Adding Users and Permissions

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for all tasks managed within the Core Absence Management Module in 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	28th October 2025
Summary of Change	Changes to improve clarity.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

Accessing the system

To Access the HR Platform

Using your preferred browser, open the system. When prompted, enter your email address and the password provided to you within your welcome email. You are logged into the system. Please note the first time you log into the system, you will be asked to create a new password.

To Find a School within a Trust

In order to view the Case Management module, you must first select the school that you wish to view.

1. On the left-hand side of the system, click on **Select Property**. The **Select Property** window is displayed.
2. To search for the school, click on the magnifying glass icon next to **Property Title**. The search function is displayed.

Please note:

HR Advisory only customers: All properties within the Trust will be displayed.

HR and Payroll Customers: Only properties (schools) who have current cases are displayed.

The Trust property will only display cases related to the Trust Central Team, not all cases within the Trust. Cases relating to individual schools should be viewed against individual properties.

3. From the drop-down menu, 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 the **Apply** button. 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. 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. User Groups allow users to be grouped by role, department or any other type of group. This is particularly useful for distributing activities and task within other modules in EPM Connect.

Pre-configured User Groups

Permissions are highly configurable within EPM Connect. This allows you to customise the permissions, depending on the roles and responsibilities of your team. However, to make it easier to assign permissions, you can assign users to 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.

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.

Super Admins are assigned by the Super User to the Trust and/or Schools. Super Admins have the same access rights as Super Users, except within the Case Management module. For Case Management, Super Admins only have the ability to view cases with which they have been granted visibility, whilst Super Users have the ability to view all cases.

Case Admins are assigned by the Super User or Super Admin to the Trust and/or School(s); Case Admins have the ability to view cases which they have been granted visibility to.

Users

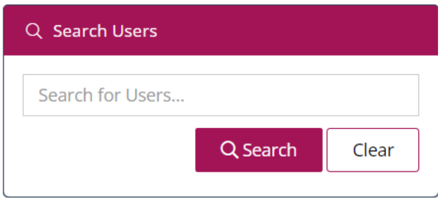
Add a User

1. In the navigation panel on the left-hand side, click on **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.



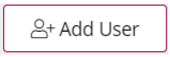
You can also search for a user directly from the list of users. To search in a column, click on the magnifying glass in the header of the column you want to search. From the drop-down list, select the rule for your search then add the criteria in the text box below.

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.

Assign a password

You must assign a password to the user's account, which they will be prompted to change on first login. The current password policy requirements for users are:

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

3. In the **Admin Password** text box, enter your password (the same as you used to log in to the system).
4. In the **New Password** text box, enter a password for the user, following the requirements above.

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 send the login and password details you have created to your employees using the template we have sent you. Alternatively, you can share the wording below for a password to be generated direct from the Platform.

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

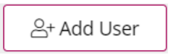
   When prompted, enter your email address and you will be advised that an email with information on how to reset your password has been sent to your email address. Please follow these instructions and this will allow you to set up a password.

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

Assign a User to a User Group

1. In the navigation panel on the left-hand side, click on **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 on **Close**. 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. The task is now complete.
12. Repeat the steps to add any additional users.