

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.

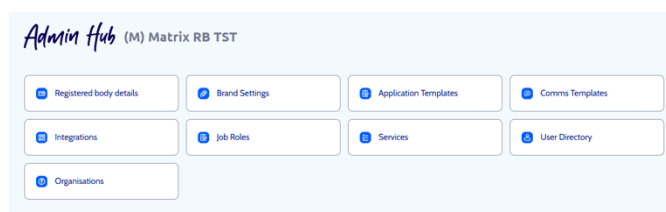
How do I create, amend, or deactivate user accounts?

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



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

A screenshot of the User Directory interface. It shows a table with columns for User name, Email, Status, Profile, Organisations, Groups, and Roles. The table lists several users, including 'Businessservices', 'Crm', 'Dummy', and 'Fran', all with a status of 'Inactive'. There are also filters and an 'Add new user' button at the top right.

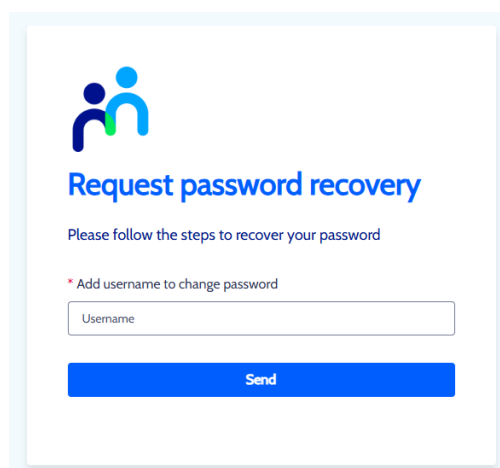
User name	Email	Status	Profile	Organisations	Groups	Roles
Businessservices	BusinessServicesLtd@teammatrix.com	Inactive	Organisation	Business Services Ltd	Business Services - Medical See more	Primary Applicant Manager
Crm	edull@testing.org@teammatrix.com	Inactive	Organisation	Pets Limited	Crm Ltd (Default) See more	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	edull@testing.fran.org@teammatrix.com	Inactive	Organisation	Surf And Turf Ltd	Surf And Turf Ltd (Default)	Applicant Manager See more

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



How do I create, amend, or deactivate organisations?

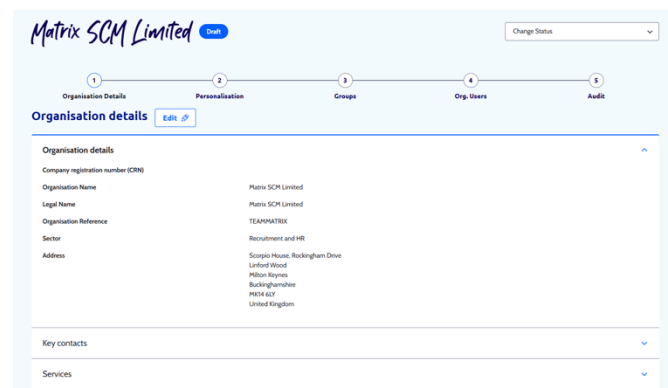
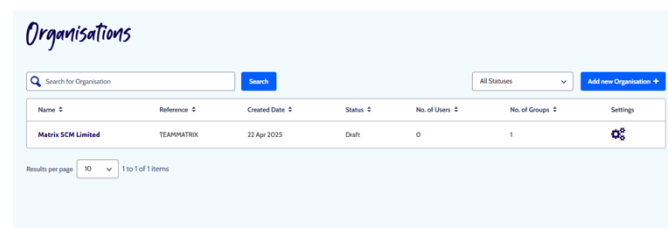
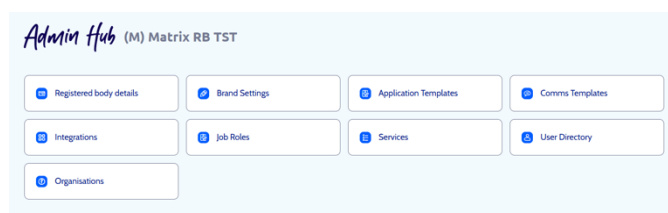
Complete organisational control from your Admin Hub

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



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

Template Category	Target Recipient	Last Edited
Application Sent	Candidate	30 July 2025 14:55 by Awan Kollamerty
Automated Withdrawal	Organisation - Primary Contact	N/A
Candidate Application Submitted	Candidate	16 July 2025 10:51 by Jordan Burton
Candidate Invite	Candidate	16 July 2025 10:51 by Jordan Burton
Candidate Welcome	Candidate	N/A
Check Results	Organisation - Primary Contact	16 July 2025 10:51 by Jordan Burton
Invite Chase	Candidate	16 July 2025 10:52 by Jordan Burton
Organisation Application Submitted	Organisation - Primary Contact	30 July 2025 09:49 by Awan Kollamerty
Organisation Welcome	Organisation	16 July 2025 10:52 by Jordan Burton
Registered Body Welcome	Registered Body	16 July 2025 10:52 by Jordan Burton

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 displays the 'Brand Settings (M) Matrix RB TST' interface. The 'Look and feel' section is active, showing a 'matrix' logo and a 'Why we're using png files instead?' note. Below this, there are color pickers for 'Header bar colour', 'Title colour', 'Button colour', and 'Hyperlink and anchor colour', all set to '#000000'. The 'Banner' section is below, with a toggle set to 'Yes'. It includes a 'Message for Registered Body Portal Banner' field with the text 'We have exciting news! - click here to find out more', a 'Banner URL' field, and color pickers for 'Background Colour' and 'Text Colour', all set to '#000000'.