Employees Module

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for all tasks managed within the Employees Management Module in EPM Connect.

Classification: Public

Document ID: EPMC008

Author: Lauren McGuire, Product Manager, Product Management

Version: 2.2

Date of Last Review: 13th February 2026

Last Reviewed by: Keren Prior, Director of Operational Excellence

Date of Next Review: 13th February 2027

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	13th February 2026
Summary of Change	Changes to Salary Statements
New Version Number	v2.2
Changes to be notified to	Director of Operational Excellence

Contents

General Guide

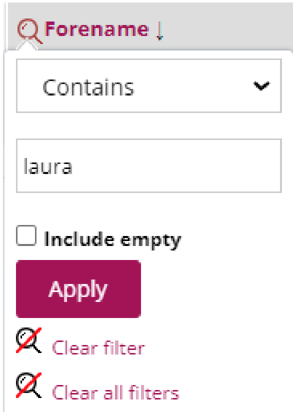
Search, filter and sort functions

Within each data grid/table displayed within the module, you can use sort and filter via the column headings.

Column headings in a bold text with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

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.

Filters can be cleared by clicking again on the magnifying glass and selecting **Clear filters** or **Clear all filters**.



Summary (including Metrics)

The Summary section of the module provides a variety of metrics, including **Employees, New Employees, Previous Employees, Average Salary** and **Average FTE Salary**.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Select **Summary**. The **Employees** module is displayed and a variety of metrics are displayed across the top of the screen.
3. To view more details, click the arrow in the top right of any of these metrics to move into specific details. The relevant page is displayed.

   The metrics displayed in **New Employees** and **Previous Employees** refer to the current month and will include anyone who is joining or leaving later that month, even if their join/leave date has not yet been reached.

4. Scroll down to view **Employees, Employee Average Salary** and **Employees by Gender** which relate to the last 12 months.

View Current Employees

When searching for an employee, you can view a list of employees within the main grid and search within it, or use the **Employee Search** box at the top of the page.

Search by Employee

To search for a current employee by name use the **Employee Search** box in the top right-hand corner. This will also allow you to search for previous and archived employees. **Previous Employees** are listed below **Current Employees**, however, **Archived Employees** will only be displayed if you have clicked on the **View Archived Employees** button.

1. Select the **All Employees** tab.
2. In the **Employee Search**, enter the name of the employee you wish to view. A list of employees matching the search criteria are displayed.
3. Click the eye icon on the far right-hand side of the employee you wish to view. The employee record is displayed.

Search within the main grid

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Click **All Employees**. The **All Employees** page is displayed and displays all current employees.
4. Select the relevant tab: **All Employees**, **Employees by Department**, **Employees by Job Role/Type**.

Search by Department

Select the **Employees by Department** tab to view all employees grouped by department and from **Department Filter** on the right-hand side select a department.

1. Select the **Employees by Department** tab.
2. From the **Department Filter** box on the right-hand side, select a department.

   A department must be selected within the **Department Filter** in order to show any data. The data field will remain blank until a department has been selected.

3. Click the column header to sort or use the magnifying glass next to the column header to further filter the columns.
4. Click on the **Forename** or eye icon on the far right-hand side of the employee you wish to view. The employee record is displayed.

Search by Job Role/Type

Select the **Employees by Job Role/Type** tab to view all employees grouped by Job Role/Type.

If the employee has multiple roles, they will appear multiple times.

Use the magnifying glass icon next to each title to search by that category.

1. Select the **Employees by Job Role/Type** tab.
2. Click the column header to sort or use the magnifying glass next to the column header to further filter the columns.
3. Click on the **Forename** or the eye icon on the far right-hand side of the employee you wish to view. The employee record is displayed.

Incomplete Records

The **Incomplete Records** page can be used to ensure all employee records are complete and highlights information which is missing from **Employee Records**. The missing information that deems the record as incomplete can be configured within **Employee Settings**.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Select **Incomplete Records**. The **Incomplete Records** page is displayed.

   The page will display the name of the employee and the incomplete information.

3. Select the relevant tab to view incomplete information within **Personal Information**, **ID & Other Checks**, **Job Information**, **Salary Information**, **Qualifications**, **Pensions** and **Probation.**
4. Read the incomplete fields details within the **Incomplete Information** column and click the pencil icon. The relevant **Employee Record** is displayed.

   It may be useful to open an additional browser tab in order to compare the information in **Incomplete Records** with the information within the **Employee Record**.

5. Complete the incomplete information.
6. Click **Save**.

   The **Employee Record** and the **Incomplete Records** page is updated.

7. Select the **Incomplete Records** tab to check that the name of the employee is no longer displayed.

   If the name is still displayed, re-check the fields detailed within the **Incomplete Information** column and repeat the process above until the name of the employee is no longer displayed.

Process a leaver

Important

When an employee resigns, several steps must be completed. The steps outlined below apply only when the employee has resigned from all roles held within the school/Trust.

If the employee is resigning from one role only but will continue in other roles within the school/trust, the only required action is to end the specific job role/appointment. However, we recommend reviewing the **User Groups** the employee belongs to, to ensure these still reflect their remaining roles and that the associated permissions remain appropriate.

1. End all job role/appointments held by the employee.
2. Process leaver
3. Update User Groups, removing access to all current User Groups and adding the employee to the Leaver User Group, in order to provide access to payslips and documents only.
4. Archive User at the point that access to payslips and documents should be removed.

Before ending an employee's employment at the school/Trust, it is important to first end each appointment/role held by the employee and to provide a reason for leaving. Once this has been done the employee's appointment can be ended.

End a Job Role/Appointment

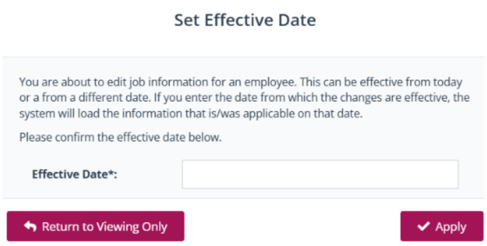
These steps apply to both processing leavers and ending only specific roles for the particular employee.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Select **All Employees**. The **View Employee Details** page is displayed.

4. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. The relevant **Employee Details** page is displayed.
5. Scroll down the page and above the **Job Information** tab, select the relevant job role.
6. Click the **Job Information** tab. The relevant job information is displayed.
7. Click the **Edit Details** button.

8. In the **Set Effective Date** window, enter today's date.

This window will appear whenever you view **Job Details** or **Salary Details** in **Edit** mode.



9. Click **Apply**.

10. In the **End Date** field, enter the end date of the appointment.
11. In the **Reason for leaving** field, enter the reason the employee is leaving the role.

Important

This is needed to update the employee's pension record and the School Workforce Census.

The leaver cannot be processed without a reason.

12. In the **Final Holiday Balance** field, enter the final balance.

This field only applies to part-time or full-time non-teaching staff.

13. In the **Paid Leave** field, enter the number of days or hours and select **Hours** or **Days**.

Paid Leave should be entered for employees who are part-time or full-time non-teaching staff.

Enter the number of days or hours leave here.

14. Click **Save**. A pop up warning is displayed.

Adding an end date to a job role or changing it to an earlier date will apply the same date to all its associated additions/deductions.

16. Click **OK** to confirm or **Cancel** to return back to the main screen.

Process Leaver

1. Repeat the steps for End Job Role/Appointment for all other roles held by the employee.

Once all appointments have been ended, you need to end the employee's employment.

This can be managed within the **Employment Record**.

This should not be changed until all appointments have ended.

2. Select **Employment Record** from the tab on the left-hand side of the Employee Record.
3. In the **Employment End Date** field, select the date the employment at the school will end.

This date should be no earlier than the end date of any of the appointments you have ended.

4. Click **Save**. A pop up warning is displayed.

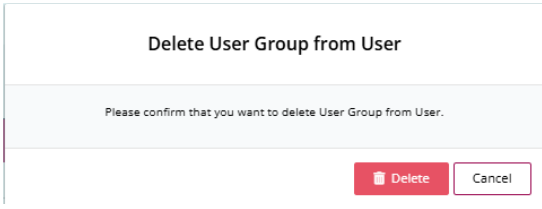
5. Tick the box to confirm that you understand that this action may trigger a P45.
6. Click **OK** to confirm or **Cancel** to return back to the main screen.

Update User Permissions

Once the leaver has been processed, User Groups should be updated to ensure that users only have access to appropriate permissions.

1. On the left-hand side of the EPM Connect window, click **Admin**. A list of further menu options is displayed.
2. Click **User Administration**. The **User Administration** page displays all current employees.
3. Use the **Search Users** function to find the employee you wish to search for the employee you wish to archive.

4. Click the **pencil** icon in the far right-hand column of the user's name to edit the user permissions. **Edit User** page is displayed.
5. Click the **x** icon next to the permission you want to remove. A pop up window is displayed.



6. Click **Delete**.
7. Repeat the process until all relevant permissions are removed.
8. Click the **+ Add User Group** button.

9. Tick the box next to **Leaver**.

   This will add the user to the Leaver User Group and limits access to **My Payslips** and **My Documents** within **My Portal** only.

10. Click the **+ Add User Group** button.

Archive user

Archiving a user is the final step when processing a leaver. Archiving a user is different from archiving an employee. Archiving a user within **User Administration** removes their access to EPM Connect.

We recommend archiving users 3 months after their **Leave Date**. This will remove access to the system.

1. On the left-hand side of the EPM Connect window, click **Admin**. A list of further menu options is displayed.
2. Click **User Administration**. The **User Administration** page is displayed and displays all current employees.

3. Use the **Search Users** function to find the employee you wish to archive.

4. Click the **x** icon in the far right-hand column of the user's name to delete the user. A confirmation pop up window is displayed.
5. Select **Archive** or **Cancel**.

6. Click the Show Archived Users button to check the employee has been archived.

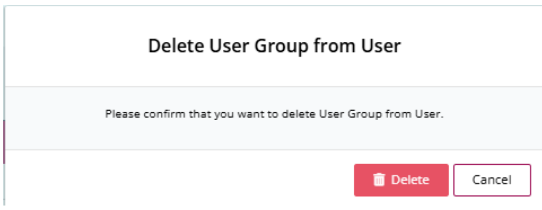
Users can be reactivated by clicking on the double arrow icon. The permissions granted to the user before archive will be applied to the user.

Manage suspended employees

Alternatively, if you wish to temporarily remove access, for example due to temporarily suspension, you can choose to remove permissions from the suspended user rather than deleting the user.

1. On the left-hand side of the EPM Connect window, click **Admin**. A list of further menu options is displayed.
2. Click **User Administration**. The **User Administration** page displays all current employees.
3. Use the **Search Users** function to find the employee you wish to search for the employee you wish to archive.

4. Click the **pencil** icon in the far right-hand column of the user's name to edit the user permissions. **Edit User** page is displayed.
5. Click the **x** icon next to the permission(s) you want to remove. A pop up window is displayed.



6. Click **Delete**.
7. Repeat the process until all relevant permissions are removed

View and Manage Archived and Previous Employees

Previous employees are those who have been processed as a leaver within the system, whilst archived employees are those who have been manually archived by a user. Archiving can be useful when an employee has been appointed but did not start within the role or when an employee has been added in error or duplicated.

Archiving a user is different from archiving an employee. Archiving a user within **User Administration** removes the user's access to EPM Connect.

View previous employee and employee role records

When an employee leaves their details are maintained within the **Previous Employee Role Records**. This section also includes current employees with previous roles.

If a previous employee returns by following the guidance detailed in the **Add a Returning Employee** guidance later within this guide.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Select **All Employees**. The **View Employee Details** page is displayed.
4. Scroll down the page to the **Previous Employee Role Records** section.
5. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. The relevant **Employee Details** page is displayed.
6. Scroll down the page and above the **Job Information** tab, select the relevant job role.
7. Click the **Job Information** tab. The relevant job information is displayed.

View archived records

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Select **All Employees**. The **View Employee Details** page is displayed.
4. Scroll down to the bottom of the page and click the **View Archived Employees** button. A list of **Archived Employees Records** is displayed.
5. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. The relevant **Employee Details** page is displayed.
6. Alternatively, you can use the **Employees Search** function to search for archived employees. However, to do this please ensure you have clicked on the **View Archived Employees** button.

Archive an employee

Employees can be archived via the **Archive** button. These employees will not be included within reports, metrics and grids within the system. Archiving a user is different from archiving an employee. Archiving a user within **User Administration** removes their access to EPM Connect. This can be seen within the **Archive User** section later in this guide.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Click **All Employees**. The **All Employees** page is displayed and displays all current employees.
4. Select the relevant tab to view **Employees by Job Role/Type** or **Employee Search**.

   Employees cannot be archived within the **Employees by Department** tab.

4. Click the **x** icon on the right-hand side to archive an employee.
5. A new window will appear. Click the **Archive** button.

Re-activate archived employees

Re-activating archived employees will make the employee live. If the roles weren't ended before archiving, they will appear within **All Employees** and the employee will be active. If the role was ended prior to archiving, they will appear within **Previous Employee Role Records** and a new role should be created, even if they are returning to the school in the same role that they held prior to leaving. A guide on how to **Add a returning employee** can be found below.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Scroll down to the bottom of the page and click the **View Archived Employees** button. A list of **Archived Employees Records** is displayed.

4. Click the double arrow icon on the right-hand side of the relevant employee to re-activate an employee's details. A new window is displayed.
5. Click the **Restore** button.

Add a returning employee

When an employee leaves their details are maintained within the Previous Employee Role Records. If a previous employee returns, a previous employee can be converted into a current employee by adding a new job role. Any previous roles held by the employee will be linked to their new **Employee Record**.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Scroll down to the bottom of the page until you get to **Previous Employee Role Records**.

   This is where all previous employees and current employees with previous roles are displayed.

4. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. The relevant **Employee Details** page is displayed.
5. Follow the **Add a job** section of the **Add a New Employee** guide (Teaching, Non-Teaching or Casuals), which can be found within the **Employees Module** page of the EPM Connect Guides.

   Adding a new role will convert the employee to current employee status, whilst linking all previous role held within the system to the **Employee Record**.

Edit/Amend Employee Details

To edit basic details, follow the guide below. To edit details related to job role, follow the separate guides that follow.

1. On the left-hand side of the EPM Connect window, click Employees. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Click **All Employees**. The **All Employees** page is displayed and displays all current employees.
4. Find the employee you wish to edit.

   To find an employee, first search for the employee you wish to view.

   Click on the magnifying glass icon to search in the selected column.

   Click on a highlighted column heading to sort alphabetically or numerically.

   Click again to switch between ascending/descending order.

5. Click the eye icon on the right-hand side to open an employee's details, or click on the person's Forename. A new **Employee Details** page is displayed with the employee's **Personal Information**.
6. Click the **Edit Details** at the bottom right-hand side of the page. The employee's information is displayed, with the ability to edit any fields within the page.

7. Select the relevant tab within the tabs displayed on the left-hand side of the **Employee Record**. The relevant tab is displayed.

8. Amend the details you require within the page.
9. Click **Save** to finish.

   Each amendment within an employee's details will appear within the **Audit Trail**. The Audit Trail records both the previous content, the change made, the date and time it was edited and the name of the person who made the change. Automated actions will be recorded as **Done By System User**.

Import Employees

Please see separate **Import Employees** Guide.

Distribute Employee Documents

This page allows you to upload and distribute documents to employee's records en masse.

Important

Ensure all documents you wish to upload start with an **NI Number** or **Employee ID** followed by a dash.

In order to distribute multiple documents to multiple records, the document name needs to follow a particular format.

The document must start with an **NI Number** or **Employee ID** followed by a dash (-).

For example:

- NI Number: QQ123456C-EmpDocument.docx, QQ123456C-EmpDocument.pdf etc.

- Employee ID: Emp1234-EmpDocument.docx, Emp1234-EmpDocument.pdf etc.

You may find it useful to use a tool such as PowerRename, which is part of Microsoft's Power Toys pack to convert your document file names.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options is displayed.
3. Select **Distribute Employee Documents**. The **Distribute Employee Documents** page is displayed.
4. Click the **Select Documents** button.

5. Select all the documents you require and click **Open**.
6. From the **Employee Identifier** drop down, select **NI Number** or **Employee ID**.

   This should be compatible with the name of your files.

7. Tick the **Visible to Employees** box to allow your employees to view these documents when viewing their **Employee Record** within **My Documents**.
8. Click the **Distribute** button. The documents will be distributed to the relevant **Employee Record** and visible within the **Employee Documents** section.

Distribute Profile Images

This page allows you to upload and distribute profile images to employee's records en masse.

Important

Ensure all documents you wish to upload start with an **NI Number** or **Employee ID** followed by a dash.

In order to distribute multiple documents to multiple records, the document name needs to follow a particular format.

The document must start with an **NI Number** or **Employee ID** followed by a dash (-).

For example:

- NI Number: QQ123456C-EmpDocument.docx, QQ123456C-EmpDocument.pdf etc.

- Employee ID: Emp1234-EmpDocument.docx, Emp1234-EmpDocument.pdf etc.

You may find it useful to use a tool such as PowerRename, which is part of Microsoft's Power Toys pack to convert your document file names.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options is displayed.
3. Select **Distribute Employee Documents**. The **Distribute Employee Documents** page is displayed.
4. Click the **Select Documents** button.

5. Select all the documents you require and click **Open**.
6. From the **Employee Identifier** drop down, select **NI Number** or **Employee ID**.

   This should be compatible with the name of your files.

7. Click the **Distribute** button. The documents will be distributed to the relevant **Employee Record**. The profile images will be distributed to the relevant **Employee Record** and visible above the **Employee Name** of the **Employee Profile.**

Bulk Actions

Entitlement Groups

Entitlement Groups Actions are managed by your EPM Team. Please do not edit this area of the system and contact your EPM Team with any questions relating to Entitlement Groups.

Increment Rules Approval

Increment Rules Approval are managed by your EPM Team. Please do not edit this area of the system and contact your EPM Team with any questions relating to Increment Approval.

Bulk Actions

This area of the module allows you to manage bulk actions across multiple employees.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Select **Bulk Actions.** The Bulk Actions page is displayed.

Create Bulk Pay Progression

The Bulk Pay Progression Action allows you to increase the number of pay points for multiple employees at the same time.

The pay point increase must be the same for all employees.

1. Select the **Bulk Actions** tab.

2. Click the **+ Create Bulk Action** button on the far right-hand side of the page.

3. Select **+ Create Bulk Pay Progression Action**.

4. Select the **Employee Bulk Changes** tab, or the **Job Bulk Changes** tab.

The **Job Bulk Changes** page tab provides the ability to search via all column headings using the magnifying glass and is useful when pay progression will be applied to a particular employee role.

The **Employee Bulk Changes** tab allows users to search via **Surname**, **Forename**, **Start Date** and **End Date**.

To search, use the **Employee Search** box, click on the magnifying glass icon to search in the selected column or click on a highlighted column heading to sort alphabetically or numerically. Click again to switch between ascending/descending order.

5. Tick the box in the far right-hand column next to each of the employees with which you wish to apply the change or tick the box in the column heading to apply the change to all employees.

Pay Range	Casual Role	Status	☐
MIDDAY 1-4 - SCALE1A2	False	Current Staff	☐

Performance Module Users

If your school has access to the Performance Module, you can view employees who have been recommended for Pay Progression during their reviews within the last rolling 12 months. These employees are denoted by a tick in the RoR box.

6. Click the **+ Create Bulk Pay Progression Action** button.

7. In the **Bulk Operation Name** text box, enter a bulk operation name, for example Sept 2024 Points for Progression.
8. From the **Effective Date** calendar, select an effective date.
9. In the **Increase Points** text box, enter the number of points of increment.
10. Click the **+ Apply Bulk Changes** button to apply the change. The **Bulk Action Details** page is displayed.

This page provides an overview of **Validation Errors**, **Validated Items** and **Ignored Items**.

11. Follow the Bulk Actions Details guide below to complete the final steps and process the actions.

Create Bulk Paid For Weeks Amendment

Important

The Bulk Paid for Weeks Amendment Action allows you to amend the number of paid for weeks for a number of employees at the same time.

This is generally better managed via overall Entitlement Groups. Please speak to your EPM Team.

1. Select the **Bulk Actions** tab.
2. Click the **+ Create Bulk Action** button on the far right-hand side of the page.

3. Select **+ Create Bulk Paid for Weeks Amendment**.
4. Select the **Employee Bulk Changes** tab, or the **Job Bulk Changes** tab.

The **Job Bulk Changes** page tab provides the ability to search via all column headings using the magnifying glass and is useful when pay progression will be applied to a particular type of employee role.

The **Employee Bulk Changes** tab only allows the user to search via **Surname**, **Forename**, **Start Date** and **End Date**.

To search, use the **Employee Search** box, click on the magnifying glass icon to search in the selected column or click on a highlighted column heading to sort alphabetically or numerically. Click again to switch between ascending/descending order.

5. Tick the box in the far right-hand column next to each of the employees with which you wish to apply the change or tick the box in the column heading to apply the change to all employees.

6. Click the **+ Create Bulk Paid for Weeks Amendment Action** button.

7. In the **Bulk Operation Name** text box, enter a bulk operation name.
8. From the **Effective Date** calendar, select an effective date.
9. In the **New PFW Value** text box, enter the new Paid For Weeks value.
10. Click the **+ Apply Bulk Changes** button to apply the change.

Create Bulk Spot Rate Salary Update

The Bulk Spot Rate Salary Update action allows you to amend spot rates for a number of employees at the same time.

1. Select the **Bulk Actions** tab.
2. Click the **+ Create Bulk Action** button on the far right-hand side of the page.

3. Select **+ Create Bulk Paid for Weeks Amendment**.

4. Tick the box in the far right-hand column next to each of the employees with which you wish to apply the change or tick the box in the column heading to apply the change to all employees.

5. Click the **+ Create Bulk Spot Rate Salary Action** button.

6. In the **Bulk Operation Name** text box, enter a bulk operation name.
7. In the **Effective Date** field, enter an effective date.
8. Move the **Salary Change** toggle to **YES** or **NO**.

Selecting **YES** will display a number of options relating to how the pay should be changed, select the relevant **Type** and enter a number within the **Value** field:

For **Fixed Increase** enter a specific monetary increase, for example £1,290.

For **Percentage Increase** enter a percentage increase, for example 5%.

For **Override Spot Salary** enter the new rate, for example £20,000.

9. If relevant, move the **Round FTE Salary** toggle to **YES** or **NO**.

   Selecting **YES** will display a number of options. Select from:

   Round – Round to the nearest pound

   Ceil – Round up to the nearest pound,

   Floor – Round down to the nearest pound.

   Ensure the **Change Base Hourly Rate Divider** and **Change Daily Rate Divider** toggles are set to **NO**.

10. Click the **+ Apply Bulk Changes** button to apply the change.

Enforce Salary Calculations

Enforce Salary Calculations relates to the **Enforce Salary Calculation** toggle in **Salary Information** within the Employee Record.

The toggle is usually set to **YES** as a default, however if this has been switched to **NO**, the **Enforce Salary Calculations Action** can be used to align multiple salaries which have been entered outside of the enforced salary calculations.

If you are unsure, please speak to your EPM team.

1. Select the **Bulk Actions** tab.
2. Click the **+ Create Bulk Action** button on the far right-hand side of the page.

3. Select **+ Create Enforce Calculations Action.**

4. In the **Bulk Operation Name** text box, enter a bulk operation name.
5. Click the **+ Apply Bulk Changes** button to apply the change.

Bulk Action Details

The **Bulk Action Details** page provides an overview of the jobs (items) associated with this bulk action. These are categorised as **Validation Errors**, **Validated Items**, **Ignored Items** or **Changes**.

Validation Errors

Validation Errors provides a list of errors. View the missing or incorrect information within the **Errors** column of the data table.

The error usually relates to information held or missing within the **Salary Information** or **Job Information** page. Click the pencil icon to edit the information within these sections.

Once edited the action will undergo re-validation. If successful, these changes will be displayed within the **Changes** table and you will now be able to approve the bulk action.

If you do not wish to edit the job now, select the other icon to ignore the job. This will allow you process all validated items and edit this job at a later date.

Actions

Actions are displayed in the far right-hand column of each job.

Click the pencil icon to edit a job.

Click the other icon to ignore the job. Clicking on this icon will move the job to the **Ignored Items** table.

Validated Items

Validation Items provides a list of items which have met validation criteria.

Ignored Items

Ignored Items displays a list of items which you have chosen to ignore by clicking the ignore symbol. These items will not be processed when approving the bulk action.

Changes

Changes displays a list of items previously listed in **Validation Errors** which have now passed validation. These items will not be processed when approving the bulk action.

1. Once edited, click **Bulk Actions** in the navigation pane. The **Bulk Actions** page is displayed.
2. Click the pencil icon next to the action you wish to view.
3. Ensure that there are no jobs displayed within the **Validation Errors** table.

   If any jobs appear, edit the job or click the ignore icon to allow the remaining jobs to be processed.

4. Click **Approve Bulk Action** to process the bulk action.

   Approved **Bulk Actions** will be displayed within the main **Bulk Actions** tab as **Completed**.

   A confirmation message will appear to confirm the action has been completed.

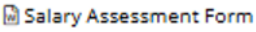
Salary Statements

This function supports in generating salary statements for each employee.

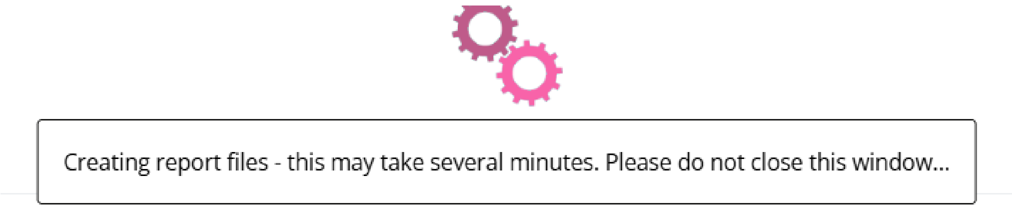
1. On the left-hand side of the EPM Connect window, select **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Click **All Employees**. The **All Employees** page is displayed and displays all current employees.
4. Click the **Reports** button in the top right-hand corner of the screen. A drop-down list of reports is displayed.

5. Click on the **Salary Assessment Form** report. A **Download Custom Report** window is displayed.

6. In the **Effective Date** field, select a date.
7. From the **Job Categories** drop-down menu, select all the job categories that apply.
8. Click the **Download** button. The report will appear within your downloads.

   This may take a few minutes, particularly for larger schools.

9. Go to your Downloads folder.
10. Right click on the zip file named **Combined SAF** and select **Extract All**.
11. A duplicate un-zipped version of the file will appear within your **Downloads** folder.
12. Open the duplicate un-zipped version of the file.

    Each file will be prefixed with the **NI Number** (National Insurance Number) of the related employee. Any files with the prefix **NOT SET** relates to employees within the system that are missing an **NI Number**.

    Important

    Files with the prefix **NOT SET** must be deleted as they will not be uploaded to the relevant employee file without a NI Number within the prefix.

    We therefore recommend opening each file with a **NOT SET** prefix to view the employee it relates to and updating the **NI Number** field within the **Personal Information** tab of each relevant **Employee Record** in the system.

    Before deleting each **NOT SET** file, open each file and note down the name so that these employee records can be updated.

13. Delete all files with the prefix **NOT SET** and return to the EPM Connect screen.

14. Select **Distribute Employee Documents** from the left-hand navigation pane,
15. Click the **Select Documents** button.
16. Select the relevant files from your documents and click **Open**.

    These are the files that were created within the earlier step and are denoted by the employee's **NI Number**.

17. From the **Employee Identifier**, select **NI Number**.

    This has match the File Prefix of the documents for the distribution function to work.

18. Tick the **Visible to Employees** box if you wish for the documents to be viewed by your employees.
19. Click **Distribute**.

    The documents will be distributed to the **Employee Record** of each of the relevant employees. Once distributed, we recommend deleting the files from your download..

Posts

This section provides an overview of all posts within the school. **All Posts** provides a list of all posts, both filled and unfilled and allows you to add new posts as they arise, whilst the **Posts Map** provides a handy organisation chart. Users who have added the **Recruitment** module can also create vacancies from this area.

Add Post

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Posts**. A list of further menu options will appear.
3. Click **All Posts**. The Posts page is displayed and displays all current posts.

You can either create a new post by adding the **+ Add Post** button, or click the **Copy Post** item to use a current post as a template.

1. Click the **+ Add Post** button. A **+ Create Post** page is displayed.

2. In the **ID** text box, add an ID. This is a mandatory field and the ID can be anything you choose.
3. In the **Title** text box, add a title. This is a mandatory field.
4. From the **Post Type** drop-down menu, select the post type. This is not a mandatory field.

    Post Types are configured within Settings.

5. In the **Description** text box, add a description.

    This is a free text field and can provide a useful area to include a summary of the role.

6. Complete the fields within the **Job Information** section.

The **Report To Post** drop down denotes the employees Line Manager. The Line Manager is required for various approval processes within the system, where the approver selected is 'Line Manager'.

7. Tick the **Requires Approval** box if the post requires approval and select relevant **Users** or **User Groups** for approval from the drop-down menus.

   If this box is ticked the post cannot be filled until the post has been approved.

   If approval for the post is not required, leave the **Requires Approval** box blank.

   All users must approve the post before the post can be filled.

View and Edit Post

View and edit posts via a list of posts within All Posts or an organigramme within Posts Map.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Posts**. A list of further menu options will appear.
3. Click **All Posts**. The Posts page is displayed and displays all current posts.
4. Click the **Title** of the post you wish to view, or click the pencil icon in the far right-hand column.
5. Review the information and make any relevant changes.
6. Scroll down to the Approval section.
7. Tick the Requires Approval box if the post requires approval and select the Users or User Groups you wish to approve the post.
8. Click **Save** to finish.

Posts Map

1. On the left-hand side of the EPM Connect window, click Employees. A list of further menu options is displayed.
2. Click **Posts**. A list of further menu options will appear.
3. Click **Posts Map**. The **Posts Map** page is displayed and displays all current posts within an organigramme.

   Scroll left to write to view the employees within the map.

4. Click any of the posts within the organigramme to view and edit the post.
5. Click **Save** to finish.

Add Post

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Posts**. A list of further menu options will appear.
3. Click **All Posts**. The Posts page is displayed and displays all current posts.
4. Click the **+ Add Post** button.

5. In the **ID** field, enter and ID.
6. In the **Title** field, enter and title.
7. From the **Post Type** drop-down menu, select a post type.
8. In the **Description** field, enter a description.
9. From the **Contract Agreement Type** drop-down menu, select an agreement type.
10. From the **Contract Hour Type** drop-down menu, select an hour type.
11. In the **Contract Hours** field, enter the contract hours.
12. In the **Annual Salary** field, enter the annual salary.
13. In the **Paid for Weeks** field, enter the paid for weeks.

    Paid for Weeks are working weeks plus holiday entitlement.

14. In the **Working Weeks** field, enter the working weeks.

    Working Weeks are the number of contracted weeks the employee is expected to work.

15. In the **Paid Over Weeks** field, enter the paid for weeks.

    Paid Over Weeks should match your FTE.

16. In the **FTE Weeks** field, enter the paid for weeks.

    FTE Weeks are the full-time week that the employee's salary is calculated over.

    Pay Range indicates what you would previously have included as Pay Scale – i.e. your main pay spine.

17. In the **Pay Scale** field, enter the pay range.

    Pay Scale indicates the point within the range.

18. From the **Role Identifier** drop-down field, select a role.
19. In the **Reports To Post**, select the post or person this employee will report to for this role.
20. From the **Department** drop-down field, select a department.
21. Tick the **Requires Approval** box if this applies and select the users or user groups that will approve the role.
22. Click the **Save** button to finish.

Approve Posts

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Posts**. A list of further menu options will appear.
3. Click **Approve posts**. The **Posts** page is displayed and displays all current posts.
4. Select the **Open** tab.

   The **Open** tab contains all posts that have not yet been approved.

   The **Closed** tab contains all approved posts.

To view the post

1. Click the edit icon to view and edit the post. A new page is displayed.
2. Click the relevant tab.

   The **History** tab, will show any changes made to the post, and include for example when the post was filled and by whom.

   The **Approval** tab will display the approval status and any relevant notes. If approval is not required, it will remain blank.

   The **Document** tab allows you to add documents related to the post. This could be a Job Description or any other relevant document. Click the **+ Add Document** button to add a document.

   The **Notes** tab allows you to add notes related to the post. Click the **+ Add Notes** button to add a document.

   The **Audit Trail** tab provides an audit trail of the post, including when the post was created and approved.

To approve the post

1. Click the tick icon to view and edit the post. A new page is displayed.
2. In the **Approval Note** field, enter a note.

   This is particularly useful if the post is rejected.

3. Click the **Approve** button to approve the post or the **Reject** button to reject the post.

Reports

Reports relating to Employees can be viewed by clicking on the Reports button at the top of the screen.

Analytics

The Analytics tab provides you with a variety of infographics related to:

- **Number of Employees**
- **Employee Turnover**
- **Employee Salary**

Use the **Analytics Filter** in the top right-hand corner to set the time period and filter based on gender, department, age group or job category.

Click on the relevant tabs to view **Number of Employees**, **Employee Turnover** and **Employee Salary**.

Trust Overview

The Trust overview provides an opportunity to view a bird's eye view of the **Employees** module from a Trust perspective. This includes a **Summary**, **All** (Employees) **Records**, **Employee Setup** (Settings) and **Bulk Actions**.

Summary (including Metrics)

The Summary section of the module provides a variety of metrics, including **Employees, New Employees, Previous Employees, Average Salary a**nd **Average FTE Salary**.

1. On the left-hand side of the EPM Connect window, click **Trust Overview**. A list of further menu options is displayed.
2. Select **Employees**.
3. Select **Summary**. The **Multi-Site Employee Summary** page is displayed and a variety of metrics are displayed across the top of the screen.
4.  To view more details, click the arrow in the top right of any of these metrics to move into specific details.

   The metrics displayed in **New Employees** and **Previous Employees** refer to the current month and will include anyone who is joining or leaving later that month, even if their join/leave date has not yet been reached.

   The **Unique Employees By NI Number** provides the total number of employees with an **NI Number** and at least one **Job Role** linked to their **Employee Record**.

   The **Number of Job Roles** provides the total number of job roles across the Trust.

5. Scroll down to view **Employees, Employee Average Salary** and **Employees by Gender** which relate to the last 12 months.

Reports

Reports relating to Employees at a Trust level can be viewed by clicking on the **Reports** button at the top of the screen.

All Records

All Records provides a list of all employee records within the Trust. This is split into two sections: All Employees (those currently employed by the Trust) and Previous Employees (those previously employed by the Trust.

The table can be used to find employees. When searching for an employee, you can filter and search for employees within the main grid, or use the **Employee Search** box at the top of the page.

Search by Employee

To search for a current employee by name use the **Employee Search** box in the top right-hand corner. This will also allow you to search for previous and archived employees. However, archived employees will only be displayed if you have clicked on the **View Archived Employees** button.

1. Select the **All Employees** tab.
2. In the **Employee Search**, enter the name of the employee you wish to view. A list of employees matching the search criteria are displayed.
3.  Click the eye icon on the far right-hand side of the employee you wish to view. A new page is displayed.

   Clicking on an employee will take you to the property (school) related to the employee. You will notice the property name at the top of the screen will change.

Search within the main grid

1. Click the column header to sort or use the magnifying glass next to the column header to further filter the columns.
2.  Click on the **Forename** or the eye icon on the far right-hand side of the employee you wish to view. The employee record is displayed.

   Clicking on an employee will take you to the property (school) related to the employee. You will notice the property name at the top of the screen will change.

View Previous Employees

Previous employees are those who have been processed as a leaver within the system, either for all roles or for a single appointment. Employees may therefore appear within both **Employees** and **Previous Employees** whilst archived employees are those who have been manually archived by a user. Archiving can be useful when an employee has been appointed but did not start within the role or when an employee has been added in error or duplicated.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Scroll down to the bottom of the page to view **Previous Employees**.

4. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. The relevant **Employee Details** page is displayed.
5. Alternatively, you can use the **Employees Search** function to search for previous employees.

Edit/Amend Employee Details

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed
2. Click **Details**. A list of further menu options will appear.
3. Click **All Employees**. The **All Employees** page is displayed and displays all current employees.
4. Find the employee you wish to edit.

   To find an employee, first search for the employee you wish to view.

   Click on the magnifying glass icon to search in the selected column.

   Click on a highlighted column heading to sort alphabetically or numerically.

   Click again to switch between ascending/descending order.

5. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. A new **Employee Details** page is displayed with the employee's **Personal Information**.

   Clicking on an employee will take you to the property (school) related to the employee. You will notice the property name at the top of the screen will change.

6. Click the **Edit Details** at the bottom right-hand side of the page. The employee's information is displayed, with the ability to edit any fields within the page.

7. Select the relevant tab within the tabs displayed on the left-hand side. The relevant tab is displayed.
8. Amend the details you require within the page.
9. Click **Save** to finish.

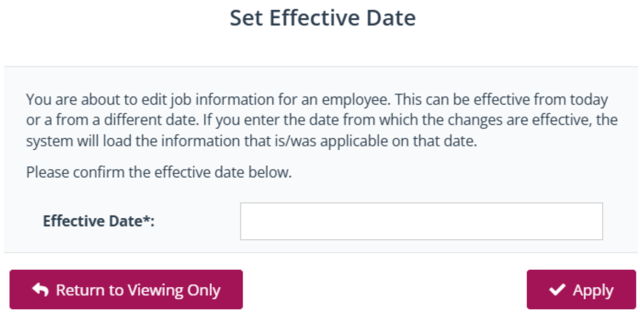
   Each amendment within an employee's details will appear within the audit trail.

Edit Job Role Information

This section provides information relating specifically to each role held by the employee. This will include all current and previous roles.

1. Open the relevant employee record.
2. Select a job role from the **Select Job Role** drop-down menu, located under the first set of tabs on the left-hand side. The information related to the job role you have selected, is displayed.
3. Click **Edit Details**. A new window is displayed.

4. In the **Effective Date** text box, select a date.



5. Click the **Apply** button.
6. Select the relevant tab displayed on the left-hand side. The tab information is displayed.
7. Amend the details you require within the page.

   Each amendment within an employee's details will appear within the **Audit Trail**.

   HR Admin Customers

   Editing contract information within the Employee Record may require the user to activate a workflow which will create tasks for both the school and EPM. See **Contracts and Letters** for more information.

Employee Setup

This page allows you to manage setting for the Employees Module for all Trust properties.

1. On the left-hand side of the EPM Connect window, click Trust Overview. A list of further menu options is displayed.
2. Select **Employees**.
3. Select **Employees Setup**. The **Employees Setup** page is displayed.
4. Select the **Main Settings** tab.
5. Move the **Exclude Zero Hour Staff** toggle to **YES** to include them within analytics and **NO** to exclude them.
6. Click **Save** to finish.