

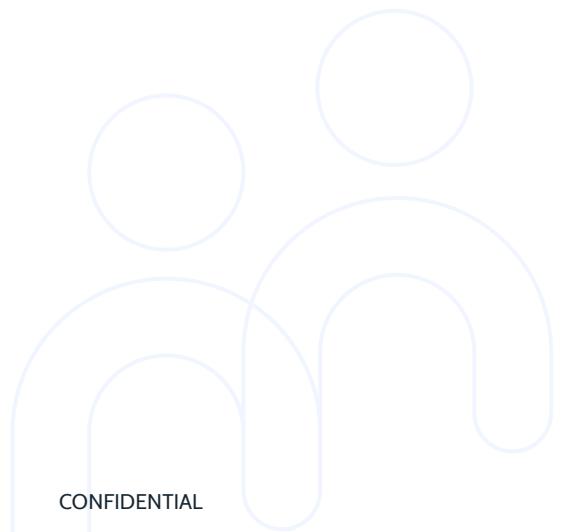


Matrix Security Watchdog

Matrix Screening, Powered by Prism

Technical Migration FAQ's

DATE: August 2025



What does migration look like?

Your seamless transition to Matrix Screening Platform—step by step

We've designed our migration process to be as smooth as possible for your organisation. Here's exactly what to expect:

Before We Begin (One Week Prior). To ensure a flawless data transfer, please avoid creating new organisations or users during the week before migration. Any additions during this period won't be transferred and will need to be recreated manually after migration.

Phase 1: Secure Setup. Our team creates a dedicated migration user account to safely test your new system. We'll verify everything is working perfectly—from login functionality to ensuring all your organisations and users are visible and accessible.

Phase 2: Platform Configuration. We'll build your registered body on the Matrix Screening platform and configure all essential integrations, including DBS Basic and DBS Standard/Enhanced where applicable. Your system will be tailored to your specific needs from day one.

Phase 3: Complete Data Transfer. We extract and migrate your core data: organisations, users, and job roles. Every piece of information transfers securely to your new platform.

Phase 4: Quality Assurance. Using the migration user account, we conduct comprehensive testing to confirm your system is fully operational. We verify successful login, complete organisation migration, user access, and URL functionality.

Final Step: Go-Live Approval. Our team reviews all testing results to ensure your Matrix Screening platform is ready for immediate use by your organisation

What do I do post-migration?

Account Setup

You'll receive a welcome email with step-by-step instructions to create your new account. For security, we don't transfer passwords from eBulk, so you'll set up a fresh, secure password and log in with your email address.

Communication Templates

Default vs Custom Templates

Your platform comes with professional email templates similar to those in eBulk. Love them as-is? No action needed. Want to make them uniquely yours? Simply visit the Admin Hub's "Templates" section to customise your communications.

Organisation-Specific Templates

Tailor templates for individual organisations in just a few clicks:

1. Navigate to Admin Hub → Organisations
2. Select your target organisation
3. Access the Personalisation tab
4. Edit Communication Templates to match their specific needs

Branding Options

The Look and Feel

Transform your platform's appearance with customisable:

- Header bar colours
- Title and button styling
- Hyperlink colours
- Your organisation's logo (SVG or PNG format, max 2MB)

Page Footers

Take full control of your footer links, including resources like "Rehabilitation of Offenders Guidance" or "DBS Code of Practice." Add, edit, or remove links through Admin Hub → Brand Settings.

Banners

Reinstate your site banner through Brand Settings. Simply toggle the banner option to "Yes" and it will display across your entire registered body and all associated organisations.

Onboarding Migrated Users

What is not being migrated? (Templates, users, data, orgs/departments)

Migrating	Not Migrating
Job Roles	Applications
Organisations	Organisations <ul style="list-style-type: none"> • Comms templates • Notes • Audit
Contact Information <ul style="list-style-type: none"> • Primary Contact • Address information 	

<p>Application Submission Notifications</p> <ul style="list-style-type: none"> • Recipients email(s) <p>Field Defaults</p> <ul style="list-style-type: none"> • Fixed Job roles • Fixed position applied for • Allow basic applications • Allow standard/enhanced applications • Section Y (default values) 	Organisations created within the week prior to your migration date.
Organisation Users	Results (no application results) <ul style="list-style-type: none"> • Application references • Certificate numbers • Issue Dates • Status
Registration Body Users	System Banners (RB Admin)
Integration <ul style="list-style-type: none"> • DBS Basic • DBS Standard/Enhanced 	Branding
	User Passwords
	Banners

What happens if I experience issues or need support with Matrix Screening?

Expert support when you need it most

Your dedicated Client Relationship Manager is always ready to help with any questions or challenges. Plus, don't miss our exclusive post-migration webinar where our technical experts will provide live support and answer your questions.

Further details and how to sign up for our post-migration webinar will be shared soon.

How will I receive billing invoices from Matrix Screening?

Your invoices will continue to be sent to the same email contacts used in eBulk Plus. During the transition period, you may receive invoices from both systems until your eBulk Plus balance is fully settled.

Will I be able to access reports in Matrix Screening?

Comprehensive reporting at your fingertips

Yes! Full reporting capabilities are available through our Sisense reporting tool.

Important browser note: For optimal performance, please use Chrome, Edge, or similar browsers when accessing reports. Firefox and Safari are not currently supported due to cookie settings.