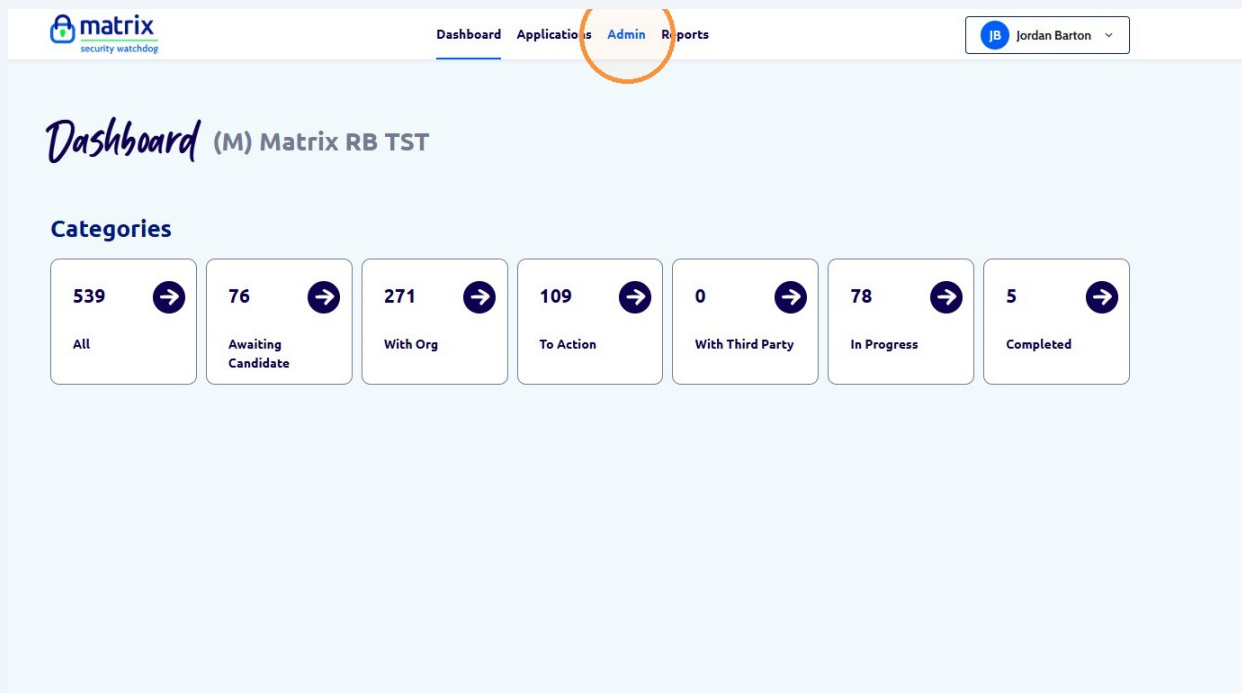


How To Configure Preset Job Roles for Organisations

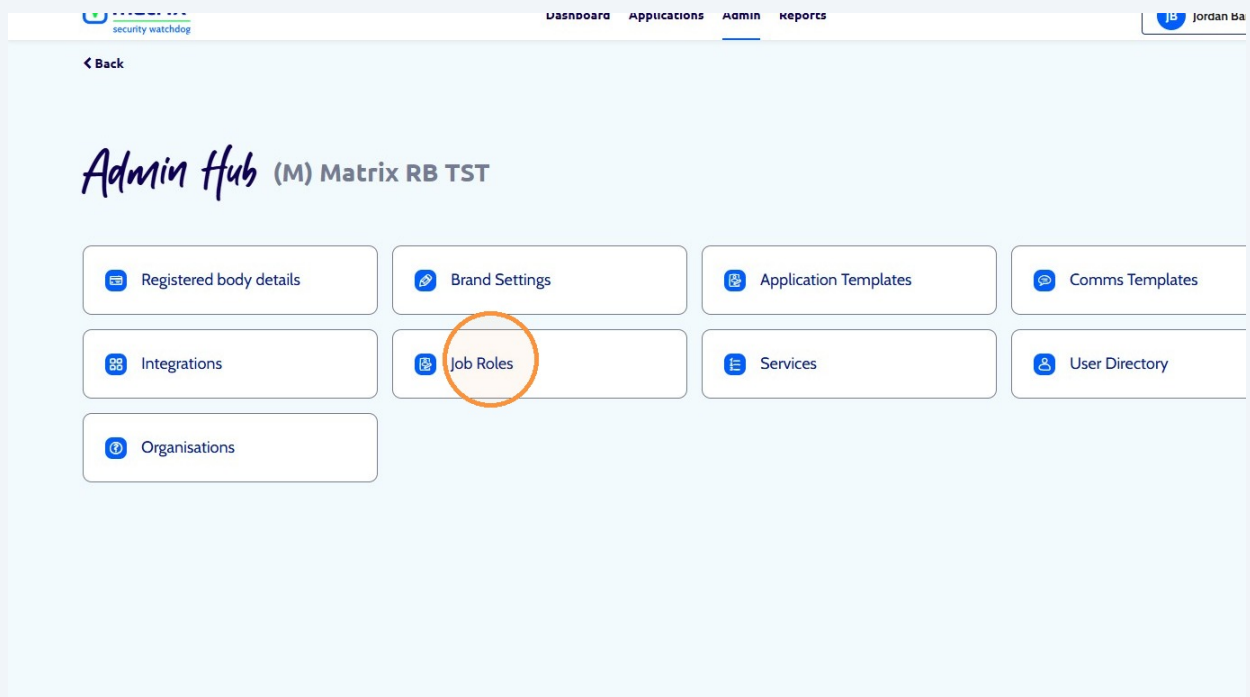


This guide provides a step-by-step process for configuring preset job roles within an organisation, ensuring that users can efficiently manage and assign roles. By following the outlined steps, users can streamline their administrative tasks, enhance organisational structure, and improve role clarity. This resource is essential for administrators looking to optimize their job role management in a user-friendly manner.

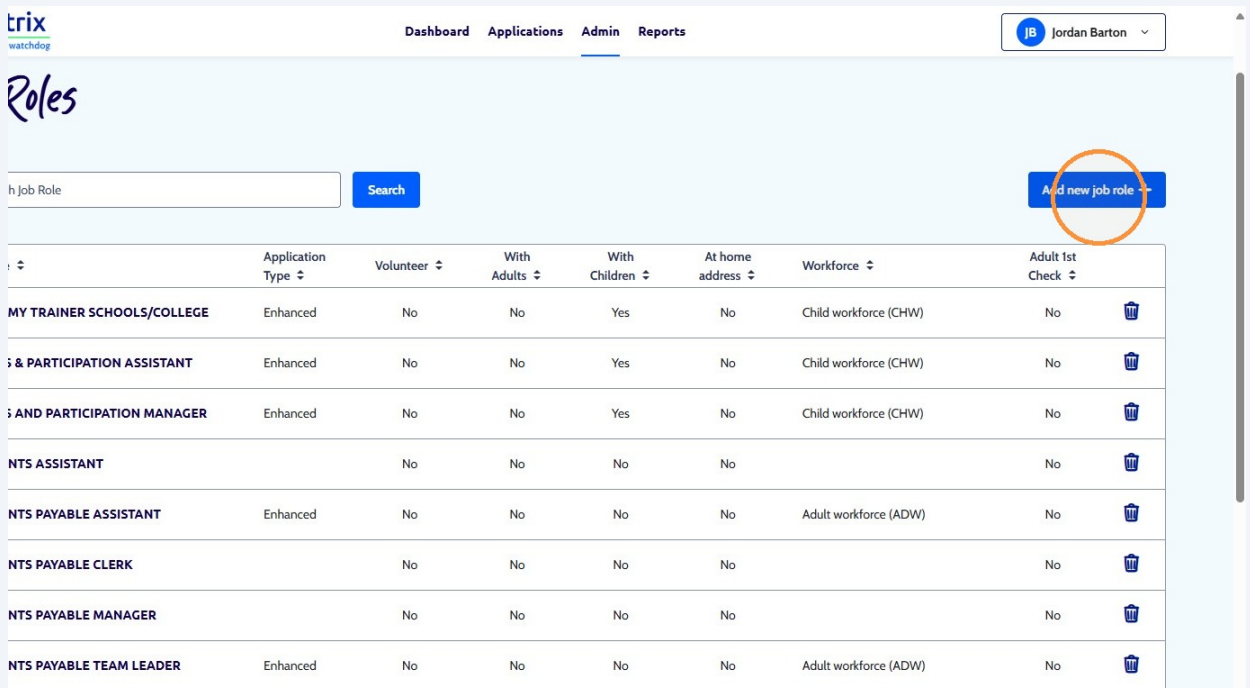
1 Click "Admin"



2 Click "Job Roles"



3 Click "Add new job role"



4 Click the "Job Role Name" field.

Dashboard Applications

Roles

Job Role	Application Type	Volunteer	With Adults
ACADEMY TRAINER SCHOOLS/COLLEGE	Enhanced	No	No
ACCESS & PARTICIPATION ASSISTANT	Enhanced	No	No
ACCESS AND PARTICIPATION MANAGER	Enhanced	No	No
ACCOUNTS ASSISTANT		No	No
ACCOUNTS PAYABLE ASSISTANT	Enhanced	No	No
ACCOUNTS PAYABLE CLERK		No	No
ACCOUNTS PAYABLE MANAGER		No	No
ACCOUNTS PAYABLE TEAM LEADER	Enhanced	No	No

New Job Role

Job Role Details

Job Role Name *

Application type

Workforce

Is volunteer? *

Working with adults in regulated activity *

Working with children in regulated activity *

Working at home address *

DBS adult first check required *

5 Click the "Search Job Role" field.

Dashboard Applications Admin Reports

Job Roles

Job Role	Application Type	Volunteer	With Adults	With Children	At home address	Workforce	Adult 1st Check
ACADEMY TRAINER SCHOOLS/COLLEGE	Enhanced	No	No	Yes	No	Child workforce (CHW)	No
ACCESS & PARTICIPATION ASSISTANT	Enhanced	No	No	Yes	No	Child workforce (CHW)	No
ACCESS AND PARTICIPATION MANAGER	Enhanced	No	No	Yes	No	Child workforce (CHW)	No
ACCOUNTS ASSISTANT		No	No	No	No		No
ACCOUNTS PAYABLE ASSISTANT	Enhanced	No	No	No	No	Adult workforce (ADW)	No
ACCOUNTS PAYABLE CLERK		No	No	No	No		No
ACCOUNTS PAYABLE MANAGER		No	No	No	No		No
ACCOUNTS PAYABLE TEAM LEADER	Enhanced	No	No	No	No	Adult workforce (ADW)	No

6 Click "ACADEMY TRAINER SCHOOLS/COLLEGE"

Admin Hub > Job Roles

Job Roles

Search Job Role

Job Role	Application Type	Volunteer	With Adults	With Children	At home address	Workforce	Adult 1st Check
ACADEMY TRAINER SCHOOLS/COLLEGE	Enhanced	No	No	Yes	No	Child workforce (CHW)	No
ACCESS & PARTICIPATION ASSISTANT	Enhanced	No	No	Yes	No	Child workforce (CHW)	No
ACCESS AND PARTICIPATION MANAGER	Enhanced	No	No	Yes	No	Child workforce (CHW)	No
ACCOUNTS ASSISTANT		No	No	No	No		No
ACCOUNTS PAYABLE ASSISTANT	Enhanced	No	No	No	No	Adult workforce (ADW)	No
ACCOUNTS PAYABLE CLERK		No	No	No	No		No
ACCOUNTS PAYABLE MANAGER		No	No	No	No		No

7 Click here.

trix watchdog Dashboard Applications

> Job Roles

Job Roles

Search Job Role

ACADEMY TRAINER SCHOOLS/COLLEGE

Job Role Details

Job Role Name * Application type

Workforce Is volunteer? *

Working with adults in regulated activity * Working with children in regulated activity *

Working at home address * DBS adult first check required *

8 Click here.

Job Roles

Roles

h Job Role

Job Role	Application Type	Volunteer	With Adults	With Children	At home address	Workforce	Adult 1st Check	
MY TRAINER SCHOOLS/COLLEGE	Enhanced	No	No	Yes	No	Child workforce (CHW)	No	
ACCESS & PARTICIPATION ASSISTANT	Enhanced	No	No	Yes	No	Child workforce (CHW)	No	
ACCESS AND PARTICIPATION MANAGER	Enhanced	No	No	Yes	No	Child workforce (CHW)	No	
ACCOUNTS ASSISTANT		No	No	No	No		No	
ACCOUNTS PAYABLE ASSISTANT	Enhanced	No	No	No	No	Adult workforce (ADW)	No	
ACCOUNTS PAYABLE CLERK		No	No	No	No		No	
ACCOUNTS PAYABLE MANAGER		No	No	No	No		No	

9 Click "No, go back"

Job Roles

Search Job Role

Job Role

ACADEMY TRAINER SCHOOLS/COLLEGE

ACCESS & PARTICIPATION ASSISTANT

ACCESS AND PARTICIPATION MANAGER

ACCOUNTS ASSISTANT

ACCOUNTS PAYABLE ASSISTANT

ACCOUNTS PAYABLE CLERK

ACCOUNTS PAYABLE MANAGER

ACCOUNTS PAYABLE TEAM LEADER

ACCOUNTS RECEIVABLE CLERK

Are you sure you wish to delete ACADEMY TRAINER SCHOOLS/COLLEGE?

No, go back Yes, confirm

10 Click "Admin"

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Dashboard Applications **Admin** Reports

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n Hub > Job Roles

Job Roles

Search Job Role

Job Role	Application Type	Volunteer	With Adults	With Children	At home address	Workforce	Adult 1st Check
CADEMY TRAINER SCHOOLS/COLLEGE	Enhanced	No	No	Yes	No	Child workforce (CHW)	No
ACCESS & PARTICIPATION ASSISTANT	Enhanced	No	No	Yes	No	Child workforce (CHW)	No
ACCESS AND PARTICIPATION MANAGER	Enhanced	No	No	Yes	No	Child workforce (CHW)	No
ACCOUNTS ASSISTANT		No	No	No	No		No
ACCOUNTS PAYABLE ASSISTANT	Enhanced	No	No	No	No	Adult workforce (ADW)	No
ACCOUNTS PAYABLE CLERK		No	No	No	No		No

11 Click "Organisations"

Admin Hub (M) Matrix RB TST

Registered body details

Brand Settings

Application Templates

Comms Templates

Integrations

Job Roles

Services

User Directory

Organisations

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12 Click here.

Admin Hub

Organisations

Search for Organisation All Statuses

	Reference	Created Date	Status	No. of Users	No. of Groups	Settings
Andy Ltd	AndyLtd	28 Jul 2025	Active	6	21	
AndysOrg	AndysOrg	25 Jul 2025	Draft	0	2	
AndysOrg 25/07/2025	AndysOrg25/07/2025	25 Jul 2025	Draft	0	1	
Antonio's Org	Antonio'sOrg	13 Aug 2025	Draft	0	1	
Apex Window Cleaning Tayside Ltd	ApexWindowCleaningTaysideLtd	2 Apr 2025	Draft	0	1	
Bartnik Limited	BartnikLimited	8 Apr 2025	Draft	0	1	
Bedhampton Pianoshop Limited1	BedhamptonPianoshopLimited1	4 Jul 2025	Draft	0	1	

13 Click here.

Andy Ltd Active Change Status

1 Organisation Details 2 Personalisation 3 Groups 4 Org. Users 5 History

Search for Group

	Reference	Created Date	Settings
Andy Ltd (Default)	AndyLtd	28 Jul 2025	
AndyTest1	AndyTest1	29 Jul 2025	
AndyTest2	AndyTest2	29 Jul 2025	
AndyPort	AndyPort	28 Jul 2025	
Ashtestvalidation	Ashtestvalidation	29 Jul 2025	

14 Click "2"

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Dashboard Applications Admin Reports

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Admin Hub > Organisations > Organisation Details

< Back to Admin Hub

Andy Ltd **Active** Change Status

1 Organisation Details 2 **Personalisation** 3 Groups 4 Org. Users 5 History

Organisation details Edit

Organisation details	
Company registration number (CRN)	11659402
Organisation Name	Andy Ltd
Legal Name	Andy Ltd
Organisation Reference	AndyLtd
Sector	Academy Education
Address	505 Pinner Road 1 Harrow

15 Click "Edit"

Admin Hub > Organisations > Organisation Details

< Back to Admin Hub

Andy Ltd **Active** Change Status

1 Organisation Details 2 **Personalisation** 3 Groups 4 Org. Users 5 History

Personalisation Edit

Default fields

Default values for application fields (DBS Only)

Fixed list of positions applied for No

Position applied for Not provided

Default values for Section Y fields (Standard/Enhanced Only)

Certificate type Not provided

Workforce Not provided

Working with adults in regulated activity Not provided

16 Click the "Fixed list of positions applied for" field.

The screenshot shows a user interface for 'Personalisation' within a system. At the top, there's a navigation bar with 'Dashboard', 'Applications', 'Admin', and 'Reports'. Below this is a progress bar with five steps: 1. Organisation Details, 2. Personalisation (current), 3. Groups, 4. Org. Users, and 5. History. The 'Personalisation' section has an 'Edit' button. Under 'Default fields', there are two sections: 'Default values for application fields (DBS Only)' and 'Default values for Section Y fields (Standard/Enhanced Only)'. In the first section, the 'Fixed list of positions applied for' field is a toggle switch currently set to 'No', which is circled in orange. Below it is a text input field for 'Position applied for'. The second section contains four dropdown menus for 'Certificate type', 'Workforce', 'Working with adults in regulated activity', and 'Working with children in regulated activity', each with a 'Select' button.

17 Click "Yes, confirm"

This screenshot shows the same 'Personalisation' step as the previous one, but with a confirmation dialog box overlaid. The dialog box has a question mark icon and the text: 'Are you sure you wish to change the details of 'Fixed list of positions applied to'. Confirming this change will remove any previously saved information for 'Position Applied for'?'. At the bottom of the dialog, there are two buttons: 'No, go back' and 'Yes, confirm'. The 'Yes, confirm' button is circled in orange. The background shows the same form fields as before, but they are partially obscured by the dialog box.

18 Click "Select Job Roles"

1 Organisation Details 2 Personalisation 3 Groups 4 Org. Users 5 History

Personalisation

Edit

Default fields

Default values for application fields (DBS Only)

Fixed list of positions applied for *

Position applied for

Yes

Select Job Roles

Default values for Section Y fields (Standard/Enhanced Only)

Certificate type

Select

Workforce

Select

Working with adults in regulated activity

Select

Working with children in regulated activity

Select

Working at home address

Select

19 Click here.

trix watchdog

Dashboard Applications

9 11 19

1 Organisation Details 2 Personalisation 3 Groups

Personalisation

Edit

Default fields

Default values for application fields (DBS Only)

Fixed list of positions applied for *

Position applied for

Yes

Select Job Roles

Default values for Section Y fields (Standard/Enhanced Only)

Certificate type

Select

Workforce

Select

Working with adults in regulated activity

Select

Working with children in regulated activity

Select

Working at home address

Select

Select Job Roles

Job Roles

Add Job Role

20 Click "Select Job Role"

The screenshot shows the 'trix watchdog' application interface. On the left, a sidebar contains 'Organisation Details', 'Personalisation', and 'Group'. The main area displays 'Personalisation' settings, including a toggle for 'All values for application fields (DBS Only)' and a 'Select Job Roles' button. An orange circle highlights the 'Select Job Roles' button in the sidebar. On the right, a modal titled 'Select Job Roles' is open. It features a 'Job Roles' section with an 'Add Job Role' button and a dropdown menu labeled 'Select Job Role'. An orange circle highlights the dropdown menu. A 'Select Job Role' button is also visible in the modal.

21 Click "Select Job Role"

The screenshot shows the 'trix watchdog' application interface. On the left, a sidebar contains 'Organisation Details', 'Personalisation', and 'Group'. The main area displays 'Personalisation' settings, including a toggle for 'All values for application fields (DBS Only)' and a 'Select Job Roles' button. An orange circle highlights the 'Select Job Roles' button in the sidebar. On the right, a modal titled 'Select Job Roles' is open. It features a 'Job Roles' section with an 'Add Job Role' button and a dropdown menu labeled '3 options selected'. An orange circle highlights the dropdown menu. A 'Select Job Role' button is also visible in the modal. The dropdown menu is open, showing a list of job roles with checkboxes: 'Search...', 'ACCOUNTS ASSISTANT', 'ACCOUNTS PAYABLE ASSISTANT', 'ACCOUNTS PAYABLE CLERK', 'ACCOUNTS PAYABLE MANAGER', and 'ACCOUNTS PAYABLE TEAM LEADER'. The 'ACCOUNTS PAYABLE ASSISTANT', 'ACCOUNTS PAYABLE CLERK', and 'ACCOUNTS PAYABLE MANAGER' options are checked.

22 Click "Save"

Organisation Details Personalisation Groups

Personalisation Edit

Default values for application fields (DBS Only)

List of positions applied for ☒ Yes

Position applied for Select Job Roles

Default values for Section Y fields (Standard/Enhanced Only)

Certificate type

Workforce

Working with adults in regulated activity

Working with children in regulated activity

Working at home address

Working as a peer

Add Job Role

- ☒ ACCOUNTS PAYABLE ASSISTANT ☒ ACCOUNTS PAYABLE CLERK ☒
- ☒ ACCOUNTS PAYABLE MANAGER ☒

Cancel **Save** ✓

23 Click "Job roles saved successfully."

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Job roles saved successfully.

Change Status

1 Organisation Details 2 Personalisation 3 Groups 4 Org. Users 5 History

Personalisation Edit

Default values for application fields (DBS Only)

List of positions applied for ☒ Yes

Position applied for Select Job Roles

Default values for Section Y fields (Standard/Enhanced Only)

Certificate type

Workforce

Working with adults in regulated activity

Working with children in regulated activity

24 Click "Save"

Candidate Application Submitted		Candidate		N/A	
Candidate Invite		Candidate		N/A	
Candidate Welcome		Candidate		N/A	
Check Results		Organisation - Primary Contact		N/A	
Invite Chase		Candidate		N/A	
Organisation Application Submitted		Organisation - Primary Contact		N/A	
Organisation Welcome		Organisation		N/A	

Additional instructions

Number of Invite Chases

Invite Chase Frequency

Cancel **Save**

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25 Click "2"

Personalisation details saved successfully
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Admin Hub > Organisations > Organisation Details

[Back to Admin Hub](#)

Andy Ltd Active

1 Organisation Details **2 Personalisation** 3 Groups 4 Org. Users 5 History

Groups

Name	Reference	Created Date	Settings
Andy Ltd (Default)	AndyLtd	28 Jul 2025	
Andy Test 1	AndyTest1	29 Jul 2025	
Andy Test 2	AndyTest2	29 Jul 2025	

26 Click "See more"

1 Organisation Details 2 Personalisation 3 Groups 4 Org. Users 5 History

Personalisation [Edit](#)

Default fields

Default values for application fields (DBS Only)

Fixed list of positions applied for

Position applied for

Yes

ACCOUNTS PAYABLE ASSISTANT

[See more](#)

Default values for Section Y fields (Standard/Enhanced Only)

Certificate type [Not provided](#)

Workforce [Not provided](#)

Working with adults in regulated activity [Not provided](#)

Working with children in regulated activity [Not provided](#)

Working at home address [Not provided](#)

Is volunteer [Not provided](#)

DBS Adult first check required [Not provided](#)

Cost code mandatory [Not provided](#)

No

27 Click here.

trix watchdog

Dashboard Applications Admin Reports

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Change status

1 Organisation Details 2 Personalisation 3 Groups 4 Org. Users 5 History

Personalisation [Edit](#)

Default fields

Default values for application fields (DBS Only)

Fixed list of positions applied for

Position applied for

Yes

ACCOUNTS PAYABLE ASSISTANT

[See more](#)

Default values for Section Y fields (Standard/Enhanced Only)

Certificate type [Not provided](#)

Workforce [Not provided](#)

Working with adults in regulated activity [Not provided](#)

Working with children in regulated activity [Not provided](#)

Working at home address [Not provided](#)

Is volunteer [Not provided](#)

DBS Adult first check required [Not provided](#)

Cost code mandatory [Not provided](#)

No

Job roles

ACCOUNTS PAYABLE ASSISTANT

ACCOUNTS PAYABLE CLERK

ACCOUNTS PAYABLE MANAGER

[Close](#)