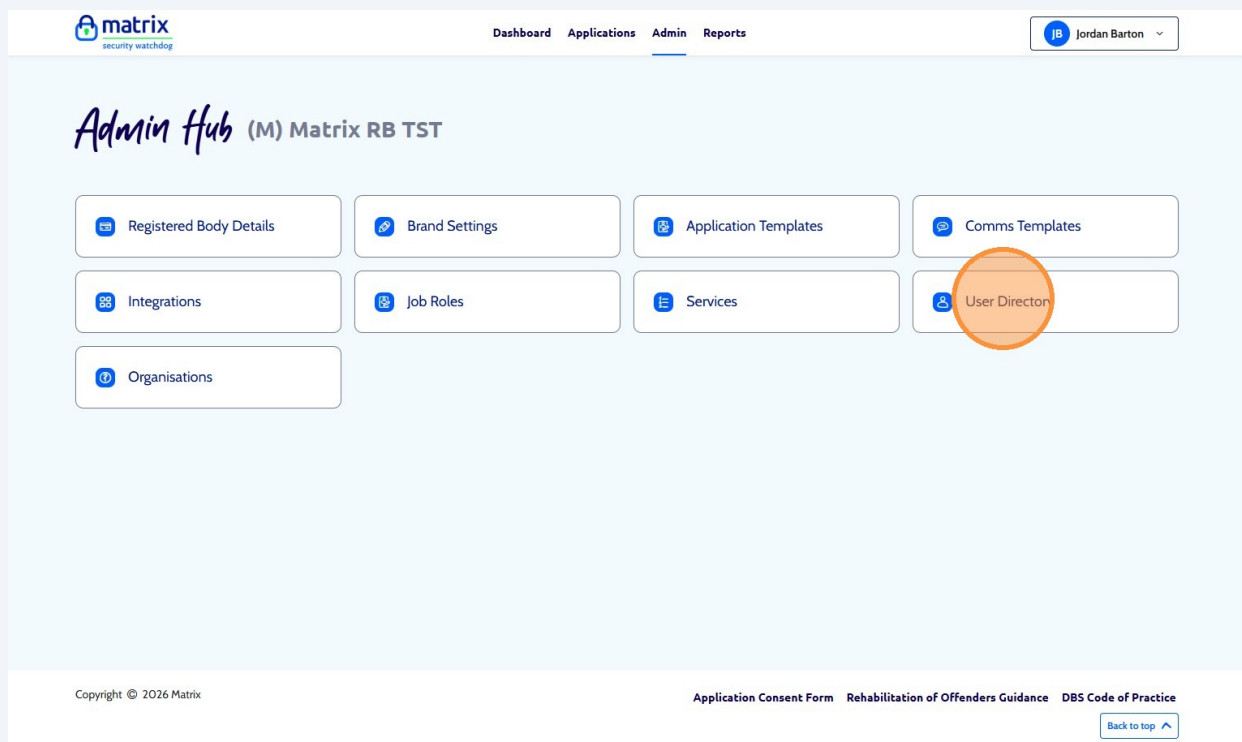


How to Add and Remove additional Organisations to a User



This guide provides a straightforward process for managing user access to multiple organizations within the Matrix Screening Admin Hub. It simplifies the steps needed to add or remove organization profiles, ensuring efficient user management. By following this guide, users can enhance their administrative capabilities and maintain accurate access controls, which is crucial for organizational security and functionality.

1 Click **User Directory** from the Admin Hub



2 Click the name of the user you wish to add additional Organisations to

The screenshot shows the 'Admin Hub > User Directory' page. At the top, there's a navigation bar with 'matrix security watchdog', 'Dashboard', 'Applications', 'Admin', and 'Reports'. A user profile 'JB Jordan Barton' is in the top right. Below the navigation, there's a 'Back to Admin Hub' link and a 'User Directory' title. A search bar and 'Filters' button are present. A table lists users with columns: User name, Email, Status, Profile, Organisations, Groups, and Roles. The first row, 'Asfa' with email 'vikas@mat.com' and status 'Active', is highlighted with an orange circle. Other users listed include 'Ash' with various email addresses and statuses, mostly 'Inactive'.

User name	Email	Status	Profile	Organisations	Groups	Roles
Asfa	vikas@mat.com	Active	Organisation	Business Consultancy Ltd	Business Consultancy Ltd (Default)	Applicant Manager See more
Ash	ashsetty11@email.com	Inactive	Organisation	New Company	New Company Ltd (Default)	Applicant Manager See more
Ash	ashsettygg@email.com	Inactive	Organisation	Andy Ltd		ID Checker See more
Ash	ashsettyKK@email.com	Inactive	Organisation	Andy Ltd		ID Checker See more
Ash	ashsettynmnm@email.com	Inactive	Organisation	Andy Ltd	Andy Ltd (Default)	Primary Applicant Manager
Ash	ashsettynmnm@email.com	Inactive	Registered Body			Countersignatory See more
Ash	ashsettynbnm@email.com	Inactive	Organisation	Andy Ltd	Andy Ltd (Default)	ID Checker

3 Click Profiles

The screenshot shows the 'Admin Hub > User Directory > User Details' page. The 'User Details' title is at the top. Below it, there are two tabs: 'Identity' and 'Profiles'. The 'Profiles' tab is selected and highlighted with an orange circle. The main content area shows 'Asfa's Details' with a status 'Active' and a green checkmark. There are two sections: 'Name' and 'Contact details'. The 'Name' section has fields for 'First name', 'Last name', and 'Preferred name', all containing 'Asfa'. There is also a 'Profile picture' field with a 'Drop a file here or browse to upload' button. The 'Contact details' section has an 'Email address' field containing 'vikas@mat.com'.

Asfa's Details Active ✓

Name

First name * Asfa

Last name * Pawar

Preferred name * Asfa

Profile picture

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

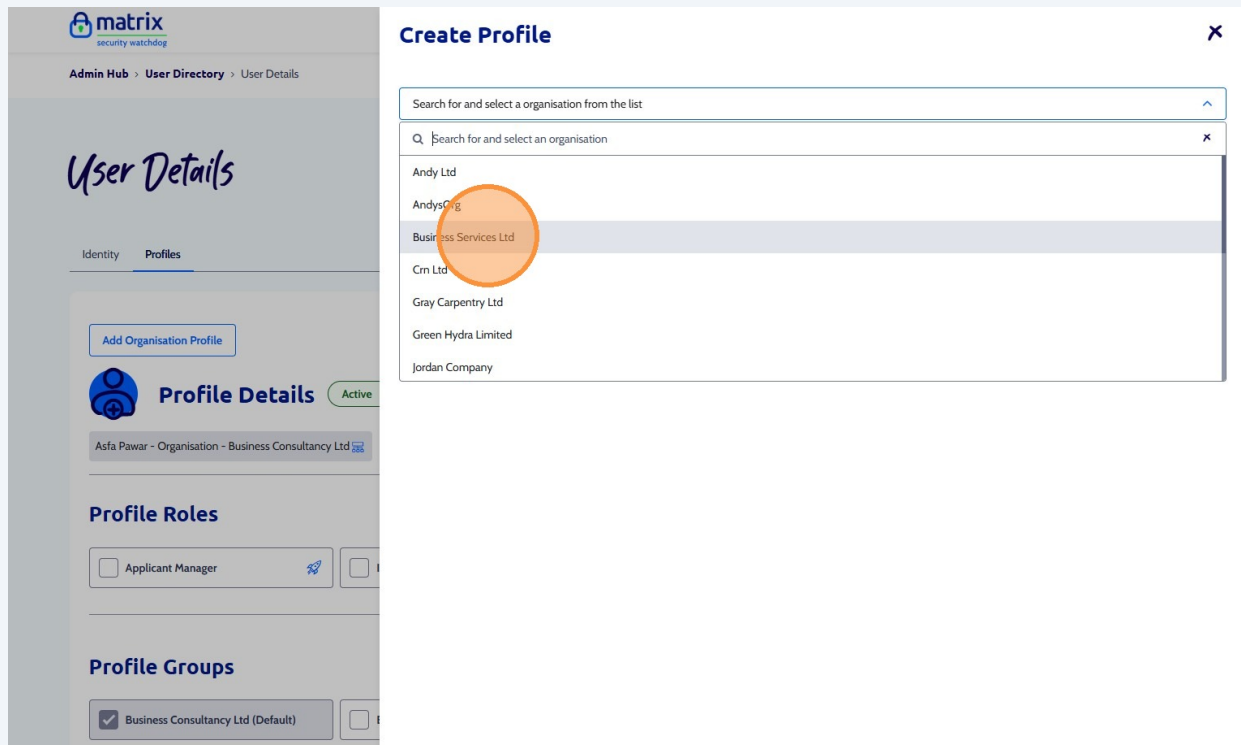
Contact details

Email address * vikas@mat.com

4 Click **Add Organisation Profile**

The screenshot displays the Matrix Security Watchdog Admin interface. At the top, the navigation bar includes the Matrix logo, the text 'security watchdog', and a menu with 'Dashboard', 'Applications', 'Admin' (selected), and 'Reports'. A user profile for 'Jordan Barton' is visible in the top right. Below the navigation bar, the breadcrumb trail reads 'Admin Hub > User Directory > User Details'. The main heading is 'User Details' in a large, stylized font. Underneath, there are two tabs: 'Identity' and 'Profiles' (selected). The 'Profiles' tab contains a section for 'Profile Details' for the user 'Asfa Pawar - Organisation - Business Consultancy Ltd'. This section includes a blue profile icon, the text 'Profile Details', and three buttons: 'Active' (with a green checkmark), 'Deactivate Profile', and 'Remove Profile'. An orange circle highlights the 'Add Organisation Profile' button in the top left of this section. Below the 'Profile Details' section is the 'Profile Roles' section, which lists three roles: 'Applicant Manager' (unchecked), 'ID Checker' (unchecked), and 'Primary Applicant Manager' (checked). At the bottom is the 'Profile Groups' section, which lists four groups: 'Business Consultancy Ltd (Default)' (checked), 'Business Consultancy - Sheffield' (unchecked), 'Business Consultancy - Liverpool' (unchecked), and 'Business Consultancy - London' (unchecked).

5 Select the additional Organisation you wish to give this user access to



The screenshot shows the 'Create Profile' dialog box in the Matrix Security Watchdog interface. The dialog has a search bar at the top with the text 'Search for and select a organisation from the list'. Below the search bar is a list of organizations. The organization 'Business Services Ltd' is highlighted with an orange circle. The background shows the 'User Details' page for 'Asfa Pawar' with the 'Profiles' tab selected.

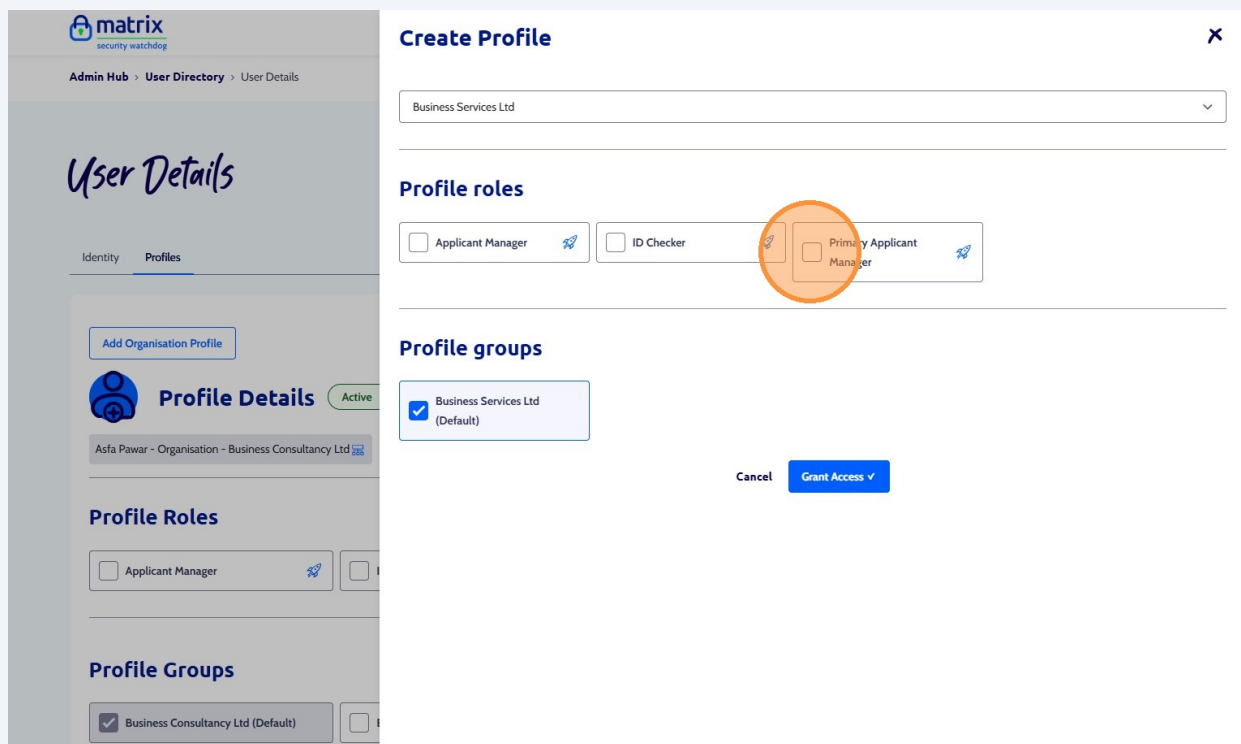
Create Profile

Search for and select a organisation from the list

Q Search for and select an organisation

- Andy Ltd
- Andysong
- Business Services Ltd**
- Cm Ltd
- Gray Carpentry Ltd
- Green Hydra Limited
- Jordan Company

6 Select the role and Groups inside this Organisation, you would like this user to have



The screenshot shows the 'Create Profile' dialog box in the Matrix Security Watchdog interface. The organization 'Business Services Ltd' is selected in the dropdown menu. Under the 'Profile roles' section, the 'Primary Applicant Manager' role is selected with an orange circle. Under the 'Profile groups' section, the 'Business Services Ltd (Default)' group is selected. The background shows the 'User Details' page for 'Asfa Pawar' with the 'Profiles' tab selected.

Create Profile

Business Services Ltd

Profile roles

- ☐ Applicant Manager
- ☐ ID Checker
- ☒ Primary Applicant Manager

Profile groups

- ☒ Business Services Ltd (Default)

Cancel Grant Access ✓

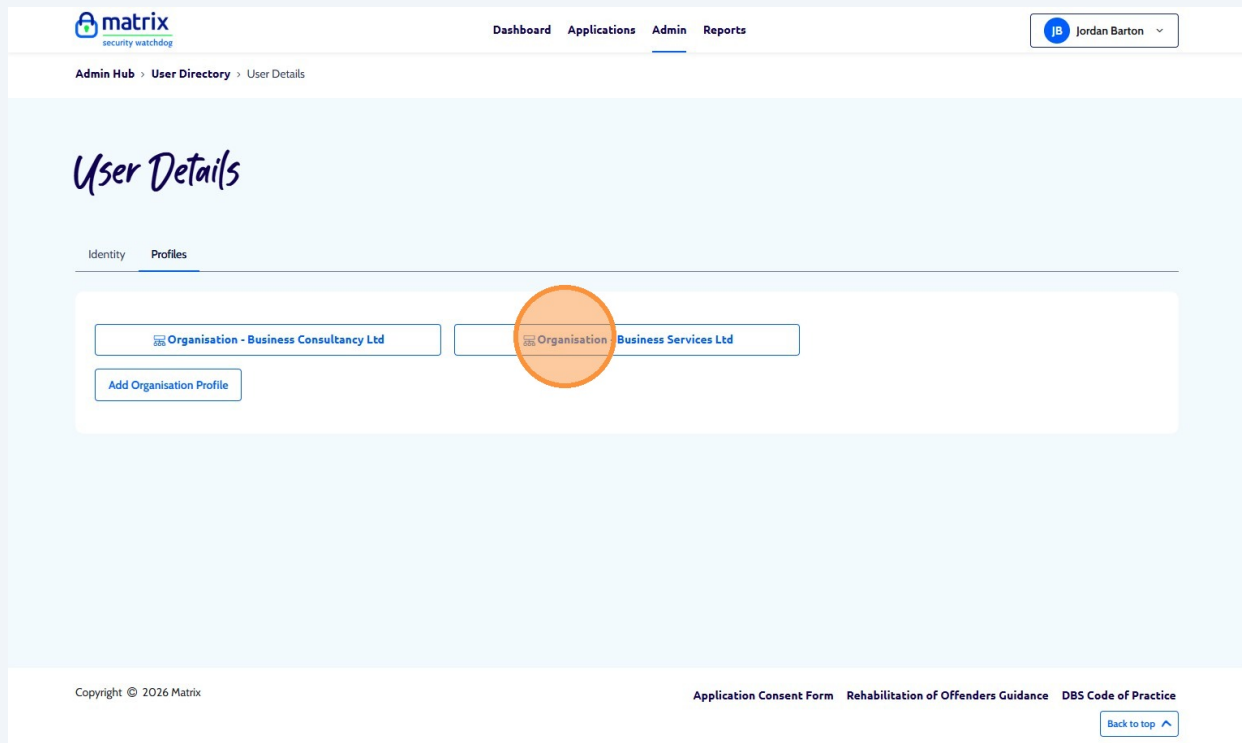
7 Click **Grant Access**

The screenshot shows the 'Create Profile' dialog in the Matrix Security Watchdog interface. The dialog has a title bar with a close button (X). Below the title bar is a dropdown menu showing 'Business Services Ltd'. Under the 'Profile roles' section, there are three checkboxes: 'Applicant Manager' (unchecked), 'ID Checker' (unchecked), and 'Primary Applicant Manager' (checked). Under the 'Profile groups' section, there is one checkbox: 'Business Services Ltd (Default)' (checked). At the bottom of the dialog, there are two buttons: 'Cancel' and 'Grant Access'. The 'Grant Access' button is highlighted with an orange circle.

8 You can repeat Steps 4-7 for as many Organisations as you wish to add to this user account

9

You can view a user's Organisation profile by clicking the icon from their 'Profiles' tab



matrix security watchdog

Dashboard Applications Admin Reports

JB Jordan Barton

Admin Hub > User Directory > User Details

User Details

Identity Profiles

Organisation - Business Consultancy Ltd Organisation - Business Services Ltd

Add Organisation Profile

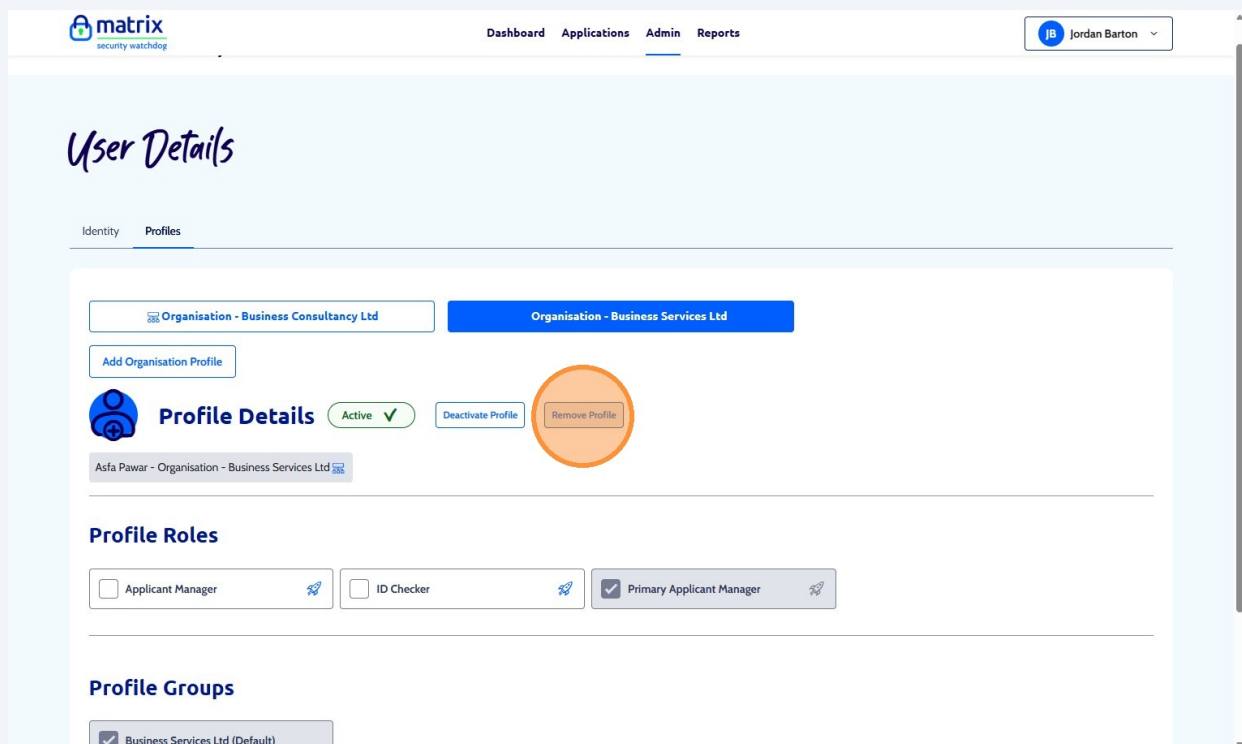
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If you need to remove a user's access to an Organisation, click **Remove Profile**



matrix security watchdog

Dashboard Applications Admin Reports

JB Jordan Barton

User Details

Identity Profiles

Organisation - Business Consultancy Ltd Organisation - Business Services Ltd

Add Organisation Profile

Profile Details Active ☒ Deactivate Profile Remove Profile

Asfa Pawar - Organisation - Business Services Ltd

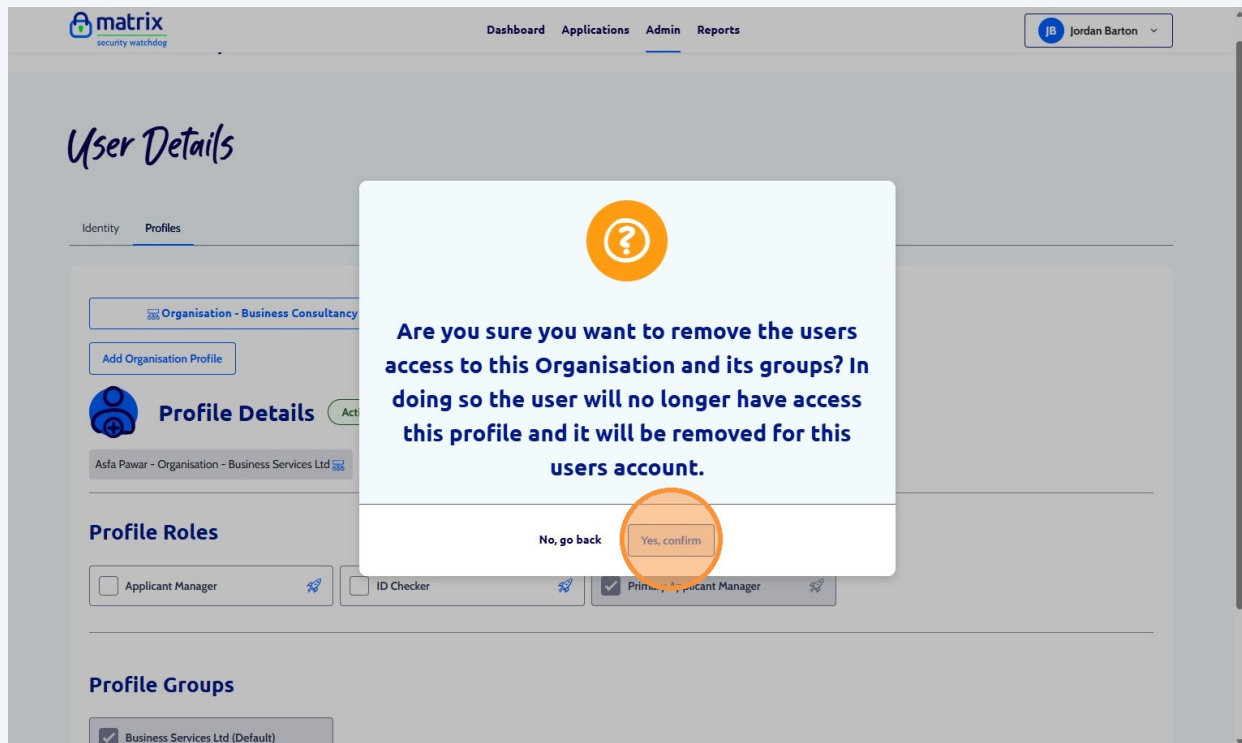
Profile Roles

☐ Applicant Manager ☐ ID Checker ☒ Primary Applicant Manager

Profile Groups

☒ Business Services Ltd (Default)

11 Click **Yes, confirm**



12 Removing a user's Organisation profile, will remove their access to applications for that Organisation