Adding Users and Permissions

EPM Connect Guide

Document Control

Document Overview: This document provides a step by step guide to adding users and managing permissions 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 23rd October 2025 and is issued on a version-controlled basis under her signature.

Document History

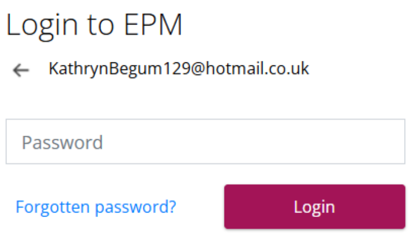
Date of Change	22nd October 2025
Summary of Change	Changes to Add a Job Role and Salary Information sections.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

Accessing the system

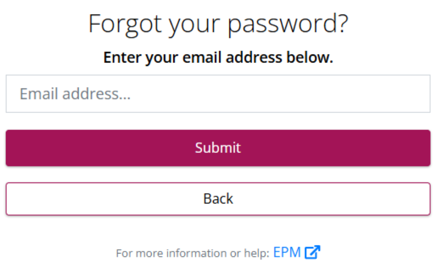
To Access the system for the first time

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.

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 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. **User Groups for distribution purposes s** 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.

Adding 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**.**

Adding Permission-based User Groups

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.

HR only

Super Users are assigned to each Trust or School. Super Users have view and edit rights across each module. They have overall responsibility of user's access and permissions, with the ability to create (and manage) new users (including employees), user groups and those assigned to each group. For Case Management, Super Users have the ability to view cases for which they have been granted visibility,

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.

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.

Admin Assistants are assigned by the Super User. Admin Assistants have view-only access to employee data and access to absence data for direct reports and/or where an approver tag has been assigned.

Line Managers are assigned by the Super User to the Trust and Schools. Line Managers have access to manage direct reports, including view-only access of employee data and the ability to view, edit and approve absences. Line Managers also have the ability to view and edit data within the Performance Management module for schools/trust who have bought this module.*

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 and any modules where self-service is provided.

HR & Payroll

Super Users are assigned to each Trust or School. Super Users have view and edit rights across each module and will manage all Payroll elements including Absences and exports for employees and absences, along with managing approvals. They have overall responsibility of user's access and permissions, with the ability to create (and manage) new users (including employees), user groups and those assigned to each group. For Case Management, Super Users have the ability to view cases with which they have been granted visibility.

Line Managers are assigned by the Super User to the Trust and Schools. Line Managers have access to manage direct reports, including view-only access of employee data and the ability to view, edit and approve absences. Line Managers also have the ability to view and edit data within the Performance Management module for schools/trust who have bought this module.*

Authorisers are assigned by the Super User. Payroll Authorisers have visibility of employee absences and are responsible for authorising Payroll runs.

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 are assigned by the Super User. Admin Assistants have view-only access to employee and absence data and only have access to absence data for direct reports or if assigned an Absence tag.

Absence Admins are assigned by the Super User. Payroll Absence Admins have ability to manage absences including importing them but no visibility of the payroll itself.

Absence Admin Assistants assigned by the Super User. Payroll Absence Admin Assistants have view-only access to absence data.

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.

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

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

Add a permission-based user group

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**.**
6. Move the **Update Permissions** toggle to **YES** to select the relevant permissions.
7. Click the **+** within the dark blue Permissions title

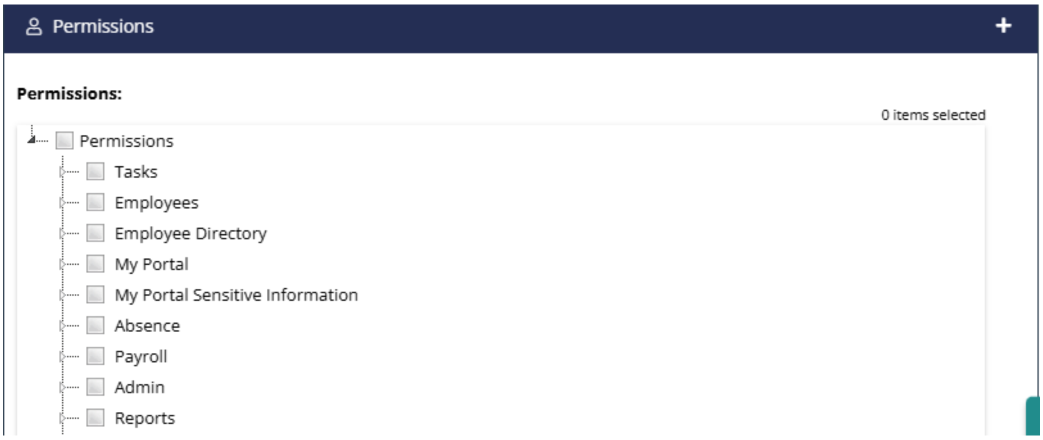
8. Click the small triangle on the left-hand side of **Permissions**. A list of further options is displayed.

9. Click the small triangle on the left-hand side of any of the menu options titles. A list of permissions is displayed.

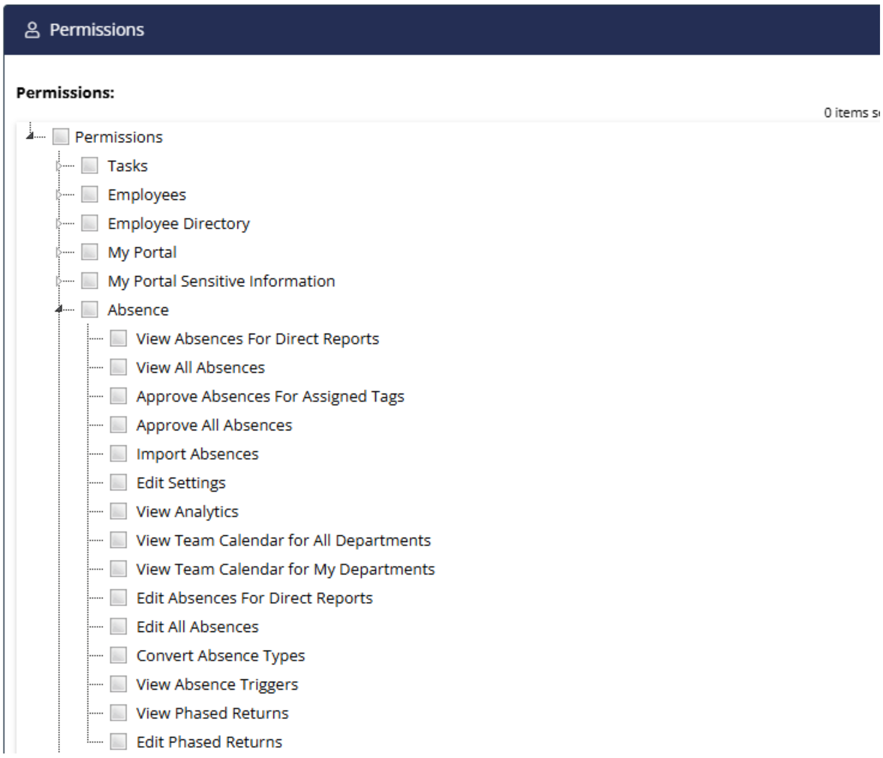
We recommend clicking the small arrow to expand each module permissions menu rather than ticking the box next to the module name itself as this will allow you to define specific permissions within each module.

Ticking the box next to a module will not automatically provide access to this element within My Portal. To provide access to this module within My Portal, click the small triangle next to My Portal and tick all relevant areas of My Portal.



10. Tick the relevant permissions.

    These permissions will be granted to the users within the User Group.



11. Click **Save**.

Users

Add a User

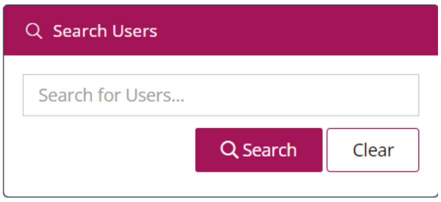
Employees are automatically added as users as part of the **Add an Employee** process. However, it may be useful to set up non-employees such as governors and trustees as users in order to distribute tasks.

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.



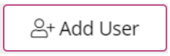
You can also search for a user directly from the list of users. To search in a column, click on the magnifying glass in the header of the column you want to search. From the drop-down list, select the rule for your search then add the criteria in the text box below.

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.*

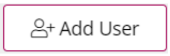
   When prompted, enter your email address and you will be advised that an email with information on how to reset your password has been sent to your email address. Please follow these instructions and this will allow you to set up a password.

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

Assign a User to a User Group

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.

Adding 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. **User Groups for distribution purposes s** 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.

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**.

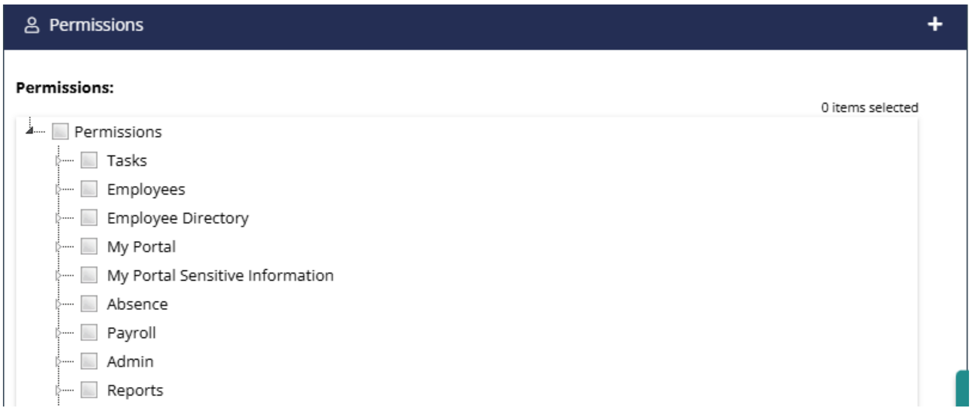
7. Move the **Update Permissions** toggle to **YES** to select the relevant permissions.
8. Click the **+** within the dark blue Permissions title

9. Click the small triangle on the left-hand side of the Permissions menu. A list of further menu options is displayed.

10. Click the small triangle on the left-hand side of any of the menu options titles. A list of permissions is displayed.

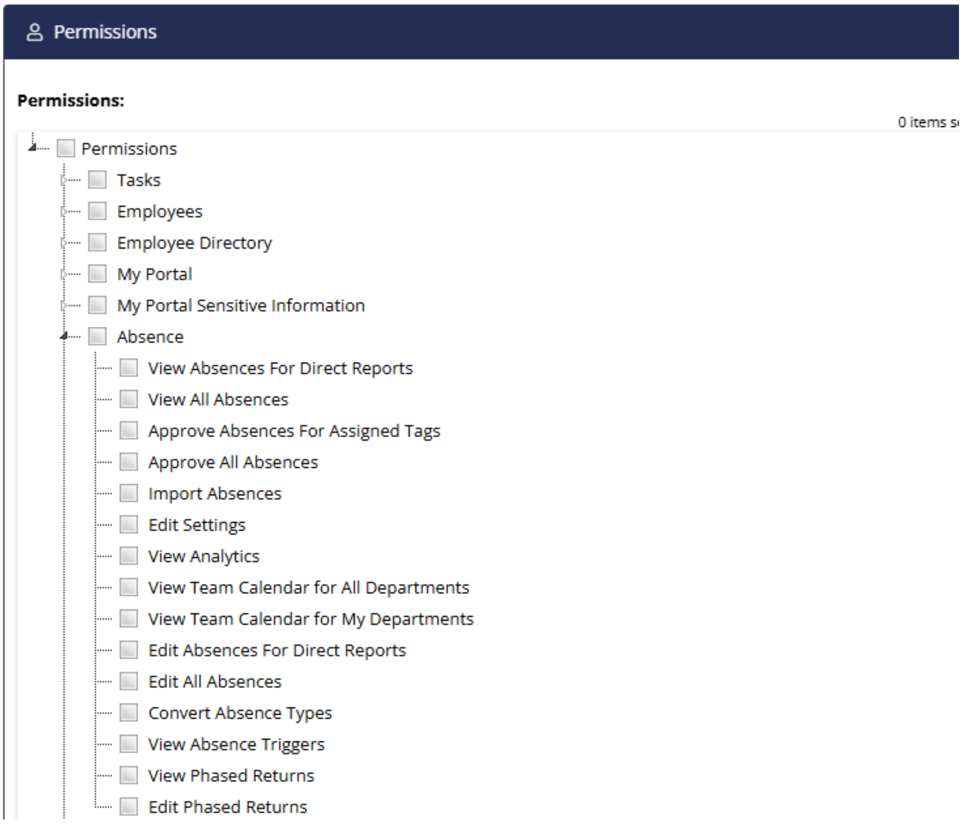
We recommend clicking the small arrow to expand each module permissions menu rather than ticking the box next to the module name itself as this will allow you to define specific permissions within each module.

Ticking the box next to a module will not automatically provide access to this element within My Portal. To provide access to this module within My Portal, click the small triangle next to My Portal and tick all relevant areas of My Portal.



11. Tick the relevant permissions.

    These permissions will be granted to the users within the User Group.



12. 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 at any point, tick the user groups you wish to unmap and click the **– Unmap User Group** button.

Assign Users to a User Group

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

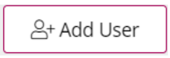
1. From the left-hand navigation pane, select **Select Property**.
2. Click the relevant Property title.
3. From the left-hand navigation pane, select **Admin**. The **Admin** menu is expanded.
4. From the **Admin** menu, select **User Administration**. The **User Administration** page is displayed.
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.