Adding Users and Permissions Additional Modules – post May 2026

Applies to customers migrating to EPM Connect before May 2026

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 for customers who migrate after May 2026.

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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 **:** 13th April 2026 and is issued on a version-controlled basis under her signature.

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Contents

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

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 users to 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.

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.

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.

Important

One or a limited number of **System Access** users will be assigned to each Trust or School. The remaining User Groups are assigned to users by those with **System Access**. Those with **System Access** 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**.

Employees

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**.

Leavers

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

User Admin

User Admin have the ability to assign users to user groups and add users.

Module-based User Groups

All other user groups are modular-based and stackable to allow specific permissions to be granted for employees within each module.

The user groups within each module include:

View: View-only access, with no ability to edit data other than within My Portal.

Edit: Provides the ability to view and edit data within the relevant module

Line Manager: Ability to view and edit data related to direct reports within the relevant module.

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

Advanced: Provides all view and edit permissions, the ability to manage settings and view and manage group access within the module, plus additional permissions related to the specific module, these vary depending on the module and are listed below.

Notification Admin: Ability to manage notifications within the system, including the ability to manually send notification emails when notifications are switched off during Month 1 following Go Live.

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.

The table below provides details of a breakdown of the permissions related:

	View	Edit	Advanced	Line Manager
SCR				
View Single Central Record	✓	✓	✓	
Edit Single Central Record		✓	✓	
Edit Employees for Single Central Record		✓	✓	
View Employee Audit Trail	✓	✓	✓	
Edit Settings			✓	
Training				
View All Training Records	✓	✓	✓	
Edit All Training Records		✓	✓	
Edit Course Library		✓	✓	
Edit User Group Access			✓	
Approve All Training Logs			✓	
Edit Settings			✓	
Performance				
View & Edit Performance Records For Reviewees				✓
View & Edit Performance Records For Direct Reports				✓
Edit Observations For Observees		✓	✓	✓
View All Performance Records	✓	✓	✓	
Edit All Performance Records		✓	✓	
View Property Standards and Objectives	✓	✓	✓	✓
Edit Property Standards Standards and Objectives		✓	✓	
Edit Review and Observation Templates			✓	
Edit Settings			✓	
Recruitment				
Download Reports		✓	✓	
Edit Vacancies		✓	✓	
Edit Vacancies (Recruitment Panel)			✓	
Approve Vacancies			✓	
Edit Settings			✓	
Manage Talent Pool Candidates		✓	✓	
School Workforce Census				
View School Workforce Census	✓			
Edit School Workforce Census	✓			

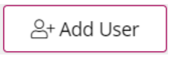
Users

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.