Adding and Managing Users, Permissions & Notifications

EPM Connect Guide

Document Control

Document Overview: This document provides a step by step guide to adding users and managing permissions and notifications within EPM Connect.

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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 07^{th} July 2026and is issued on a version-controlled basis under her signature.

Document History

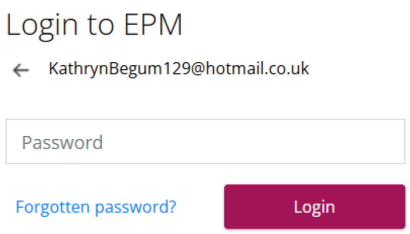
Date of Change	07^{th} July 2026
Summary of Change	Leaver group added.
New Version Number	V4.1
Changes to be notified to	Director of Operational Excellence

Contents

Accessing the system

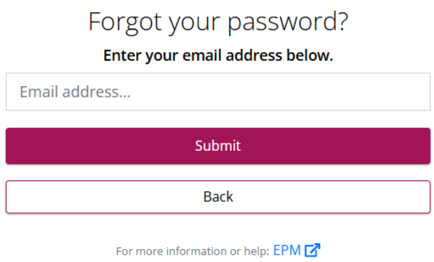
To Access the system for the first time

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.

Users and User Groups

Users

Users describe any person who has access to the system.

Employees are granted permission only to their own details.

However, other permissions can be allocated to users within EPM Connect to provide them with view and editing rights to specific areas within the system.

User Groups

User Groups have two purposes:

1. **Permission-based User Groups:** allow the same permissions to be set for groups of users to provide them with view and editing rights to specific areas within the system.
2. **Distribution-based User Groups:** allow users to be grouped by role, department or any other type of group. This is particularly useful for distributing training, performance activities and other tasks within EPM Connect.

   User Groups used for distributing training, performance activities and tasks do not need permissions.

Add User Groups for distribution

User Groups for distribution can be added within **Admin**.

1. On the left-hand side of the EPM Connect window, select **Admin**. A list of further options is displayed.
2. Select **User Administration**. The User Administration page is displayed.
3. Click the Add User Group button at the top of the screen. The Add User Group page is displayed.

4. In the **Name** field, enter a name for the User Group.

   Permissions are not required for user groups that have been added for distribution-only purposes.

5. Click **Save** to finish**.**

Add permission-based User Groups

We recommend carefully considering the permissions of the user group before assigning to individual users to prevent users from viewing information that is not relevant or suitable.

To support the set-up of permission-based user groups, EPM have set up a number of pre-configured user groups.

Pre-configured User Groups

EPM have pre-configured a number of user groups within the system; to provide the functionality they require within EPM Connect via Permissions.

The permissions assigned to the user group will determine what the user is able to view and edit. Therefore, should one of your team be unable to view or edit certain information within the system, it is best to first check the user group they have been assigned to and consider changing the user group if the permissions are not sufficient. For further support please contact your Implementation Team.

Users are individuals who are able to log into the system in order to carry out specific tasks. An employee who has a record on the system is not a user unless they are given a user profile and assigned to a user group.

User groups link users together within one, giving them the permissions assigned to the user group. User groups can be created at Trust level and then mapped to schools within the Trust or assigned directly at school level.

Please note only **Super Users** are assigned to each Trust or School. The remaining User Groups are assigned by the Super User to the Trust and Schools. All Super Users have overall responsibility for user's access and permissions, with the ability to create (and manage) new users (including employees), user groups and those assigned to each group.

User Groups can be assigned in **User Admin** within **Admin**.

Leavers

Leavers should be removed from all user groups and added to the **Leaver** user group, which will provide access to **My Payslips & Statements** and **My Documents** only.

Document Review Team

These users will be sent notifications from the HR Admin Team when new contracts and letters are ready for review. Please note this is only available for HR Essentials and HR Partner customers. Please add the relevant users to this user group.

Employees and Line Managers

Employees only have access to their own information and tasks assigned to them within each module via My Portal, in addition to the Employee Directory.

Employee Line Managers* mirrors the permissions of Employees, but with the added ability to view employee details for direct reports. Line Managers also have the ability to view and edit data within the Performance Management module for schools/trust who have bought this module.

*Line Managers are assigned by populating the **Report To** field within the **Job information** section of the **Employee Profile**.

HR Advisory-only customers

ADV-SuperUsers have view-only access to cases, appeals and meetings, in addition to user permissions and documents.

ADV-Case Admin have view-only access to cases, appeals, meetings and documents. ADV-Case Admin do not have the ability to view user permissions.

HR Essentials

ADM-SuperUsers can add and edit employees, view analytics, sensitive data, posts and incomplete records, edit group access, manage bulk actions and upload employees, documents and profile images bulk. They can add and edit tasks, manage task settings, view user permissions and documents, plus access to the Report Builder module and Document workflows.

ADM-Admin can add and edit employees, view analytics, sensitive data, posts and incomplete records, edit group access, and upload employees, documents and profile images in bulk. ADM-Admin have the ability to add and edit tasks, view user permissions and documents, plus access to the Report Builder module and Document workflows.

ADM-Admin Assistants have limited permissions, with view-only access to employees, employee analytics and incomplete records, plus the ability to edit tasks.

Case Admins have the ability to view cases which they have been granted visibility to. This user is only applicable to customers

HR Partner

Super Users can add and edit employees; view analytics, sensitive data, posts and incomplete records; manage bulk actions and upload employees, documents and profile images in bulk. They can view cases, appeals and meetings; add and edit tasks and manage task settings; plus access to the Report Builder module and Document workflows.

Case Admin permissions are limited to viewing cases, appeals and meetings.

Admin can add and edit employees, view analytics, sensitive data, posts and incomplete records, and upload employees, documents and profile images in bulk. They have the ability to add and edit tasks, view user permissions and documents, manage Pay Award admin and access the Report Builder module and Document workflows.

Case Admins are assigned by the Super User to the Trust and/or School(s); Case Admins have the ability to view cases which they have been granted visibility to. This user is only applicable to customers with access to the Case Management module.

Admins are assigned by the Super User to the Trust and Schools. Admins have access to manage employees, including generation of documents for review/approval, but without the ability to create new users and assign them to user groups. Payroll Admins can manage employee salary information and have visibility of absences and payroll runs.

Admin Assistants have limited permissions, with view-only access to employees, employee analytics and incomplete records and the ability to edit tasks and manage Pay Award admin.

Payroll & Pensions

PAY-SuperUsers have the ability to add and edit employees, view analytics and incomplete records; manage bulk actions and upload employees, documents and profile images in bulk. Plus, the ability to add and edit tasks; manage task settings; view user permissions and documents and manage all elements related to Absence and Payroll, with the exception of authorising payroll.

PAY-Authorisers have view-only access to employee details, incomplete records and analytics, with the ability to approve a number of Bulk Actions. Plus, the ability to authorise payroll and view absence analytics and the team calendar for all employees.

PAY-Admin have the ability to add and edit employees; view analytics, sensitive data, posts and incomplete records; manage bulk actions and upload employees, documents and profile images in bulk. They can add and edit tasks; view absence and documents and manage all elements within the payroll module, with the exception of authorising payroll.

PAY-Admin Assistants have the ability to view analytics and incomplete records, manage bulk actions, and upload documents and profile images in bulk. They can edit tasks and view documents, absence analytics and the Team Calendar.

PAY-Absence Admin have the ability to manage all elements within the absence module and edit tasks, view user permissions and documents.

PAY-Absence Admin Assistants have the ability to edit tasks, view absences, view absence analytics and view the Team Calendar.

Create a new permission-based user group

Permission-based user groups must be set up by EPM. If the user groups available do not match the permissions you require, please speak to your EPM Team.

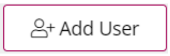
Users

Assign a User to a User Group

We recommend carefully considering the permissions of the user group before assigning to individual users to prevent users from viewing information that is not relevant or suitable.

We recommend when adding an employee that the employee is assigned to an **All Staff** and **Employee** User Group as a minimum.

1. From the left-hand navigation pane, select **Admin**. The **Admin** menu is expanded.
2. From the **Admin** menu, select **User Administration**. The **User Administration** page is displayed.
3. Click on the **User Groups** tab. A list of the user groups available for the school is displayed.
4. From the list of user groups, find the user group you want to assign the user to.
5. Click on the pencil icon in the right-hand column. The **Edit User Group** page is displayed.
6. Click on the **Add User** button. The **Add Users in User Group** window is displayed.
7. Find the user you want to assign to the user group.
8. Check the check box in the right-hand column.
9. Click on the **Add Users** button. The user is added to the user group.



10. Click the **Close** button. The **Add Users in User Group** window closes.

11. Select the blue **Users** tab. A list of all users is displayed with the user groups that you have assigned in the **User Group** column.
12. Repeat the steps to add any additional users.

Update User Details

Update User Email and Login

1. On the left-hand side of the EPM Connect window, select **Admin**. The **Admin** menu is expanded..
2. From the **Admin** menu, select **User Administration**. The **User Administration** page is displayed.
3. In the **Search Users** box, enter the name of the employee you wish to manage.
4. Click the pencil icon on the far right-hand next to the employee.
5. In the **Email Address** field, enter the new email address.
6. Click **Save**.

Please note that changing the user's email will update within the **Employee's Record** and will also form their new login.

Updating an Employee Record will NOT however automatically update their **User Email** and therefore **Login**.

Update Password

We recommend asking your employees to update their own passwords within **My Account** within **My Portal**, however this can be managed on behalf of the employee within **User Administration**.

1. On the left-hand side of the EPM Connect window, select **Admin**. The **Admin** menu is expanded..
2. From the **Admin** menu, select **User Administration**. The **User Administration** page is displayed.
3. In the **Search Users** box, enter the name of the employee you wish to manage.
4. Click the pencil icon on the far right-hand next to the employee.
5. Click the + button on the Password Settings section. The sections expands.
6. Password In the **Email Address** field, enter the new email address.
7. In the **Admin Password** field, enter your password.

   This is your personal password, not the password of the employee you are editing.

8. In the **New Password** field, enter a new password for the employee.
9. In the **Confirm New Password** field, re-enter the new password.
10. Click **Save**.

Delete, Archive and Suspend Employees

Archive user

Please note that users cannot be deleted but instead are archived. Archived users will not be granted access to the system.

1. On the left-hand side of the EPM Connect window, click **Admin**. A list of further menu options is displayed.
2. Click **User Administration**. The **User Administration** page is displayed and displays all current employees.
3. Use the **Search Users** function to find the employee you wish to archive.

4. Click the **x** icon in the far right-hand column of the user's name to delete the user. A confirmation pop up window is displayed.
5. Select **Archive** or **Cancel**.

6. Click the Show Archived Users button to check the employee has been archived.

Users can be reactivated by clicking on the double arrow icon. The permissions granted to the user before archive will be applied to the user.

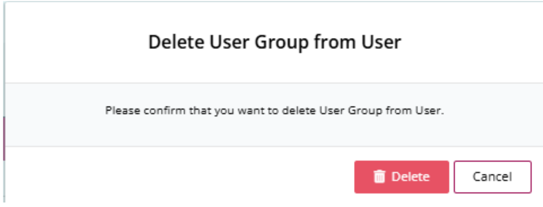
Manage suspended employees

Alternatively, if you wish to temporarily remove access, for example due to temporarily suspension, you can choose to remove permissions from the suspended user rather than deleting the user.

1. On the left-hand side of the EPM Connect window, click **Admin**. A list of further menu options is displayed.
2. Click **User Administration**. The **User Administration** page displays all current employees.
3. Use the **Search Users** function to find the employee you wish to search for the employee you wish to archive.

4. Click the **pencil** icon in the far right-hand column of the user's name to edit the user permissions. **Edit User** page is displayed.

5. Click the **x** icon next to the permission(s) you want to remove. A pop up window is displayed.



6. Click **Delete**.
7. Repeat the process until all relevant permissions are removed.

Add a User

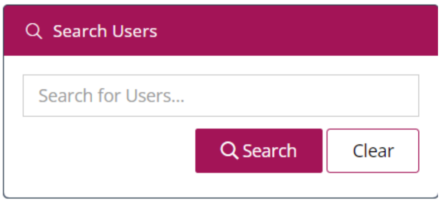
Employees are automatically added as users as part of the **Add an Employee** process. However, it may be useful to set up non-employees such as governors and trustees as users in order to distribute tasks.

1. On the left-hand side of the EPM Connect window, select **Admin**. The **Admin** menu is expanded.
2. From the **Admin** menu, select **User Administration**. The **User Administration** page is displayed.

Check if the user exists

Before adding a user, you should check that the user does not already have a record on the system. This will ensure that you do not have duplicate user records.

1. Select the **Users** tab. A list of users currently available is displayed.
2. In the **Search Users** text box, type the name of the user.



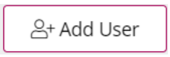
You can also search for a user directly from the list of users. To search in a column, click on the magnifying glass in the header of the column you want to search. From the drop-down list, select the rule for your search then add the criteria in the text box below.

3. Click on the **Search** button. If the user exists, they will be displayed in the list of users. If not, you will need to add them.

Create the user

To add a new user:

1. Click on the **Add User** button at the top of the page. The **Add User** page is displayed.



2. Add the **Email Address**, **First Name** and **Surname** for the user.
3. In the **Admin Password** text box, enter your password (the password you used to login to the system).
4. In the **New Password** text box, enter a password for the user, following the requirements below.

   - 10 Characters
   - At least one upper case
   - At least one lower case
   - At least one special character/symbol (e.g. # ! $)
   - At least one number

5. In the **Confirm New Password** text box, re-type the password for the user.
6. Click on **Save**. The **Edit User** page is displayed.

From this page you can also amend the user's password and set their permissions for access to the system.

Passwords will not automatically be sent via the system. Please ask the employee to visit the EPM Connect Login page and click **Forgotten Password**. Please see example wording below which can be sent to new users.

*Click Here and this will take you to the **Forgotten Password** page of the EPM Connect platform.*

When prompted, enter your email address and you will be advised that an email with information on how to reset your password has been sent to your email address. Please follow these instructions and this will allow you to set up a password.

Once you have logged in once, you will automatically be taken to EPM Connect to log on.

Manage Notifications

There are various automated notifications that can be set up within EPM Connect. These support a smooth process and prevent information and actions from being missed. However, too many notifications and certain types of notifications can be frustrating. It's therefore important to take time to consider whether each notification should be activated.

We recommend switching off employee notifications until access has been provided to employees.

1. From the left-hand navigation pane, select **Admin**. The **Admin** menu is expanded.
2. From the **Admin** menu, select **Notification Settings**. The **Notification Settings** page is displayed.

Set notifications for changes to Personal Information

1. Select the **My Profile – Personal Information** tab. The tab information is displayed.
2. In the **Notify User** field, select the relevant email address(es).

   The users corresponding to these email addresses will receive a notification when data such as **Contact Details**, **Next of Kin** and **Bank Details** are changed by employees within **My Portal**.

   To notify an entire User group(s), leave this field blank and complete the **Notify User Group** field.
3. In the **Notify User Group** field, select the relevant user group(s).

   The individuals within these User Groups will receive a notification when **Personal Information** is changed by employees withihn **My Profile** in **My Portal**.

   If you wish to notify individual Users, leave this field blank and complete the **Notify Users** field.
4. Click **Save**.

Set notifications for changes to Bank Details

Payroll customers: Please ensure you inform your EPM payroll team should you receive a notification that **Bank Details** have been changed by an employee after the Payroll Cut Off Date.

1. Select the **My Profile – Bank Details** tab. The tab information is displayed.
2. In the **Notify User** field, select the relevant email address(es).

   The email addresses correspond to the users that will receive a notification when **Bank Details** are changed by employees withihn **My Profile** in **My Portal**.

   To notify an entire User Group(s), leave this field blank and complete the **Notify User Group** field.
3. In the **Notify User Group** field, select the relevant user group(s).

   The individuals within these User Groups will receive a notification when **Personal Information** is changed by employees within **My Profile** in **My Portal**.

   If you wish to notify individual Users, leave this field blank and complete the **Notify Users** field.
4. Click **Save**.

Set notifications for changes to Probation

1. Select the **My Profile – Probation Reminders** tab. The tab information is displayed.
2. In the **Notify User** field, select the relevant email address(es).

   The email addresses correspond to the users that will receive a notification when **Probation** information is changed by employees withihn **My Profile** in **My Portal**.

   If you wish to notify an entire Users group(s) , leave this field blank and complete the **Notify User Group** field.
3. In the **Notify User Group** field, select the relevant user group(s).

   The individuals within these User Groups will receive a notification when **Probation** information is changed by employees withihn **My Profile** in **My Portal**.

   If you wish to notify individual Users, leave this field blank and complete the **Notify Users** field.
4. Click **Save**.

Set Leaver Notifications

1. Select the **Employee Leaver Notifications** tab. The tab information is displayed.
2. In the **Notify User** field, select the relevant email address(es).

   The email addresses correspond to the users that will receive a notification when an employee is marked as a leaver within the system.

   If you wish to notify an entire Users group(s) , leave this field blank and complete the **Notify User Group** field.

3. In the **Notify User Group** field, select the relevant user group(s).

   The individuals within these User Groups will receive a notification when when an employee is marked as a leaver within the system.

   If you wish to notify individual Users, leave this field blank and compelte the **Notify Users** field.

4. Click **Save**.

System Emails

A number of actions in the system, such as auto-generated tasks, relating to Return to Work, Self Certification, Approvals, Training, will send an email notification to relevant users, unless switched off.

Forcing review for system emails allows you to see which emails are about to be sent via the system. It's not recommended to use this mode unless the system is currently setup and you don't want your users to receive emails.

We recommend switching off employee notifications until access has been provided to employees.

System emails settings

1. Select the **System Emails** tab. The tab information is displayed.
2. Move the **Force review for system emails** toggle to **YES** or **NO**. to switch automated email alerts off.

   Selecting **YES** will require manual review by SuperUsers before sending.

   Selecting **NO** will automatically send email alerts to relevant users relating to these tasks.

Emails for review

If the **Force review for system emails** toggle is moved to **YES** this section will provide a list of all email to review. From here users with relevant permissions can select which emails can be sent and which should be deleted.

1. Tick the box on the far right-hand side of each of the emails you wish to send.
2. From the Please select action drop down located above the table, select Send selected emails.
3. Tick the box on the far right-hand side of each of the emails you wish to delete.
4. From the Please select action drop down located above the table, select Delete selected emails.

   Any emails selected as Delete Selected emails will be removed and cannot be sent at a later date.

   Any emails that are left unticked will be neither deleted or dent and will remain within the list until either action is selected.

Add Permissions via MAT Admin (For Trust users only)

User Groups have two purposes:

1. **Permission-based User Group:** allow the same permissions to be set for groups of users to provide them with view and editing rights to specific areas within the system.
2. **Distribution-base User Groups** allow users to be grouped by role, department or any other type of group. This is particularly useful for distributing training, performance activities and other tasks within EPM Connect. Distribution-based user groups do not need permissions.

Permissions related to modules can only be managed by EPM. All permissions within permissions-based user groups are managed by EPM. Therefore, only distribution-based user group can be added by users within EPM Connect.

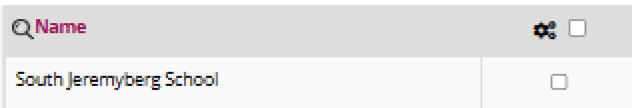
However, users with access to MAT Admin can configure permissions for individual users in relation to the Trust Overview, for example the ability to view Trust Reports, view all Trust Employees etc. It is also possible to limit access to elements of the Trust Overview to specific schools.

Managing Permissions within Trust Overview

1. On the left-hand side of the EPM Connect window, select **Trust Overview**. A list of further menu options is displayed.
2. Select **MAT Admin**. A list of further menu options is displayed.
3. From the **MAT Admin** menu, select **Central Users**. The **Multi-site User Group Administration** page is displayed with a list of all current central user groups.
4. In the **Central Users** search box, enter the name of the user you wish to edit.
5. Click the pencil icon next to the user you wish to manage.
6. Click **Add Property** to add all relevant properties.

This will determine which properties are viewed by the users.

7. Tick the box next to the relevant properties, or click the box within the grey header to select all.

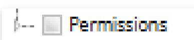


8. Click **Add Properties**.

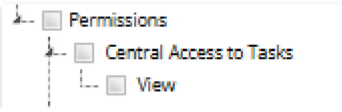
The user will be granted access to the selected properties.

9. Click the **Permissions** button on the top right-hand side.

10. Click the small triangle next to **Permissions**.



11. Click the small triangle next to each Permission type.



This will expand the list of permissions.

12. Tick all relevant permissions.
13. Click **Save**

Please note that permissions take up to 120 seconds to update within the system.

Create Central User Groups

We understand that although each property may use slightly different user groups, many of the user groups will be used across all or multiple properties. The **Central User Group** page allows you to create central user groups and map them across properties, saving you time in setting up individual user groups.

1. On the left-hand side of the EPM Connect window, select **Trust Overview**. A list of further menu options is displayed.
2. Select **MAT Admin**. A list of further menu options is displayed.
3. From the **MAT Admin** menu, select **Central User Groups**. The **Multi-site User Group Administration** page is displayed with a list of all current central user groups.
4. Click the **Create Central User Group** button.

5. In the **Title** field, enter a title for the user group.
6. Click **Save**.

7. Click **Save**.

Map User Groups to properties

Once all central user groups have been created, they can be mapped across the relevant properties.

1. Click the pencil icon next to the user group you wish to map to additional properties.
2. Scroll down to **Properties Not Mapped**. This is displayed within the **Mapping Setup** tab.
3. Tick all the properties that you wish to add this central user group to.
4. Click **+ Copy User Group**.

5. Click on the **Mapped User Groups** tab to view all the properties mapped to this user group.

To Unmap the user groups, tick the relevant user groups and click the **– Unmap User Group** button.

Assign Users to a User Group

We recommend carefully considering the permissions of the user group before assigning to individual users to prevent users from viewing information that is not relevant or suitable.

Once all relevant trust **User Groups** have been added, users can be added to the user groups.

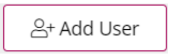
1. On the left-hand side of the EPM Connect window, select **Select Property**.
2. Click the relevant Property title.
3. From the left-hand navigation pane, select **Admin**. The **Admin** menu is expanded.
4. From the **Admin** menu, select **User Administration**. The **User Administration** page is displayed.
5. Click on the **User Groups** tab. A list of the user groups available for the school is displayed.

   This will include central User Groups added within MAT Admin.

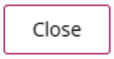
6. From the list of user groups, find the user group you want to assign the user to.
7. Click on the pencil icon in the right-hand column. The **Edit User Group** page is displayed.

   The **Users** tab will display all users currently assigned to the **User Group**.

8. Click on the **Add User** button. The **Add Users in User Group** window is displayed.
9. Find all the users you want to assign to the user group.
10. Check the check box in the right-hand column.
11. Click on the **Add Users** button. The user is added to the user group.

12. Click the **Close** button. The **Add Users in User Group** window closes.

13. Select the **Users** tab. A list of all users assigned to this user group is displayed.
14. Repeat the steps to add any additional users.