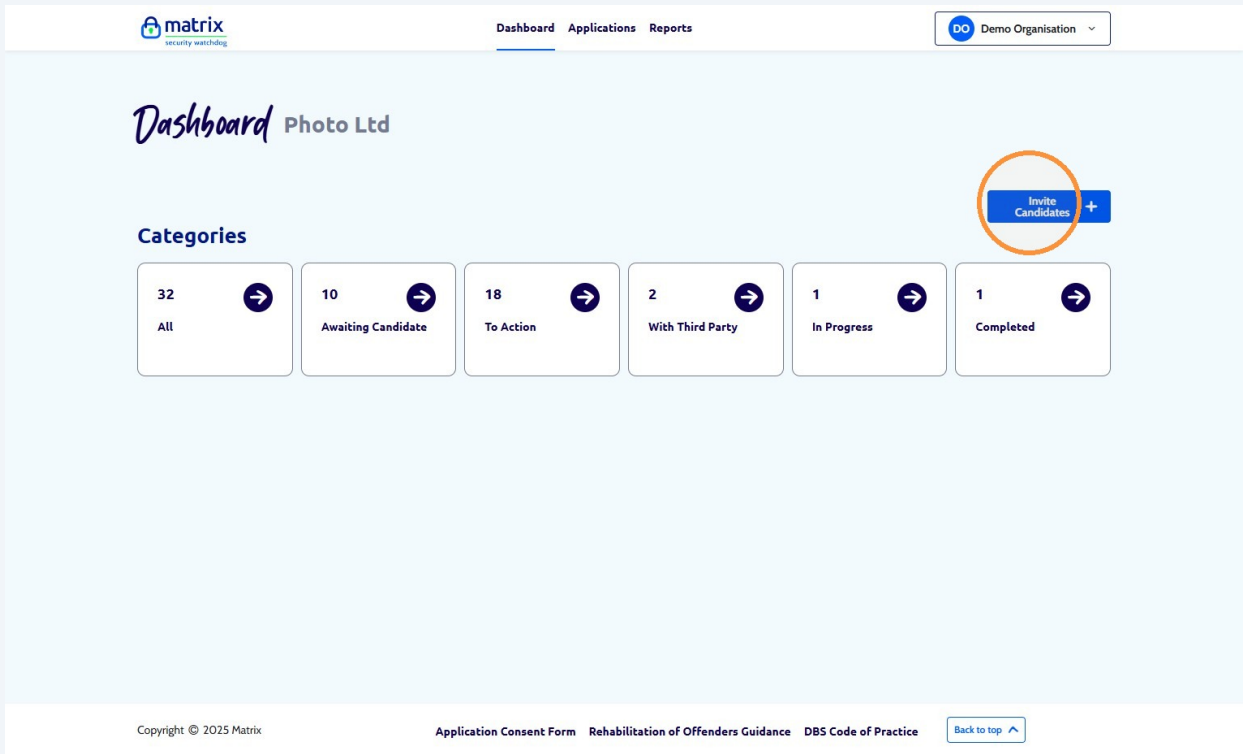


How To Invite Candidates to Submit Their Application



This guide provides a straightforward process for inviting candidates to submit their applications, ensuring a smooth and efficient recruitment experience. By following the outlined steps, users can easily navigate the platform, utilise bulk upload features, and manage individual candidate invitations. It is an essential resource for HR professionals looking to streamline their hiring process and enhance candidate engagement.

1 Click **Invite Candidates** from the Dashboard



2

The Organisation will be pre-populated based on the Organisation you are a user of

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Dashboard Applications Reports

DO Demo Organisation

Invite Candidates

Invitation Details

Organisation *
Photo Ltd

Organisation Group *
PhotoLtd

Checks Required

DBS Standard Check
A check of spent and unspent convictions and cautions that are held on the Police National Computer, which are not subject to filtering.

Select

DBS Enhanced Check
A check of spent and unspent convictions and cautions that are held on the Police National Computer, plus information held by local police relevant to the role.

Select

Digital Identity Check
A secure, remote method of verifying an individual's identity using Identity Document Validation Technology (IDVT) instead of presenting physical documents in person.

Select

Digital Right to Work Check
A secure, remote method of establishing an individual's eligibility to work in the UK using Identity Document Validation Technology (IDVT) from a certified provider (IDSP).

Select

3

If your Organisation has multiple groups that you have been assigned, select the Organisation Group you wish the candidate(s) to be created under from the **Organisation Group** field

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Dashboard Applications Reports

DO Demo Organisation

Invite Candidates

Invitation Details

Organisation *
Photo Ltd

Organisation Group *
PhotoLtd

Q Search...

PhotoLtd

PhotoLtdPrintingServices

Checks Required

DBS Standard Check
A check of spent and unspent convictions and cautions that are held on the Police National Computer, which are not subject to filtering.

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Select

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A secure, remote method of establishing an individual's eligibility to work in the UK using Identity Document Validation Technology (IDVT) from a certified provider (IDSP).

Select

4

Select the type of check(s) you require the candidate(s) to submit from the 'Checks Required' section

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Dashboard Applications Reports

DO Demo Organisation

Invite Candidates

Invitation Details

Organisation * Photo Ltd

Organisation Group * PhotoLtd

Checks Required

DBS Standard Check

A check of spent and unspent convictions and cautions that are held on the Police National Computer, which are not subject to filtering.

Select

DBS Enhanced Check

A check of spent and unspent convictions and cautions that are held on the Police National Computer, plus information held by local police relevant to the role.

Remove

Digital Identity Check

A secure, remote method of verifying an individual's identity using Identity Document Validation Technology (IDVT) instead of presenting physical documents in person.

Remove

Digital Right to Work Check

A secure, remote method of establishing an individual's eligibility to work in the UK using Identity Document Validation Technology (IDVT) from a certified provider (IDSP).

Select

5

If you have a large number of candidates that you need to invite, a Bulk Upload feature is available from the 'Candidate Details' section

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Dashboard Applications Reports

DO Demo Organisation

Remove Select

Candidate Details

How will you like to upload your candidates?

☐ Add Individually

☒ Bulk Upload

Candidates *

Drop file here or browse to upload

Upload

Download Excel Template

Template Details

☐ Override Email Template

Heading

Submit Your Application

Salutation

Dear

Section 1

Thank you for being part of our process! To move forward, we'll need you to complete a criminal record check application online.

6 A spreadsheet containing the candidates details can be uploaded

matrix security watchdog

Dashboard Applications Reports

DO Demo Organisation

Remove Select

Candidate Details

How will you like to upload your candidates?

☐ Add Individually

☒ Bulk Upload

Candidates *

Drop file here or browse to upload

Upload

Download Excel Template

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7 An Excel Template is available to download for populating with the candidates you wish to invite, ensuring the data is supplied in the correct format

matrix security watchdog

Dashboard Applications Reports

DO Demo Organisation

Remove Select

Candidate Details

How will you like to upload your candidates?

☐ Add Individually

☒ Bulk Upload

Candidates *

Drop file here or browse to upload

Upload

Download Excel Template

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☐ Override Email Template

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8

If you don't need to bulk upload a large volume of candidates, select 'Add Individually'

The screenshot shows the 'matrix security watchdog' interface. At the top, there are navigation tabs: 'Dashboard', 'Applications', and 'Reports'. On the right, a dropdown menu shows 'DO Demo Organisation'. Below the navigation, there are two buttons: 'Remove' and 'Select'. The main section is titled 'Candidate Details' with an upward arrow. It asks 'How will you like to upload your candidates?' and has two radio buttons: 'Add Individually' (which is selected and circled in orange) and 'Bulk Upload'. Below the radio buttons are four input fields: 'Forename *', 'Surname *', 'Email Address *', and 'CC Email Address'. There is a 'Remove' button with a trash icon to the right of the 'CC Email Address' field. Below the input fields, there is a link 'Add another +' and a note: 'You can add up to 10 candidates when using this option.' The bottom section is titled 'Template Details' with an upward arrow. It has a toggle switch for 'Override Email Template'. Below the toggle, there are three text areas: 'Heading' (containing 'Submit Your Application'), 'Salutation' (containing 'Dear'), and 'Section 1'.

9

Enter the candidate's forename into the **Forename** field

This screenshot is identical to the one above, but with an orange circle highlighting the 'Forename *' input field. The rest of the form, including the navigation, buttons, and other input fields, remains the same.

10 Enter the candidate's surname into the **Surname** field

The screenshot shows the 'Candidate Details' section of the Matrix Security Watchdog interface. At the top, there are navigation tabs: 'Dashboard', 'Applications', and 'Reports'. A dropdown menu on the right shows 'DO Demo Organisation'. Below the navigation, there are two buttons: 'Remove' and 'Select'. The 'Candidate Details' section has a heading 'Candidate Details' with a chevron icon. Below the heading, there is a question 'How will you like to upload your candidates?' with two radio buttons: 'Add Individually' (selected) and 'Bulk Upload'. Below the radio buttons, there is a form with four input fields: 'Forename *' (containing 'Demo'), 'Surname *' (containing 'Candidate' and highlighted with an orange circle), 'Email Address *' (empty), and 'CC Email Address' (empty). To the right of the 'CC Email Address' field is a 'Remove' button with a trash icon. Below the form, there is a link 'Add another +' and a note 'You can add up to 10 candidates when using this option.' Below the 'Candidate Details' section, there is a 'Template Details' section with a heading 'Template Details' and a chevron icon. Below the heading, there is a toggle switch 'Override Email Template' which is currently off. Below the toggle, there are three text input fields: 'Heading' (containing 'Submit Your Application'), 'Salutation' (containing 'Dear'), and 'Section 1' (empty).

11 Enter the candidate's email address into the **Email Address** field.

If you would like to also CC someone into the invitation, this can be entered in the **CC Email Address** field

The screenshot shows the 'Candidate Details' section of the Matrix Security Watchdog interface. At the top, there are navigation tabs: 'Dashboard', 'Applications', and 'Reports'. A dropdown menu on the right shows 'DO Demo Organisation'. Below the navigation, there are two buttons: 'Remove' and 'Select'. The 'Candidate Details' section has a heading 'Candidate Details' with a chevron icon. Below the heading, there is a question 'How will you like to upload your candidates?' with two radio buttons: 'Add Individually' (selected) and 'Bulk Upload'. Below the radio buttons, there is a form with four input fields: 'Forename *' (containing 'Demo'), 'Surname *' (containing 'Candidate'), 'Email Address *' (empty and highlighted with an orange circle), and 'CC Email Address' (empty). To the right of the 'CC Email Address' field is a 'Remove' button with a trash icon. Below the form, there is a link 'Add another +' and a note 'You can add up to 10 candidates when using this option.' Below the 'Candidate Details' section, there is a 'Template Details' section with a heading 'Template Details' and a chevron icon. Below the heading, there is a toggle switch 'Override Email Template' which is currently off. Below the toggle, there are three text input fields: 'Heading' (containing 'Submit Your Application'), 'Salutation' (containing 'Dear'), and 'Section 1' (empty).

12 You can invite up to 10 candidates using the 'Add Individually' option.

If you wish to add more than one candidate, click 'Add another' to enter the details of another candidate.

matrix
security watchdog

Dashboard Applications Reports

DO Demo Organisation

Remove Select

Candidate Details

How will you like to upload your candidates?

☒ Add Individually
☐ Bulk Upload

Forename *	Surname *	Email Address *	CC Email Address	Remove
Demo	Candidate			

Add another +
You can add up to 10 candidates when using this option.

Template Details

☐ Override Email Template

Heading
Submit Your Application

Salutation
Dear

Section 1

13

A preview will be available of the email that the candidate(s) will receive once invited in the 'Template Details' section

matrix security watchdog

Dashboard Applications Reports

DO Demo Organisation

Template Details

☐ Override Email Template

Heading

Submit Your Application

Salutation

Dear

Section 1

Thank you for being part of our process! To move forward, we'll need you to complete a criminal record check application online.

Please click the link below to begin your application:

Section 2

Before you start, please have the following information ready:

- Your National Insurance number
- Your address history for the past 5 years

What happens next?

Once your application is submitted, you'll receive a confirmation email with the next steps for the criminal record checking process.

Got questions?

If you need assistance or have any questions, feel free to contact us. We're happy to help!

14

If you wish to amend the content of the email for these candidates, click the **Override Email Template** button

matrix security watchdog

Dashboard Applications Reports

DO Demo Organisation

Template Details

☒ Override Email Template

Heading

Submit Your Application

Salutation

Dear

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Before you start, please have the following information ready:

- Your National Insurance number
- Your address history for the past 5 years

What happens next?

Once your application is submitted, you'll receive a confirmation email with the next steps for the criminal record checking process.

15 From here, you can amend the content of the email before inviting the candidates

The screenshot shows the 'Template Details' page in the Matrix Security Watchdog application. At the top, there's a navigation bar with 'Dashboard', 'Applications', and 'Reports'. Below this, there's a header area with 'Demo', 'Candidate', and 'thisisademo@demo.com' fields. A note says 'Add another + You can add up to 10 candidates when using this option.' The main section is titled 'Template Details' and contains a toggle switch labeled 'Override Email Template', which is circled in orange. Below the toggle, there are fields for 'Heading' (containing 'Submit Your Application') and 'Salutation' (containing 'Dear'). A rich text editor for 'Section 1' contains the following text: 'Thank you for being part of our process! To move forward, we'll need you to complete a criminal record check application online. Please click the link below to begin your application:'.

16 Once you are happy, click **Send Invitation**

The screenshot shows the 'Send Invitation' page in the Matrix Security Watchdog application. It displays a preview of the email content. The email body includes: 'Thank you for being part of our process! To move forward, we'll need you to complete a criminal record check application online. Please click the link below to begin your application:'. Section 2 follows, stating 'Before you start, please have the following information ready:' with a bulleted list: 'Your National Insurance number' and 'Your address history for the past 5 years'. It then asks 'What happens next?' and explains that a confirmation email will be sent. A 'Got questions?' section invites users to contact support. The 'Closing Wishes' section contains a text box with 'Kind regards,'. At the bottom, there are two buttons: 'Cancel' and 'Send Invitation', with the latter circled in orange. The footer includes copyright information, navigation links for 'Application Consent Form', 'Rehabilitation of Offenders Guidance', and 'DBS Code of Practice', and a 'Back to top' link.

17

All the candidates invited will now appear on the Dashboard in the **Awaiting Candidate** category.

The candidates will also have now been setup with a user account against the email address provided for them. They will receive automated emails inviting them to set their password for their user account, and login to submit their application