

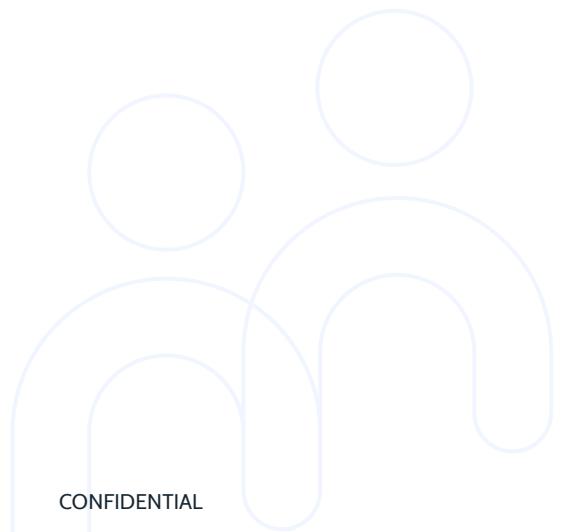


Matrix Security Watchdog

Matrix Screening, Powered by Prism

Admin Hub FAQ

DATE: August 2025



Matrix Screening Admin Hub FAQ

Welcome to your complete guide to managing your Matrix Screening platform. Below you'll find step-by-step guidance for all the essential administrative tasks.

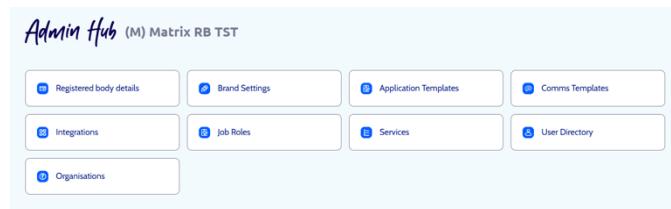
How do I create, amend, or deactivate user accounts?

Managing your team has never been easier

All user management happens in one convenient location—the 'User Directory' tile in your Admin Hub.

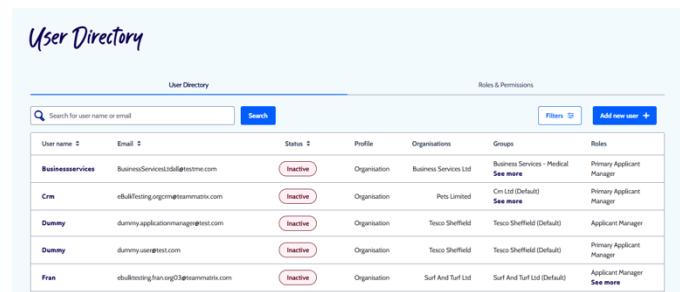
What you can do:

- **Create new users** in seconds with guided setup
- **View all existing users** at a glance
- **Edit user details** and permissions instantly
- **Deactivate accounts** when team members leave



The screenshot shows the Admin Hub interface with the 'User Directory' tile selected. The tile has a light blue background and a white border. It displays a grid of icons and labels: 'Registered body details', 'Brand Settings', 'Application Templates', 'Comms Templates', 'Integrations', 'Job Roles', 'Services', and 'User Directory'. Below these are two more buttons: 'Organisations' and 'Organisations' (repeated). The overall layout is clean and modern, using a light blue and white color scheme.

Quick Access: Admin Hub → User Directory → Choose your action



The screenshot shows the 'User Directory' screen within the Admin Hub. The title 'User Directory' is at the top. Below it is a table with columns: 'User name', 'Email', 'Status', 'Profile', 'Organisations', 'Groups', and 'Roles'. The table contains six rows of data. At the bottom right of the table are 'Filters' and 'Add new user' buttons. The data in the table is as follows:

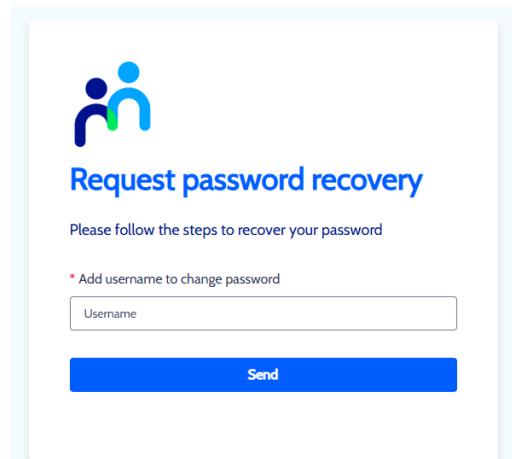
User name	Email	Status	Profile	Organisations	Groups	Roles
Businesservices	BusinessServicesLtd@teammatrix.com	Inactive	Business Services	Business Services Ltd	Business Services - Medical	Primary Applicant Manager
Cms	ebullTesting.orgcms@teammatrix.com	Inactive	Organisation	Pets Limited	Cms Ltd (Default)	Primary Applicant Manager
Dummy	dummy.applicationmanager@test.com	Inactive	Organisation	Tesco Sheffield	Tesco Sheffield (Default)	Applicant Manager
Dummy	dummy.user@test.com	Inactive	Organisation	Tesco Sheffield	Tesco Sheffield (Default)	Primary Applicant Manager
Fran	ebullTesting.fran.orgD@teammatrix.com	Inactive	Organisation	Surf And Turf Ltd	Surf And Turf Ltd (Default)	Applicant Manager

How does a user reset their password?

Self-service password recovery—no admin intervention needed

Your users can regain access independently with our streamlined reset process:

1. **Enter your username** on the login screen
2. **Click "Reset Password"** if the password is forgotten
3. **Check your email** for the secure reset link
4. **Create a new password** following the link
5. **Login immediately** with new credentials



The screenshot shows a password recovery page. At the top is a logo of two stylized human figures. Below it is the heading 'Request password recovery'. A sub-instruction says 'Please follow the steps to recover your password'. A note 'Add username to change password' is followed by a 'Username' input field. At the bottom is a large blue 'Send' button.

How do I create, amend, or deactivate organisations?

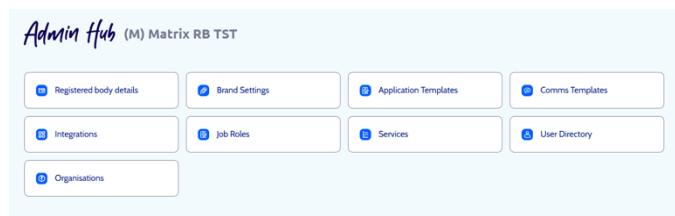
Complete organisational control from your Admin Hub

Manage all your partner organisations through the '**Organisations**' tile - your central hub for organisational oversight.

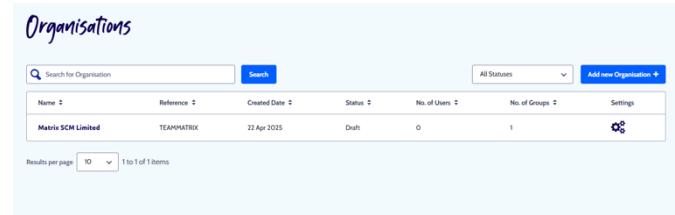
Everything you need:

- **Add new organisations** with custom configurations
- **Browse all current organisations** in an easy-to-scan list
- **Modify organisation details** by clicking the 'Settings' icon
- **View comprehensive organisation profiles** at a glance

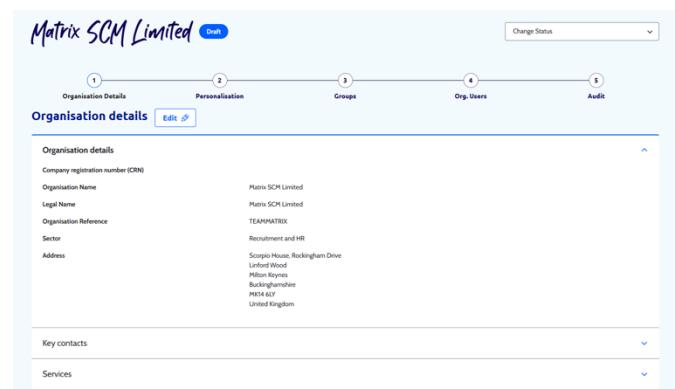
Quick Access: Admin Hub → Organisations → Select action or Settings icon



The screenshot shows the Admin Hub interface with the 'Organisations' tile selected. The tile has a light blue background and a white border. It displays the text 'Organisations' in a large, bold, dark blue font. Below the title, there is a search bar with the placeholder 'Search for Organisation' and a 'Search' button. To the right of the search bar are buttons for 'All Statuses' and 'Add new Organisation'. The main content area shows a table with one row, representing 'Matrix SCH Limited'. The columns are: Name, Reference, Created Date, Status, No. of Users, No. of Groups, and Settings. The 'Settings' icon is a blue gear icon. At the bottom of the tile, there is a 'Results per page' dropdown set to '10' and a note '1 to 1 of 1 items'.



The screenshot shows the 'Organisations' list view. The title 'Organisations' is at the top in a dark blue font. Below it is a search bar with a magnifying glass icon and a 'Search' button. To the right are buttons for 'All Statuses' and 'Add new Organisation'. The main area is a table with a single row for 'Matrix SCH Limited'. The columns are: Name, Reference, Created Date, Status, No. of Users, No. of Groups, and Settings. The 'Settings' icon is a blue gear icon. At the bottom, there is a 'Results per page' dropdown set to '10' and a note '1 to 1 of 1 items'.



The screenshot shows the 'Matrix SCH Limited' organisation profile. The title 'Matrix SCH Limited' is at the top in a dark blue font. Below it is a navigation bar with five tabs: '1 Organisation Details', '2 Personalisation', '3 Groups', '4 Org. Users', and '5 Audit'. The 'Organisation details' tab is selected and has a blue border. Below the tabs is a section titled 'Organisation details' with an 'Edit' button. The details include: Company registration number (CRN) 'Matrix SCH Limited', Organisation Name 'Matrix SCH Limited', Legal Name 'Matrix SCH Limited', Organisation Reference 'TEAMMATRIX', Sector 'Recruitment and HR', Address 'Scout House, Rockingham Drive, Linford Woods, Milton Keynes, Buckinghamshire, MK14 6EF, United Kingdom'. Below this is a 'Key contacts' section and a 'Services' section.

How do I create and amend email templates?

Professional communications, perfectly tailored

Default Templates for Everyone

Set your standard communications through the '**Comms Templates**' tile in Admin Hub. These templates become the default for all your organisations - ensuring consistent, professional messaging across your entire network.

Customise:

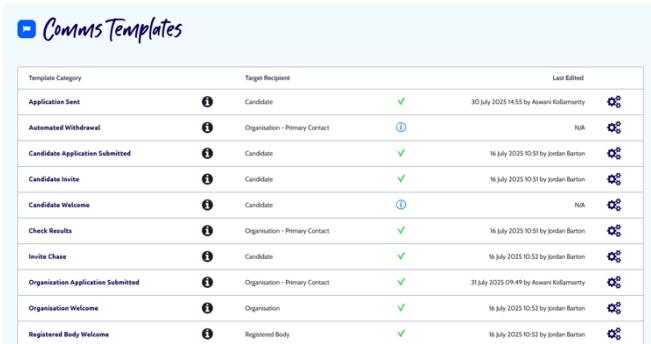
- Email wording and tone
- Visual branding elements
- Standard messaging across all templates

Organisation-Specific Templates

Need custom messaging for specific organisations?
No problem!

Steps:

1. Navigate to **Organisations** tile in Admin Hub



The screenshot shows the 'Comms Templates' list view. The title 'Comms Templates' is at the top in a dark blue font. Below it is a table with ten rows, each representing a template category. The columns are: 'Template Category', 'Target Recipient', and 'Last Edited'. The rows are: 'Application Sent' (Candidate, 30 July 2025 14:55 by Awanir Kollamettoy), 'Automated Withdrawal' (Organization - Primary Contact, N/A), 'Candidate Application Submitted' (Candidate, 16 July 2025 10:51 by Jordan Barton), 'Candidate Invite' (Candidate, 16 July 2025 10:51 by Jordan Barton), 'Candidate Welcome' (Candidate, N/A), 'Check Results' (Organization - Primary Contact, 16 July 2025 10:51 by Jordan Barton), 'Invite Chase' (Candidate, 16 July 2025 10:52 by Jordan Barton), 'Organization Application Submitted' (Organization - Primary Contact, 31 July 2025 09:49 by Awanir Kollamettoy), 'Organization Welcome' (Organization, 16 July 2025 10:52 by Jordan Barton), and 'Registered Body Welcome' (Registered Body, 16 July 2025 10:52 by Jordan Barton). Each row has a blue gear icon for 'Last Edited'.

2. Find and select the target organisation
3. Click the 'Personalisation' tab
4. Customise templates specifically for that organisation

How do I create, amend, or delete pre-set job roles?

Streamline role management across all organisations

Create a library of standard job roles through the 'Job Roles' tile in your Admin Hub, then deploy them strategically across your organisation network.

Master Job Role Management:

- Add new standard roles that organisations can adopt
- Edit existing roles to keep pace with industry changes
- View all available roles in your central library
- Enable role access per organisation through their Personalisation tab

How It Works:

- Step 1: Build your role library in the Job Roles tile
- Step 2: Configure which organisations can access specific roles via their Personalisation tab
- Step 3: Organisations use only the roles you've approved for them

How do I brand my system and set up banners?

Make Matrix Screening unmistakably yours

Transform your platform's appearance through the 'Brand Settings' tile in your Admin Hub—where visual identity meets professional functionality.

Complete Branding Control:

- Custom colour schemes for headers, buttons, and links
- Logo integration (SVG or PNG, max 2MB)
- Banner management for important announcements
- Footer customisation for links and resources

Banner Setup Made Simple:

1. Access Admin Hub → **Brand Settings**
2. Click **Edit** to access branding options
3. Scroll to **Banner Settings**
4. Toggle from **No** to **Yes**
5. Configure your banner content and styling

Pro Tip: Your banner displays across your entire registered body and all associated organisations - perfect for system-wide announcements or branding consistency.

Quick Access: Admin Hub → Brand Settings → Edit → Configure as needed

The screenshot shows the 'Brand Settings' page for a registered body. The 'Look and feel' section is visible at the top, featuring a logo upload area for 'Registered Body logo (svg or png file)' and color selection boxes for 'Header bar colour', 'Title colour', 'Button colour', and 'Hyperlink and anchor colour', each with a corresponding hex code input field. A note in the top right corner explains the benefit of using an SVG or PNG file. The 'Banner' section is located below, with a toggle switch set to 'Yes'. It includes fields for 'Message for Registered Body Portal Banner' (with a note about existing news), 'Banner URL' (with a character limit of 50/150), 'Background Colour', and 'Text Colour', each with a hex code input field. The 'Banner' section also includes a note about using a logo with a white background.