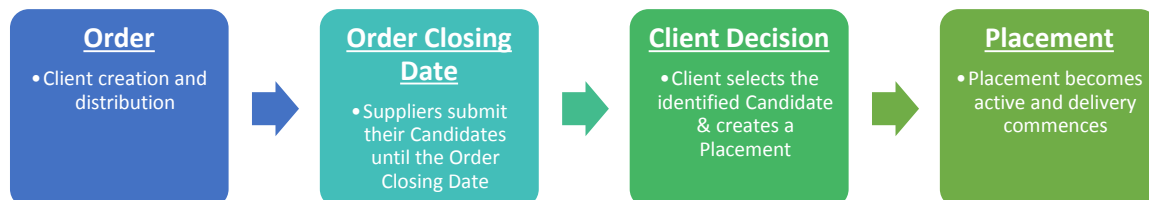# System Overview Guide

Agency Workers

v3.0

Overview

The Matrix-CR.Net system is a sophisticated web based technology platform used by clients and suppliers to aid in the efficient and fair procurement of services through a 12 step process.

Orders (client service needs) and Candidates (supplier service bids) within the system are broken down into two separate metrics: Attributes and Price.

Attributes - 60%
- Objective specification of service needs – In a closed question format

+

Price - 40%
- Rate submitted by a supplier to deliver the specified service

=

Candidate - 100%
- Attributes that can be met
- Price of service

The client inputs to what percentage these two metrics will account for in the complete Candidate score, which defines how the Matrix-CR.Net system will rank those Candidates into a shortlist.

During the Order creation and distribution period, a client also sets out timescales that outline the subsequent periods where Candidates can be reviewed.

Order
- Client creation and distribution

Order Closing Date
- Suppliers submit their Candidates until the Order Closing Date

Client Decision
- Client selects the identified Candidate & creates a Placement

Placement
- Placement becomes active and delivery commences

The client will review the Candidates as they are submitted, interview if they wish and reject any non-compliant Candidates.
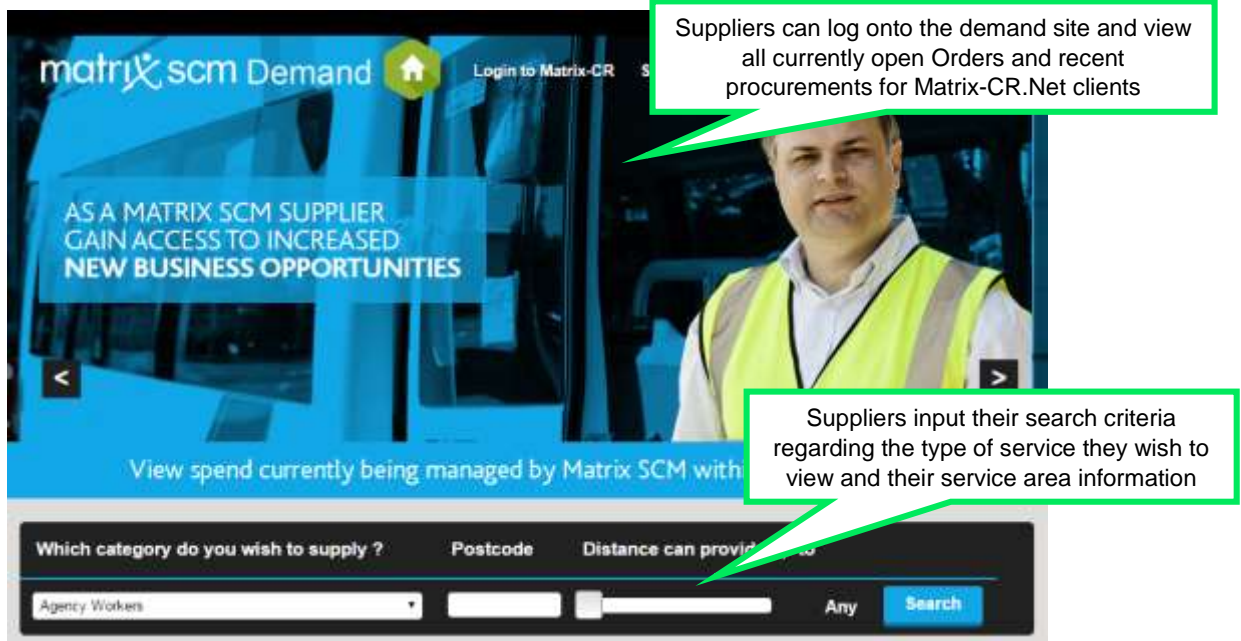
Once the Order Closing Date has passed, the client will be able to progress their chosen Candidate through to the Placement (contract) step and this finalises the procurement process, after which the service delivery can commence.

This guide is a step-by-step walk through of the 12 steps within Matrix-CR.Net and explains how each step is fundamental to achieving efficient, fair and equitable service procurement.

Step 1 – Advertising

To advertise a public sector client's recent services procurements on a public domain website

Matrix-CR.Net aggregates all client Order and recent spend information and displays it on a demand site:

> Suppliers can log onto the demand site and view all currently open Orders and recent procurements for Matrix-CR.Net clients
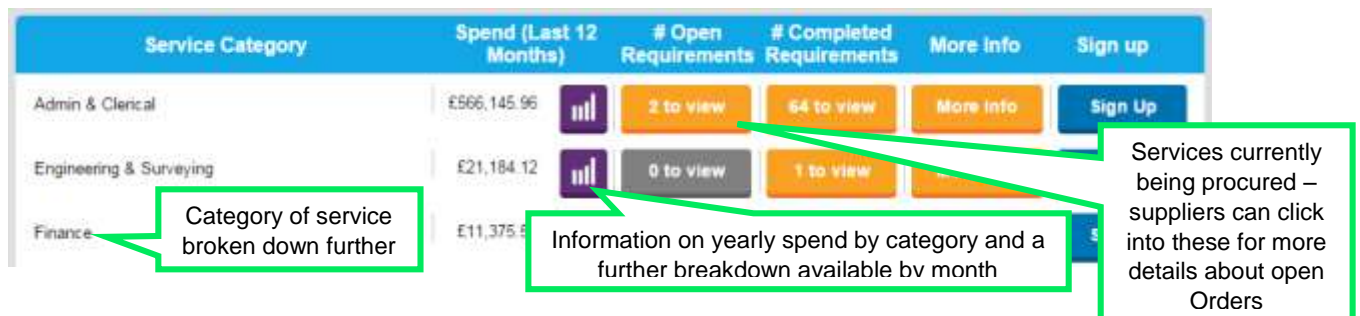
> Suppliers input their search criteria regarding the type of service they wish to view and their service area information

> The demand site will then show suppliers which clients are procuring the chosen services in the defined area.

Once a supplier has selected a client, they can see all the information about their recent service procurements:

> Category of service broken down further

> Information on yearly spend by category and a further breakdown available by month

> Services currently being procured – suppliers can click into these for more details about open Orders

The information displayed provides a transparent view of a client's service procurement opportunities which can encourage suppliers to join Matrix-CR.Net and Accredit and Enrol into Matrix SCM's supply chain.

Advertising also allows existing Matrix-CR.Net suppliers to view potential opportunities in other service areas or with different clients.

Examples:

1.   A supplier reviews the demand site and notes they can supply one of the services recently procured by client A

The supplier Registers with Matrix-CR.Net, Accredits and Enrols into client A's Matrix SCM supply chain:

Supplier	⟶	Service 1	⟶	Client A

Once approved the supplier will be able to offer and bid to provide this service for client A through the Matrix-CR.Net system.

2.   The supplier then reviews the demand site again and notes that client B also procures the same services through Matrix-CR.Net.

The supplier Accredits and Enrols to that client's Matrix SCM supply chain:

Supplier	⟹	Service 1	⟶	Client A
		Service 1	⟶	Client B

Once approved the supplier can then offer and bid to provide this service for client A and client B.

3.   The supplier reviews the demand site and notes that client A is procuring Service 2 through the Matrix-CR.Net system.

The supplier diversifies their business, and Enrols into that service area with client A:

Supplier	⟹	Service 1	⟶	Client A
		Service 2	⟶	

Once approved the supplier can then offer and bid to provide Service 1 and Service 2 for client A and they have grown their business directly in line with the market needs.

Step 2 – Accreditation

Accreditation is the first step for a supplier to join Matrix SCM's supply chain

Completed at a parent company level, Accreditation is an objective evaluation of a supplier based on a set of criteria defined by Matrix SCM.

Suppliers must firstly register on to Matrix-CR.Net to set up an account and get login details

A supplier will be asked a series of closed questions which have a predefined list of answers. This allows the system to quickly identify if an Accreditation has passed or failed based on the Accreditation criteria.

All suppliers are asked the same questions, this ensures that all suppliers which supply into Matrix SCM are evaluated in a fair way and they all meet the same base level criteria.

The Accreditation questions are scored by Matrix-CR.Net initially and if any of the answers do not meet the minimum standard, the system will alert the supplier, giving them the opportunity to revise their Accreditation.

Once submitted, an Accreditation is reviewed by Matrix SCM and the supplier will be informed if it was approved or rejected:

Approved - The supplier will progress to Step 3 – Enrolment

Rejected - The supplier can review the reasons why, update their Accreditation and re-submit

Step 3 – Enrolment

The second step for a supplier to join Matrix SCM's supply chain

Completed at a supplier location level, Enrolment is a subjective evaluation of a supplier based on a set of criteria defined by Matrix SCM.

Suppliers must have an approved Accreditation before they can enrol on Matrix-CR.Net

Suppliers input further information about the services they want to deliver to the selected client by selecting the Service Category they wish to supply to that client, from a list.

The Service Categories they wish to supply
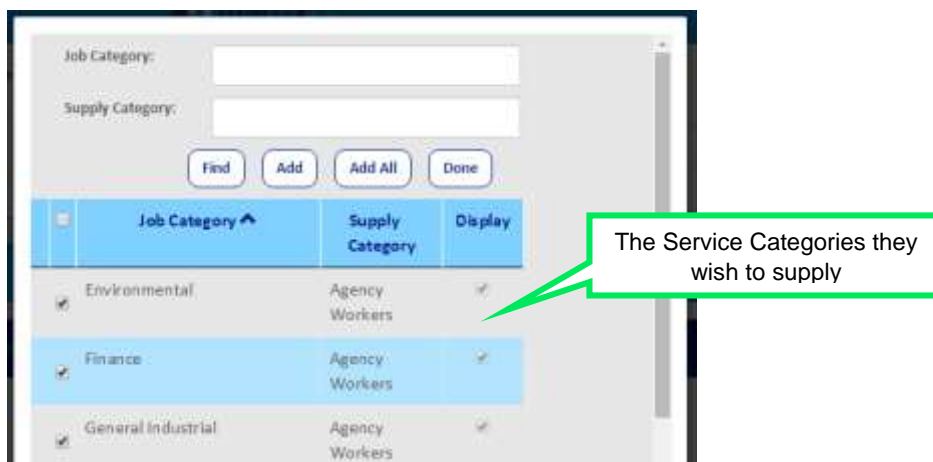
Suppliers will then be asked a series of Yes/No questions, sign and upload a Client Addendum.

All suppliers are asked the same questions and this ensures that all suppliers which supply into Matrix SCM are evaluated in a fair way and they all meet the same base level criteria.

Once submitted, an Enrolment is reviewed by Matrix SCM and the supplier will be informed if it was approved or rejected:

Approved - The supplier will be added to Matrix SCM's supply chain for their specified client

Rejected - The supplier can review the reasons why, update their Enrolment and re-submit

Step 4 – Order Creation

A client qualitatively details and specifies the service they are looking to procure

This is the first point in the procurement process.

Clients define their Order criteria through the Attribute metric and can add additional information and ask additional Profile questions to ensure a supplier fully understands their service need.

The order will contain full Service Details:

1. Start Date

2. End Date

3. Start Time

4. End Time

5. Shifts

6. Job description
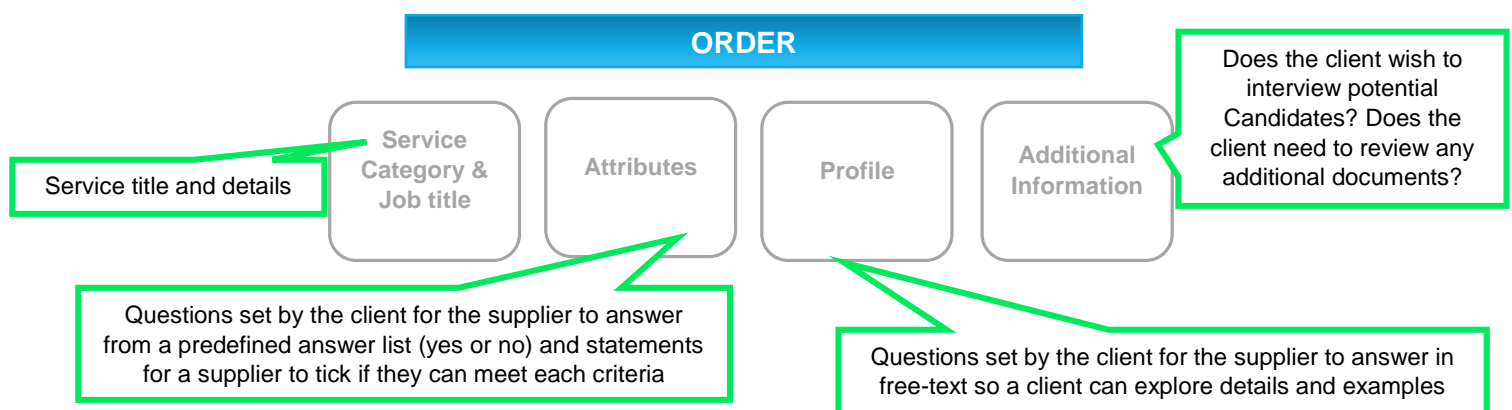
The more detailed the Order, the more accurate supplier Candidates will be.

All suppliers within a client's supply chain, enrolled into the relevant Service Category, will receive this Order and all the information within it.

Suppliers can use the Order messaging tool to ask the client any questions if necessary.
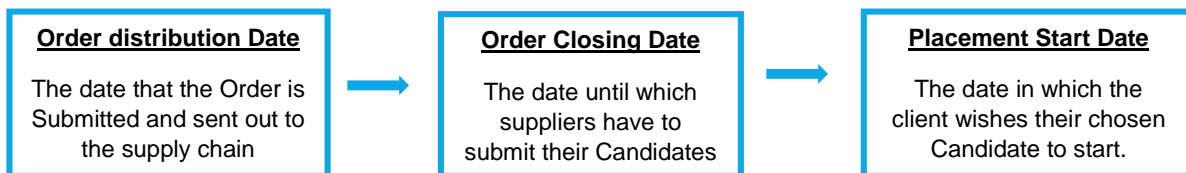
Step 5 – Order Distribution

The simultaneous circulation of a client's Order to all the suppliers within the supply chain who stated they could supply this Service Category during the Enrolment process

The client assigns weightings to the two scored metrics within a Candidate submission. This will set how all submitted Candidates will be scored by Matrix-CR.Net:

Attributes		Price		Candidate
Objective specification	**+**	Rate offered by supplier	**=**	Supplier bid
60%		**40%**		**100%**

These are example weightings and may be different by client.

The client also defines the timescales within the rest of the process:

Order distribution Date		Order Closing Date		Placement Start Date
The date that the Order is Submitted and sent out to the supply chain	→	The date until which suppliers have to submit their Candidates	→	The date in which the client wishes their chosen Candidate to start.

The client also sets the number of Candidates they want within their shortlist, this defines how many Candidates the client will review after the Order Closing Date.

Once complete, the Order is simultaneously sent out to the relevant supply chain so all suppliers receive the same information at the same time. Suppliers receive an email notification when the Order is distributed.

Step 6 – Candidate

A Candidate is a submission from a supplier towards the specification of an Order, including a price quotation to deliver the services required

Suppliers review an Order and the specifications outlined by the client to establish if they can provide the service as specified.

At this stage a supplier can send an Order message to the client to clarify details.

These messages and responses will be displayed on the Order so all suppliers will always have the same of information about the service requirement.

Suppliers then accept or decline the Order, indicating to the client whether or not they are going to submit a Candidate.

Candidate scoring is structured around the two metrics, Attributes and Price.
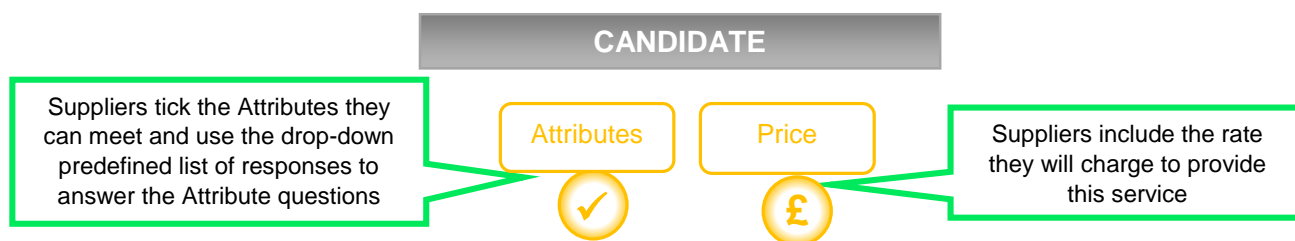
Candidate creation and submission process ensures that all suppliers promote their services in a clear and simple way.

Once submitted, Matrix-CR.Net will score the Candidates on their Attribute and Price metrics and create a shortlist (the number of Candidates within the shortlist is defined by the client):

Candidate	Attribute Score 60%	Price Score 40%	Total Score 100%	Shortlist Ranking
B	58	30	88	1
D	50	34	84	2
A	45	29	74	3
C	40	31	71	4

Suppliers will receive a notification informing them whether or not their Candidate has been shortlisted.

Before the Order Closing Date, suppliers can revise their Candidate's pricing, potentially increasing their pricing score and improving their ranking position.

Step 7 – Placement

The creation of two separate contracts outlining the service to be delivered and at what price.

One contract between the client and Matrix SCM, binding the Order specification and Candidate information, and adding anything further if necessary.
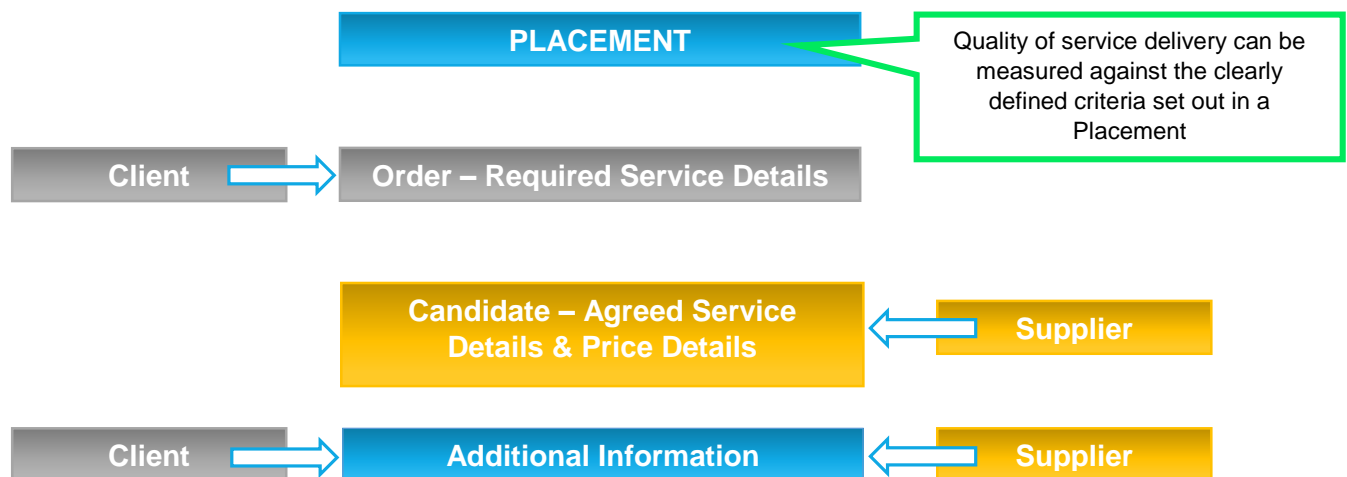
The second contract, between Matrix SCM and the supplier, again binding the Order specification and Candidate information, and adding anything further if necessary.

Within the system, clients and suppliers will see both these contracts as one Placement, detailing the service to be delivered and the rate to be charged.

This is the last point in the procurement process.

The client will create a Placement with a Candidate from their final Candidate shortlist.

The Placement ensures that all parties are clear on the service that is to be delivered.

	PLACEMENT	Quality of service delivery can be measured against the clearly defined criteria set out in a Placement
Client →	**Order – Required Service Details**	
	Candidate – Agreed Service Details & Price Details	← **Supplier**
Client →	**Additional Information**	← **Supplier**

Once created, the Placement will be reviewed and checked by Matrix SCM. Within this period. Pre-Employment Checks on the worker assigned to the Candidate submission will be completed.

If the Worker doesn't have the correct documentation, Matrix SCM will notify the supplier of the action they need to take for the Placement to progress.

Once these checks are complete (and correct), Matrix SCM will send the Placement to the supplier for review.

The supplier will then accept or reject the Placement.

Accepting – Makes the Placement active and will trigger a notification to all other suppliers that their Candidate was unsuccessful

Rejecting – Informs the client that the supplier is now unable to provide the service as set out, and the client will then create a Placement with the next appropriate Candidate within the shortlist

Once a Placement is active service delivery can commence.

Change Orders and Extensions can be added to a Placement (providing the other party accepts/approves the adjustments) and these are displayed within the Placement to ensure it always represents the latest agreed scope of service, which reduces scope creep.
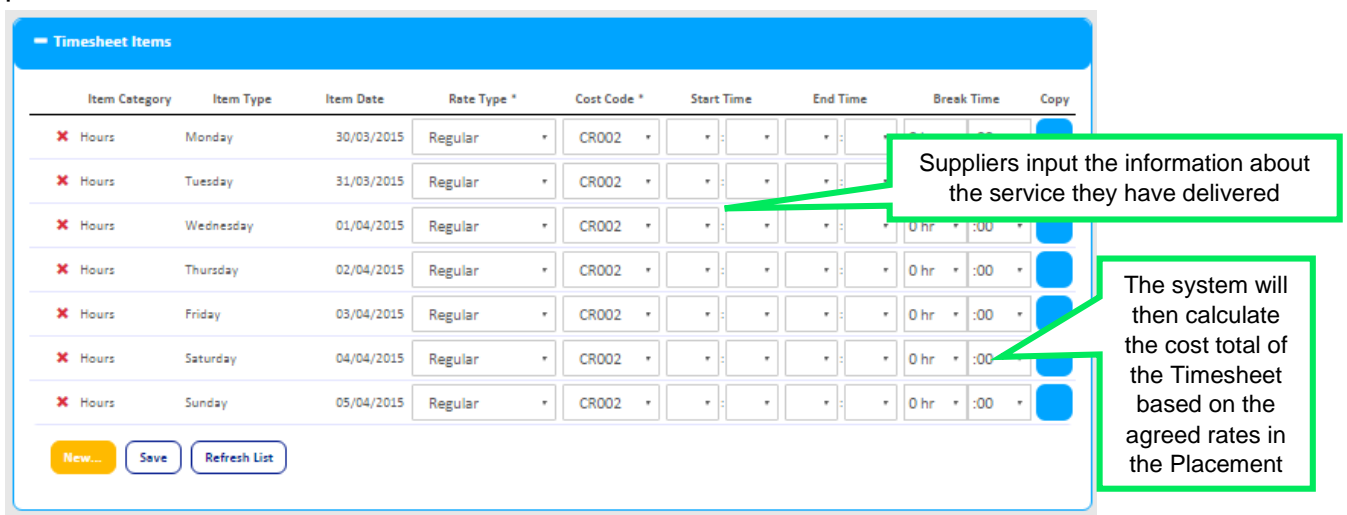
Step 8 – Timesheets

A supplier-raised bill for services delivered as part of an active or recent Placement.

The first step in the payment process.

Once a service is delivered (in part or in full), a Timesheet is generated by a supplier on Matrix-CR.Net.

The system ensures that the supplier bills the client according to the price parameters set out in the Placement.
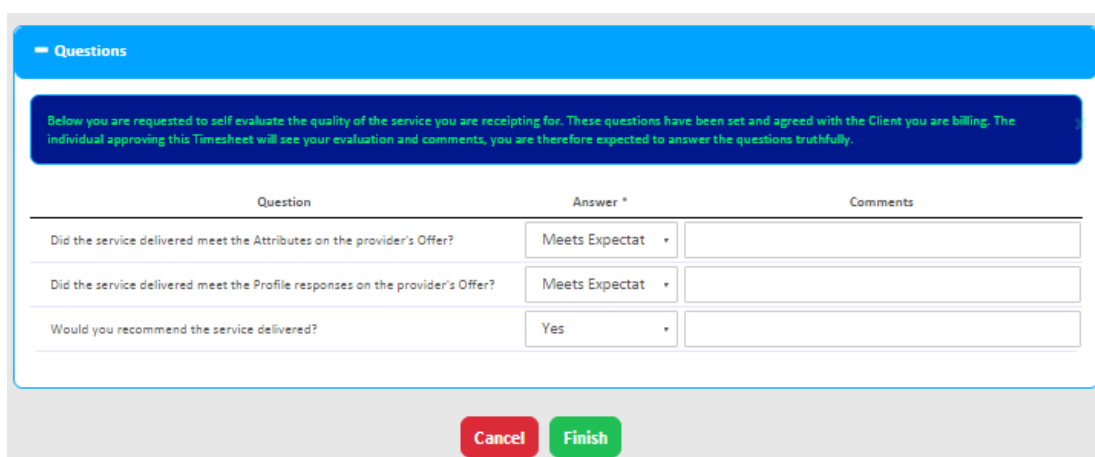
Suppliers input the information about the service they have delivered

The system will then calculate the cost total of the Timesheet based on the agreed rates in the Placement

The supplier also gets an opportunity to evaluate the quality of service they have delivered:

This Timesheet is then sent to the client for review and validation:

Client reviews all the information and the price compared to service delivered

The client will then approve or reject the Timesheet.

Approved – Triggers the automatic Invoice, Self-Bill and Payment steps, and the client will also be able to evaluate a supplier's service delivery

Rejected – The Timesheet will be return to the supplier with feedback, this can then be amended and re-submitted
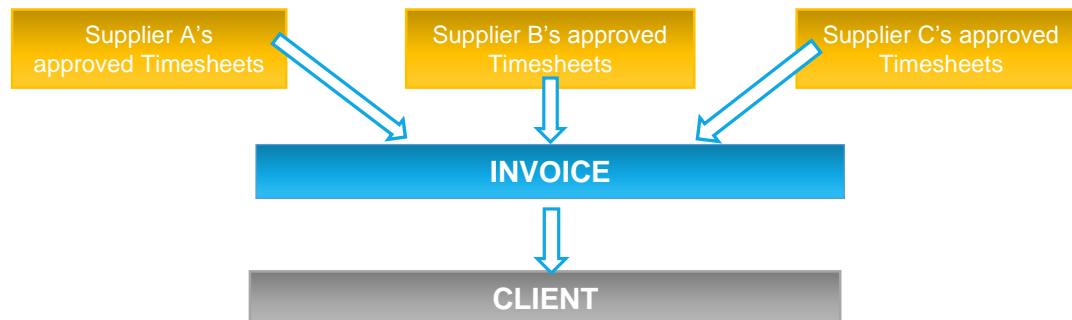
Timesheet adjustments can also be raised to rectify any errors from previous Invoices.

Step 9 – Invoice

A weekly consolidated Invoice to the client from Matrix SCM for all approved Timesheets.

Matrix-CR.Net consolidates all approved Timesheet data into one Invoice.

This is then issued to the client in the form of a VAT Invoice.

This process means that instead of paying each supplier individually, a client simply has to pay Matrix SCM one lump sum payment and Matrix SCM then pays the suppliers individually.

Note:

1. The weekly Matrix-CR.Net Invoice processing on Wednesdays collates all the Timesheets which were <u>approved</u> between the previous Wednesday and the next Tuesday, to create both consolidated client Invoices and supplier Self-Bill Invoices, around which the agreed payment terms will then apply.

2. For example, the Invoice run on Weds 20 Jun 2012 would collect all Timesheets which were approved between 00:00 on Weds 13 Jun 2012 and 23:59 on Tues 19 Jun 2012, and create one consolidated client Invoice and a supplier Self-Bill Invoice for each corresponding supplier. These Invoices would be dated Weds 20 Jun 2012 and would then require payment according to the payment terms agreed in the contracting process

Step 10 – Self-Bill

An automatically-generated Invoice produced by the system on behalf of the supplier.

Matrix-CR.Net produces a Self-Bill Invoice from the supplier to Matrix SCM, billing Matrix SCM for services as per approved Timesheets.

This step completes the Invoice loop without suppliers having to complete any administration, and Matrix SCM then pay suppliers for the services they have delivered.

Step 11 – Payment

Clients pay a lump-sum to Matrix SCM on a weekly basis as per the consolidated Invoice issued

Matrix SCM pays suppliers as per the Self-Bill Invoices

For clients, one lump-sum payment per week is less administrative work and effort.

Suppliers do not have to maintain an extensive credit control function to chase multiple payments.

Step 12 – Audit and supplier Management

The management and audit of supplier compliance and quality performance.

Suppliers must be continuously audited for compliance against the Matrix SCM Accreditation and Enrolment criteria.
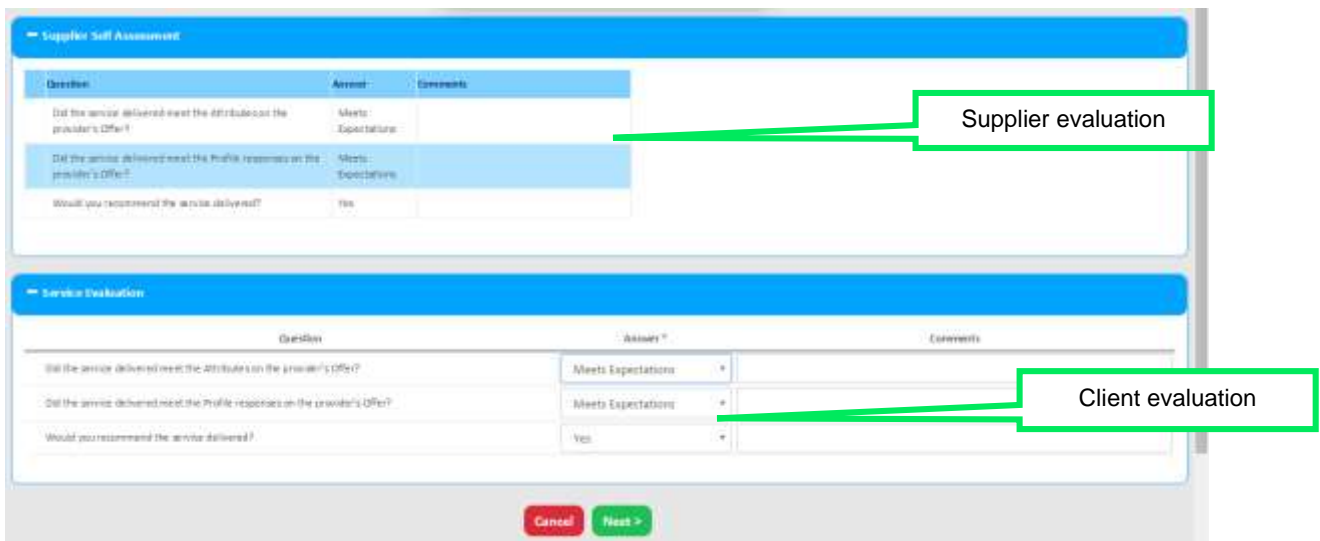
The system reviews supplier compliance documentation and generates notifications when these document are nearing expiry.

For example, if the insurance certificate uploaded by a supplier during Accreditation was due to expire the system would notify them and they would need to upload a new certificate

Matrix SCM is also able to review the historical service quality of a supplier and take actions if necessary.

This data is taken from the client and supplier evaluations completed during the Timesheet step:

Supplier evaluation

Client evaluation

Action can be taken to remove a supplier from Matrix SCM's supply chain if they fail to meet the client's defined standards.
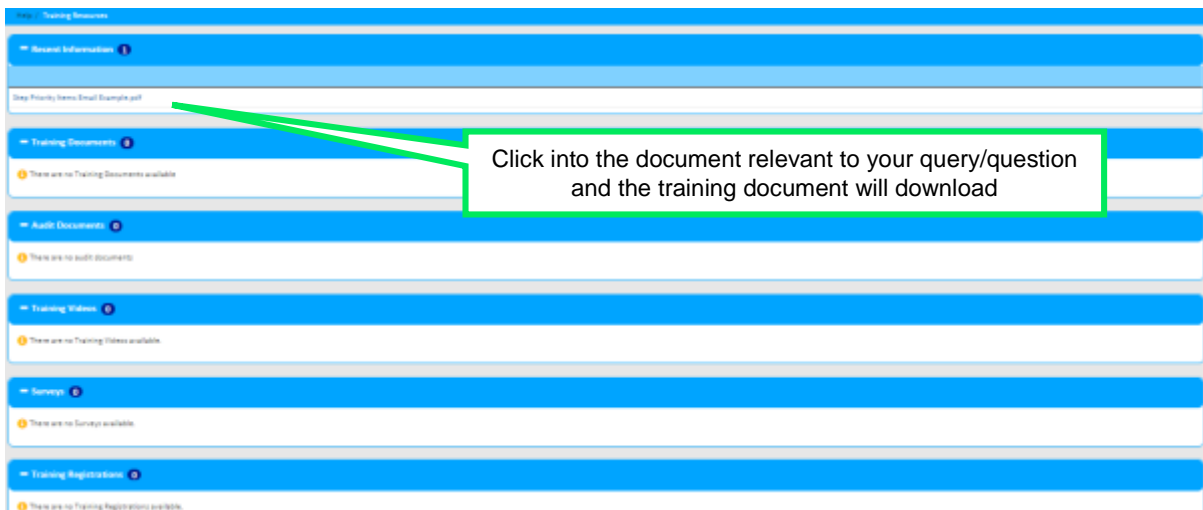
Need More Support?

If you need more support regarding anything detailed in this guide, please use the help functions available within your Matrix-CR.Net account:
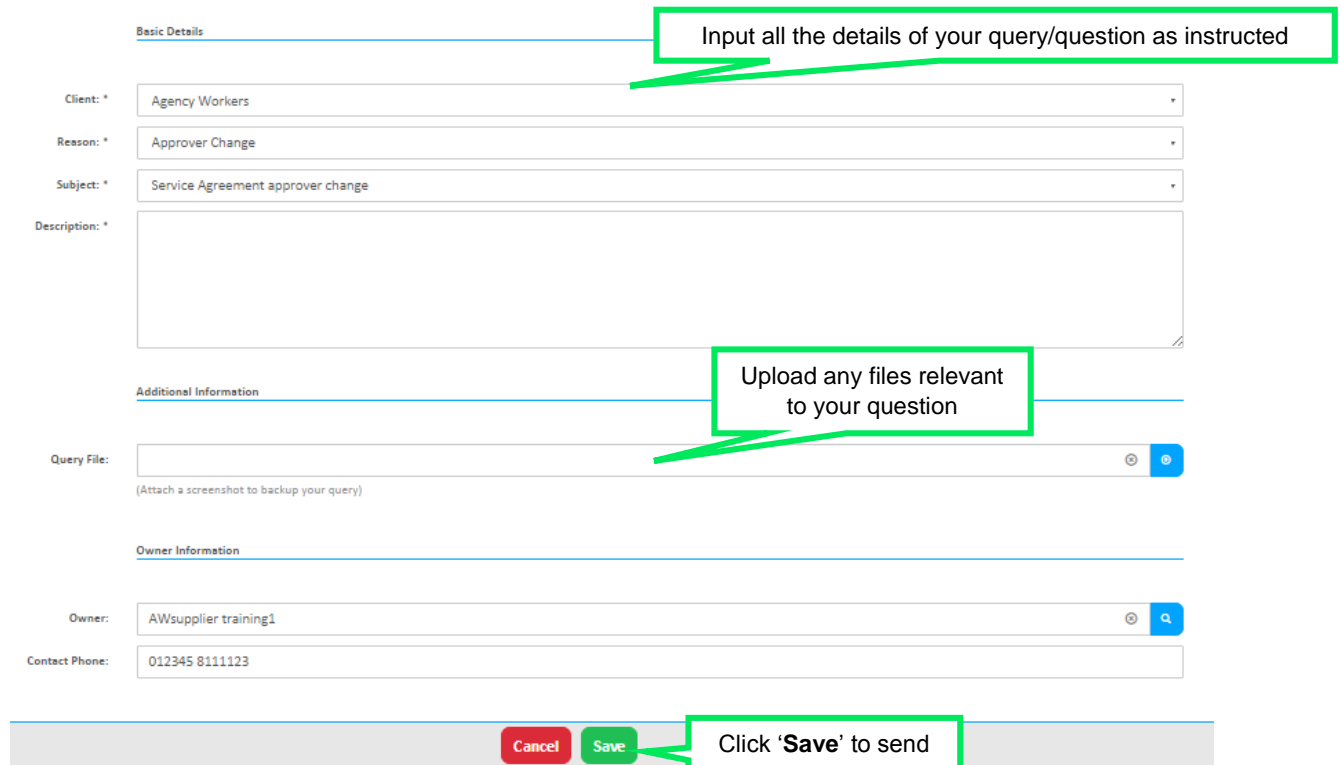

Click into the '**Help**' link available on your system homepage

You will be taken to the help and support section where you have a number of different ways of finding the answer to any questions you may have:

Here are listed the contact details for the Matrix SCM operations centre

a) Click here to view all available training guides

b) Click here to raise a Query

c) Click here to open Live Support

3. Training Guides / Documents / Videos are available for you to view and use as support:

Click into the document relevant to your query/question and the training document will download

4. Queries can be raised to the Matrix SCM Account Management team:

A member of the Matrix SCM Account Management team will be assigned to your Query and they will respond to you with an answer.

Each individual Query has its own unique reference number which will detail the question and the response.

You can look through all the Queries you have raised and any that have been raised by members of your team by clicking into the 'Browse' link under the Queries section of the help and support section.

5.   Live Support is an instant chat help function where you will be conversing with a member of the Matrix SCM Account Management team in real-time:

Welcome to Online Support! Please outline you query in detail (providing order/placement/timesheet numbers) and if you are a client or supplier.

Fields marked with * are required

Please select the department you would like to reach:

- Support for CR.net   ● Online!
- Support for SProc.Net   ● Offline Send a Message

Input your details and the details about your question as instructed

Your Name: *
Your Company   *
Your Question (please include any order/placement/timesheet numbers and the issue):   *

Start Chat

Click '**Start Chat**' to bring up the instant chat

All the system help and support option are also available on your system homepage: