Getting Started

The following pages are a step-by-step guide to get you up-and-running and comfortable with using Unify by ClarionCall, enabling you to familiarise yourself with the site layout, and the initial set-up processes.

We'll offer you tips and help-points to ensure that you understand the basics of using the Unify system, and ensure that the right support is in place so that you are able to set your account up quickly, and easily, according to your specifications.
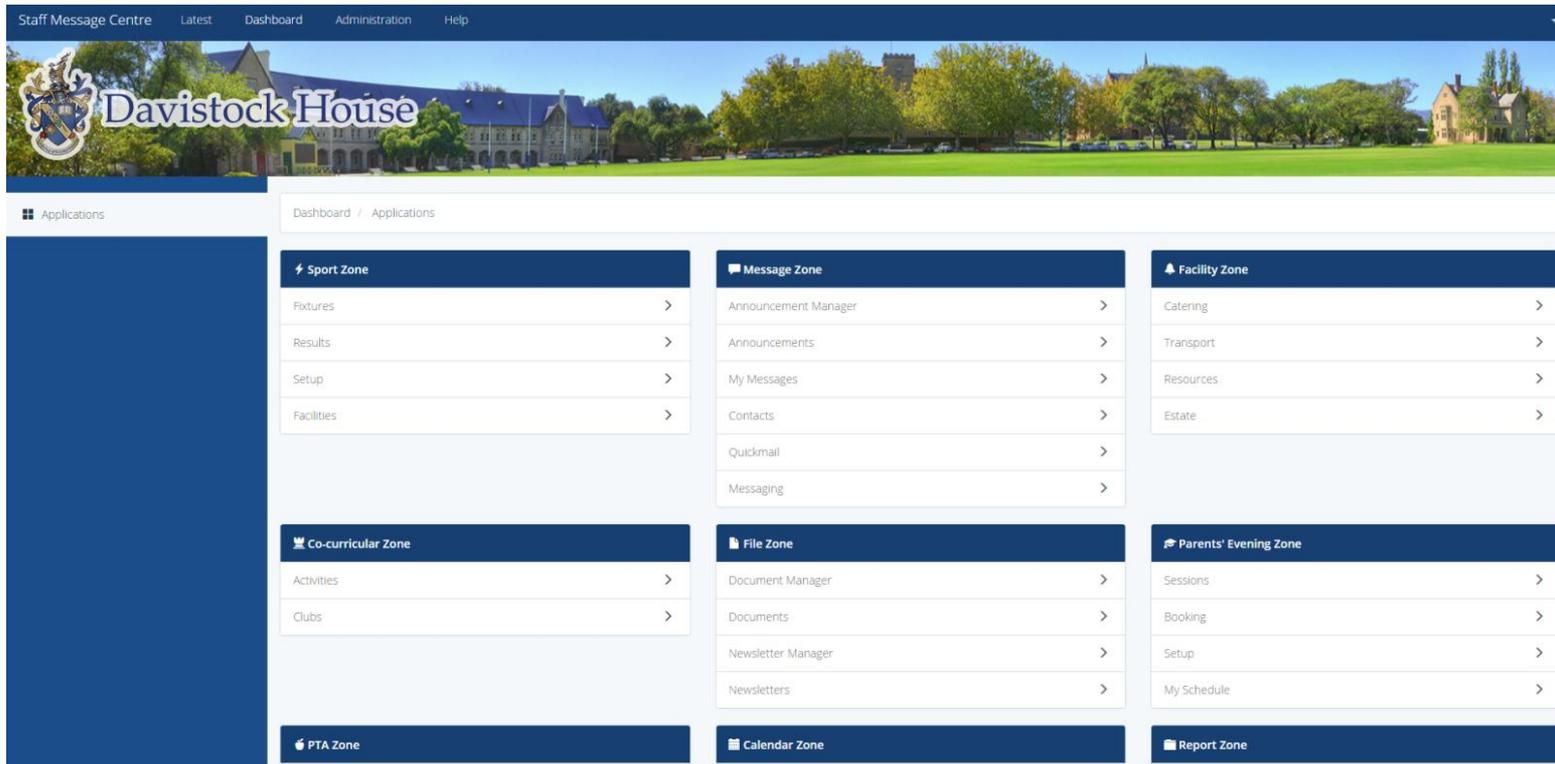
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1. Message Centre Overview

☐ - There are two Message Centres associated with Unify:

– The **'Staff Message Centre'** is where school staff create and add content

– The **'Parent Message Centre'** is where parents log in and view content

☐ - Content access can be set to either public, private, or in both of these spaces.

– **'Public'** content can be viewed on the home page before logging in to the Message Centre

– **'Private'** content can only be viewed when logged in to a Message Centre

1. Message Centre Overview

	Available to see before logging in to Message Centre	Available to see after logging in to Message Centre
(Noticeboard)	**Public**	**Private**
Parent Message Centre	Announcements Sports Fixtures Events etc	Announcements (Shared) Sports Fixtures (Shared) Documents (Shared) Newsletters (Shared) Events (Shared) Parents Evenings (Personal) Co-Curricular (Personal) Messages (Personal) etc
Staff Message Centre	Sign-in page	Content created by staff for parents Team Sheets Parents Evenings Co-Curricular Events etc

Some information can be brought out of the Private and displayed Publically if desired

1. Message Centre Overview

☐ - The **'Dashboard'** can be thought of as a Site Map, containing areas accessible to users, and can be used to navigate between zones. The level of content that users see is dependent on how their access rights are set up.

2. Administration

The **'Administration'** tab allows you to create and customise rules and settings to best fit your school's needs.

☐ **Branding** – The branding section allows you to set the primary colour scheme, and change heading and logo settings for both the Parent and Staff Message Centres.

- – The 'Primary Colour' setting can be set to match your school website colour scheme; ensuring your online branding is consistent. A HEX value colour code should be typed into the colour option bar.
- – The 'Font Family' option allows font styles to be changed.
- – Enabling a 'Header' leaves a coloured space at the top of the Message Centre. Choosing a 'Background Colour' changes the colour of the header, again, this must be a Hex value colour code.
- – The header size can be changed as desired, although will automatically revert to 'small', once a user is logged in, to preserve their user experience.
- – An image of your school can be uploaded as a 'Header Background Image', replacing the block colour header. Recommended dimensions can be found in the table in the header tab.
- – Your school logo can be uploaded to appear over the header background image.

Unify

2. Administration

Uploading Documents and Newsletters to the Message Centre will give parents and staff instant access to information.

Documents	Newsletters
In 'File Zone' on the dashboard, click the 'Document Manager' tab.	In the 'File Zone' on the dashboard, click the 'Newsletter Manager' tab.

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A folder must be created in order to upload a file. Click the 'Folders' tab on the left-hand side. Click the '+New' icon, enter the folder name, and click the 'Save' icon.

⇩

Documents	Newsletters
To upload a document, click the 'Files' tab, select the folder you wish to upload the file to, and click the '+New' icon. In the 'Basic' tab, enter the document name, enter the type of file, and a brief description. These details must be entered to upload the document successfully. Click the 'Choose File' icon, and upload your selected file. Both documents and folders are saved in alphabetical order.	To upload a newsletter, click the 'Files tab, select the folder you wish to upload the file to, and click the '+New' icon. In the 'Basic' tab, enter the newsletter name, upload date, and a brief description. These details must be entered to upload the newsletter successfully. Click the 'Choose File' icon, and upload your selected file. Both newsletters and folders are saved in chronological order, with the most recent upload appearing first.

⇩

'Audience' allows you to choose whether the file can be accessed publically, privately, or both (full). 'Visibility' enables you to select where the file can be viewed, either the Staff Message Centre, Parent Message Centre, or both. Once these details have been entered, click 'Submit'.

2. Administration

Announcements can be used to give parents, and staff, key information and reminders.

In 'Message Zone' on the 'Dashboard, click 'Announcement Manager'. Click the '+New' icon.

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Enter the announcement title, the date you wish it to go live, the expiry date, and a brief summary. Type your announcement in the 'Message' box. Details of how to edit your text are displayed when the mouse hovers over the editing icons.

⬇

The 'Pinned' option allows you to 'pin' your announcement to the announcement board, ensuring your message is constantly displayed at the top of the announcements list. 'Pinning' a maximum of 2 announcements is recommended, as only 4 can be actively displayed.

⬇

Use the 'Image' tab to upload an image to your announcement. This will appear above your text, and will automatically scale to fit the modal window.

⬇

'Audience' allows you to choose whether the announcement can be accessed publically, privately, or both (full). 'Visibility' enables you to select where it can be viewed, either the Staff Message Centre, Parent Message Centre, or both.
Once these details have been entered, click 'Submit'.
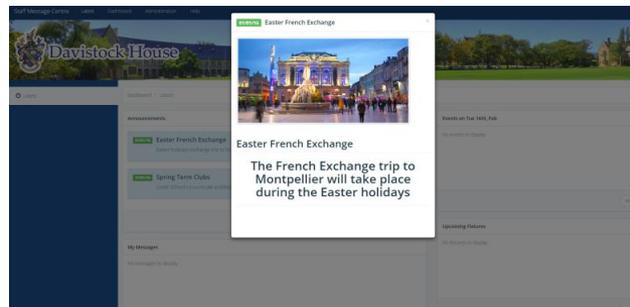
3. Registration

The user registration process is managed separately for parents and staff, and can be done individually, or as a group.
We recommend registering a few staff members at first to get used to the process, before registering all parents.

Individual	Group
Click the 'Administration' tab, and click 'Users' on the left-hand side.	Click the 'Administration' tab, and click 'Registration' on the left-hand side.

Individual	Group
Select 'Staff Message Centre' or 'Parent Message Centre' from the drop-down menu and click 'Load'. Search using the filter drop-down menus, or by typing a name into the search bar	Choose to register the Staff or Parent Message Centre, and select to send to either 'In Progress and Unregistered', 'In Progress Only', or 'Unregistered Only' contacts. Use the filters to select users from groups in ClarionCall. Once the group is selected, click 'Filter'.

Individual	Group
Click the 'Edit' icon to check details, and to change a user's account type. To register an individual, check the tick box next to their name, scroll down, click the 'Bulk' icon, and select 'Register by e-mail'. The 'Send a Message' page will load.	Click member names to select them for registration, click again to deselect them if necessary . Click 'Submit' to apply your choice of who to send the message to, and the 'Send a Message' page will load.

Click 'Show/Hide' to view message recipients. Edit the 'Cc', 'Reply-To' and 'Cc Groups' settings as necessary. Enter the e-mail subject and type your message, or, select a template to use as a message. Use the 'Attachments' tab to select and upload an attachment if required. Click 'Submit' to send the registration e-mail

4. Help and Support

☐ - Help

- The Unify help page can be found by clicking the 'Help' tab at the top of your screen.
- Navigate the page using the left-hand menu. The menu is organised by Unify Zone, and sub-divided by sections from within that zone.
- If you cannot find the assistance you are looking for in our Help page, make use of the Support Portal to contact a member of the ClarionCall team.

☐ - Support Portal

- The Support Portal can be accessed from within the Help page by clicking the green 'Support Portal' icon.
- Here, you can log a 'ticket' regarding a specific issue you are experiencing. This will be assigned to a member of the team, who will be able to assist you.
- Try to include as much detail as initially possible in your ticket. You can log into the Portal at any time and update your ticket.
- Once you are logged into the ticket portal, any tickets you have previously raised, and their replies, can be viewed.