
It is important to log out of RM Finance and RM Unify in the correct way.



Click on you name at the top right of the screen and click on Log out.



Click on the blue “Complete Sign Out” button



1. Close the Signing Out instance
2. Finally close the Sign In – RM Unify instance.

If you do not sign out of the software in the correct way, the system will seem to retain previous information and will not respond in the correct way.

Step 5 – Activating and Giving Permissions to Users

Please refer to the RM document “Uploading Your Data into RM Finance” which describes how to activate and give permissions to an RM Finance user.

Once the data has been migrated, the users can now log into RM Finance Online.

The first thing that should be done is to set up the recovery email address. Please see the note above about Password Recovery.

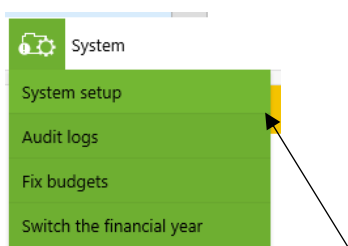
The user will be prompted to change the password.

Click on the RM Finance tile. The user will see a message to say that the account is inactive.

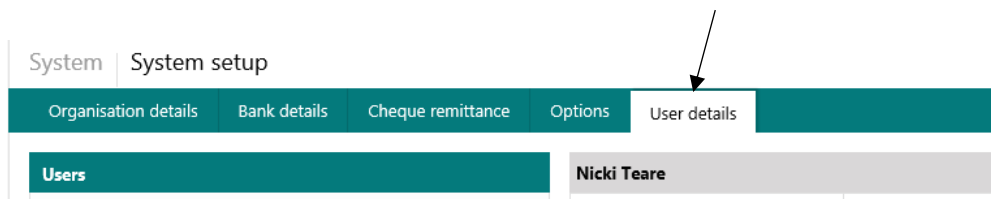
The administrator must now log back in.

Step 6 – Setting Up RM Finance Online.

Once the administrator has logged back into RM Unify they will now need to click on the RM Finance Tile.



From System menu select System setup



Click on User Details to see the list of staff who could access RM Finance Online.

Please refer to section three in the “Uploading Your Data into RM Finance” document so see how to activate users. Care should be taken to ensure that users have the appropriate level of access for their roles.

In time, you may also have to remove or deactivate users should they no longer perform the role assigned to them.

If you are unsure of any of the above procedures please contact the

Helpline on 01992 555713

Or

email : fss.helpdesk@hertsforlearning.co.uk