Employees Module Settings

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for managing settings within the Employees 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	23rd October 2025
Summary of Change	Changes to improve clarity.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

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Overview

You can customise the settings within **Employees** in order to tailor the module to your organisation's requirements. Once set up, you will be able to apply these options to new and existing employees and identify missing information within the system. This ensures employee data is high quality, thorough, and accurately matched to each employee, providing accurate reporting.

As part of implementation, our Implementation Team will work with the School and Trust to complete the key settings, however you may over time wish to change certain settings.

Some settings are restricted as these are managed by EPM. If you have any questions or require any changes, please speak to your EPM Team. A Restricted access message will appear when visiting or attempting to edit any information within restricted tabs.

The following settings are available to edit:

- Other Checks
- Task Templates
- Incomplete Records
- Post Types
- Signer Tags
- Shift Templates

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options are displayed.
2. Click **Settings**. The Employee Settings page is displayed.

Main Settings

Main Settings are managed by your EPM Team and should not be edited. If you have any questions or require any changes, please speak to your EPM Team.

Salary Formulas

Salary Formulas settings are managed by your EPM Team and should not be edited. If you have any questions or require any changes, please speak to your EPM Team.

Pay Additions & Deductions

Pay Additions & Deductions settings are managed by your EPM Team and should not be edited. If you have any questions or require any changes, please speak to your EPM Team.

Benefits

Automatic Point Increment settings are managed by your EPM Team and should not be edited. If you have any questions or require any changes, please speak to your EPM Team.

Other Checks

There are many pre-populated checks within the system which can be selected when adding and managing employee records, but the system also gives you the ability to create consistent capture of employee data by adding in your own preferred checks to the Employees section. These settings are really useful for role or site specific needs, as each school can create individual checks to match up to their requirements.

Any **Other Checks** added to the system will be recorded within **ID and Other Checks** within the **Employees** module and within the **SCR Module** and the **SCR Report** as long as the check is assigned to at least one employee and is ticked as an **Other Check** to include within the SCR, within **SCR Settings**.

1. Select the **Other Checks** tab.
2. Click the **Create Other Check** button on the bottom right-hand side of the page. A new window is displayed.

3. In the **Other Check Title** text box, enter a title.
4. Select the **Requires Certificate** box to enable capture of certificate number.
5. Select the **Requires Expiry** box if the check requires an expiry date.

   This will enable capture of an expiry date.

6. In the **Assign To** box select individual users OR in the **Assign to User Groups** box select user groups.
7. Click **Save** to finish.

   Once saved you can view all items on the main screen and can edit any fields by clicking on the or delete by clicking on the . These can be fully customised as you move forward, editing at any time.

Task Templates

This tab allows you to ease the process of managing starter/leaver tasks by grouping common tasks within templates. This allows you to easily assign groups of tasks and set these tasks as standard for specific types of employees. This is particularly useful for new starters.

Less common, individual tasks can be managed within the **Task Management** module. See our **Guide to Task Management** for more information.

To create **Task Templates** you must first create the individual tasks.

Tasks

1. Select the **Task Templates** tab.
2. Select the **Task** tab.
3. Click the **+ Create Task** button on the bottom right-hand side of the page. A new window is displayed.

4. In the **Add Task Title** text box, enter a title.
5. In the **Description** text box, enter a description.
6. From the **Activation Option** drop-down menu, within the first text box, select an option. Within the second drop-down menu select **Days**, **Weeks** and **Months**.

   Apply Template Date will use the date you have set once the **Template** has been created.

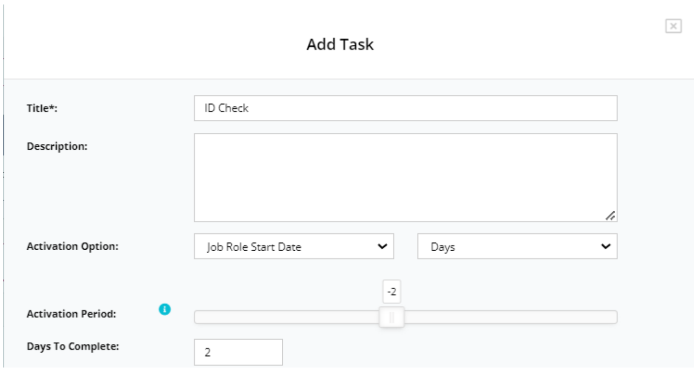
   Job Role Start Date will use the date the job starts.

   Job Role End Date will use the date the job ends.

   The **Activation Period** slider determines how many **Days**, **Weeks** or **Months** the task will be sent to the employee from the date chosen within **Activation Option**.

7. Use the **Activation Period** slider to set a period of time either before or after the selected activation option to activate this task.

   The slider is used to set the number of **Days**, **Weeks** or **Months**, for example, 4 days after the template date. If the slider is set below 0, it will send the task this many days/weeks/months ahead of the date selected within **Activation Option**. For example, 2 days before the start date, as shown below.



8. In the **Days to Complete** field, enter the days to complete.

9. In the **Assign To** box select individual users OR in the **Assign to User Groups** box select **User Groups**.
10. Tick the **One or Many Tasks** box to create an individual task for each person chosen in the assign to section. Leave it blank to create one task that is assigned to each assigned user and can be completed at any time by any of the users assigned.
11. Click the **+ Reminder** button to create a reminder for the task. A new window is displayed.

12. In the **Title** text box, enter a title.
13. In the **Description** text box, enter a description.
14. In the **Notify** field, within the first text, box enter a number and within the second drop-down menu, **Days**, **Weeks** and **Months**.
15. Select the **Notify by Email** box to send reminders via email.
16. Select the **Notify by Popup** box to send reminders via popups within the system.

   We recommend selecting either **Notify by Email** or both options as not all users will login to the system regularly.

17. Click **Save** to finish.

   Once saved you can view all items on the main screen and can edit any fields by clicking on the or delete by clicking on the .

   Tasks cannot be deleted if assigned to a task template. Therefore, to delete a task you must first remove it from the relevant task templates. These can be fully customised as you move forward, editing at any time.

Templates

Tasks can be grouped together as templates. For example, you may create a **Template** named *Teachers – New Starters* with the **Type** – *Starter*, containing tasks such as *Create email account*, *Review ID*, *Give lanyard*, *Add to Payroll* etc.

Tasks must be created individually before creating a task template.

Templates can be edited using the pencil icon or deleted using the small red x.

1. Select the **Task Templates** tab.
2. Select the **Templates** tab.
3. Click the **+ Create Template** button on the bottom right-hand side of the page. A new window is displayed.

4. In the **Title** text box, enter a title.
5. From the **Type** drop-down menu, select a type
6. From the **Tasks** drop-down menu, select all tasks to be included within this template.
7. Click **Save** to finish.

Incomplete Records

The **Incomplete Records** tab allows you to exclude fields in the system which should not be highlighted as incomplete, within **Incomplete Records**. The ticked fields will still exist within the system but will not be classed as incomplete if left blank.

1. Select the **Incomplete Records** tab.
2. Select each of the fields you wish to exclude from the **Incomplete Records** section.
3. Click **Save** to finish.


Post Types

The settings within the **Post Types** tab is only mandatory for users with the **Recruitment** module, as posts are required when creating vacancies. However, **Post Types** can also be used to identify and organise job posts and identify filled and unfilled roles across the organisation. They are also used to build the **Posts Map**.

The **Post** field is available when adding a new job role within the **Employee Record**.

Please note, **Post Type** is not related to **Type of Post** within the **Job Information** page, this relates to the **School Workforce Census**.

1. Select the **Post Types** tab.
2. Click the **+ Create Post Type** button.


3. In the **Title** text box, enter a title.

   For example, *HR* can be used to categorise posts such *HR Manager*, *HR Assistant*, etc. Alternatively, a wider *Administrative Staff* post type can be used to categorise these posts.
4. Click **Save** to finish.


Signer Tags

The **Signer Tags** tab allows you to assign signature tags to this property. These tags determine the personnel who can sign signable documents.

1. Select the **Signer Tags** tab.
2. Click the **+ Add Signer Tags** button.


3. In the **Name** text box, enter a name.
4. From the **Selected Users** drop-down menu, select all relevant users.
5. Click **Save** to finish.


Shift Templates

Shift Templates can be created and managed within the **Shift Templates** tab. These prevent the need to add individual shifts for each employee. They also support calculations when using the **Absence Management** module.

Shift templates are used when adding a **Work Pattern** for an employee within the **Employee Record Job Information**. An option to choose a template will appear when clicking **Add Shift**.

We recommend setting up shift templates for key roles within the school, for example, Classroom Teacher, Teaching Assistant etc. This will allow you to choose a template when adding **Work Patterns**, making the process more efficient. When adding a unique shift pattern, it may still be useful to use a template as a starting point.

1. Select the **Shift Templates** tab.
2. Click the **+ Add Shift Template** button.

3. In the **Name** text box, enter a name.
4. From the **Type** drop-down menu, select the option you require.
5. In the **Start Time** text box, enter a start time.
6. In the **End Time** text box, enter a start time.
7. Click the arrow within the **Hours per day** text box to calculate the total hours per day.

8. Select the boxes that apply - **Default for Teaching Staff** or **Default for Support Staff** (other staff).
9. From the **Selected Users** drop-down menu, select all relevant options.
10. In the **Description** text box, enter a description.
11. Select all the **Days** that do not apply

    The days highlighted in burgundy indicate those that apply, those that don't apply are greyed out.

12. Click **Add Shift** to confirm.