Core Time & Expenses Module

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for all tasks managed within the Core Time & Expenses Module in EPM Connect.

Classification: Public

Document ID: EPMC012

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Version: 2.0

Date of Last Review: 23rd October 2025

Last Reviewed by: Keren Prior, Director of Operational Excellence

Date of Next Review: 23rd October 2026

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	23rd October 2025
Summary of Change	Changes to improve clarity.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

Overview

Our **Time & Expenses Module** allows Trust/school to add timesheets, expense and time claims on behalf of employees. It does not include self-service functionality.

You can fully customise the settings to meet your Trust/School's expenses process. This is managed via your EPM Team. The Team will provide an initial basic set up which can then be further developed over time.

Please note all Timesheets, Time and Expense Claims should be processed by the monthly cut off date provided by your EPM Team.

Create Expense Claim

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Create**. A list of further menu options is displayed.
3. Within the **Create As…** drop-down-menu at the top of the screen, select an employee.
4. Click the **Create Expense Claim** button. A new window is displayed.

   The **Reference** and **For** fields are pre-populated.

5. In the **Title** field, enter a Claim Title.
6. From the **Default Job Role** drop-down menu, select the job role this claim applies to.

   This will display **None** but clicking on the drop-down menu will display all roles held by the employee.

7. Click either **Add Mileage Line** or **Add Non-Mileage Line** button.

Add Mileage Line

1. Click the **Add Mileage Line**.

2. In the **Date Incurred*** field select a date. Additional fields are now displayed.
3. From the **Job Role*** drop-down menu, select the relevant job role.
4. From the **Vehicle*** drop-down menu, select ***Add a new vehicle*** or select the relevant vehicle. Additional fields are displayed.

   If previous mileage claims have been made, the drop-down menu will display the registration numbers of vehicles used in previous claims.

   If no previous mileage claims have been made or the drop-down does not display the registration number of the vehicle you wish to use, select ***Add a new vehicle***.

5. In the **Registration Number** field, enter the registration number of the vehicle used during the claim.
6. From the **Type** field, select the vehicle type.
7. From the **Engine Size (CC)** drop-down menu, select the engine size.
8. Move the **Is this a Company Car?** toggle to **YES** if this applies.
9. Move the **Does a Car Allowance apply?** Toggle to **YES** if this applies.
10. Click **Save**. The window closes.

11. In the **From** field, enter the starting location.
12. In the **Total Miles** filed, enter the total miles.
13. Select the **Round Trip** tick box if you wish to include both the outgoing and return trip within the claim.
14. The **Total Amount** (**Gross)** field will be updated. To check the calculation, click the calculator icon next to the figure displayed.
15. Tick the box next to the message at the bottom of the page.

To enter the next claim click **Add Mileage Line** or **Add Non-Mileage Line**, or if all claims have been entered click either the **Save Draft** or **Save and Submit** button.

16. Once all claims have been entered click either the **Save Draft** or **Save and Submit** button. This will now be sent to your **Line Manager** or **Approver** for approval.

Depending on settings this will either be ready to **View**, or will be sent for **Approval**.

Add Non-Mileage Line

1. Click the **Add Non-Mileage Line**.

2. In the **Date Incurred** field select a date. A new window is displayed.

The options available are based on the Expense items set up in Time & Expense Settings. Speak to your EPM Team if you wish to add additional expense items.

3. Select the expense item you wish to claim and click the **Select Item** button. You will return to the main page where additional fields are displayed.

The fields displayed depend on the expense type selected.

For some expense claims the **Total Amount (Gross)** will be calculated automatically. We therefore recommend completing this field last. If this has not been completed automatically, enter the total within this field.

4. Complete the remaining fields.

5. Click the box next to the message at the bottom of the page.

   To enter the next claim click **Add Mileage Line** or **Add Non-Mileage Line** or if all claims have been entered click either the **Save Draft** or **Save** and **Submit** button.

6. Once all claims have been entered click either the **Save Draft** or **Save and Submit** button.

   Clicking **Save and Submit** will send the claim to Payroll for processing and cannot be edited once saved. Should a mistake be made, speak to your EPM Payroll Team.

   Clicking **Save Draft** will save the item and can be viewed and edited by selecting **View** from the **Time and Expenses** menu within the left-hand Navigation Pane.

Create Time Claim

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Create**. A list of further menu options is displayed.
3. Within the **Create As…** drop-down-menu at the top of the screen, select an employee.
4. Click the **+ Create Time Claim** button. A new window is displayed.

   The **Reference** and **For** fields are pre-populated.

5. In the **Title** field, enter a title.
6. From the **Default Job Role** drop-down menu, select the job role this claim applies to.
7. Click the **Add Time Line** button.

8. In the **Date Worked** field select a date. Additional fields are displayed.
9. From the **Job Role** drop-down menu, select the relevant job role.
10. In the **Start Time** field, enter a start time.
11. In the **End Time** field, enter a start time.
12. In the **Hours Worked** field, enter hours and minutes worked.
13. In the **Breaks** field, enter breaks in hours and minutes.
14. Click either the **Save Draft** or **Save and Submit** button. This will now be sent to your Line Manager or Approver for approval.

Create Timesheets

You can create custom and fixed timesheets.

Fixed Timesheets are useful when an employee works the same hours each day, or at least the same hours for a period of time. Custom Timesheets are useful when an employee works varied hours each week and can even combine time worked in multiple roles within a single timesheet.

Create Fixed Timesheets

Fixed Timesheets can be created for employees. These are useful when an employee works the same hours each day, or at least the same hours for a period of time.

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Create**. A list of further menu options is displayed.
3. Within the **Create As…** drop-down-menu at the top of the screen, select an employee.
4. Click the **Create Fixed Timesheet** button.

5. In the **Title** field, enter a title.
6. In the **Start Date** field, enter a start date.
7. In the **End Date** field, enter an end date.
8. Select the days that apply from the options available.
9. These will default to Monday, Tuesday, Wednesday, Thursday and Friday and will be shown in pink. To remove any days which do not apply click the day and it will change to grey.

10. From the **Job Role** drop-down menu, select the job role that applies.
11. In the **Start Time** field, enter a start time.
12. In the **End Time** field, enter an end time.
13. In the **Hours Worked** field, enter the hours worked.
14. Click the **Save Draft** button.

   Save and Submit should only be clicked once the month has completed, unless you are certain that there will be no change to hours. Once a timesheet has been submitted no changes can be made.

Create Custom Timesheets

Custom Timesheets can be created for employees. These are useful when an employee works varied hours each week and can even combine tie worked in multiple roles within a single timesheet.

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Create**. A list of further menu options is displayed.
3. Within the **Create As…** drop-down-menu at the top of the screen, select an employee.
4. Click the **Create Custom Timesheet** button.


5. In the **Title** field, enter a title.
6. From the **Default Job Role*** drop-down menu, select a job role.

   Default Job Role, **Default Start Time**, **Default End Time** and **Default Hours Worked** when entered will automatically populate each new line entered but can be overwritten.

7. In the **Default Start Time** field, enter a start time.
8. In the **Default End Time** field, enter an end time.
9. In the **Default Hours Worked** field, enter the hours worked.
10. In **Line 1**, select a **Date Worked**.
11. From the **Job Role** drop-down menu, select a job role.
12. In the **Start Time** field, enter a start time.
13. In the **End Time** field, enter an end time.
14. In the **Hours Worked** field, enter the hours worked.
15. In the **Breaks** field, enter the breaks in hours and minutes.
16. In the **Notes** field, enter any relevant notes.
17. Click the **+ Add Day** button. This will create a new line.
18. Click the **Save Draft** button.


   Save and Submit should only be clicked once the month has completed, unless you are certain that there will be no change to hours. Once a timesheet has been submitted no changes can be made.


Edit Timesheets, Time and Expense Claims

You can edit draft claims and timesheets before they are submitted.

Once a claim has been submitted the pencil icon next to the item will be greyed out and it cannot be edited. However, should an employee realise a mistake has been made following a claim submission, the approver(s) can query the claim and at this point, the employee can amend the claim.

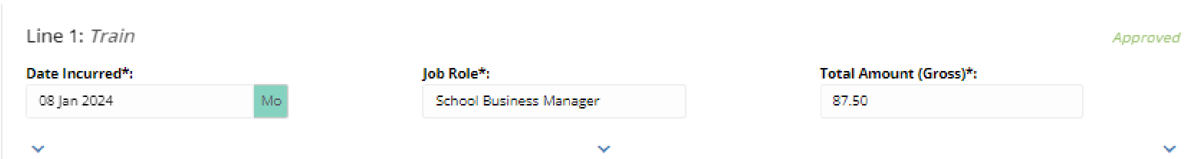
Please note all Timesheets, Time and Expense Claims should be processed by the monthly cut off date provided by your EPM Team.

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **View**. The **View Claims and Timesheet** module is displayed.
3. Select the relevant tab: **Expense Claims**, **Time Claims** or **Timesheets**.
4. Click the pencil icon on the far right-hand side of the item you wish to view to open the claim or timesheet.

View Claims and Timesheets

Expense Claims, **Time Claims** and **Timesheets** can be viewed within the **View** area of the **Time & Expenses** Module. View-only access can be provided to members of your team, for example a member of your Finance Team, even if not an approver. This can be set up in **Time & Expense Settings.** A full list of claims or timesheets exported to Excel or Word.

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **View**. The **View Claims and Timesheets** page is displayed.
3. Select the tab you wish to view **Expense Claims**, **Time Claims** or **Timesheets**.
4. Click the **Reference** number of the item you wish to view or click the eye icon in the far-right column. A new window is displayed, with each item within that claim.
5. To view the full details of each line item, click the downwards arrow at the bottom of that line. The full details of the line item are displayed.



The Status displays the current status of the item:

Draft: The item has been saved as a draft but not submitted

Exported for Payment – The item has been processed by the EPM Payroll Team.

Cancelled: The item has been cancelled.

6. Click **Close** to close the window.