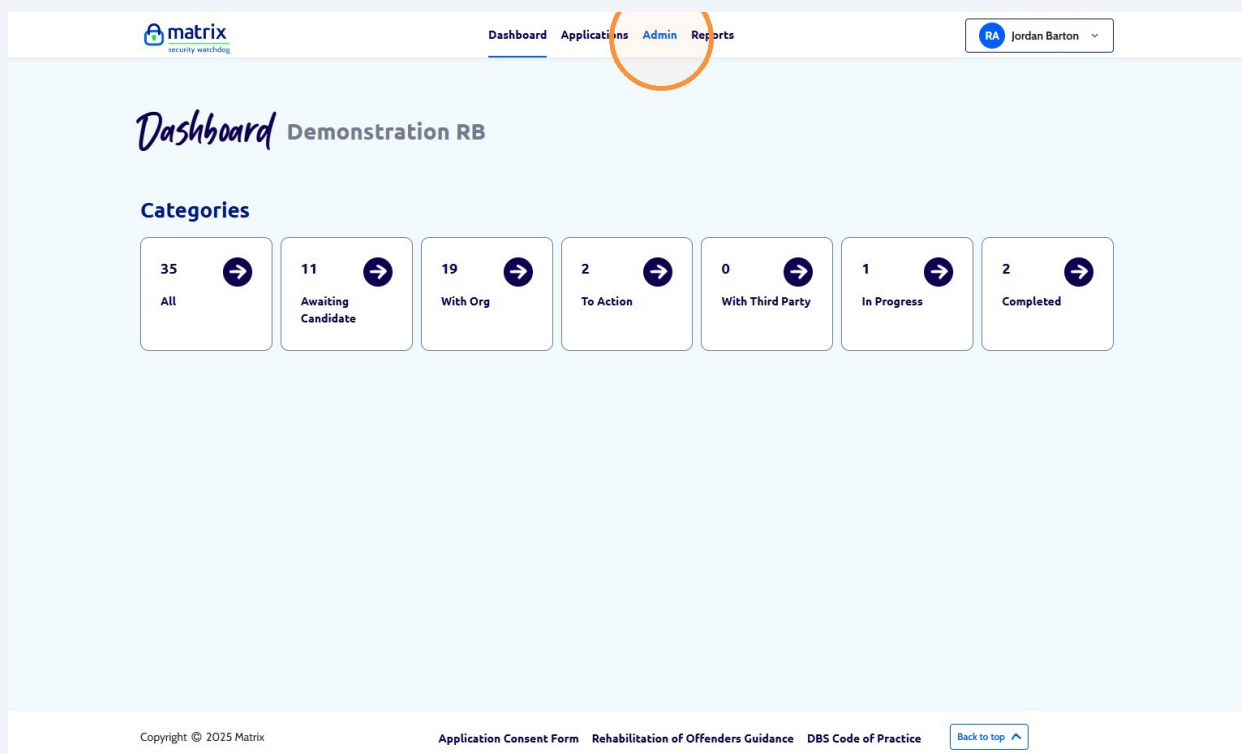


How to Add a New User



This guide provides a straightforward, step-by-step process for adding a new user to the Matrix Screening platform. It simplifies the user management task, ensuring that even those with minimal technical skills can successfully navigate the system. By following these clear instructions, users can efficiently expand their team and manage user roles, enhancing overall productivity. Viewing this guide will save time and reduce errors in user setup.

1 Click **Admin** in the toolbar



2 Navigate to **User Directory**

The screenshot shows the Matrix Admin Hub dashboard. The top navigation bar includes the Matrix logo, a user profile for Jordan Barton, and tabs for Dashboard, Applications, Admin, and Reports. The main content area is titled 'Admin Hub Demonstration RB' and contains a grid of menu items: Registered body details, Brand Settings, Application Templates, Comms Templates, Integrations, Job Roles, Services, and User Directory. The 'User Directory' item is circled in orange. At the bottom, there is a footer with copyright information and links to various documents.

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Dashboard Applications Admin Reports

RA Jordan Barton

Admin Hub Demonstration RB

Registered body details Brand Settings Application Templates Comms Templates

Integrations Job Roles Services User Directory

Organisations

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Application Consent Form Rehabilitation of Offenders Guidance DBS Code of Practice Back to top

3 Click **Add new user**

The screenshot shows the Matrix User Directory page. The top navigation bar is the same as the previous screenshot. The breadcrumb trail shows 'Admin Hub > User Directory'. Below the breadcrumb is a 'Back to Admin Hub' link. The main content area is titled 'User Directory' and features a search bar, a 'Search' button, a 'Filters' button, and an 'Add new user' button circled in orange. Below these elements is a table listing users with columns for User name, Email, Status, Profile, Organisations, Groups, and Roles.

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Dashboard Applications Admin Reports

RA Jordan Barton

Admin Hub > User Directory

Back to Admin Hub

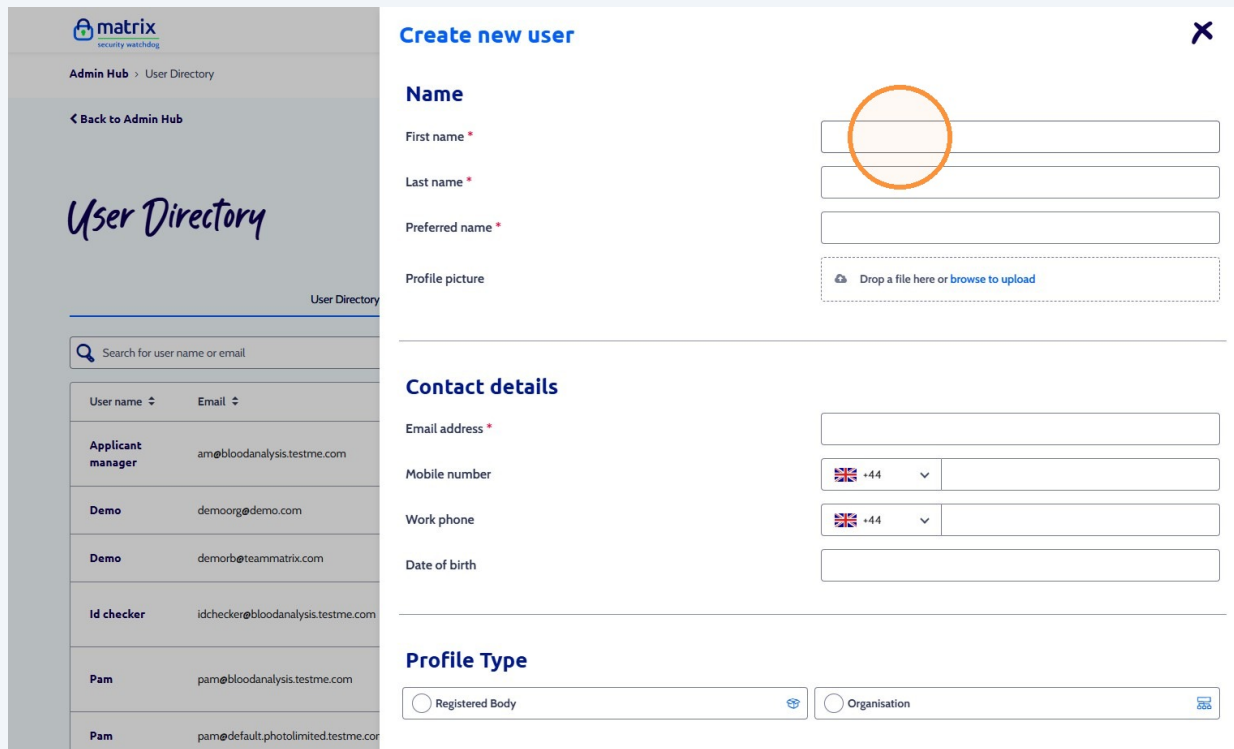
User Directory

Roles & Permissions

Search for user name or email Search Filters Add new user

User name	Email	Status	Profile	Organisations	Groups	Roles
Applicant manager	am@bloodanalysis.testme.com	Active	Organisation	Blood Analysis Limited	Blood Analysis Limited (Default)	Applicant Manager
Demo	demoorg@demo.com	Active	Organisation	Photo Ltd	Photo Ltd (Default) See more	Primary Applicant Manager
Demo	demorb@teammatrix.com	Active	Registered Body			Countersignatory See more
Id checker	idchecker@bloodanalysis.testme.com	Active	Organisation	Blood Analysis Limited	Blood Analysis Limited (Default)	ID Checker
Pam	pam@bloodanalysis.testme.com	Active	Organisation	Blood Analysis Limited	Blood Analysis Limited (Default)	Primary Applicant Manager
Pam	pam@default.photolimited.testme.com	Active	Organisation	Photo Ltd	Photo Ltd (Default)	Primary Applicant Manager

4

Enter the first name of the user in the **First name** field

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Admin Hub > User Directory

[Back to Admin Hub](#)

User Directory

User Directory

Search for user name or email

User name	Email
Applicant manager	am@bloodanalysis.testme.com
Demo	demoorg@demo.com
Demo	demorb@teammatrix.com
Id checker	idchecker@bloodanalysis.testme.com
Pam	pam@bloodanalysis.testme.com
Pam	pam@default.photolimited.testme.com

Create new user

Name

First name *

Last name *

Preferred name *

Profile picture browse to upload"/>

Contact details

Email address *

Mobile number

Work phone

Date of birth

Profile Type

☐ Registered Body ☐ Organisation

5 Enter the last name of the user in the **Last name** field

The screenshot shows the 'Create new user' form in the Matrix Security Watchdog Admin Hub. The form is divided into three main sections: Name, Contact details, and Profile Type. The 'Name' section has fields for First name, Last name, and Preferred name, along with a Profile picture upload area. The 'Contact details' section has fields for Email address, Mobile number, Work phone, and Date of birth. The 'Profile Type' section has radio buttons for Registered Body and Organisation. The 'Last name' field is highlighted with an orange circle.

Create new user

Name

First name *

Last name *

Preferred name *

Profile picture

Drop a file here or [browse to upload](#)

Contact details

Email address *

Mobile number

Work phone

Date of birth

Profile Type

☐ Registered Body ☐ Organisation

6 Enter the email address for the user in the **Email address** field

The screenshot shows the 'Create new user' form in the Matrix Security Watchdog Admin Hub. The form is divided into three main sections: Name, Contact details, and Profile Type. The 'Name' section has fields for First name, Last name, and Preferred name, along with a Profile picture upload area. The 'Contact details' section has fields for Email address, Mobile number, Work phone, and Date of birth. The 'Profile Type' section has radio buttons for Registered Body and Organisation. The 'Email address' field is highlighted with an orange circle.

Create new user

Name

First name *

Last name *

Preferred name *

Profile picture

Drop a file here or [browse to upload](#)

Contact details

Email address *

Mobile number

Work phone

Date of birth

Profile Type

☐ Registered Body ☐ Organisation

7

For Organisation users, select 'Organisation' as the Profile Type

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security watchdog

User Directory

Search for user name or email

User name	Email
Applicant manager	am@bloodanalysis.testme.com
Demo	demoorg@demo.com
Demo	demorb@teammatrix.com
Id checker	idchecker@bloodanalysis.testme.com
Pam	pam@bloodanalysis.testme.com
Pam	pam@default.photolimited.testme.com
Pam	pam@defaultandprintingservices.photolimited.testme.com
Pam	pam@printingservices.photolimited.testme.com

Results per page 10 1 to 8 of 8 items

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Create new user

Name

First name * Test

Last name * OrgUser

Preferred name * Test

Profile picture Drop a file here or [browse to upload](#)

Contact details

Email address * testorguser@testing.com

Mobile number +44

Work phone +44

Date of birth

Profile Type

☐ Registered Body ☒ Organisation

8

Find the Organisation you require this user to be assigned to from the drop-down list

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User Directory

Q Search for user name or email

User name

Email

Applicant manager	am@bloodanalysis.testme.com
Demo	demoorg@demo.com
Demo	demorb@teammatrix.com
Id checker	idchecker@bloodanalysis.testme.com
Pam	pam@bloodanalysis.testme.com
Pam	pam@default.photolimited.testme.com
Pam	pam@defaultandprintingservices.photolimited.testme.com
Pam	pam@printingservices.photolimited.testme.com

Results per page 10 1 to 8 of 8 items

Copyright © 2025 Matrix

Create new user

X

Name

First name *

Test

Last name *

OrgUser

Preferred name *

Test

Profile picture

Drop a file here or [browse to upload](#)

Contact details

Email address *

testorguser@testing.com

Mobile number

+44

Work phone

+44

Date of birth

Profile Type

Registered Body

Organisation

Search for and select an organisation from the list

9

Select the Organisation required

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security watching

User Directory

Q Search for user name or email

User name

Email

Applicant manager	am@bloodanalysis.testme.com
Demo	demoorg@demo.com
Demo	demorb@teammatrix.com
Id checker	idchecker@bloodanalysis.testme.com
Pam	pam@bloodanalysis.testme.com
Pam	pam@default.photolimited.testme.com
Pam	pam@defaultandprintingservices.photolimited.testme.com
Pam	pam@printingservices.photolimited.testme.com

Results per page 10 1 to 8 of 8 items

Copyright © 2025 Matrix

Create new user

X

Name

First name *

Test

Last name *

OrgUser

Preferred name *

Test

Profile picture

Drop a file here or [browse to upload](#)

Contact details

Email address *

testorguser@testing.com

Mobile number

+44

Work phone

+44

Date of birth

Blood Analysis Limited

Photo Ltd

Q Search for and select an organisation

Search for and select an organisation from the list

10 Select the user role required from the 'Profile roles' available



User Directory

User name	Email
Applicant manager	am@bloodanalysis.testme.com
Demo	demoorg@demo.com
Demo	demorb@teammatrix.com
Id checker	idchecker@bloodanalysis.testme.com
Pam	pam@bloodanalysis.testme.com
Pam	pam@default.photolimited.testme.com
Pam	pam@defaultandprintingservices.photolimited.testme.com
Pam	pam@printingservices.photolimited.testme.com

Results per page: 10 1 to 8 of 8 items

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Create new user

Mobile number

+44

Work phone

+44

Date of birth

Profile Type

☐ Registered Body

☒ Organisation

Photo Ltd

Profile roles

☐ Applicant Manager

☐ ID Checker

☒ Primary Applicant Manager

Profile groups

☒ Photo Ltd (Default)

☐ PhotoLtdPrintingServices

Cancel

Create User

11

Select the groups that you would like the user to have access to within the Organisation from the 'Profile groups' section.

Access to the default group is provided automatically, and if the Organisation only has the one default group then no further action is required.

If the Organisation has multiple groups created inside it (e.g. departments inside the Organisation), then you can specify which groups this user should have access to

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User Directory

Search for user name or email

User name	Email
Applicant manager	am@bloodanalysis.testme.com
Demo	demoorg@demo.com
Demo	demorb@teammatrix.com
Id checker	idchecker@bloodanalysis.testme.com
Pam	pam@bloodanalysis.testme.com
Pam	pam@default.photolimited.testme.com
Pam	pam@defaultandprintingservices.photolimited.testme.com
Pam	pam@printingservices.photolimited.testme.com

Results per page: 10 1 to 8 of 8 items

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Create new user

Mobile number: +44

Work phone: +44

Date of birth:

Profile Type

☐ Registered Body ☒ Organisation

Photo Ltd

Profile roles

☐ Applicant Manager ☐ ID Checker ☐ Primary Applicant Manager

Profile groups

☒ Photo Ltd (Default) ☐ PhotoLtdPrintingServices

Cancel Create User

12 Click **Create User** to add the user

matrix security watchdog

User Directory

Search for user name or email

User name	Email
Applicant manager	am@bloodanalysis.testme.com
Demo	demoorg@demo.com
Demo	demorb@teammatrix.com
Id checker	idchecker@bloodanalysis.testme.com
Pam	pam@bloodanalysis.testme.com
Pam	pam@default.photolimited.testme.com
Pam	pam@defaultandprintingservices.photolimited.testme.com
Pam	pam@printingservices.photolimited.testme.com

Results per page: 10 (1 to 8 of 8 items)

Copyright © 2025 Matrix

Create new user

Mobile number:

Work phone:

Date of birth:

Profile Type

☐ Registered Body ☒ Organisation

Photo Ltd

Profile roles

☐ Applicant Manager ☐ ID Checker ☒ Primary Applicant Manager

Profile groups

☒ Photo Ltd (Default) ☐ PhotoLtdPrintingServices

Cancel **Create User**

13 The user will receive an automated email to the email address provided so that they can set their password and login