

# Enhanced Time & Expenses Module

## EPM Connect Guide



# Document Control

**Document Overview:** This document outlines the step-by-step process for all tasks managed within the Enhanced Time & Expenses 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 23<sup>rd</sup> October 2025 and is issued on a version-controlled basis under her signature.

## Document History

<b>Date of Change</b>	23 <sup>rd</sup> October 2025
<b>Summary of Change</b>	Changes to improve clarity.
<b>New Version Number</b>	v2.0
<b>Changes to be notified to</b>	Director of Operational Excellence

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## Time & Expenses Module Guide

Our Enhanced Time & Expenses Module allows employees to add timesheets, expense and time claims via My Portal, significantly reducing administration for your team. Self-service provides a simple process for your employees whilst saving your admin teams valuable time and effort.

You can fully customise the settings and approvals process to meet your Trust/School's expenses process. This allows employees to only claim for the expenses relevant to them and ensures your employees' overtime, expenses and timesheets are processed timely and accurately.

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

### Employee Self Service - My Portal

Timesheets, time and expense claims can be added by your employees via **My Portal** within **My Expenses** and **My Time**.

The configuration you have managed within the **Settings** section of the module (see separate guide) will dictate the information and fields visible to user groups and individual employees. Employees will see a copy of the **Header Guidance** and **Sign Off Message** you have set and a copy of the policies attached.

Employees can add **Expenses** and **Time Claims**, and **Timesheets**, creating drafts before submitting fully, with reminders to save changes. Any obvious mistakes, such as future, rather than current dates will prompt the employee to amend before saving.

Employees can view all draft, approved, paid and rejected time claims within **Open Expenses** and **Closed Expenses, Open Time Claims** and **Closed Time Claims, Open Timesheets** and **Closed Timesheets**.

### Time and Expense Claims

Employees add mileage and other expense claims, based on the parameters you have set.

Once a claim has been submitted it cannot be amended. 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.

### Timesheets

Employees can choose to complete both fixed and custom timesheets. They can create a **Fixed Timesheet**, with preset hours for the entire month and adjust these throughout the month, saving valuable time. Alternatively **Custom Timesheets** can be created, with the ability to further amend these throughout the month.

Timesheets should be saved initially as a draft until the employee is certain that there will be no more changes. Once a timesheet has been submitted by the employee, it cannot be amended. Once confident that no more changes need to be made, the employee will submit the timesheet for approval.

## Create Timesheets. Expense and Time Claim

For customers who have opted with access to the **Enhanced Time & Expenses Module**, the school's employees will add their own timesheets, expense and time claims via the **My Expenses** and **My Time** pages within **My Portal**.

## 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 settings and a full list of claims or timesheets exported to Excel or Word.

Claims cannot be approved via this section, only viewed. Approver's personal claims and timesheets will not be stored within this section, but instead within **My Portal**.

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 screenshot shows a window titled 'Line 1: Train' with a status of 'Approved' in green text. It contains three input fields: 'Date Incurred\*' with the value '08 Jan 2024' and a 'Mo' button; 'Job Role\*' with the value 'School Business Manager'; and 'Total Amount (Gross)\*' with the value '87.50'. Each field has a small downward arrow at the bottom.

The **Status** displays the current status of the item:

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

**Query/Change Required:** The item has been queried by the approver and/or changes requested

**Authorisation in Progress:** The item has been saved and submitted for approval.

**Approved:** The item has been approved by the Approver.

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

**Cancelled:** The item has been cancelled.

**Rejected:** The item has been rejected by the Approver.

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

## Approvals

Timesheets, Time and Expenses claims awaiting approval can be viewed within the **Approvals** section of the **Time & Expenses** module. In addition, each approval will send as a task to the Approver. These can be viewed within **My Tasks**.

### Approve or reject Time or Expense Claims

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Approvals**. The **Claims and Timesheets Requiring Approval** page is displayed.

Review claims and timesheets assigned to you for approval in the **My Required Approvals** tab. Subsequent reviews by other approvers may be required later.

For claims, you can approve or reject each line assigned to you. For **Timesheets**, you must approve or reject the whole timesheet.

View all **Claims** and **Timesheets** with issues preventing approvals, find resolutions, and update them after resolution.

3. Select the **My Required Approvals** tab to view all items awaiting approval.
4. Find the item you wish to review and click the tick icon in the far-right column to review the item.

The following steps will only work for time and expense claims. For Timesheets, follow the **Approve or reject Timesheets Guide** below.

5. Review the details and ensure all information is correct.  
Approvers cannot change details but can request changes to be made.
6. Scroll down to **Approve Timesheet**.
7. From the **Action** drop-down menu, select the option you require.

**Raise Query** or **Request Change** allows the approver to ask the employee who has submitted the claim or timesheet to make changes rather than resubmit the claim from scratch. This is useful for claims with small errors or where further clarification is needed.

8. In the **Message** field, enter a message.  
This message will be sent to the employee who added the claim.
9. Click **Submit Review** to finish.



## Approve or reject Timesheets

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.

2. Select **Approvals**. The **Claims and Timesheets Requiring Approval** page is displayed.

Review claims and timesheets assigned to you for approval in the **My Required Approvals** tab. Subsequent reviews by other approvers may be required later.

For claims, you can approve or reject each line assigned to you. For timesheets, you must approve or reject the whole timesheet.

3. Select the **My Required Approvals** tab to view all items awaiting approval.

 4. Find the item you wish to review and click the tick icon in the far-right column to review.

The following steps will only work for time and expense claims. For Timesheets, follow the **Approve or reject Time and Expense Claims Guide** above.

5. Review the details and ensure all information is correct.

Approvers cannot change details but can request changes to be made.

6. From the **Action** drop-down menu, select either **Accept, Raise query or Request change, or Reject**.

7. **Raise query or Request change** will allow the employee who has submitted the timesheet to make changes and re-submit it.

**Reject** will entirely reject the claim and not allow the employee to make changes.

If you have selected **Raise query or Request change**, in the **Message** field enter a message

8. Click **Submit Review** to finish.



## My Historic Reviews

**My Historic Reviews** includes claims and timesheets that you have previously approved or sent back. These cannot be changed but can be viewed for further information.

1. Select the **My Historic Reviews** tab to view all your previous reviews.

 2. Find the item you wish to review and click the eye icon in the far-right column to view the item. The main details of the claim are displayed.

3. Click on the **Query/Change Required** arrow to view the approval history, including any changes requested or reasons for rejection.

A new window is displayed with the approval history and reasons for rejection or changes required.

4. Click **Close**. The window closes.

5. Click **Close** again.

## Manage Approval issues

The **All Approval Issues** tab provides a list of any approvals that are blocked due to missing settings, or where none of the designated approvers have permission to approve the claim or timesheet. A task will also be automatically generated for all approval issues.

1. Select the **All Approval Issues** tab.
2. Click the **Update and Refresh** issues button.

This will check for new issues and resolve any existing ones that have been resolved. Remaining issues will be displayed.
3. Click the eye icon next to the review/claim you wish to view.
4. The details of the issue are displayed, along with a number of suggested fixes.

Consider the area of the system required to fix the issue. We recommend opening an additional tab within your browser to find the relevant area of the system. Speak to your EOM Team if you are unsure of the issue or if you require settings to be updated.
5. Most issues can be fixed within **Time & Expenses Settings**, or by changing the **Line Manager** within the **Reports To** field of the **Job Information** tab, within **Employees**.
6. Click **Close**. The screen will close.
7. Go to the relevant module to fix the issue, following the advice in the previous screen.
8. Once you have fixed the issue return to the **All Approval Issues** tab and click the **Update and Refresh Issues** to check that the issue has been resolved.

## Testing

This page allows you to test Claims and Timesheets to ensure the settings you have configured work as desired. Test Claims and Timesheets cannot be saved or submitted.

To ensure your policies and processes are set up as desired, we recommend testing once settings have been completed. This allows you to test **Claims and Timesheets** to ensure that the settings meet your requirements.

Test either as an **Yourself** or as **An Employee** or ideally test from both sides to view the whole process. Should you wish to amend settings, speak to your EPM Team. **Testing** also provides an insight into the employee's experience and allows you to answer questions with confidence.

1. On the left-hand side of the EPM Connect window, click **Time & Expenses**. A list of further menu options is displayed.
2. Click **Testing**. The **Test Claims and Timesheets** page is displayed.
3. In the **Test As...** section, select either **Yourself** or **An Employee**.
4. If you have selected to test as **An Employee**, select an option from the **Please Select Employee** drop-down menu.

This will allow you to test with the settings associated with an employee of this type..
5. Click the relevant button to **Test Expense Claim**, **Test Time Claim** or **Test Fixed Timesheet**