Adding Users and Permissions Additional Modules – pre 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.

Document History

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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:

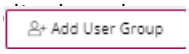
1. **Permission-based User Groups:** allow the same permissions to be set for groups of users to provide them with view and editing rights to specific areas within the system.
2. **Distribution-based User Groups:** allow users to be grouped by role, department or any other type of group. This is particularly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

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**.

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.

Recruitment

Admins are assigned by the Super User or Super Admin to the Trust and/or School(s). Admins are able to edit & approve vacancies, manage talent pool candidates & also edit various settings within the module.

Admin Assistants are assigned by the Super User or Super Admin to the Trust and/or School(s). Admin Assistants can manage talent pool candidates only.

Single Central Record

Admins are assigned by the Super User or Super Admin to the Trust and/or School(s). Admin permissions grant the user the ability to view & edit the Single Central Record, view employee audit trails & edit various settings withing the module.

Workforce Census

Admins are assigned by the Super User or Super Admin to the Trust and/or School(s). Admins are able to view & edit the Workforce Census.

Performance

Admins are assigned by the Super User or Super Admin to the Trust and/or School(s). Admins permissions grant the user the ability to view & edit performance records for reviewees, view & edit performance records for direct reports, view & edit performance records, edit observations for observees, view & edit property objectives, view & edit property standards, review templates, view & edit user group access & edit various settings withing the module.

Employees are assigned by the Super User or Super Admin to the Trust and/or School(s). The employee permission grants the user the ability to view performance records for reviewees, edit performance records for direct reports, edit observations for observees, view & edit property objectives & view property standards.

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. *

Training & CPD

Admins are assigned by the Super User or Super Admin to the Trust and/or School(s). The Admin permission grants the user the ability to view & edit all training records, view & edit user group access & edit various settings withing the module.

Time & Expenses (Enhanced module only)

Admins are assigned by the Super User or Super Admin to the Trust and/or School(s). Admins are able to view time, expenses & time sheet items, edit various settings withing the module, Approve assigned requests & manage approval issues. Admins (where full module in place) will ***NOT*** be able to submit any time & expense items.

Employees are assigned by the Super User or Super Admin to the Trust and/or School(s). Employees are able to view time, expenses & time sheet items. Employees (where full module in place) will be the only users that are able to submit any time & expense items.

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