Navigation Guide

EPM Connect Guide

Document Control

Document Overview: This document outlines an overview of general navigation within EPM Connect.

Classification: Public

Document ID: EPMC028

Author: Lauren McGuire, Product Manager, Product Management

Version: 2.0

Date of Last Review: 23rd October 2025

Last Reviewed by: Keren Prior, Director of Operational Excellence

Date of Next Review: 23rd October 2026

Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 23rd October 2025 and is issued on a version-controlled basis under her signature.

Document History

Date of Change	23rd October 2025
Summary of Change	Changes made to improve clarity.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

Accessing the system

To access the system for the first time

1. Using your preferred browser, enter **epmportal.uk**

2. The first time you login you will need to create a new password via **Forgotten Password**.

3. Click **Forgotten Password.**

4. Enter your work email address and click **Submit**.

   For those with multiple email addresses, it is important that you enter the work email address that your school registered with the EPM Implementation Team.

5. An email will be sent to you with instructions. Open the email and click **Please click on this link to reset your password**. A webpage will open.

6. In the **Email Address** field, enter your email address.

   Your new password should be:

   - 10 characters long

   - include a combination of upper and lower case letters

   - include at least one special character

   - include one number.

7. Re-enter your password and click **Reset**.

   Your password has been reset. Please return to the website and enter your **Login** and **Password**.

To Access the EPM Connect Platform

1. Using your preferred browser, enter **www.epmportal.uk**.

2. Enter your work email and click **Login**.

3. Enter your password and click **Login**.

To find the School

If you have access to multiple properties, you must first select the school that you wish to view.

1. On the left-hand side of the EPM Connect window, select **Select Property**. The **Select Property** window is displayed.

   If you are a standalone school, the system will default to your school and the school name will be displayed in the top, left-hand corner of the screen.

2. To search for the school, click on the magnifying glass icon next to **Property Title**. The search function is displayed.

3. From the drop-down list, select the search rule you want to apply.

4. In the text box, type the name of the school or the word you want to search for.

5. Click on **Apply**. A list of schools matching your search criteria is displayed.

6. In the list, click on the name of the school you want to add the employee to. The window is updated and you are directed to the **Home** page for the school you have selected. The name of the school is displayed at the top of the page.
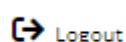
Permissions

The permissions assigned to the user group will determine what the user is able to view and edit. Should one of your team be unable to view or edit certain information within the system, check the user group they have been assigned to and consider changing the user group if the permissions are not sufficient. See our Adding Users and Permissions in EPM Connect Guide for more information.

Key menu options

These options can be found in the top right-hand corner of the screen.

   Click here to Logout.

   Click here to view manage your profile and account.

- **My Profile:** View and manage your employee profile details within **My Portal**.
- **My Account**: View **Permissions** and manage **Password Settings**.

Navigation bar

The navigation bar can be found down the left-hand side of the screen. A number of these menu options, along with additional options can be found along the top of the screen.

Each module is shown in a list within the navigation bar, along the Admin section. The modules shown will depend on the EPM services and modules you have bought.

Show Me How To Guides
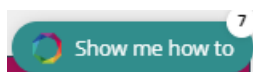
We recognise that adopting a new system can be intimidating, and users will have varying levels of experience with HR Information Systems (HRIS). Whether you're a seasoned HRIS user or have never encountered an HR system before, we're committed to making the transition as seamless and hassle-free as possible.

Although video guides, tutorials and face to face demos can be valuable, they rely on the user absorbing and retaining all the information, which is not an easy task. That's why EPM has invested in a Digital Adoption Platform or DAP technology, which seamlessly integrates with EPM Connect and guides you step-by-step through each element and task as you undertake it, almost like a sat nav, offering online prompts such as 'click here' and 'complete the fields below'.

You can use the guides to support you at any time by clicking on the **Show Me How To** button. As you grow more accustomed to tasks, you might find that you no longer require these guides, however they may still be useful for tasks that are only completed occasionally

The DAP also allows us to tailor the support we provide to your users based on their experience, analysing customer behaviour and providing more or less support as required.

1. Select the module you require.

   The guides available will reflect the module you are in. If you cannot see the guide you require, ensure you are within the relevant module within the system.

2. Click the **Show Me How To** button.
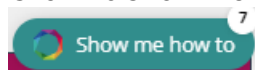
3. Click the name of guide you wish to follow.

   Guides with lines through them indicate guides that have been followed on previous occasions and can still be completed.

   The guide will take you to the relevant stage and provide you with the first instruction. For example, **Complete the following fields**, or **Click here**.

4. Follow the instruction and click **Next**.

5. Continue to follow the instructions until the task is complete.

Resource Centre

In addition to the **Show Me How To** guides, the **Resource Centre** provides access to a number of guides and resources to support you in using the system.

Written Guides: Provide easy to follow step by step instructions for each module, broken down into key tasks.

Video Guides: These videos seamlessly guide you through each module and allow you to skip to specific sections.

**FAQs**: Provide answers to frequently asked questions, broken down by module.

Feedback: Allows you to provide feedback regarding the system. Your feedback is vital to the development of our systems and services and will inform future developments, so please share your thoughts with us.

Chat Function - Client Communication Platform

Our **Client Communication Platform** provides customers with an opportunity to log and track queries and gain quick responses to questions regarding the EPM Connect platform and HR and Payroll.

The platform is designed to overlay our email communication, giving you greater visibility of your queries and status, whilst also providing EPM's Management Team with an overview of outstanding queries and response times, to analyse in detail and identify areas of support.

Click the **Chat with EPM** button to access the Client Communication Platform.

Chat with EPM...
How can we help you?
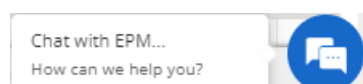
Please see the separate guide, entitled **EPM Client Communication Platform Guide** for more information.

Select Property

Property refers to the school or Trust.

Select Property allows you to choose the school you wish to view. If Trust is selected, the information will relate to the Central Team.

The name of the property you are viewing can be seen in the top left-hand side of the screen.

Your current selected page is highlighted in pink, so you always know where you are.

Admin

The options available within the **Admin** section will depend on permissions, but may include:

Main Settings: Configure the main settings across the property within this section.

The MIS Integration: Manage integration with MIS within this section.

User Administration: Manage user permissions and administration within this section.

Notification Settings: Set up notifications for events and actions within this section.

General Navigation

Data tables

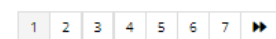Data tables are provided within a number of pages.

	To select a larger or smaller number of records select a pre-defined option from the drop down menu.
	Click the refresh button to refresh the data and remove filters.
	Click **Export** to export this information within a report, selecting either **Word** or **Excel** format.
	Select the page number you wish to review by clicking the appropriate number underneath the data table. The highlighted number indicates your current selection.
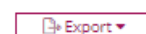
Search functions

Column headings with a magnifying glass icon, can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

To search in a column, click on the magnifying glass in the header of the column you want to search. From the drop-down list, select the rule for your search then add the criteria in the text box below.

Search by Department

Select the **Employees by Department** tab to view all employees grouped by department and from **Department Filter** on the right-hand side select a department.

A department must be selected within the **Department Filter** in order to show any data. The data field will remain blank until a department has been selected.

Select the **Employees by Job Role/Type** tab to view all employees grouped by Job Role/Type and use the magnifying glass icon next to each title to search by that category.

Search by Employee

To search for an employee by name use the pink **Employee Search** box in the top right-hand corner.

Click the eye icon on the right-hand side to open an employee's details or click on the person's **Forename**. The relevant **Employee Details** page is displayed.

Key icons

- Click here to view full information relating to the line within the table.
- Click here to edit the item or record.
- Click here to delete the item or record.
- Click here to view the employee information

Reporting

Key Reports

Standard reports can be found by clicking on the Reports button at the top of the screen of key pages within each module.

Click on the Reports button within the selection of buttons at the top of the screen to view a list of all reports related to that module.

Live Reporting

Within most pages of the system, you can export the data within the tables displayed.

Click **Export** to export this information within a report, selecting either **Word** or **Excel** format.

Export ▼

Report Builder

The **Report Builder** module allows you to view key HR and Payroll reports and create bespoke reports relating to key modules. View the **Report Builder Module Guide** for more information. This module is only available to Payroll customers.