Order Management

Client Guide - Agency Workers

v3.0

Contents

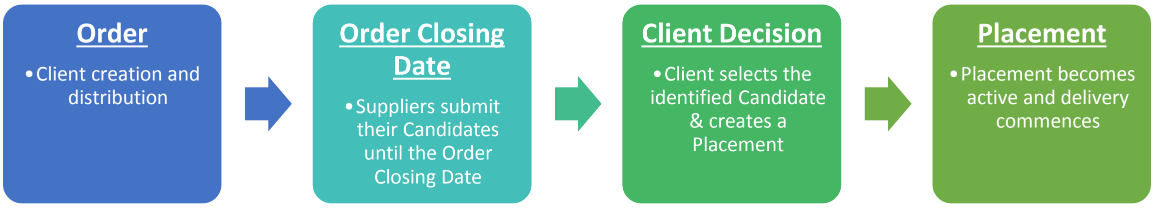
Overview

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.

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.



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 user guide is a step-by-step walk through of creating and distributing an Order and includes:

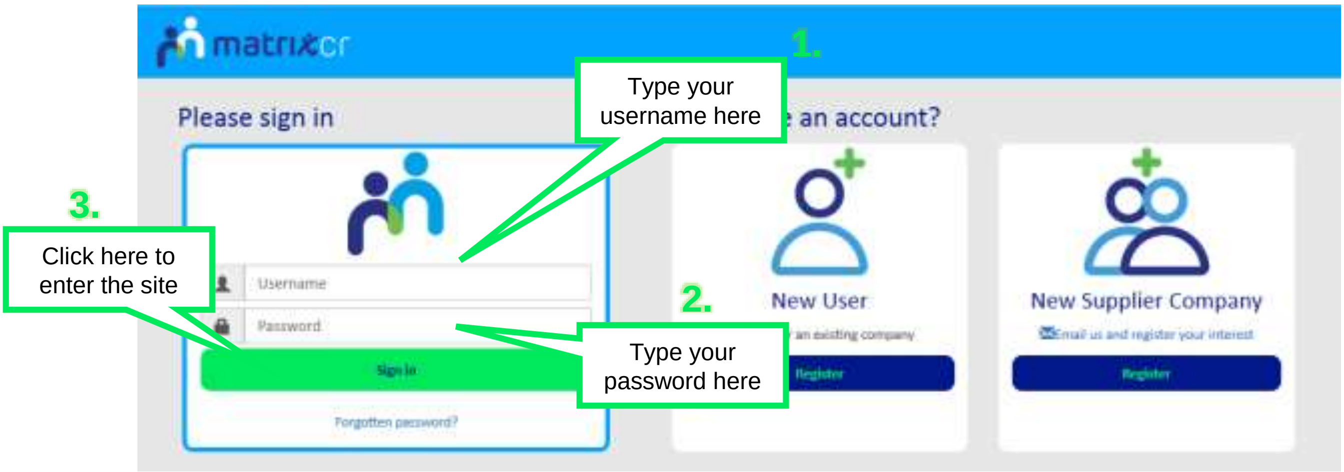
- How to create and distribute a new Order
- How to set your timescales, shortlist and weightings
- Supplier tiering
- How to review Candidates submitted to your Order
- How to set up interviews
- How to reject non-compliant Candidates

Glossary

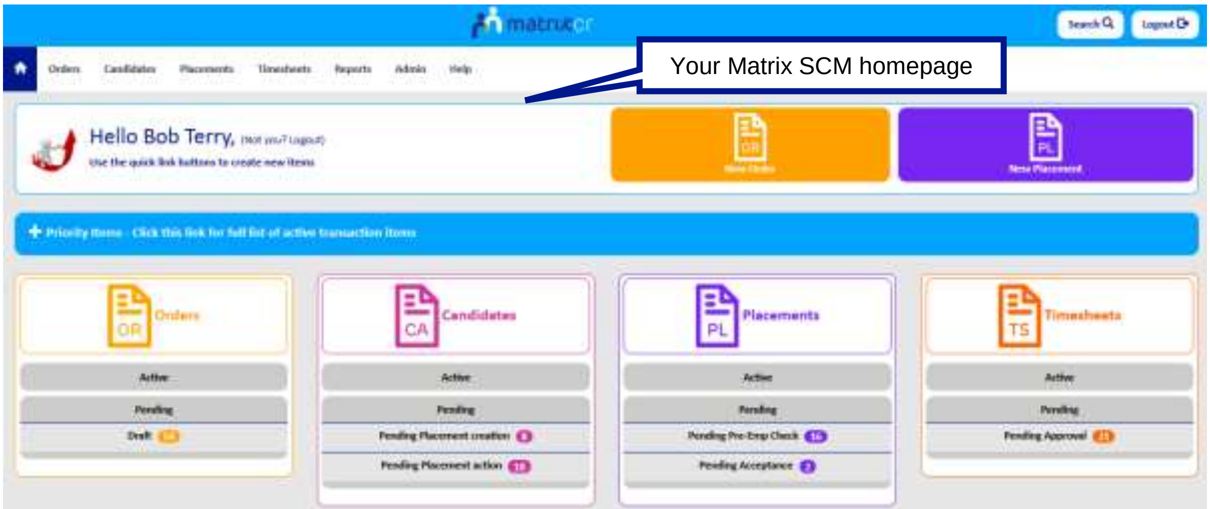
Terminology	Description
Order	A client request for a service needed, containing service details
Candidate	Supplier’s offer submission against a client’s Order criteria
Category	Type of service, e.g. Training Services, Agency Workers
Job Title	Service title and summary of any standard service details A Job Title will auto-populate sections of the Order
Location	Where the service will be carried out
Client Manager	The Matrix-CR.Net user procuring the service through the system
Cost Codes	Budget from which the service will be paid
Profile	Free-text Order criteria
Attributes	Pre-configured Order criteria, classified into Pre-Employment Checks, Skills and Qualifications
Distribution	Circulation of an Order
Weightings	Client’s prescribed values to Order sections
Draft	Saved workings but process incomplete
Order Close Date	The date an Order closes to further Candidates

Login

1. Login to your Matrix-CR.Net system:

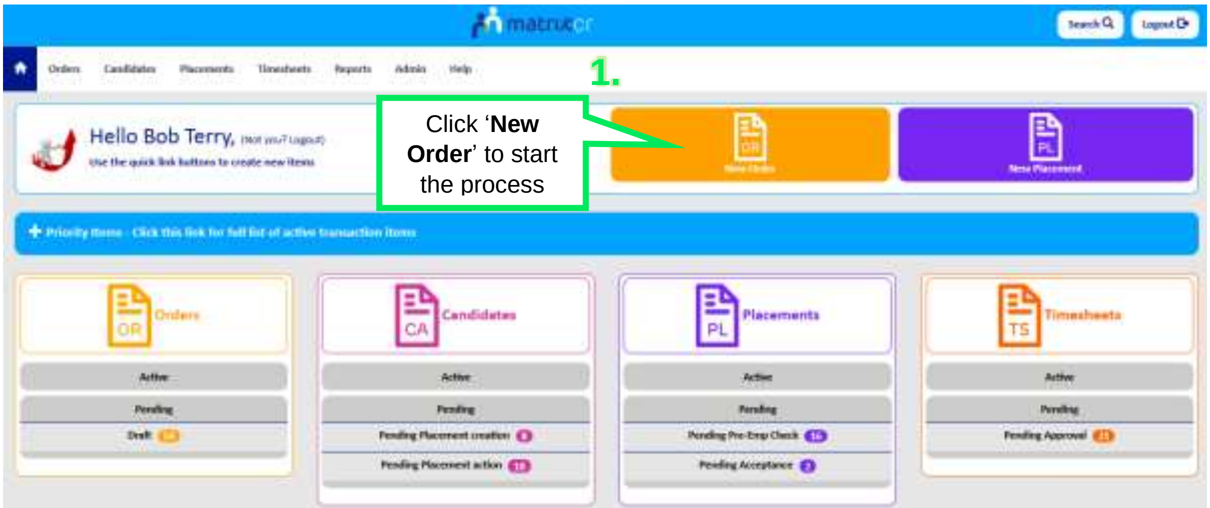


2. You will be taken directly to your Matrix-CR.Net homepage:

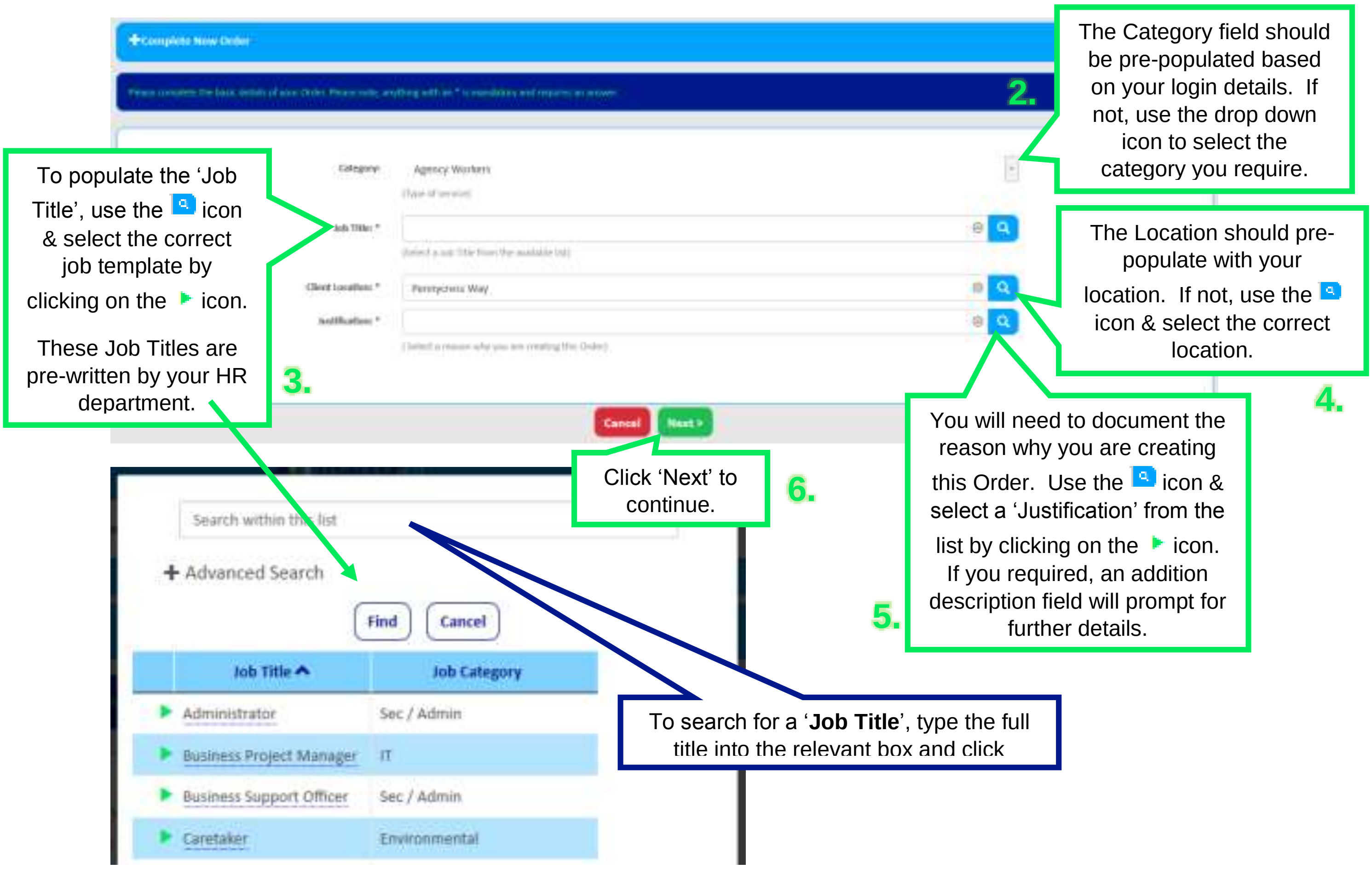


Creating a New Order

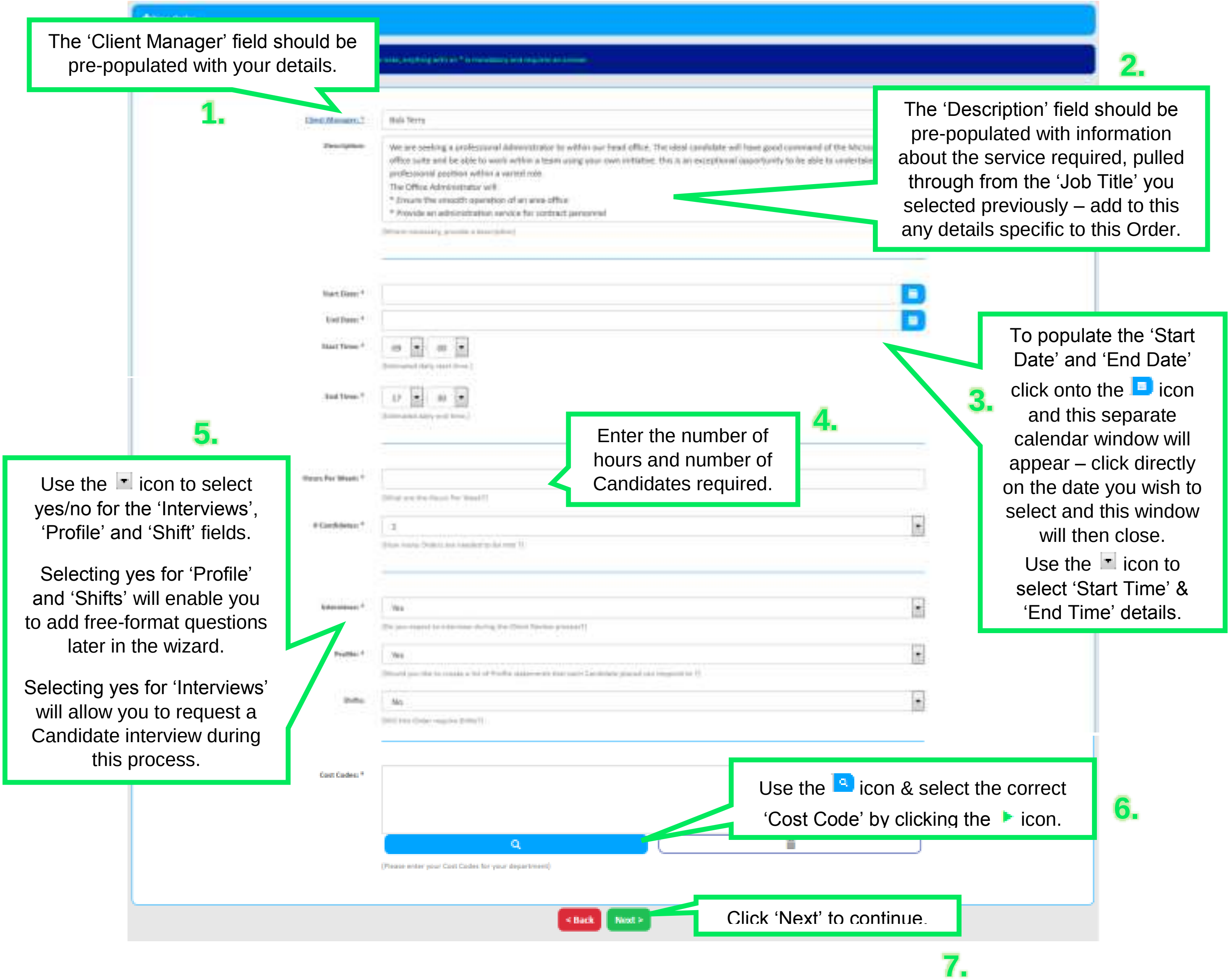
1. From your homepage you can start creating a new Order by clicking into the '**New Order**' icon:



2. Complete all fields within Step 1 (Basic Details) using the icons provided:



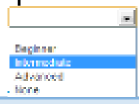
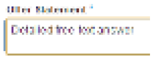
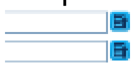
3. Enter all the additional information (Step 2) as required:



Notes:

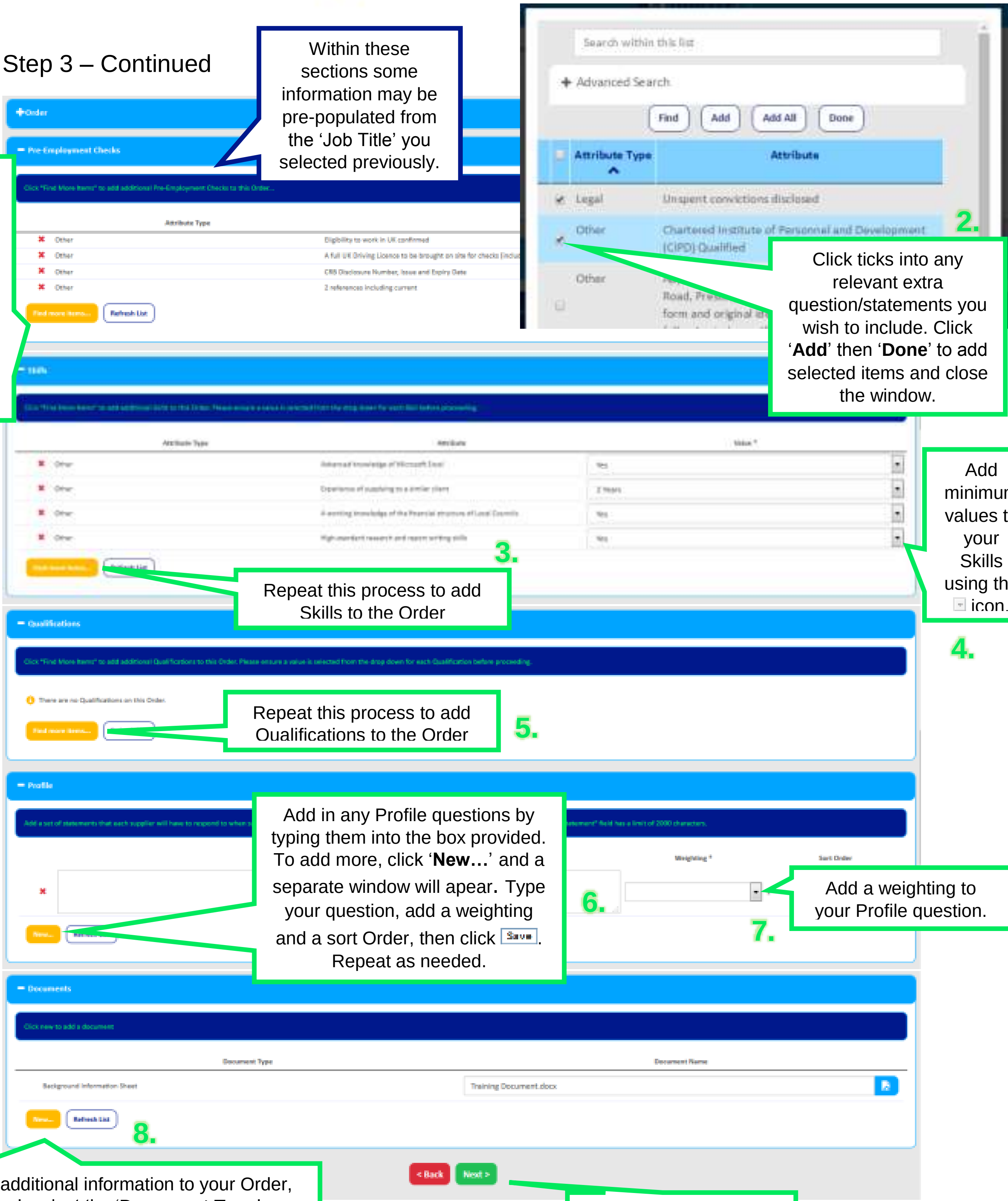
- If you select 'Yes' for Profile you will have to add at least one Profile question to your Order.
- All information, descriptions, cost codes, etc. are client specific it is not generic.
- The number of Candidates allows one Order to be created for multiple Placements for the same Job Title.

1. Step 3 is about entering the quality criteria for your Order:

	Specification	Description	Example	Supplier Response	Scoring
Attributes	**Pre-Employment Checks**	Required characteristics that a supplier must be able to deliver if submitting a Candidate.	* CV or work history obtained * Photo ID validated against person, signed & dated copy retained	Suppliers will tick the Pre-Employment Checks they are able to meet: 	Quantitative answers scored by Matrix-CR.Net
	Skills	Required skills that a Candidate must be able to deliver if being submitted by a supplier.	* Good written and verbal skills * Team working	Suppliers will select a Skill level their Candidate can provide: 	Quantitative answers scored by Matrix-CR.Net
	Qualifications	Required qualifications that a Candidate must possess if being submitted by a supplier.	* 5 G.C.S.E's at Grade C or above including Maths and English or equivalent	Suppliers will select the qualification level their Candidate can provide: 	Quantitative answers scored by Matrix-CR.Net
Profile	**Profile**	Free-text questions that a supplier is required to answer (also in free-text) if they are submitting a Candidate.	* Provide an example of team working experience?	Suppliers will give detailed free-text responses to any questions asked: 	Subjective answers not scored – Just for reference
Shifts	**Shifts**	The shift pattern that needs to be worked within this job	* Mon 6am-2pm * Mon 3pm-11pm * Tue 6am-2pm	Suppliers will tick to indicate which shifts their Candidate can work	Reviewed by you, not scored
Other	**Pre-Employment Documents**	Chance for you to upload any documents you wish to attach to your Order. You can also request documents from a supplier.	* Photo ID * Right to Work * CV	Suppliers will upload documents from their computer: 	Reviewed by you, not scored

Step 3 – Continued

Within these sections some information may be pre-populated from the 'Job Title' you selected previously.



1. To add further Pre-Employment Checks click '**Find more items…**' and a separate window will appear, as shown.

2. Click ticks into any relevant extra question/statements you wish to include. Click '**Add**' then '**Done**' to add selected items and close the window.

3. Repeat this process to add Skills to the Order

4. Add minimum values to your Skills using the icon.

5. Repeat this process to add Qualifications to the Order

6. Add in any Profile questions by typing them into the box provided. To add more, click '**New…**' and a separate window will apear. Type your question, add a weighting and a sort Order, then click Save. Repeat as needed.

7. Add a weighting to your Profile question.

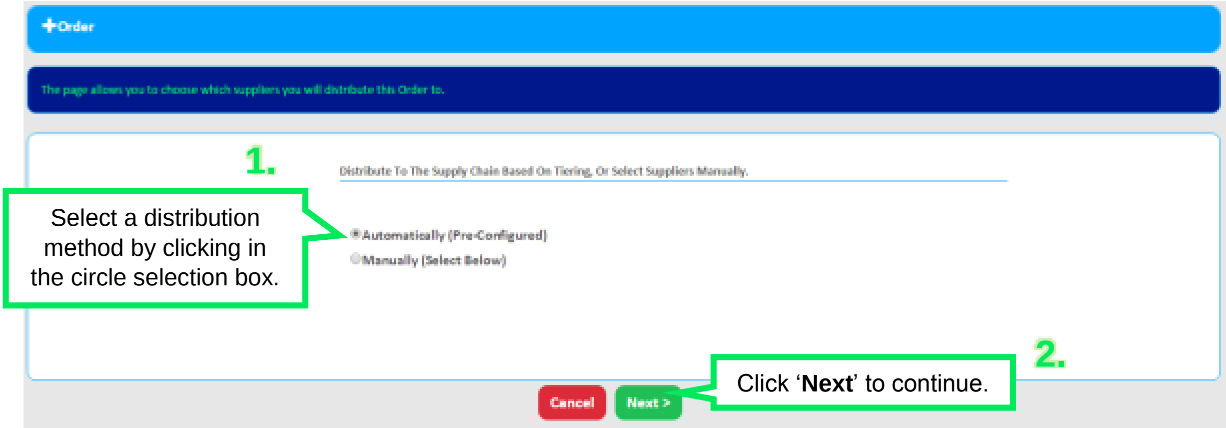
8. To add additional information to your Order, click '**New**', select the '**Document Type**' you are uploading, click to select the document you wish to attach by clicking '**Chose File**', then click '**Save**' to close the window.

9. Click '**Next**' to continue.

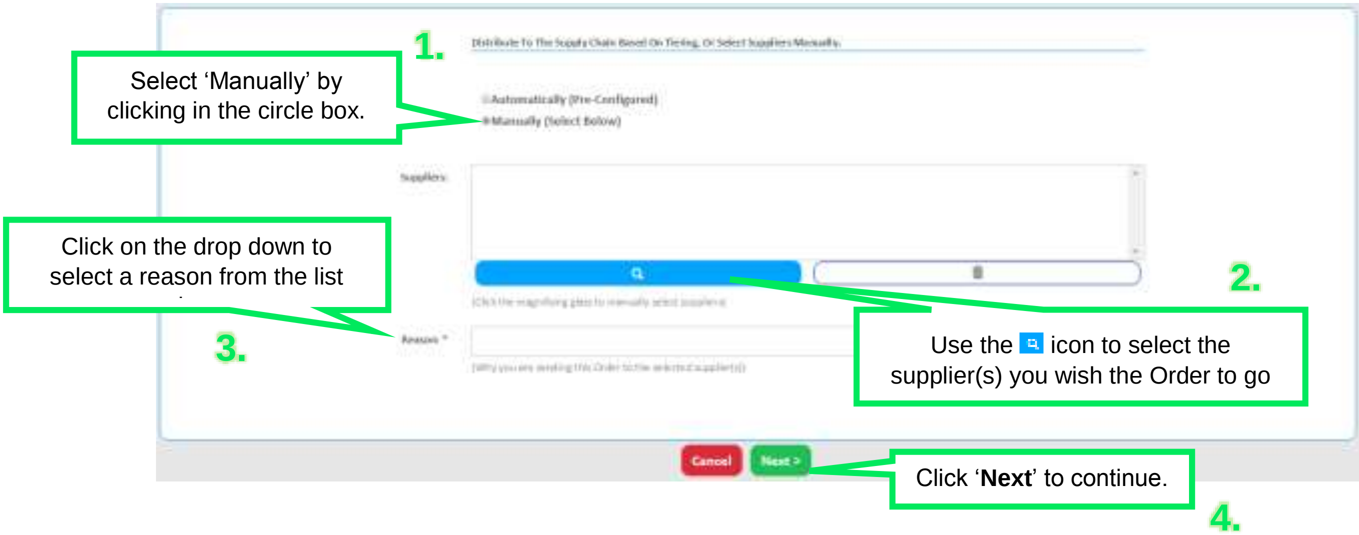
Order Distribution

Step 4, select your distribution method:

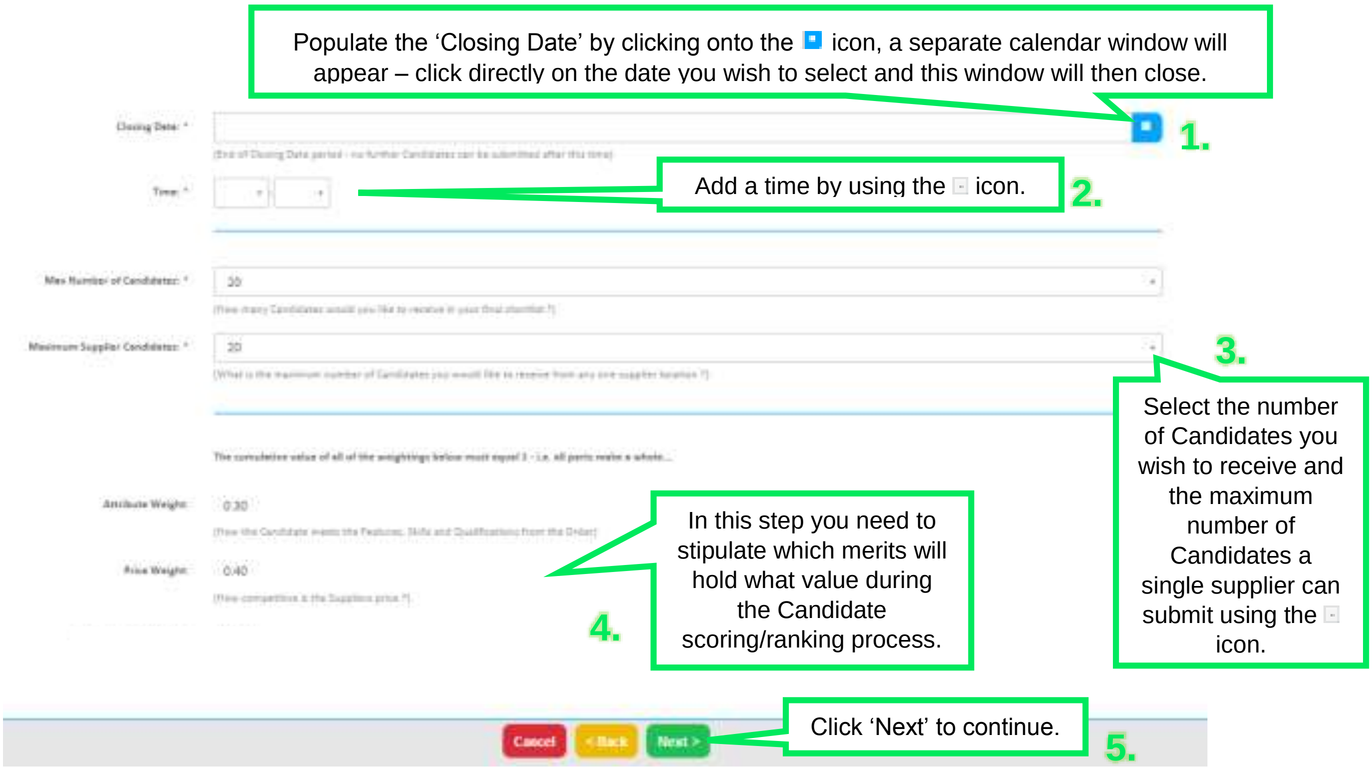
Automatically – Will distribute to all suppliers enrolled into this Order's service category.



Manually – Will allow you to stipulate to which supplier(s) you want the Order distributed.



Step 5 is about defining your Order's timescales, shortlist and weightings:



The weightings will determine a supplier's Candidate ranking when the two metrics (Attributes and Price) are scored.

For example:

	Attributes	Price	Total
Client 1	0.80	0.20	1
Client 2	0.20	0.80	1

Client 1 – Heavily driven by Candidate quality.

Client 2 – Heavily driven by Candidate cost.

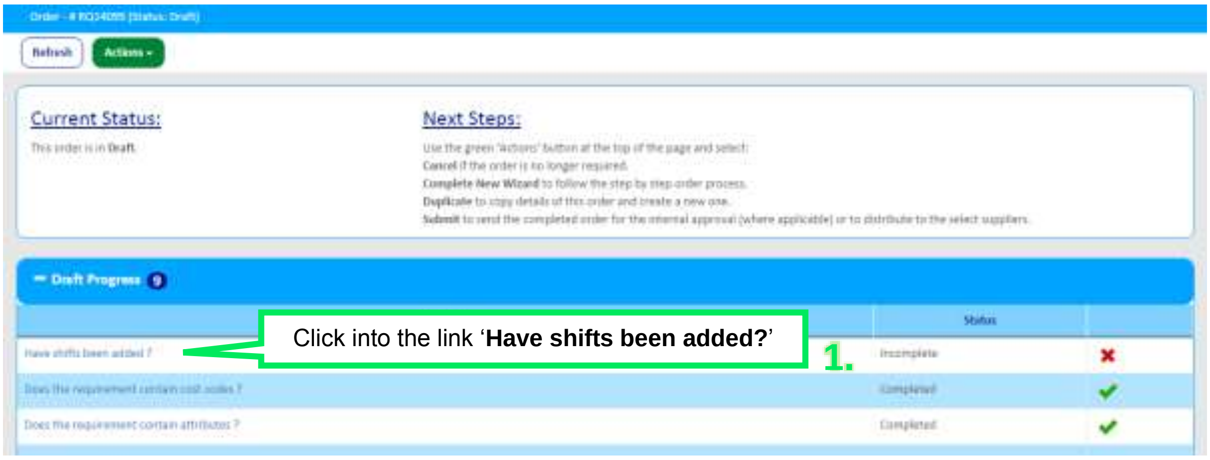
Note:

➔ Most clients pre-set their weightings at a council level, if so, these fields will be un-editable.

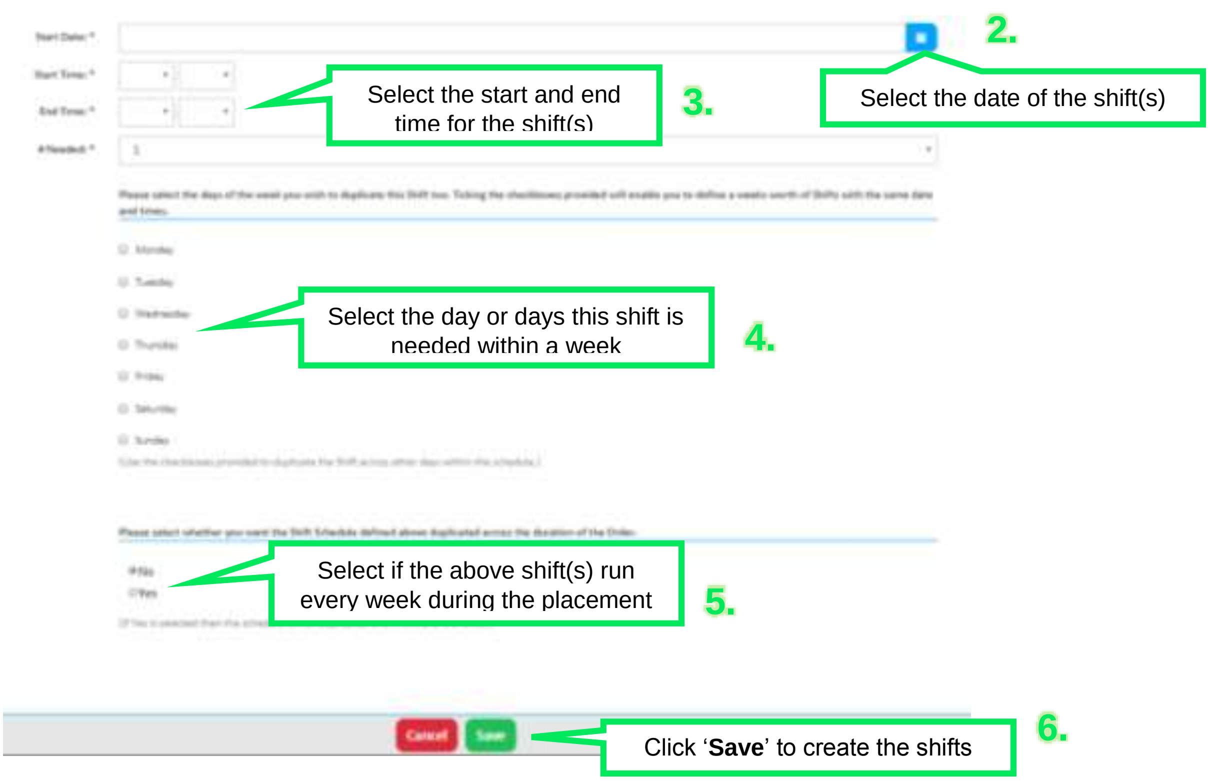
If you don't have shifts in your Order you will be taken to the final confirmation page, skip to action point 7 of this section on page 14.

If you opted to add shifts to your Order you will be directed to your Order summary page and the shifts section will show as incomplete:

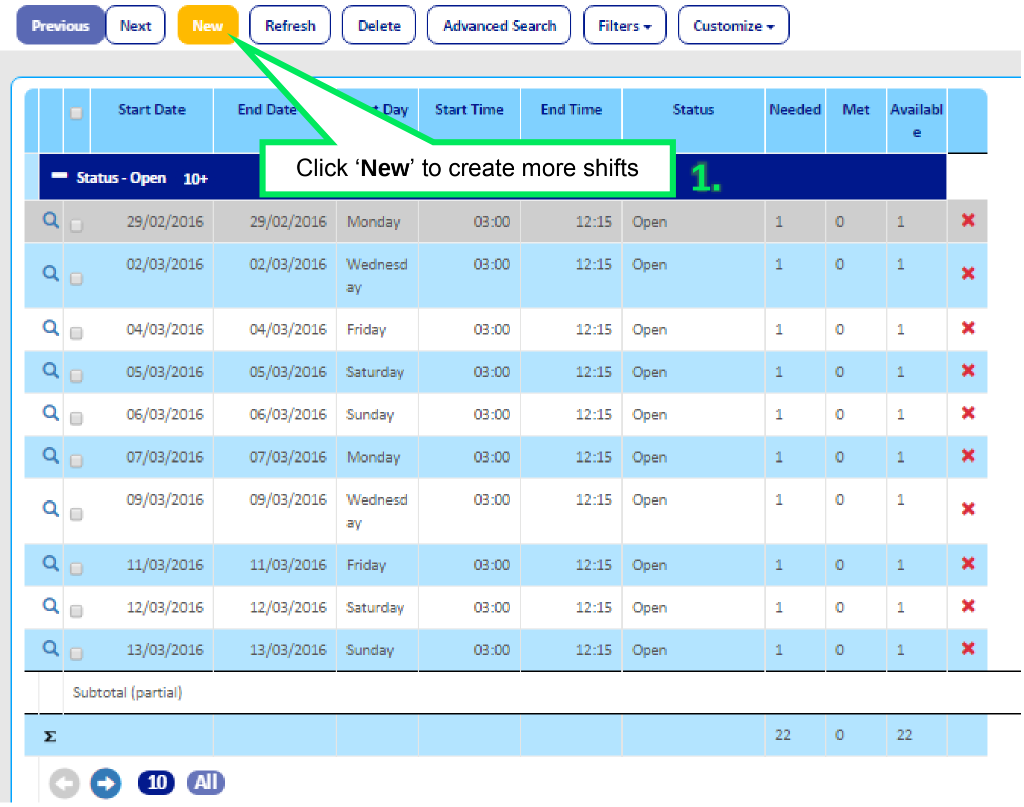
1. Click into the link '**Have shifts been added?**'



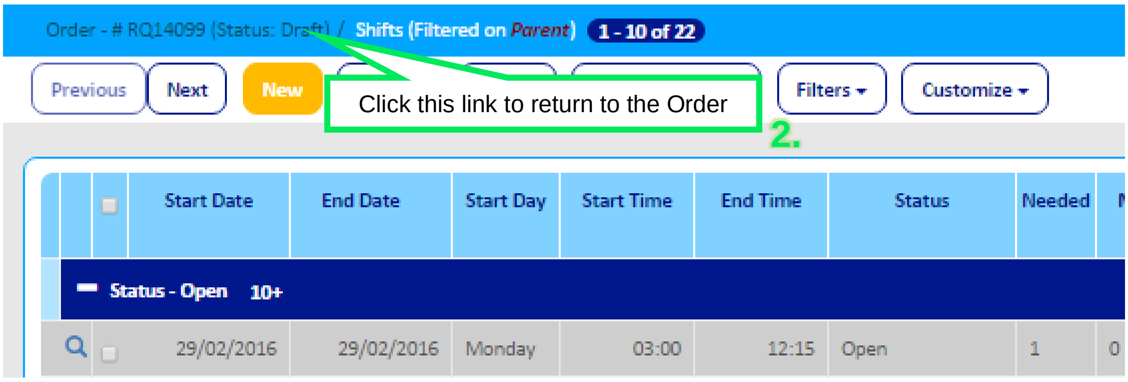
2. Populate all shifts relevant to this job vacancy



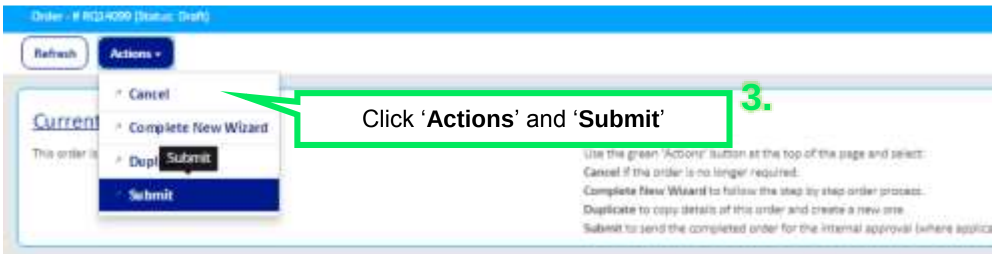
3. You will see each shift as a separate line



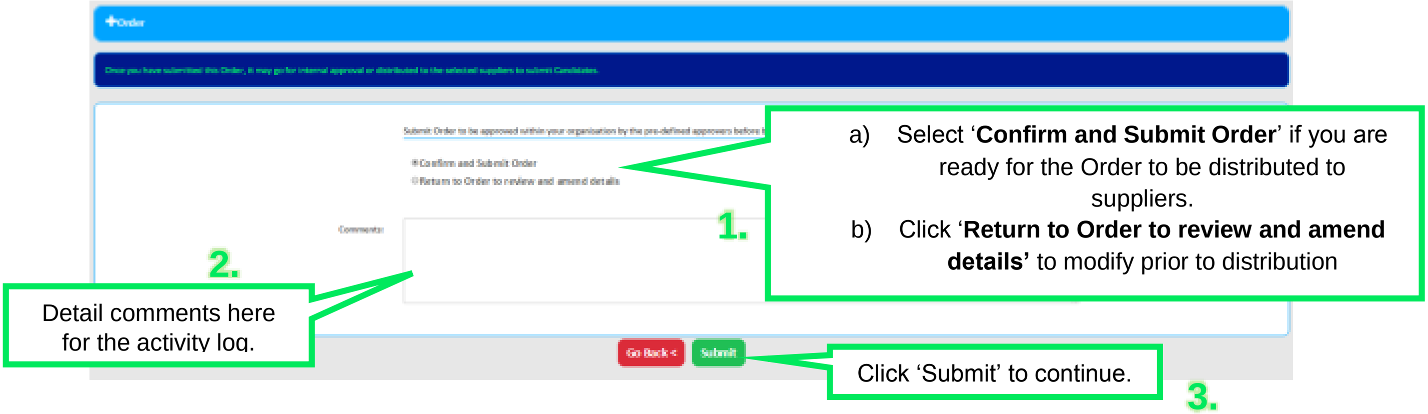
4. Add more shift by clicking '**New**' and repeating the process
5. Once all the Shifts are added return to the Order summary page



6. From the summary page click '**Actions**' and '**Submit**'



7. Confirming and submit your Order:



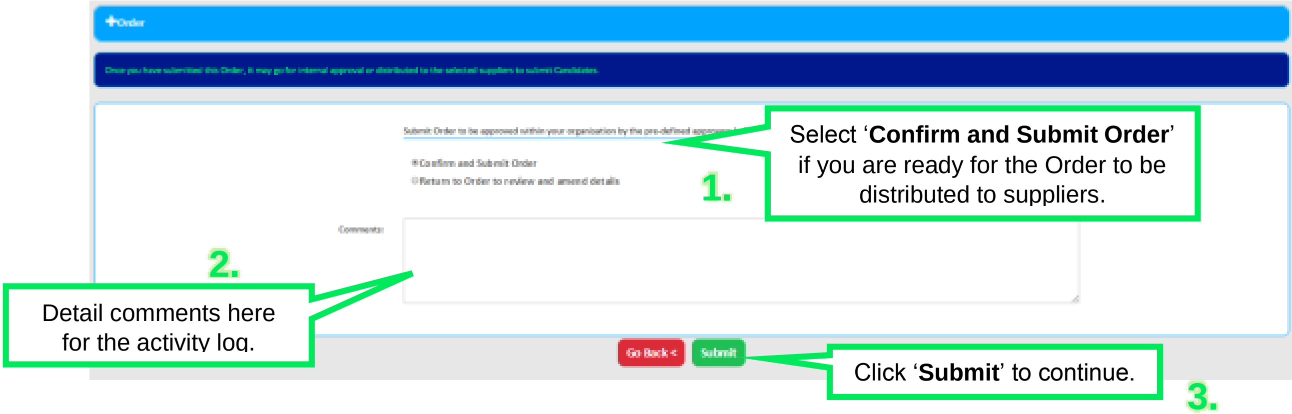
a) By submitting, your Order is now ‘Open for Candidates’ and the Order status toolbar will display:

b) If you selected to ‘return to Order & review & amend details’, your Order will remain in draft and the Order the status toolbar will display:

1. To review and add additional information to any section, click ‘**Actions**’, ‘**Complete New Wizard**’ – this will take you through the Order wizard again. All sections will still contain the data/information you input previously

2. Once complete, to submit, click ‘**Actions**’, ‘**Submit**’.

3. You will return to this screen:

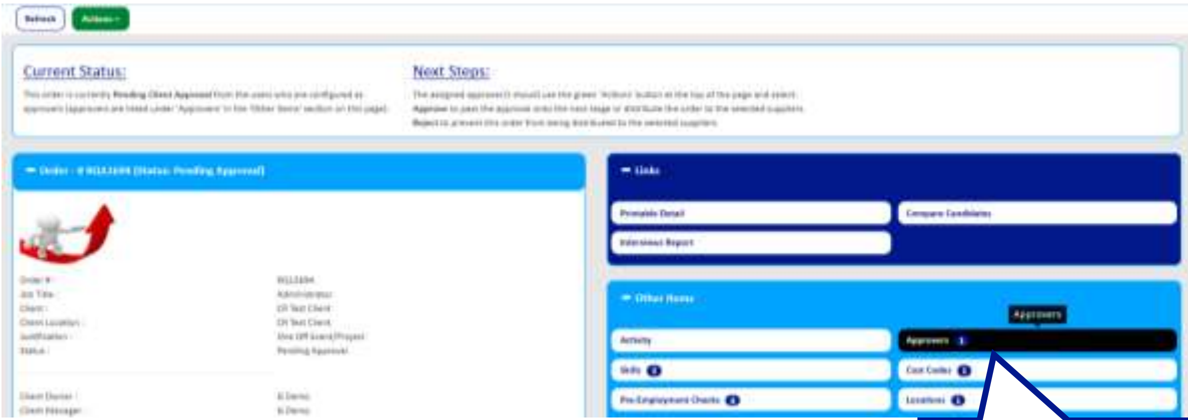


4. The Order is now ‘Open’ and the Supply Chain would have received an email notification.

Order Approval

1. If your Matrix-CR.Net system is set up with Order approval, your Order will have been sent to your Client assigned approver, before being sent to suppliers
2. Your Order status will read "Pending Client Approval"

3. Your approvers are listed under the 'Other Items' section of your Order summary page:



Click into the '**Approvers**' link to view your approvers.

4. Once approved, the Order will change status to Open and will then be distributed out to the relevant suppliers.
5. If your assigned approver rejects your Order, you will be notified and your Order status will update to rejected.

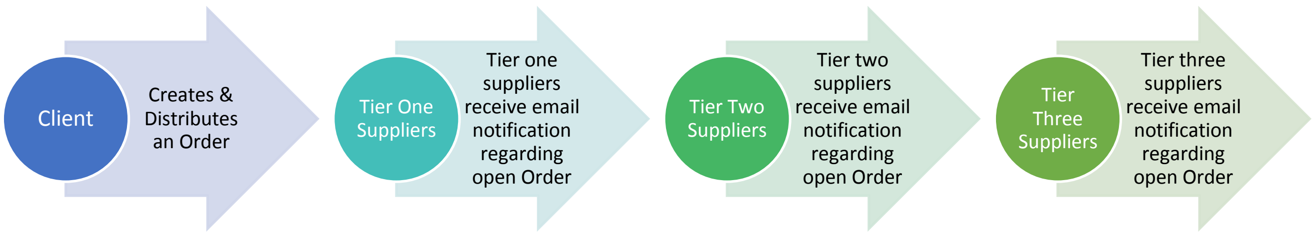
Click into the '**Activity**' link to view rejection reasons.

Supplier Tiering

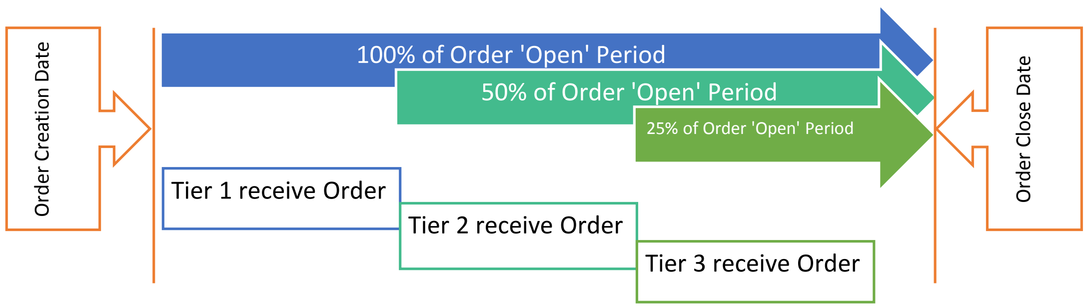
When an Order is progressed through the distribution process, the supply chain will receive notification of the Order and have access to create Candidate submissions against it.

The distribution process is staggered in line with the Matrix-CR.Net supplier tiering model and this will affect the date/time the supplier will receive the Order notification and have access to the Order.

A supplier's tier is calculated against metric targets focused around system processes and efficiencies.



Timescales:



Key Points:

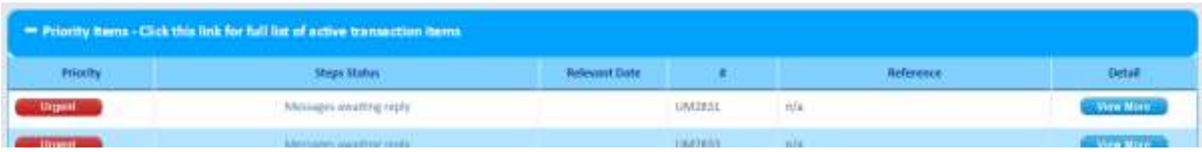
- ➔ Suppliers are aware of which tier they sit within and have access to reports/information as to why.
- ➔ You as a client should not receive any questions about the tiering process.
- ➔ If you want to know more about the tiering metrics the Matrix-CR.Net supply chain are measured against, you can download the 'Supplier Tiering Guide', available in the Matrix-CR.Net help and support area of your system
- ➔ All suppliers will be able to submit a Candidate prior to the close date of the Order.
- ➔ Tiering will not apply in immediate / emergency fill roles.

Order Messaging

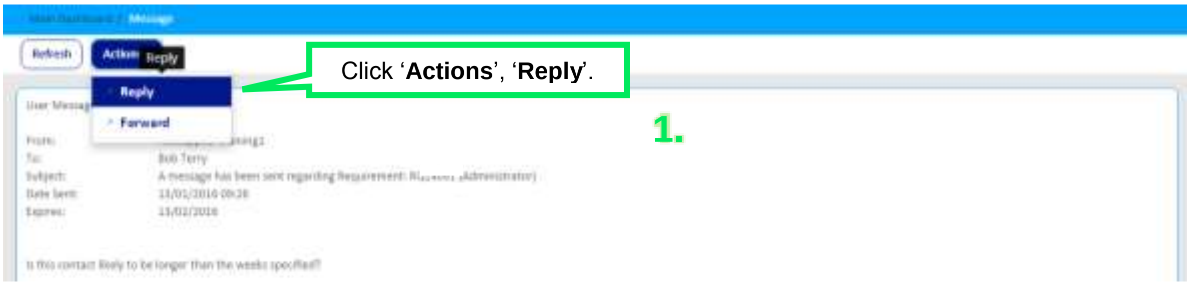
When an Order is ‘Open for Candidates’, suppliers can send you Order messages to clarify points and ask additional questions.

1. If a supplier sends you a message you will receive an email notification:

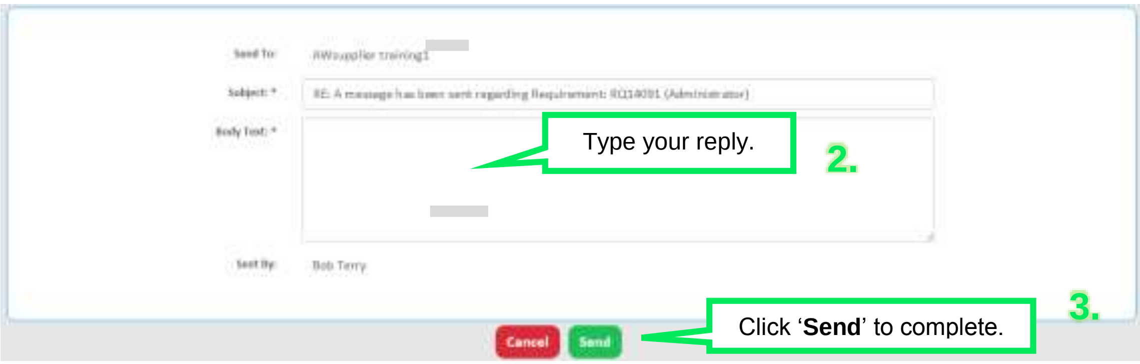
The message will also display on your ‘Priority Items’ list:



2. To reply, click ‘View More’ from your priority items list or ‘click here’ on your notification email. You will be taken to the message:



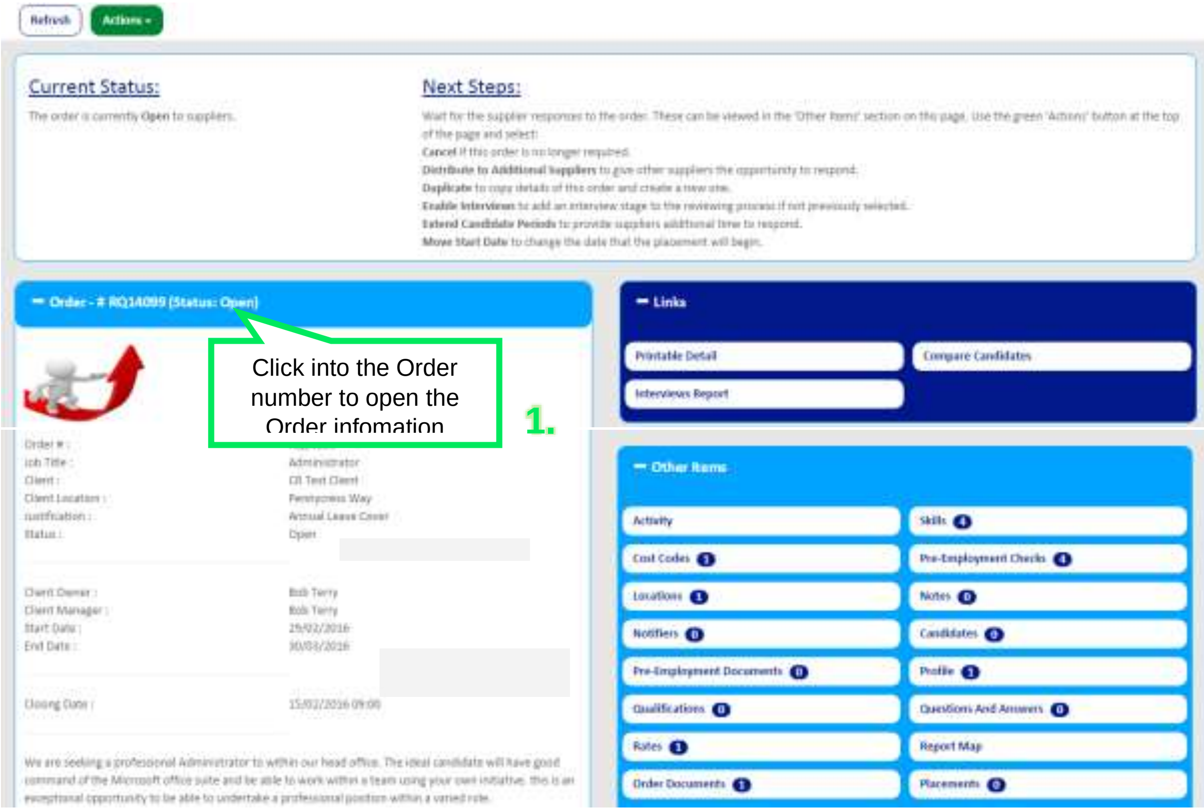
3. Draft a response:



All suppliers to whom this Order was distributed will be able to view this question and answer to ensure all suppliers have the same information.

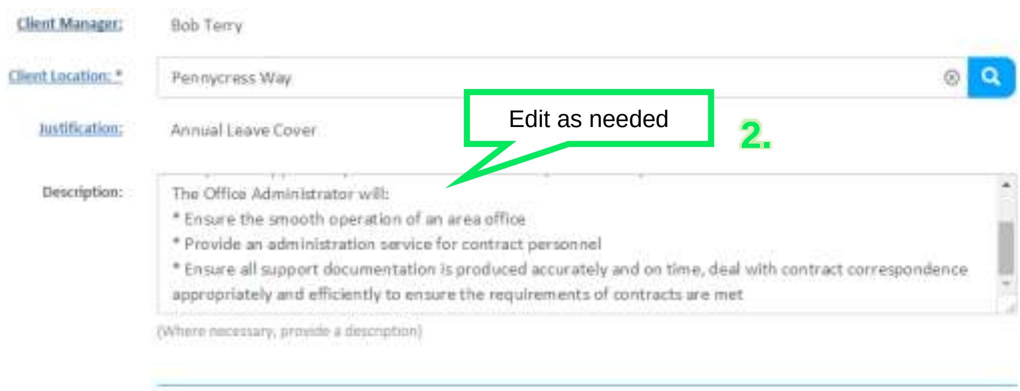
Editing Open Orders

- ➔ Within Matrix-CR.Net Client users have the ability to edit their Order after submission to the supply chain
- ➔ Suppliers are notified of any edits made so they can review the changes



Clients can edit the Order details

1. Click into the Order icon, the open fields are available if you scroll down
2. Edit as needed

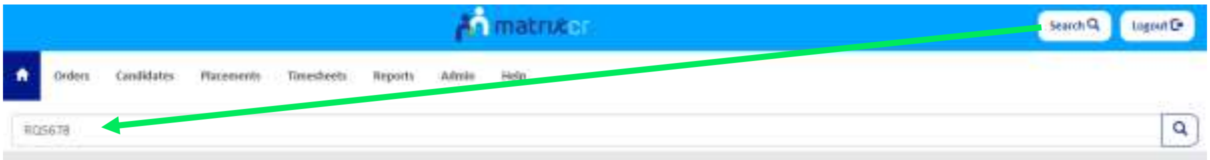


3. Click Save icon when complete

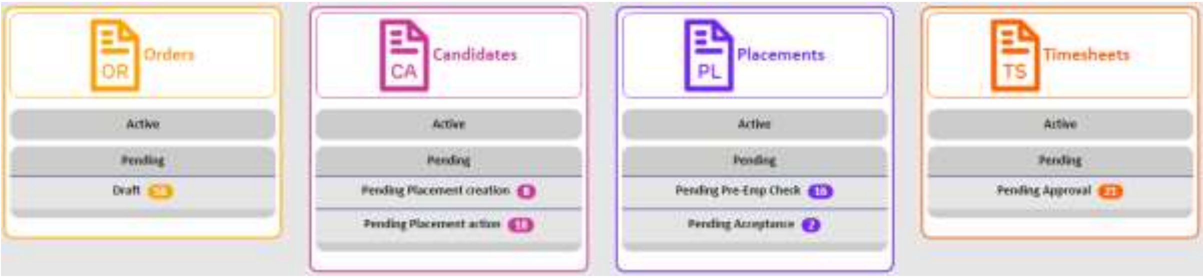
Duplicating an Order

- ➔ The Matrix-CR.Net system allows a client user to duplicate any existing Orders.
- ➔ The Order being duplicated can be in any status.
- ➔ This allows Clients to send out an Order a number of times, quickly and easily, editing any information, if needed.

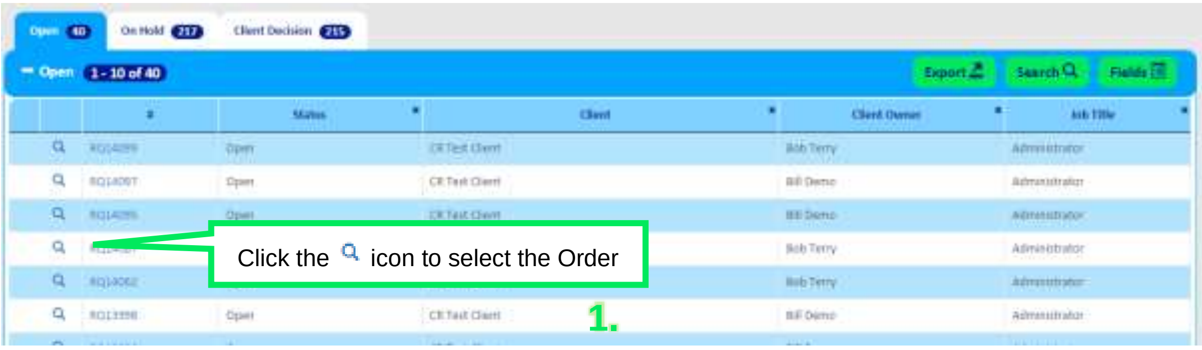
1. An old Order can be located by searching for the Order reference number using the search function within Matrix-CR.Net:



2. Or by searching through your previous from your homepage

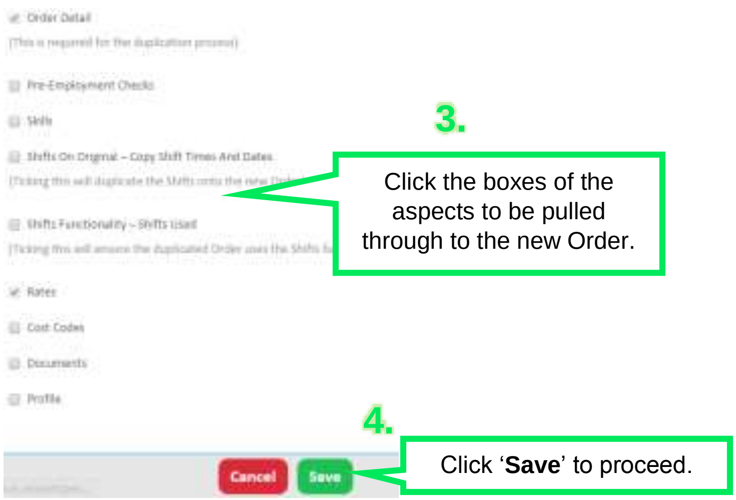


3. Select the Order you wish to copy



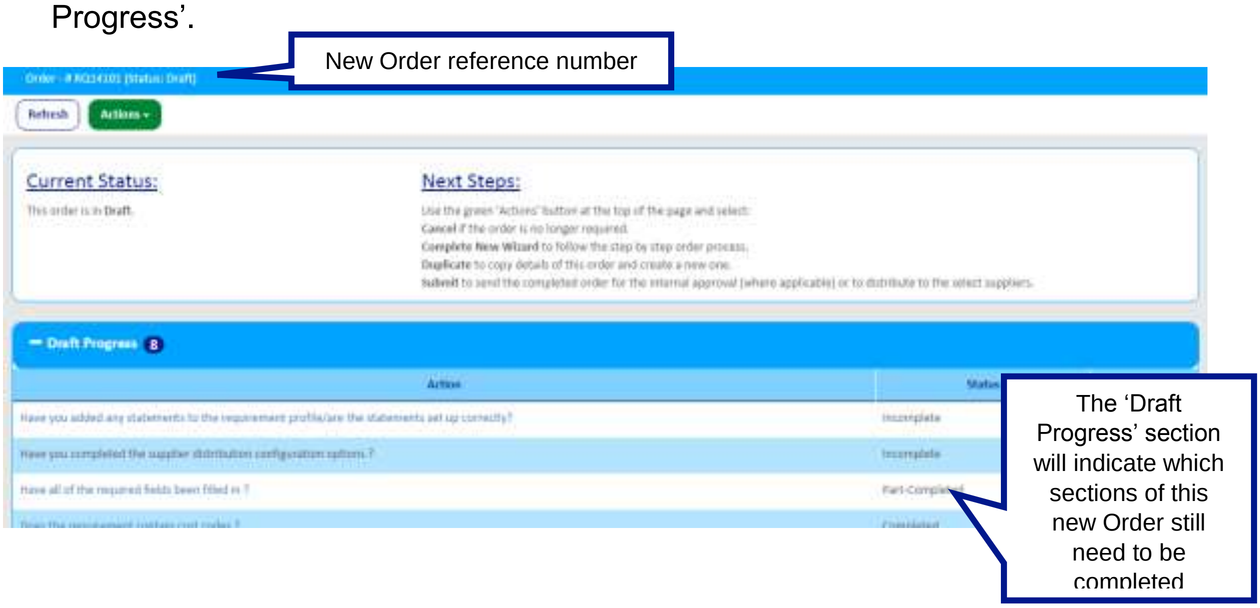
4. This will take you to the Order summary page:

5. Click the sections you wish to duplicate to the new Order by clicking in the boxes.



6. This will take you to your new Order summary page, the status will be Draft.

7. You will need to complete all the incomplete sections shown in ‘Draft Progress’.



8. To populate the missing information click ‘**Actions**’ and ‘**Complete New Wizard**’

9. Navigate through the wizard steps as if you were creating a new Order, you may add or delete information where necessary.
10. Once completed, you will be taken back to the Order summary page, the status will change to ‘Open’.
11. The new Order has been sent out to the supply chain.

Notes:

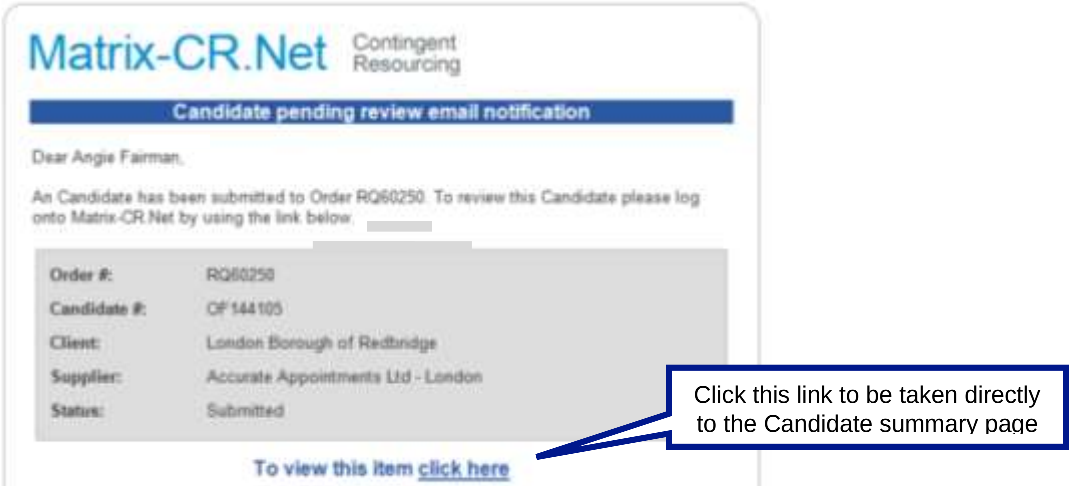
You will be sent an email notification when the ‘Order Closing Date’ has passed.

Reviewing Candidates

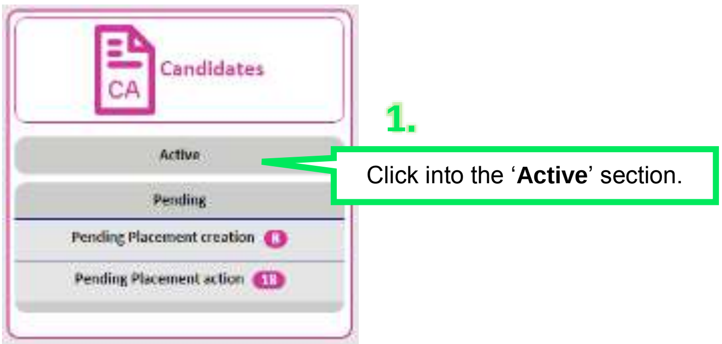
The Matrix-CR.Net system allows you to review Candidates in a number of different ways.

Candidate Summary Page:

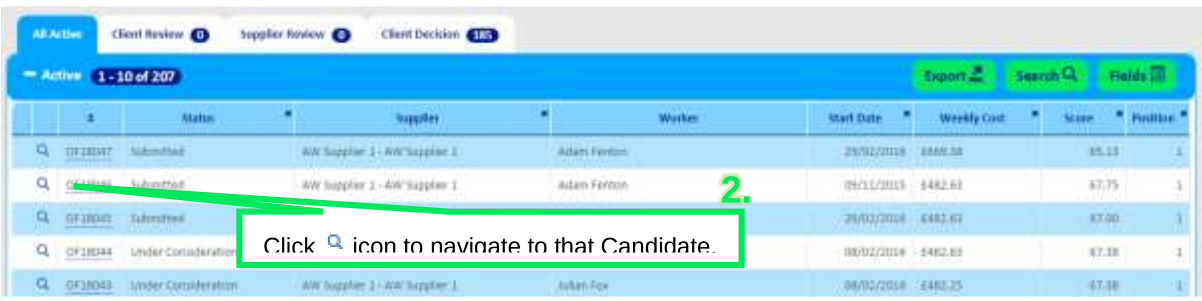
1. When a Candidate is submitted towards your Order, you will receive an email notification:



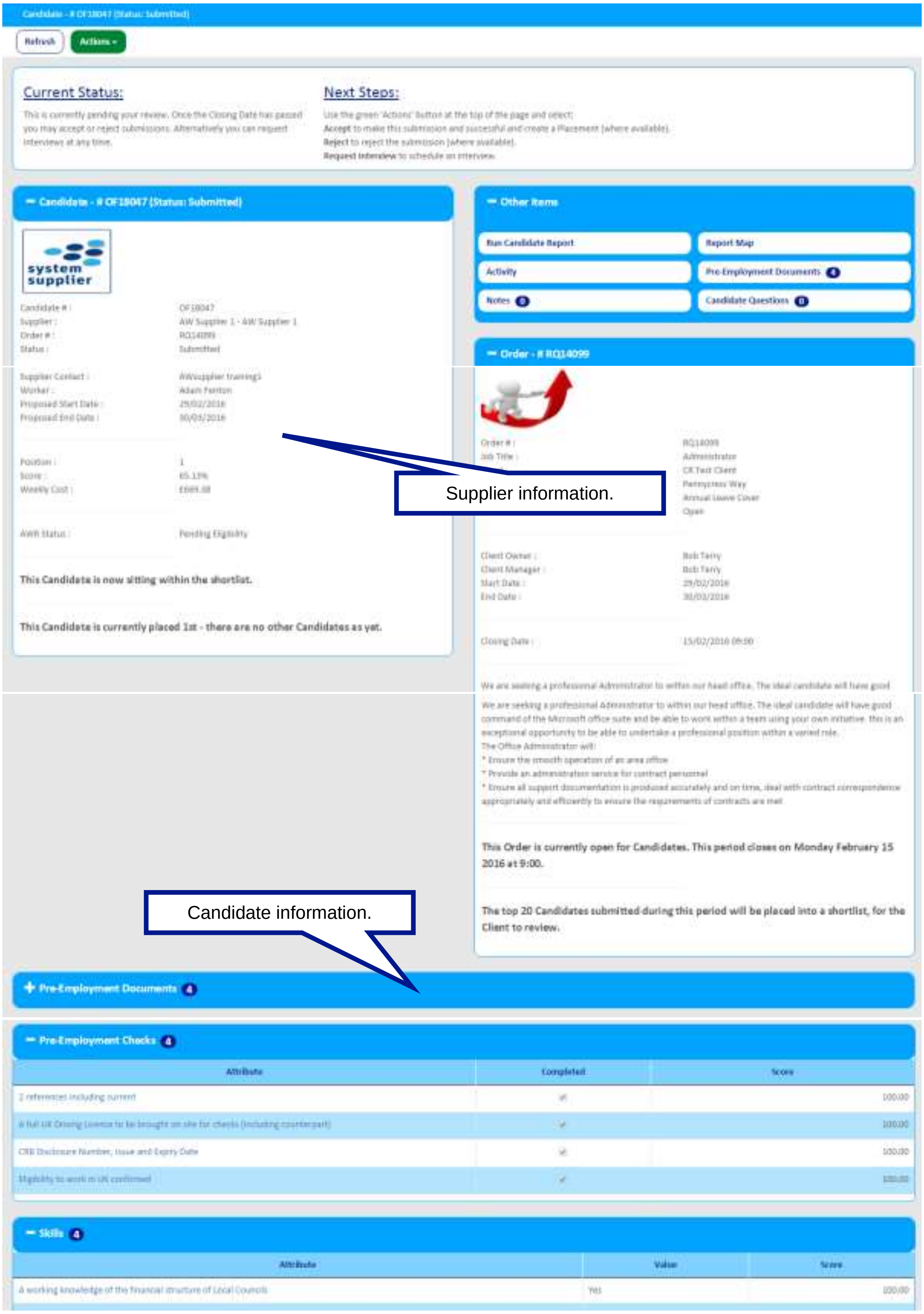
2. To review that Candidate, navigate to the Candidate section of your homepage:



3. You will be taken to a list view of all Candidates.
4. All submitted Candidates will be under the status 'Submitted'



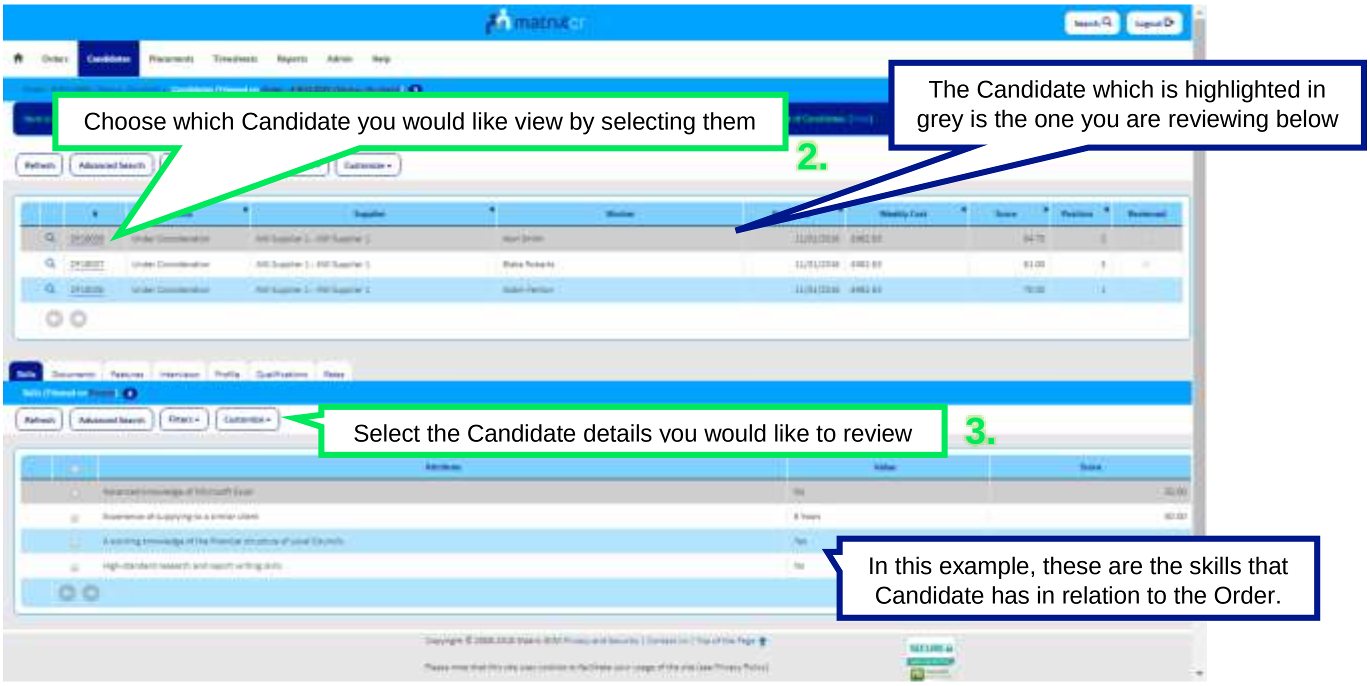
5. You will be taken to that Candidate's summary page:



Candidate List View:

1. From the Order summary page click on the 'Candidates' field title icon

2. You will be navigated to the list view of the shortlisted Candidates that have been submitted to your Order.



3. Review each Candidate's submission details, in relation to your Order specifications, by clicking on the relevant submission detail titles.
4. Once reviewed, click on the 🔍 icon to be taken to the Candidates summary page.

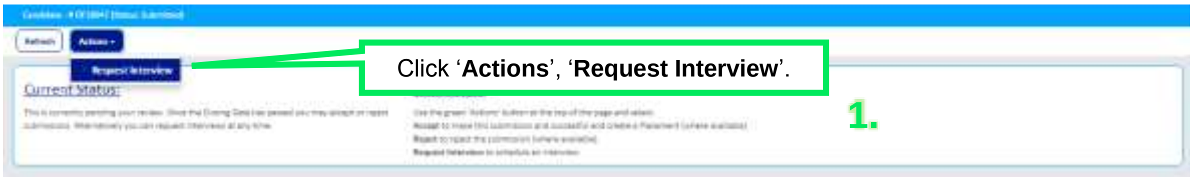
Compare Candidates:

1. From your Order summary page select ‘**Compare Candidates**’ report

2. This will open a new web page
3. This page will allow you to quickly and easily compare the Candidates in your shortlist.
4. All the information that has been input about the Candidates will be displayed within this ‘Compare Candidates’ report.
5. It has been formatted to enable the page to be printed out if necessary.

Interviews

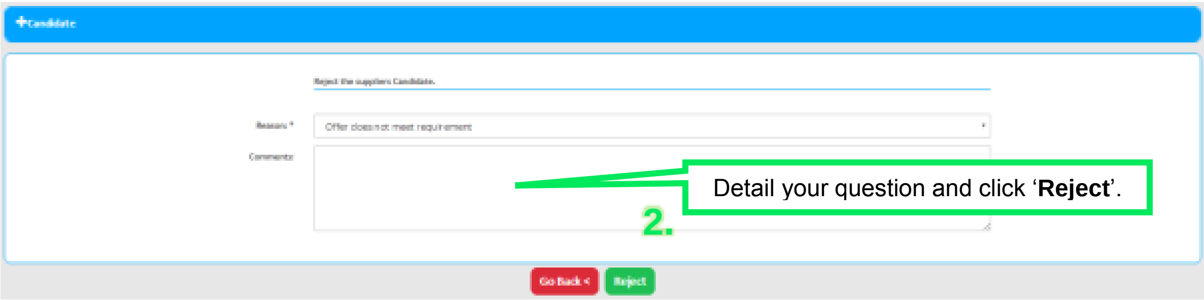
1. If required, interviews can be set up via the system. From the Candidate summary page:



2. Input all of the interview details:
3. The interview will be shown on the Candidate summary page

Rejecting a Candidate

1. If a Candidate is non-compliant against your Order criteria (for example; a supplier not answering your Profile questions, or uploaded a blank document) you can reject that Candidate from your shortlist.
2. From the Candidate summary page:
3. Click ‘Actions’, ‘Reject’
4. Complete the comments section with your rejection reasons:



5. The Candidate status will update to rejected:

6. This will update on your Order summary as well:

If you reject any non-complaint Candidates, Matrix-CR.Net will automatically pull through the next ranked Candidate into your shortlist (number of Candidates within the shortlist defined by yourself at Order creation stage).

Notes:

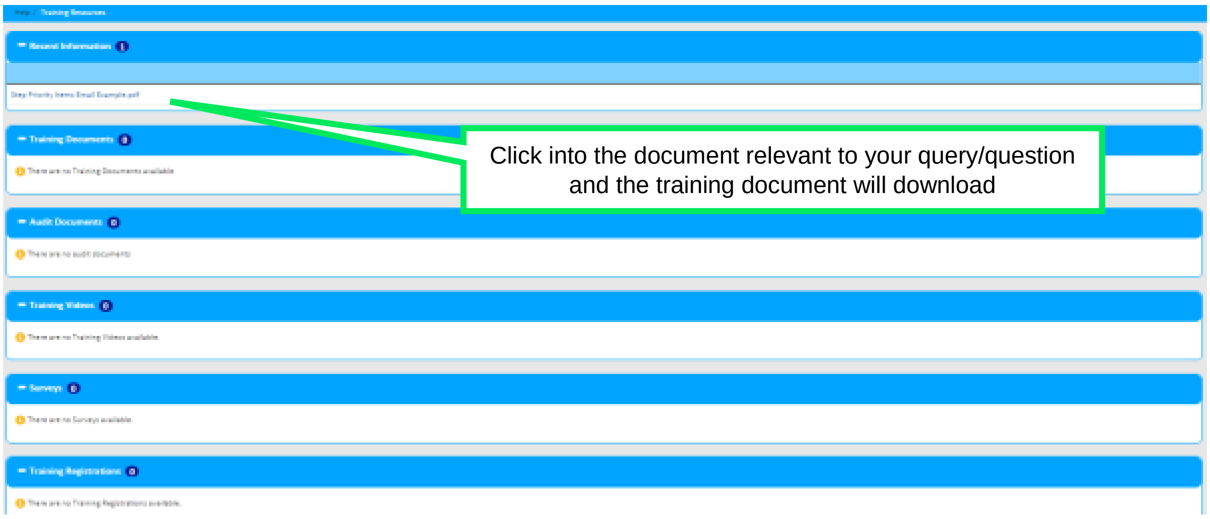
- ➔ You will be unable to create a Placement with any supplier Candidate until after the Order Close Date
- ➔ Once that date has passed you will have your final shortlist and will be able to create a Placement with your top-ranked Offer, see Matrix-CR.Net user guide Placement Management.

Need More Support?

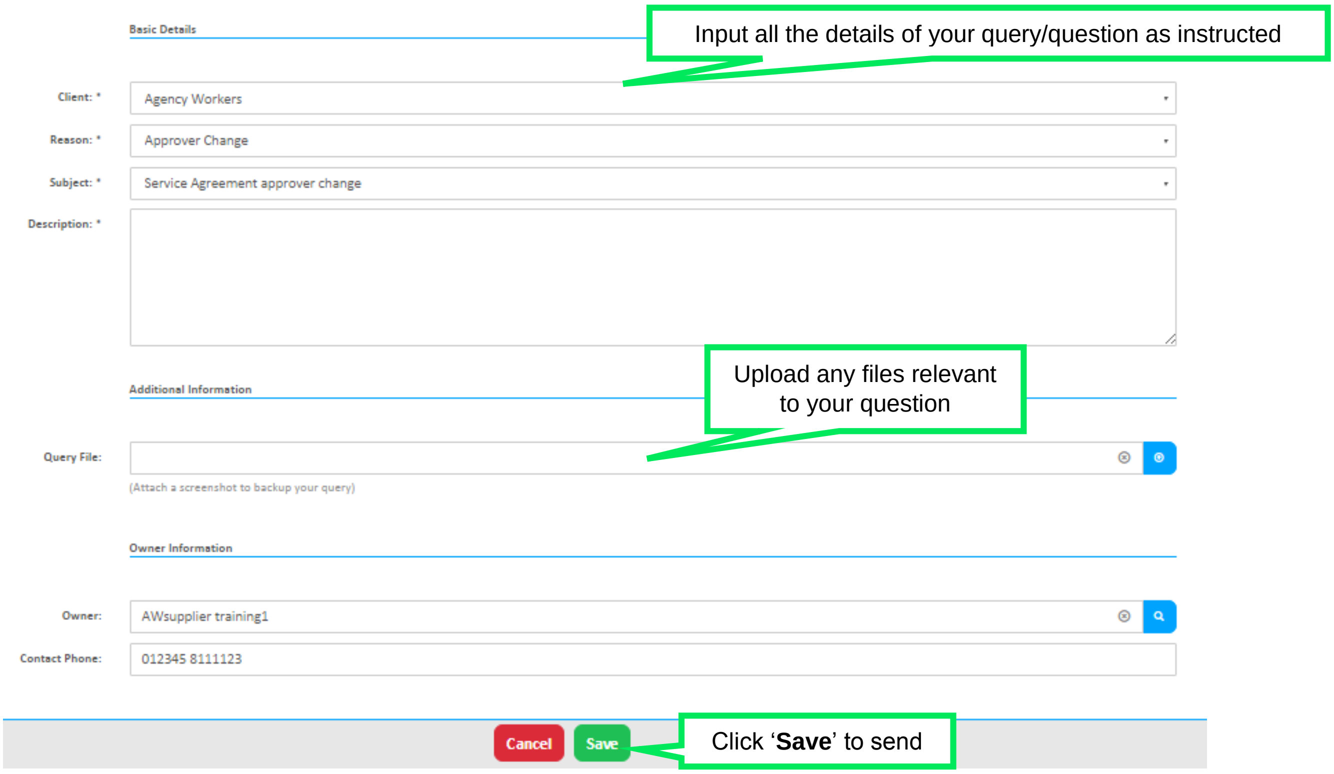
If you need more support regarding anything detailed in this guide, please use the help functions available within your Matrix-CR.Net account:

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:

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



b) Queries can be raised to the Matrix SCM Account Management team:

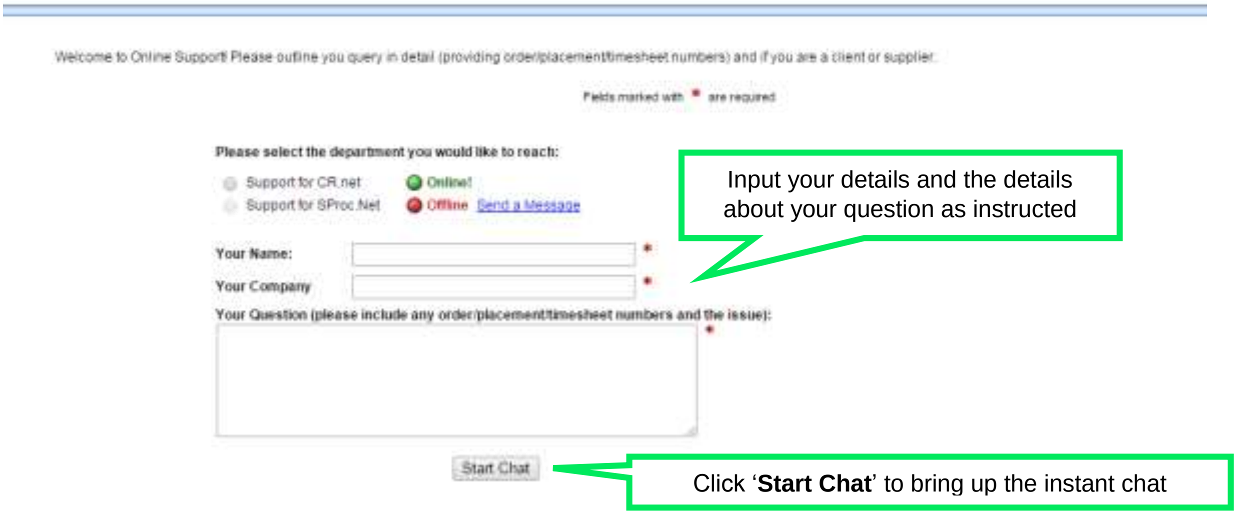


A member of the Matrix SCM Account Management team will be assigned to your Query and they will respond to you with an answer.

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.

c) 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:



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