Training & CPD - Trusts

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for Trusts for managing all tasks within the Training & CPD module in EPM Connect.

Classification: Public

Document ID: EPMC025

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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

Training & CPD – Trust Guide

Add all online and offline courses, enabling you to maintain all training records in one centralised location.

Self-service allows employees to undertake, track and update their training and log training undertaken independently, providing full transparency, greater autonomy and a reduction in workload for the central team.

The module allows you to quickly view any training requests, overdue training and completed training across all academies, track CPD hours and download training records, whilst our Trust Overview allows you view these elements from a Trust perspective.

Set a % pass rate for staff members and an approval process for courses to ensure that training is distributed quickly and to the right employees and download training records and certificates at the click of a button.

Any course indicated by a icon can only be managed at Trust level.

Anything that has been added at school level, can be edited by using the icon. Anything that has been added at school level will not appear within the course library of other schools within the Trust.

General Guidance

Column headings in 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 and add the criteria in the text box below.

Summary (including Metrics)

The **Summary** section of the module provides a variety of metrics, including **Total Logged Training**, **Completed Training, Incomplete Training** and **Overdue Training**.

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**.
3. Click **Summary**. The Training & CPD module is displayed and a variety of metrics are displayed across the top of the screen.
4. View the key headline metrics displayed across the top of the screen.
5. Click the arrow in the top right-hand button in the top right of any of these metrics to move into specific details, which training courses these relate to and the users they were assigned to.
6. Scroll down to view **Yearly Course Completions** and **Monthly Completions** which relate to the last 12 months.

View and edit courses available for distribution

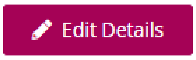
If your Trust wishes to manage all the training centrally, only those who have central access can manage the library and distribution of these courses.

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options is displayed.
3. Click **Central Courses**. The **Training Course** page is displayed.

Training Courses

The **Training Courses** tab displays all current courses available for distribution.

1. Select the **Training Courses** tab.
2. Click the **Title** of the course you wish to view.
3. Click the **Edit Details** button. A new window is displayed.



4. Edit the relevant fields and click **Save** to finish.

Near the bottom of the screen there are a variety of tabs displayed.

Distribution: This tab is used to distribute courses to individual **Users** and **User Groups**.

Enrolled Users: This tab displays all users enrolled in this course.

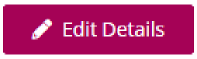
Incomplete: This tab displays all incomplete distributed courses.

Completed: This tab displays all complete distributed courses.

Audit Trail: This tab displays a full audit trail of all changes made, including time and date stamps and the name of the user who has completed the action.

Collections

1. Select the **Collections** tab to view all collections available for distribution.
2. Click the pencil icon on the far right-hand side of the course you wish to edit.
3. Click the **Edit Details** button. A new window is displayed.



4. Edit the relevant fields and click **Save** to finish.

Near the bottom of the screen there are a variety of tabs displayed:

Courses: This tab displays the courses included within the collection.

Distribution: This tab is used to distribute courses to individual **Users** and **User Groups**.

Audit Trail: This tab displays a full audit trail with time and date stamps and the name of the user who has completed the action.

Add courses

Add your own online and offline courses, enabling you to maintain all training records in one centralised location.

Add e-Learning courses

This element is not currently available within the system.

Create an online course

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options is displayed.
3. Select **Central Courses**. The **Training Course** page is displayed.
4. Click the **+Create Course** button. This will open a **New Course** window.

5. From the **Course Type** drop-down menu, select **Online** or **Offline**.

   The option will default to **Online** however you can change this to **Offline** in the drop-down menu should you wish to add an offline course.

6. In the **Title** field, select a title.

   If there are multiple courses that are similar, we suggest adding a date to differentiate.

7. From the **Category**, drop-down menu, select a category.

   Categories are set up in Settings. Settings can be customised within the **Settings** area of the module – see the **Settings** section at the bottom of the guide.

8. From the **Availability** drop-down menu, select and decide who will have access to this course, choosing from *Assignment only* (only for users who have been assigned to this course), or *Available to All* (available for all employers to choose from their list of available courses).
9. In the **Description** field, enter a description.
10. In the **URL** field, enter a URL
11. From the **Due Within** drop-down menu select an option.

    Due Within sets the date in which the training should be completed within once assigned to an employee. Once this time-period has lapsed, the employee and the person who has assigned the course will receive a notification that the course is overdue and the course will appear in **Incomplete Training** within the summary screen. If it is set to **Global** this will default to the global (i.e. standard) time-period configured within **Settings**. However, this can be over-ridden with any time period you wish (by Days or Weeks).

    Select **None** if this does not apply.

12. From the **Expiry** drop-down menu select an option.

    The expiry is more relevant when looking at auto-renewal. When you distribute courses, you can select if you want them to auto renew or not. If you select yes, it will use this expiry here. If set to auto-renew it will auto-renew and send out any updates of the course material.

13. Click **Save** to finish.

    Save

    The course will now sit within your **Central Courses** library for you to manage and distribute.

You can update any details at any time by clicking the pencil icon on the far right of any course. Edit the details and click **Save** to finish.

Create an offline course

Offline courses can be created in exactly the same way as online courses, with a number of additional fields available to provide more detail.

1. Follow the steps within **Create and online course** above but add in an optional **Location**, **Tutor** and **Agenda** (these are not mandatory fields).
2. Ensure all steps above have been completed and click **Save** to finish.

   Save

   This will now sit within your **Central Courses** library for you to manage and distribute.

Create a new Course Collection

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options is displayed.
3. Select **Central Courses**. The **Training Course** page is displayed.
4. Select the **Collections** tab.
5. Click the **+Create Collection** button. A new **Create Course Collection** window is displayed.

   + Create Collection

6. In the **Title** field, enter a title.
7. In the **Description** field, enter a description.
8. Click **Save** to finish.

   Save

Archive courses

Archive courses that you no longer want to be available for distribution.

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options is displayed.
3. Click **Central Courses**. The **Training Course** page is displayed.
4. Click the cross icon next to the course you wish to archive. A new **Archive Course** window is displayed.
5. Click the **Archive** button to archive the course.

Re-activate courses

1. Scroll to the bottom of the courses listed and click the View Archived Courses button.

2. Click the double arrow icon on the far right-hand side of the course listed.

   The course is reactivated and will be displayed within the **Central Courses** library.

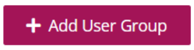
Distribute (assign) courses

The Distribution section of the module allows you to assign courses to individual **Users** or multiple employees via **User Groups**. For ease of use, we recommend setting up **User Groups** for each school within the Trust, for example St John's School Teaching, St John's School Admin, St John's School Academic Support Staff. This is managed in **Settings.**

Distribute (assign) to a User Group (en masse)

Distributing to a large group saves time, but it requires you to apply the same **Required** status (**Mandatory**, **Critical** or **Optional**) to everyone in that group. It also means that removing a single user from the distribution removes the entire group. For this reason, there may be situations where assigning courses individually via + Add User (**Distribute (assign) to single users**) is more appropriate.

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options is displayed.
3. Select **Central Courses**. The Central Courses page is displayed.
4. Click the pencil icon next to the course you wish to distribute.
5. Scroll down to the tabs and click the **Distribution** tab.
6. Click the **+ Add User Group** button.



7. From the **Central User Group** drop-down menu, select the user groups you require.
8. From the **Required** drop-down menu, select either **Critical**, **Mandatory** or **Optional**.
9. Move the **Auto-Renew** toggle to **YES** or **NO**.

   If set to **NO** the system will not automatically redistribute it.

   If set to **YES**, once it reaches its expiration the system will automatically redistribute it.
10. Click **Save** to finish.

    Save

    The selected user group will appear within the **User Groups** tab and display the number of employees this has been sent to within the **User Count**.

Distribute (assign) to single users

Adding courses to individual users allows you to set whether a course is **Mandatory**, **Critical** or **Optional** for each individual user. It also allows you to remove distribution to single users within the group. Courses can be distributed to individuals via **+ Add User.**

1. Click the pencil icon next to the course you wish to distribute.
2. Scroll down to the tabs and click the **Distribution** tab.
3. Click the **+ Add User** button.

   + Add User
4. From the **Central User Group** drop-down menu, select the user groups you require.
5. From the **Required** drop-down menu, select either **Critical**, **Mandatory** or **Optional**.
6. Move the **Auto-Renew** toggle to **YES** or **NO**.

   If set to **NO** the system will not automatically redistribute it. If set to **YES**, once it reaches its expiration the system will automatically redistribute it.
7. Click **Save** to finish.

   Save
8. Repeat the process for each user you wish to distribute the course to.

   The **Users** tab displays a list of all selected users who have been assigned to this course.

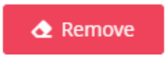
Delete Distribution to single users

Should a course be distributed incorrectly, or should an employee no longer be eligible for a course, the course can be deleted from their distribution list.

Distribution to **User Groups** cannot be removed if the course has been completed by a user.

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options is displayed.
3. Select **Central Courses**. The Central Courses page is displayed.

4. Click on the **x** icon. A new **Remove Distribution** window is displayed.
5. Click the **Remove** button to remove distribution of that course from the user.



Distribute en masse

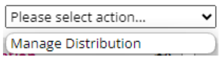
This is useful if distributing courses to a variety of user groups.

If the course library is built and managed centrally by the Trust, only the Central Team will be able to manage and distribute courses. Schools can only view courses added by the Trust Central Team.

Distribute courses with the same requirements and Auto Renew status

This is useful if you wish to distribute multiple courses with the same criteria – i.e. marked as **Mandatory** and has the same **Auto Renew** status.

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options is displayed.
3. Select **Central Courses**. The Central Courses page is displayed.
4. Select the **Training Courses** tab.
5. Tick the box next to the courses you wish to distribute.
6. Click the **Please select action…** box on the top right-hand corner, above the employees listed:



7. Click **Manage Distribution**. A new **Multiple Courses: Manage Distribution** window is displayed.
8. Click the **+ Add User Group** button.

9. From the **Central User Group** drop-down menu, select the option you require.
10. From the **Required** drop-down menu, select either **Critical**, **Mandatory** or **Optional**.
11. Move the **Auto-Renew** toggle to **YES** or **NO**.
12. Click **Save** to finish.

To remove courses, click the red cross icon.

To edit distribution, click the pencil icon.

Distribute Course Collections with the same requirements and Auto Renew status

Course collections are groups of courses packaged together for easy distribution, for example *Annual Courses for September,* or *Induction Courses*. Collections can be created by clicking the **+ Create Collection** button.

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options is displayed.
3. Select **Central Courses**. The Central Courses page is displayed.
4. Select the **Collections** tab.
5. Click the **Collection Title** of the course collection you wish to distribute.
6. Select the **Distribution** tab.
7. Click the **+ Add User Group** button. A new **Add Central User Group Distribution** window is displayed.

8. From the **Central User Group** drop-down menu, select the user group you wish to distribute to.
9. Click **Save** to finish.

Manage users and completion status

Once you have distributed courses to **User Groups** and individual **Users**, you can view and manage individual users further within the **Enrolled Users, Incomplete, Completed** and **Audit Trail** tabs.

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options is displayed.
3. Select **Central Courses**. The Central Courses page is displayed.
4. Click on the **Course Title** of the course you wish to manage.
5. Click on **Enrolled Users** to view all enrolled users and check the **Required** settings (i.e. **Critical**, **Mandatory** and **Optional**) and **Auto-Renew** (i.e. **YES** or **NO**).
6. Click **Incomplete** to see a list of any users the course has been assigned to but have not yet completed the course.
7. Click **Completed** to see a list of any users the course has been assigned to and who have completed the course.
8. For any of the custom courses you can mass update completion by clicking **Incomplete** and selecting the box on the far right-hand side of each employee. Click on the **Please select action…** box on the top right-hand side, above the employees listed:

9. Click **Bulk update** and an **Update Multiple Training Instances** window will open.
10. Click the box next to **Completed** and choose a date from the calendar.
11. Click the box next to **Outcome** and choose either *Pass, Fail* or *Not Applicable*.
12. Click the box next to **Score** and add a score.
13. Click **Save** to finish. This will update all records and move them to the **Completed** Tab.

View Training Instances

Training Instances displays a list of all training logged within the system.

1. On the left-hand side of the EPM Connect window, select click **Trust Overview**. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options will appear.
3. Select **Training Instances**. The **Training Instances** page is displayed.
4. Select the relevant tab.
5. View the name of the employee the course is **Assigned To, Course Title, Course Category**, **Date Due**, **Date Completed**, whether the course is **Optional**, **Mandatory** or **Critical**, the **Score** and the and **Approval Status** against all active users and click the magnifying glass icon to search by any of these titles.
6. Click the pencil icon to view the training instance. A new **+ Edit Training Log** window is displayed.

Reports

Produce reports on all training courses, completed or incomplete and view patterns in employees that are consistently failing to complete training. An automatic email will be sent every Monday to individual employees to remind them to complete incomplete training.

1. On the left-hand side of the EPM Connect window, select the **Trust Overview** tab. A list of further menu options is displayed.
2. Select **Training & CPD**. A list of further menu options is displayed.
3. Select **Training Instances**. The **Training Instances** page is displayed.
4. Select the relevant tab.

   Once the period you set as **Due Within** has lapsed, the employee and the person who has assigned the course will receive a notification that the course is overdue.

5. To export a report in either **Word** or **Excel** format, filter using the icon and searching for the particular course you wish to report on and click , choosing either Word or Excel format.

   You can **Export** a report in **Word** or **Excel** format wherever you see the button.

Credit Allocation

This element is not currently available within the system.

Employee view - Training & CPD

If there is an approval process in place, any courses logged will need approval. If an approval process is not in place, any courses logged by the employee will be added to their training record.

View assigned courses

1. On the left-hand side of the EPM Connect window, select **My Portal**. A list of further menu options is displayed.
2. Select **My Training**. The **My Training** page is displayed.
3. Select the **To-Do** list tab to view all incomplete training assigned to you.
4. Click the **Course Title** you wish to view.
5. In the **CPD Hours** field, enter the total hours of training completed.
6. In the **Date Completed**, select the date the training was completed.

   Once a course has been completed it will move into the **All Training** tab, which will show all compelte and incomplete courses.

7. Click **Save** to finish.

Add Documents

1. To add documents, scroll down and click the **+Add Document** button. A new window is displayed.

2. Click **Upload File** to upload a file.
3. From the **Document Type** drop-down menu, select an option.
4. In the **Title** field, enter a title.
5. Click **Save** to finish.

Add Notes

1. To add documents, click the **+Add Note** button. A new window is displayed.

2. In the **Note** field, enter a note.
3. Click **Save** to finish.

Audit Trail

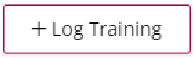
The **Audit Trail** displays every action that has been undertaken within the module. View when each course was started and completed, any documents and notes that have been uploaded and any changes to **Approval Status**.

Download certificates

1. On the left-hand side of the EPM Connect window, select click **My Portal**. A list of further menu options is displayed
2. Select **My Training**. The **My Training** page is displayed.
3. Click **Download All** in the **Certificates** box at the top of the screen.

Log Training

1. Click the **+ Log Training** button at the top of the screen. A new **Log Training for *(Name)*** screen is displayed.



2. From the **Course** drop-down menu, select the course. Further fields are displayed.
3. From the **Required** drop-down menu, select **Critical**, **Mandatory** or **Optional**.
4. In the **Date Due** field, select a due date.
5. In the **CPD Hours** field, enter the total hours of training completed.
6. In the **Date Completed**, select the date the training was completed.
7. Click the **Select files** button to add files.

Settings

Main Settings

These are the overall settings that affect the whole module. These are the Global settings, meaning they apply to all training as a default (unless changed).

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Settings**. The **Settings** page is displayed.
3. Select the **Main Settings** tab. The tab information is displayed.

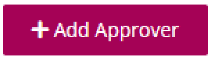
e-Learning Settings

E-Learning is not currently available within this module and therefore these settings are not needed.

Approval Notifications

These settings allow you to set up the users who will receive email notification for training approval requests.

1. Select the **Approval Notifications** tab. The tab information is displayed.
2. Click the **Add Approver** button. The **Approver Information** is displayed.



3. From the drop-down menu, select the user that applies.
4. Click **Save** to finish

Categories

This tab allows you to set your training categories.

1. Select the **Categories** tab. The tab information is displayed.
2. Click the **Add Category** button.

3. Enter the **Category Name**.
4. Click **Save** to finish.