

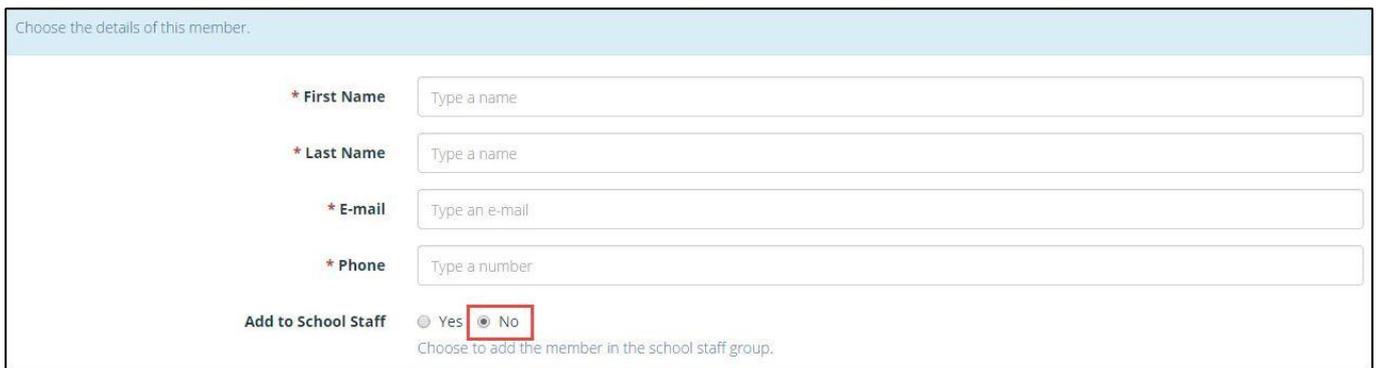
PTA Zone initial setup guide

The PTA Zone can be managed with very little effort from school staff. The leader of the PTA can be setup as an administrator of the Zone, allowing them to log-in to the Staff Message Centre (a role can be setup to ensure they can only view the PTA Zone) and edit any information that displays in the application.

Before doing this, we recommend setting the head/leader of the PTA up with a general PTA email account (e.g. 'exampleschoolptalead@gmail.com'). This ensures that any PTA correspondence is not received at the parents personal email address (a contact can be setup within the PTA Zone for event correspondence).

How to setup a parent as an administrator of the PTA Zone

1. Ensure you are logged into the Staff Message Centre.
2. Click 'Administration' in the top Navbar, and click 'Users' in the left-hand menu.
3. Select 'Staff Message Centre' from the drop-down menu and click load.
4. Click the '+New' button in the right-hand corner.
5. Enter the first and last name, email address (this is where the registration email will be sent) and mobile number of the PTA head/leader. **Do not** check the 'Add to School Staff' tick-box; this will add the parent to the school staff list, meaning they receive any correspondence sent to staff. They will be added to an 'Extended School Staff' list.



Choose the details of this member.

* First Name

* Last Name

* E-mail

* Phone

Add to School Staff Yes No

Choose to add the member in the school staff group.

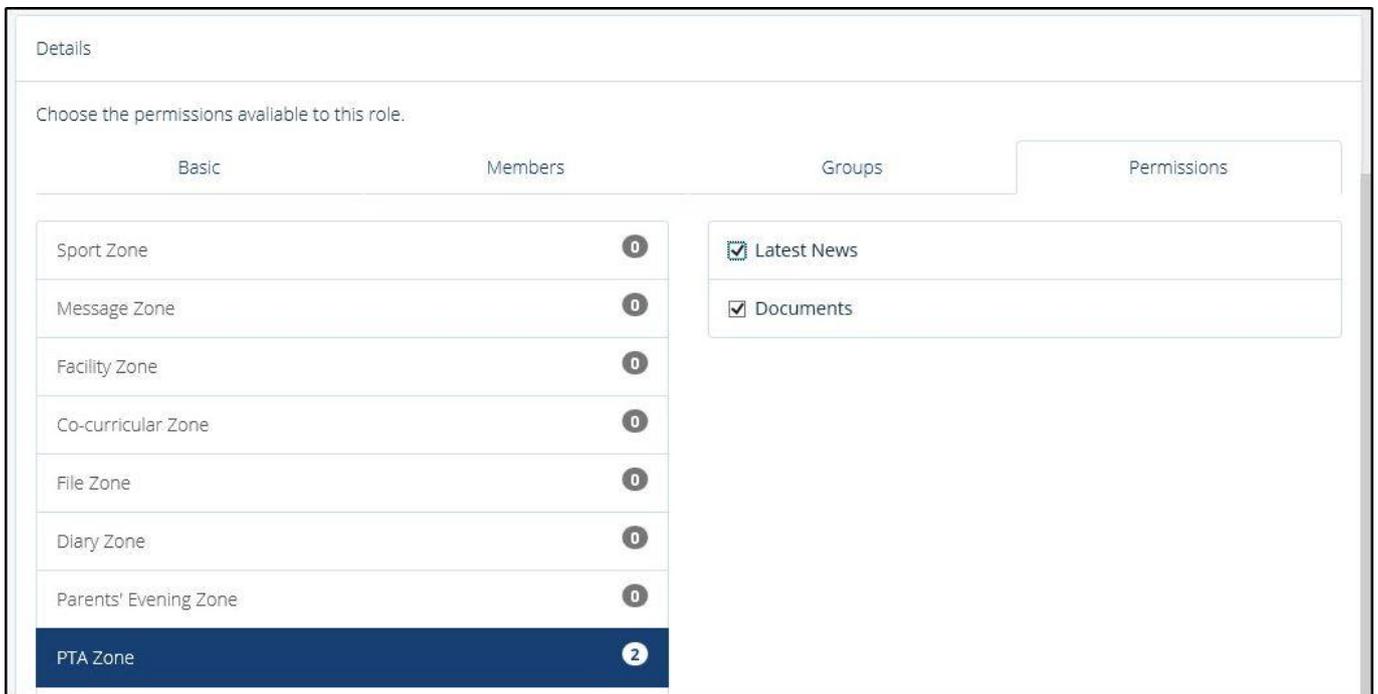
The Member Management facility

6. Click 'Submit' to add them to the 'Extended School Staff' list.

This can be repeated for whichever PTA members require access. Once you have created the extended school staff member, you will need to send them a registration email, or register them yourself using the register by print option.

How to create a role for the PTA Zone administration

1. Ensure you are logged into the Staff Message Centre
2. Click 'Administration' in the top Navbar, and click 'Roles' in the left-hand menu.
3. Select the 'Staff Message Centre' from the drop-down menu.
4. Click the '+New' button.
 - a. Enter the name of the role.
 - b. Click 'Members' and search for the PTA head/leader's name, click 'Add Member'. Add multiple members if appropriate.
 - c. Click 'Permissions', click 'PTA Zone' and tick 'Latest News' and 'Documents', leaving everything else un-ticked.



The screenshot shows the 'Details' page for a role in the Unify system. The page title is 'Details' and the instruction is 'Choose the permissions available to this role.' There are four tabs: 'Basic', 'Members', 'Groups', and 'Permissions'. The 'Permissions' tab is active. On the left, there is a list of zones with a counter in a circle next to each. The 'PTA Zone' is selected and highlighted in blue, with a counter of '2'. On the right, there is a list of permissions with checkboxes. 'Latest News' and 'Documents' are checked, while all other permissions are unchecked.

Zone	Count
Sport Zone	0
Message Zone	0
Facility Zone	0
Co-curricular Zone	0
File Zone	0
Diary Zone	0
Parents' Evening Zone	0
PTA Zone	2

Permission	Checked
Latest News	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>
Other Permissions	<input type="checkbox"/>

The PTA Zone role

5. Click 'Save & New' to save the role.

Setting this role will ensure that parents that are administrators of the PTA Zone only have access to that application, and cannot view any others.