



matrixscm

Order Management

Client Guide - Agency Workers

v3.0



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Overview

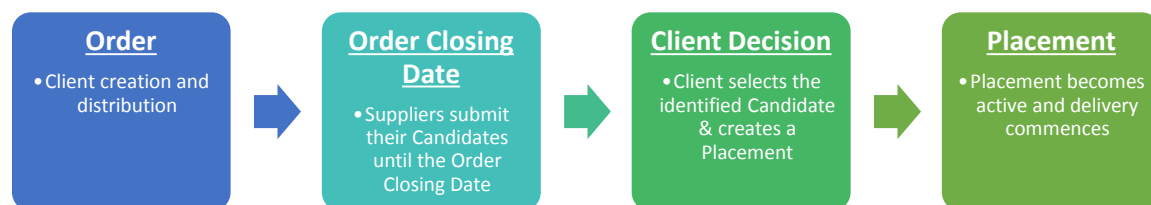
The Matrix-CR.Net system is a sophisticated web based technology platform used by clients and suppliers to aid in the efficient and fair procurement of services through a 12 step process.

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:

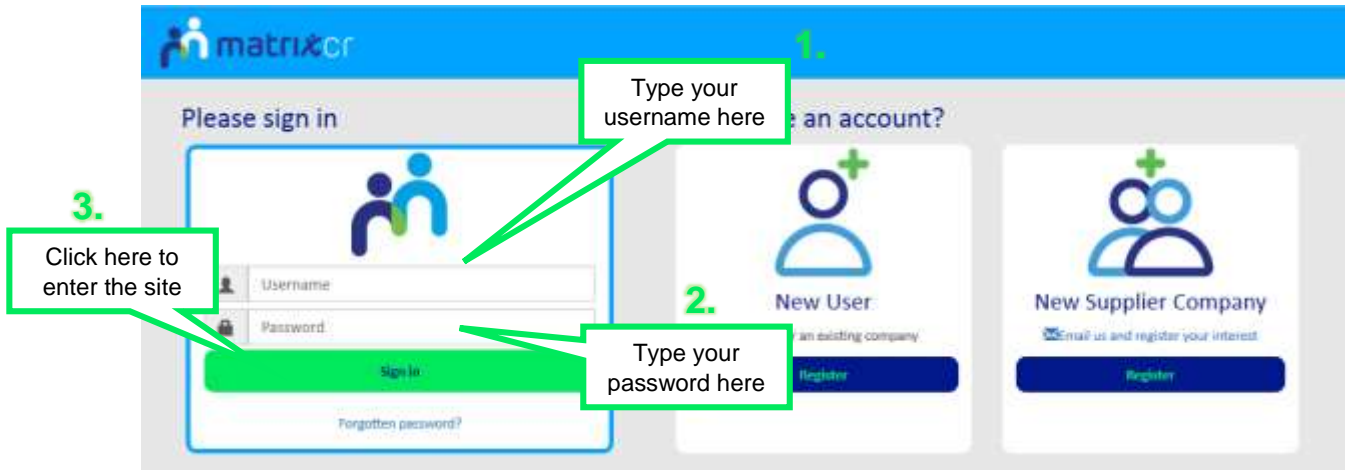
- How to create and distribute a new Order
- How to set your timescales, shortlist and weightings
- Supplier tiering
- How to review Candidates submitted to your Order
- How to set up interviews
- How to reject non-compliant Candidates

Glossary

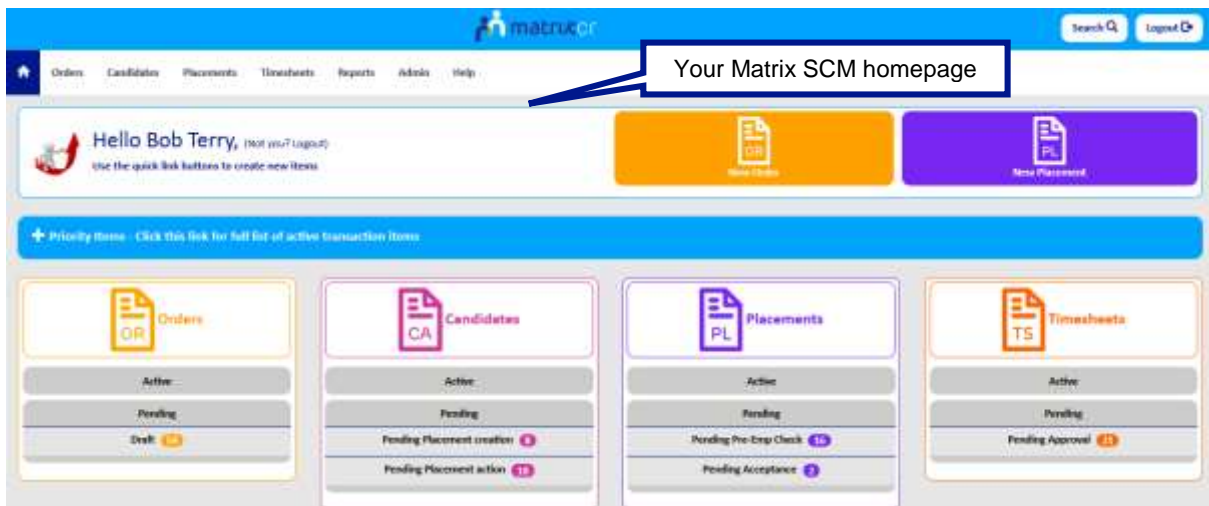
Terminology	Description
Order	A client request for a service needed, containing service details
Candidate	Supplier's offer submission against a client's Order criteria
Category	Type of service, e.g. Training Services, Agency Workers
Job Title	Service title and summary of any standard service details 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:

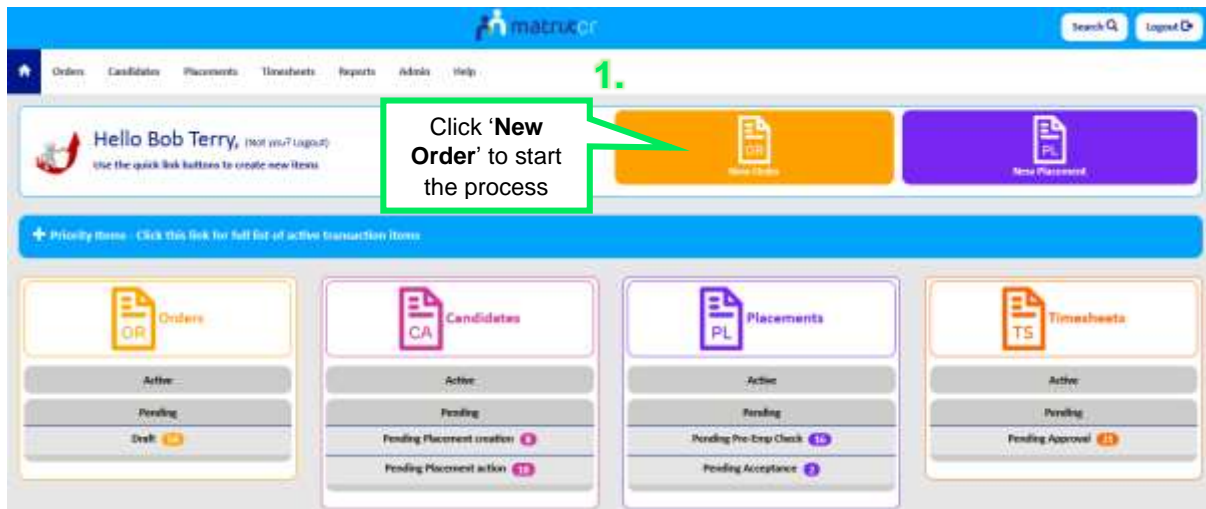


2. You will be taken directly to your Matrix-CR.Net homepage:



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:

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

3. To populate the 'Job Title', use the icon & select the correct job template by clicking on the icon. These Job Titles are pre-written by your HR department.

4. The Location should pre-populate with your location. If not, use the icon & select the correct location.

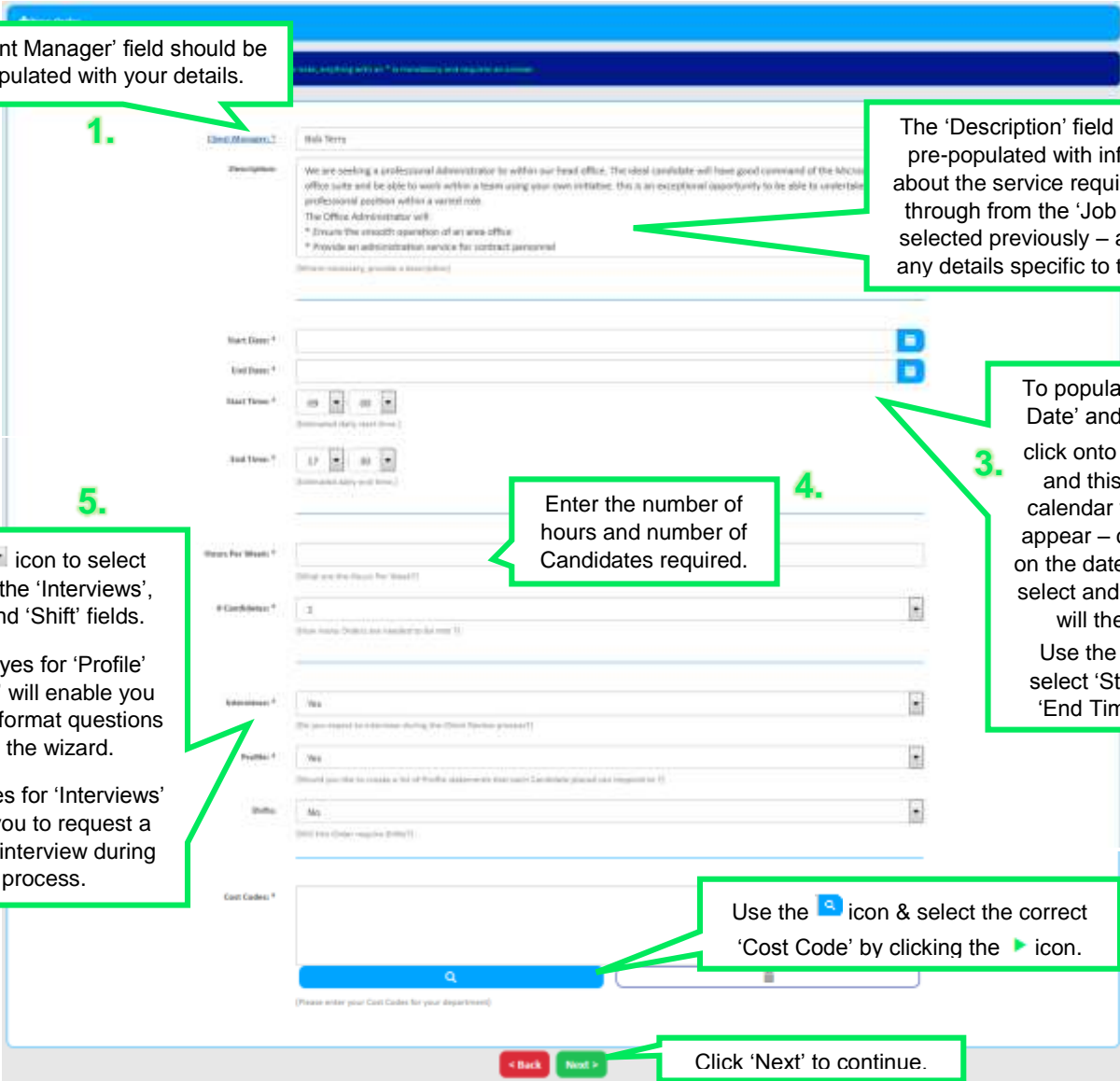
5. You will need to document the reason why you are creating this Order. Use the icon & select a 'Justification' from the list by clicking on the icon. If you required, an addition description field will prompt for further details.

6. Click 'Next' to continue.

To search for a 'Job Title', type the full title into the relevant box and click



Job Title	Job Category
Administrator	Sec / Admin
Business Project Manager	IT
Business Support Officer	Sec / Admin
Caretaker	Environmental

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






1. The 'Client Manager' field should be pre-populated with your details.

2. The 'Description' field should be pre-populated with information about the service required, pulled through from the 'Job Title' you selected previously – add to this any details specific to this Order.

3. To populate the 'Start Date' and 'End Date' click onto the  icon and this separate calendar window will appear – click directly on the date you wish to select and this window will then close. Use the  icon to select 'Start Time' & 'End Time' details.

4. Enter the number of hours and number of Candidates required.

5. Use the  icon to select yes/no for the 'Interviews', 'Profile' and 'Shifts' fields. Selecting yes for 'Profile' and 'Shifts' will enable you to add free-format questions later in the wizard. Selecting yes for 'Interviews' will allow you to request a Candidate interview during this process.


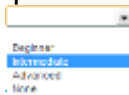

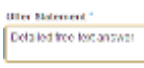
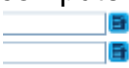
6. Use the  icon & select the correct 'Cost Code' by clicking the  icon.

7. Click 'Next' to continue.

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:

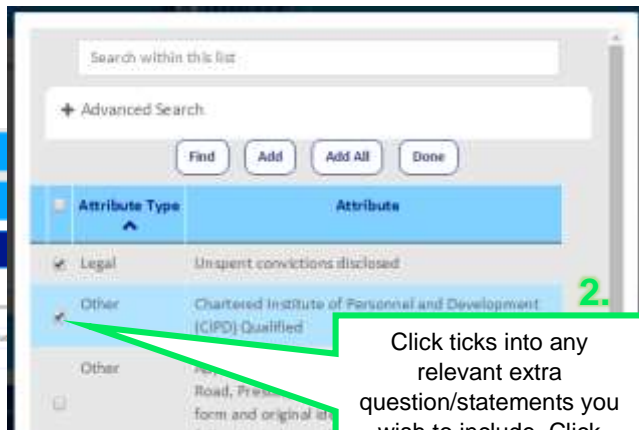
	Specification	Description	Example	Supplier Response	Scoring
Attributes	Pre-Employment Checks	Required characteristics that a supplier must be able to deliver if submitting a Candidate.	* CV or work history obtained * Photo ID validated against person, signed & dated copy retained	Suppliers will tick 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

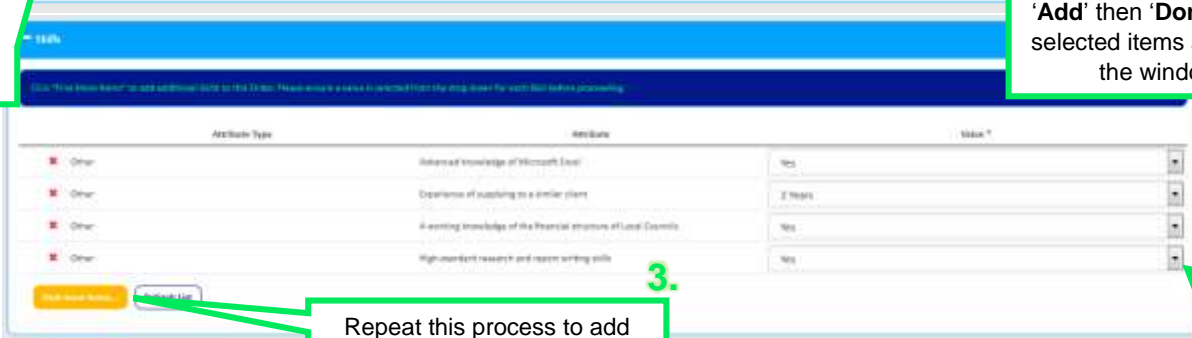
1.

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

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



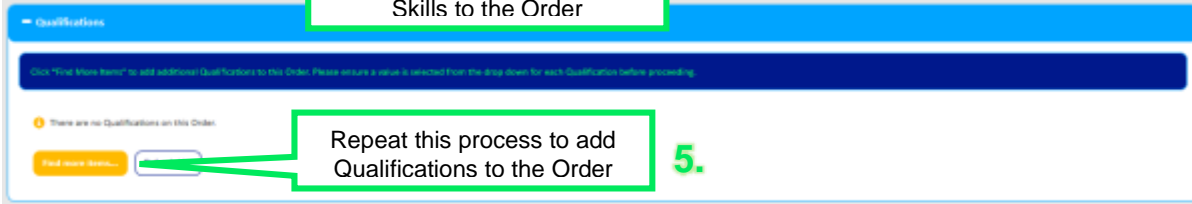
Click ticks into any relevant extra question/statements you wish to include. Click 'Add' then 'Done' to add selected items and close the window.



Repeat this process to add Skills to the Order

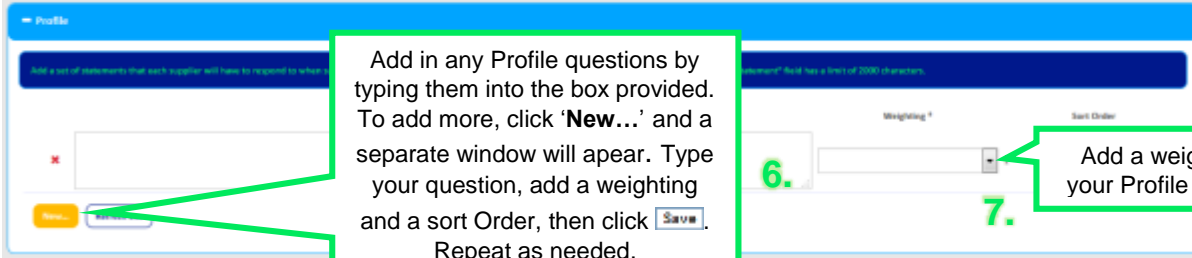
Add minimum values to your Skills using the icon.

4.



Repeat this process to add Qualifications to the Order

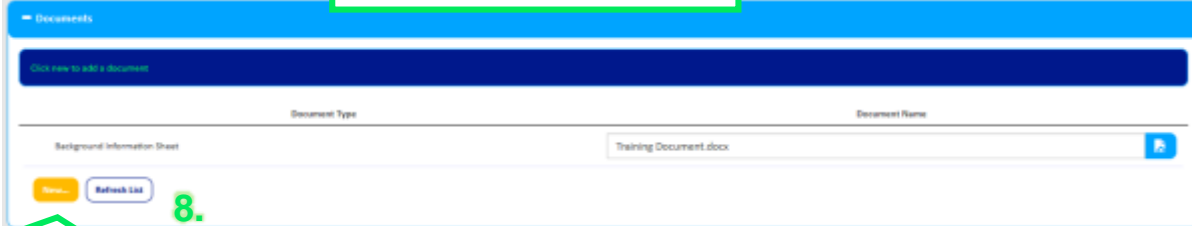
5.



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

Add a weighting to your Profile question.

7.



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.

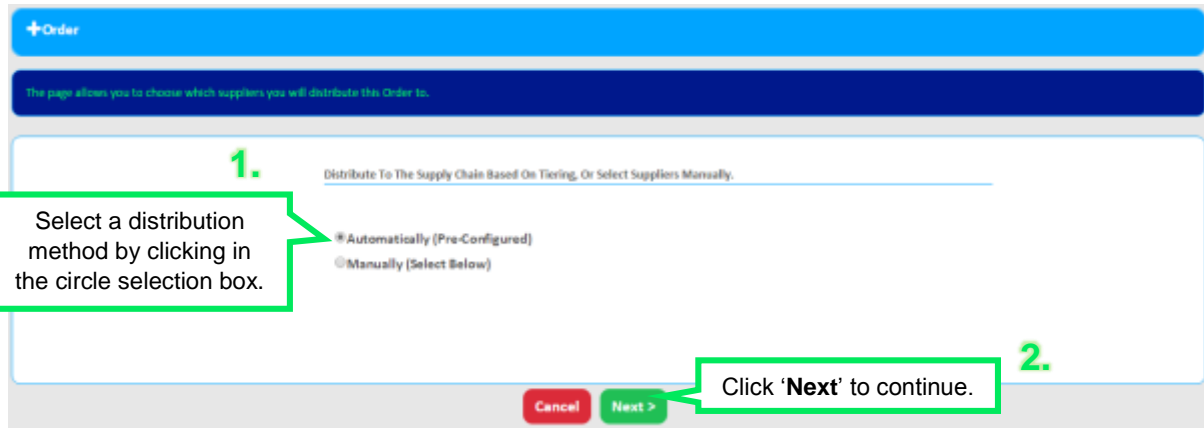
Click 'Next' to continue.

9.

Order Distribution

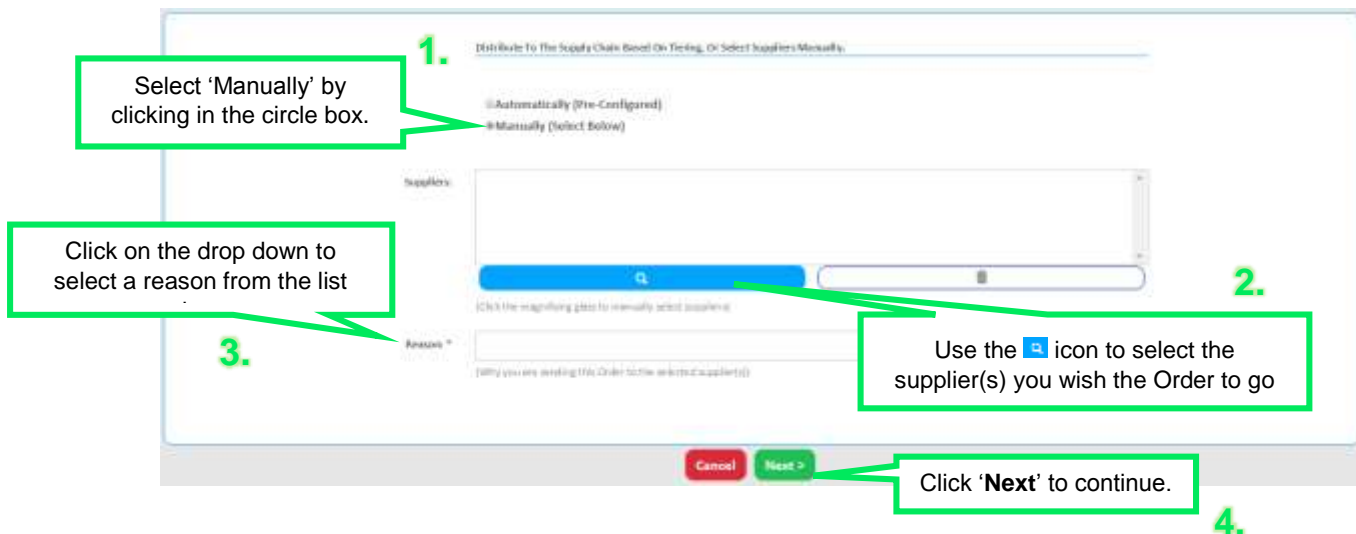
Step 4, select your distribution method:

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



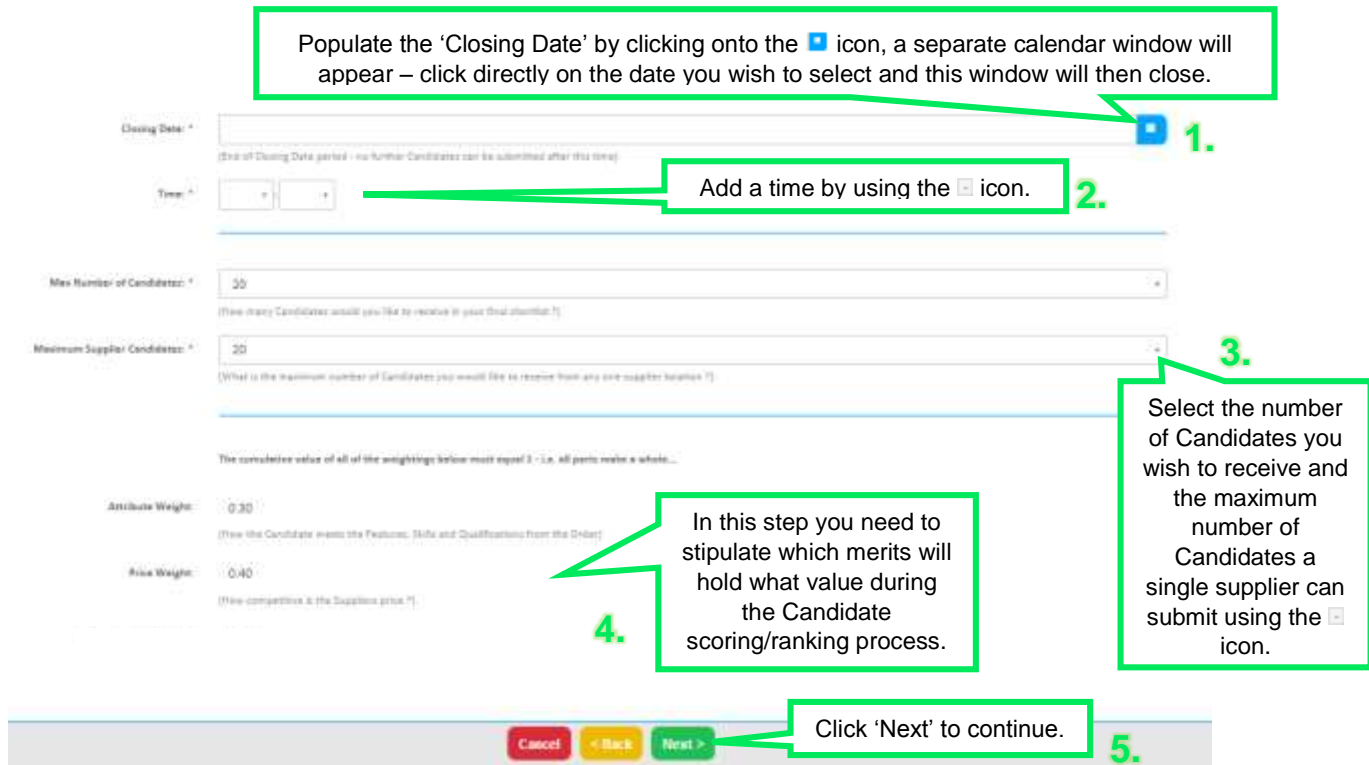
The screenshot shows a web interface for selecting a distribution method. At the top, there is a blue header with a plus sign and the word 'Order'. Below it, a dark blue bar contains the text: 'The page allows you to choose which suppliers you will distribute this Order to.' The main content area has a title '1. Distribute To The Supply Chain Based On Tiering, Or Select Suppliers Manually.' Below the title are two radio button options: 'Automatically (Pre-Configured)' which is selected, and 'Manually (Select Below)'. At the bottom of the form are two buttons: a red 'Cancel' button and a green 'Next >' button. A callout box points to the 'Next >' button with the text 'Click 'Next' to continue.' Another callout box points to the 'Automatically' radio button with the text 'Select a distribution method by clicking in the circle selection box.'


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





The screenshot shows the same web interface as above, but with the 'Manually (Select Below)' radio button selected. Below the radio buttons is a section titled 'Suppliers' which contains a search bar with a magnifying glass icon. Below the search bar is a text input field with the label 'Reason *' and a small asterisk. Below the text input field is a small note: '(Why you are sending this Order to the selected supplier(s))'. At the bottom of the form are the same 'Cancel' and 'Next >' buttons. Callout boxes provide instructions: '1. Select 'Manually' by clicking in the circle box.' points to the 'Manually' radio button; '2. Use the magnifying glass icon to select the supplier(s) you wish the Order to go' points to the search bar; '3. Click on the drop down to select a reason from the list' points to the 'Reason *' text input field; and '4. Click 'Next' to continue.' points to the 'Next >' button.

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



Populate the 'Closing Date' by clicking onto the  icon, a separate calendar window will appear – click directly on the date you wish to select and this window will then close. **1.**

Add a time by using the  icon. **2.**

Select the number of Candidates you wish to receive and the maximum number of Candidates a single supplier can submit using the  icon. **3.**

In this step you need to stipulate which merits will hold what value during the Candidate scoring/ranking process. **4.**

Click 'Next' to continue. **5.**

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 1 – Heavily driven by Candidate quality.
Client 2	0.20	0.80	1	Client 2 – Heavily driven by Candidate cost.

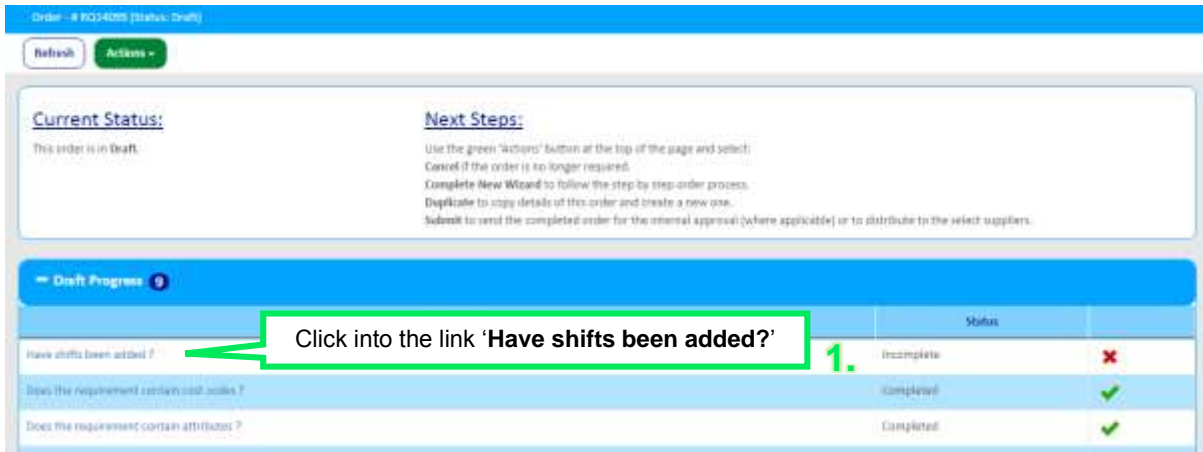
Note:

- ➔ 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?'



Order - # RQ24085 (Status: Draft)

Refresh Actions

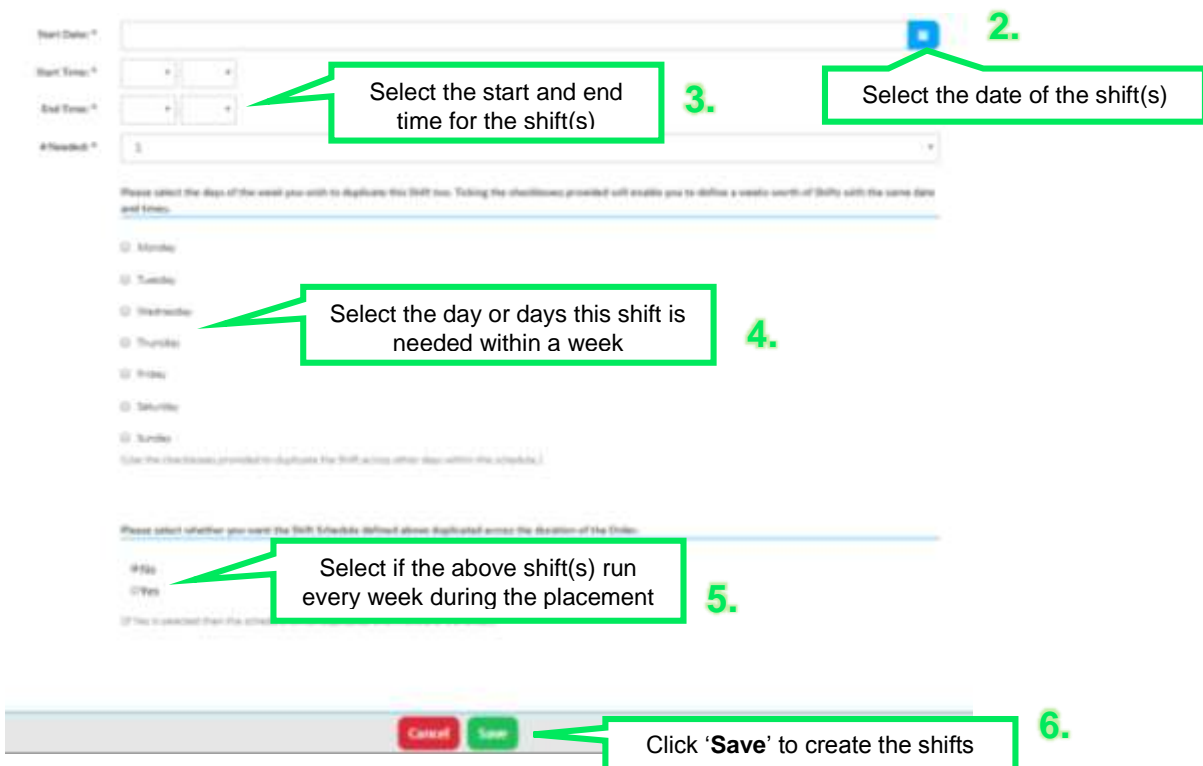
Current Status:
This order is in draft.

Next Steps:
Use the green 'Actions' button at the top of the page and select 'Cancel' if the order is no longer required.
Complete New Wizard to follow the step by step order process.
Duplicate to copy details of this order and create a new one.
Submit to send the completed order for the internal approval (where applicable) or to distribute to the select suppliers.

Draft Progress

	Status	
Have shifts been added ?	Incomplete	1. ✘
Does the requirement contain cost codes ?	Completed	✔
Does the requirement contain attributes ?	Completed	✔

2. Populate all shifts relevant to this job vacancy



Start Date:

Start Time:

End Time:

Needed:

Please select the days of the week you wish to duplicate this shift on. Ticking the checkboxes provided will enable you to define a weeks worth of shifts with the same date and times.

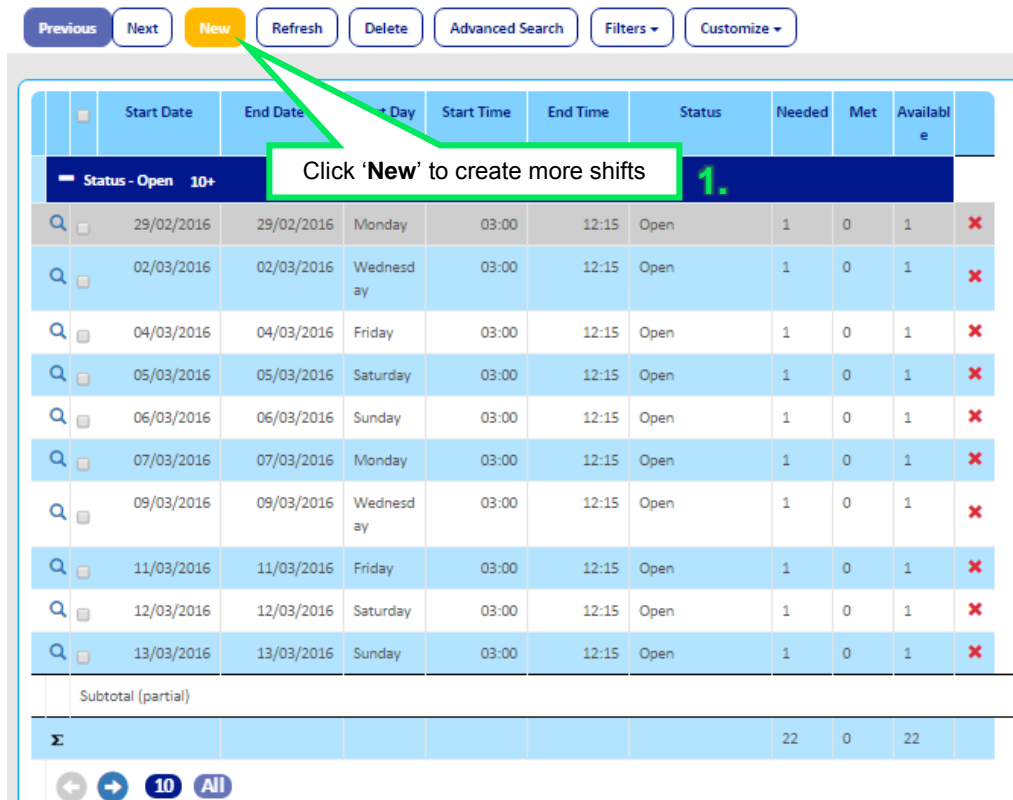
Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Please select whether you want the shift schedule defined above duplicated across the duration of the Order.

No
 Yes

Cancel Save

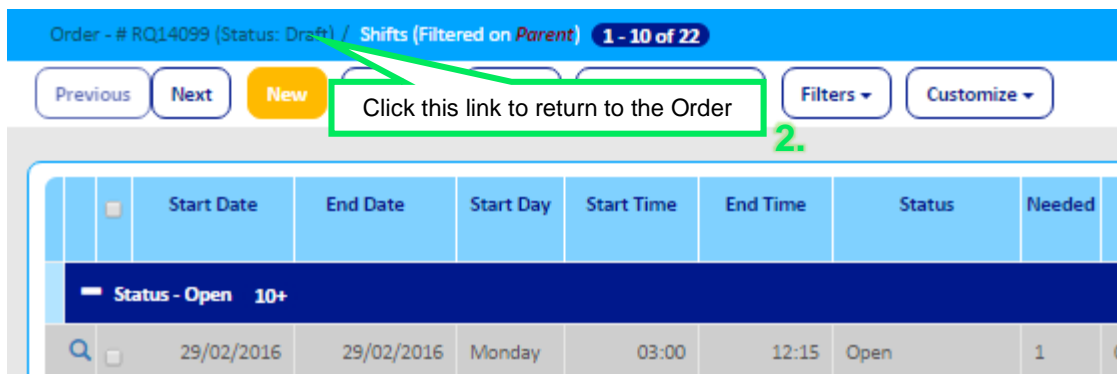
3. You will see each shift as a separate line



	Start Date	End Date	Start Day	Start Time	End Time	Status	Needed	Met	Availabl e		
Status - Open 10+											
Q	29/02/2016	29/02/2016	Monday	03:00	12:15	Open	1	0	1	✗	
Q	02/03/2016	02/03/2016	Wednesd ay	03:00	12:15	Open	1	0	1	✗	
Q	04/03/2016	04/03/2016	Friday	03:00	12:15	Open	1	0	1	✗	
Q	05/03/2016	05/03/2016	Saturday	03:00	12:15	Open	1	0	1	✗	
Q	06/03/2016	06/03/2016	Sunday	03:00	12:15	Open	1	0	1	✗	
Q	07/03/2016	07/03/2016	Monday	03:00	12:15	Open	1	0	1	✗	
Q	09/03/2016	09/03/2016	Wednesd ay	03:00	12:15	Open	1	0	1	✗	
Q	11/03/2016	11/03/2016	Friday	03:00	12:15	Open	1	0	1	✗	
Q	12/03/2016	12/03/2016	Saturday	03:00	12:15	Open	1	0	1	✗	
Q	13/03/2016	13/03/2016	Sunday	03:00	12:15	Open	1	0	1	✗	
Subtotal (partial)											
Σ								22	0	22	

4. Add more shift by clicking 'New' and repeating the process

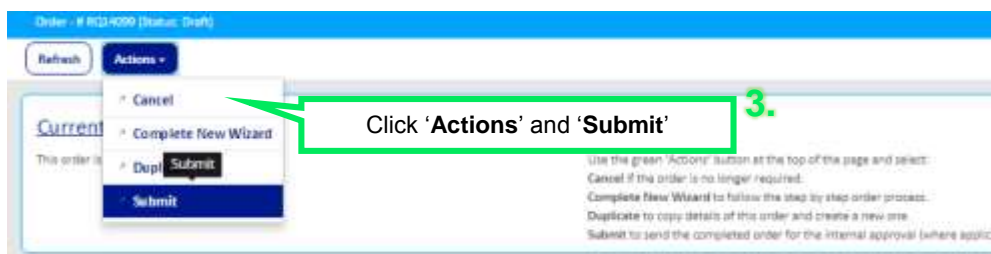
5. Once all the Shifts are added return to the Order summary page



Order - # RQ14099 (Status: Draft) / Shifts (Filtered on Parent) 1 - 10 of 22

	Start Date	End Date	Start Day	Start Time	End Time	Status	Needed
Status - Open 10+							
Q	29/02/2016	29/02/2016	Monday	03:00	12:15	Open	1

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



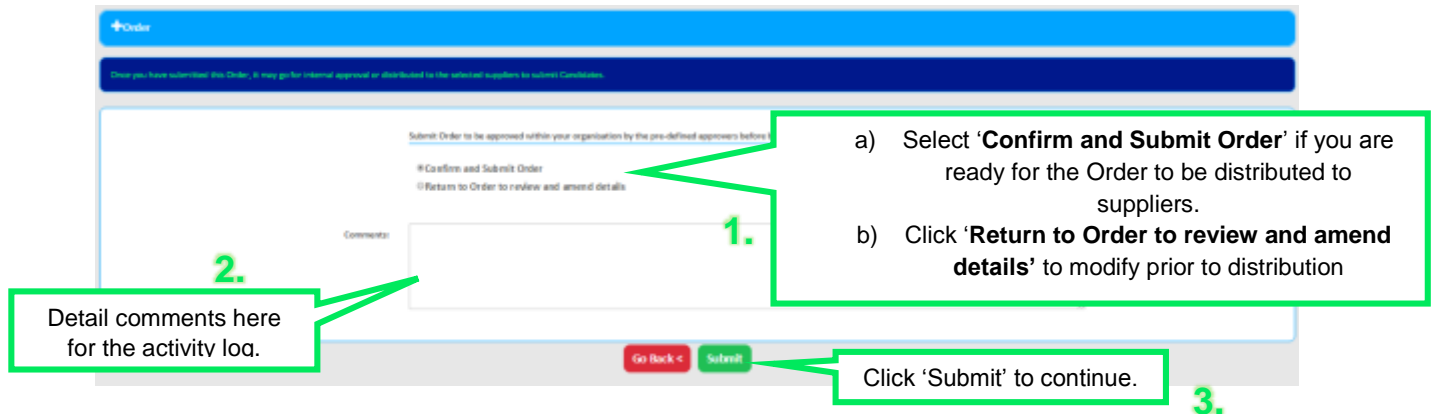
Order - # RQ14099 (Status: Draft)

Refresh Actions

- Cancel
- Complete New Wizard
- Duplicate **Submit**
- Submit**

Use the green 'Actions' button at the top of this page and select:
 Cancel if the order is no longer required.
 Complete New Wizard to follow the step by step order process.
 Duplicate to copy details of this order and create a new one.
 Submit to send the completed order for the internal approval (where applica

7. Confirming and submit your Order:



1. Confirm and Submit Order

2.

3.

a) Select '**Confirm and Submit Order**' if you are ready for the Order to be distributed to suppliers.

b) Click '**Return to Order to review and amend details**' to modify prior to distribution

Detail comments here for the activity log.

Click 'Submit' to continue.

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



Order - # 8014099 (Status: Open)

Refresh Actions

Current Status:
The order is currently Open to suppliers.

Next Steps:
Wait for the supplier responses to the order. These can be viewed in the 'Other Items' section on this page. Use the green 'Actions' button at the top of the page and select:
Cancel if this order is no longer required.
Distribute to **Additional Suppliers** to give other suppliers the opportunity to respond.
Duplicate to copy details of this order and create a new one.
Enable **Interviews** to add an interview stage to the reviewing process if not previously selected.
Extend **Candidate Periods** to provide suppliers additional time to respond.
Move **Start Date** to change the date that the placement will begin.

- 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:



Refresh Actions

Current Status:
This order is in Draft.

Next Steps:
Use the green 'Actions' button at the top of the page and select:
Cancel if the order is no longer required.
Complete **New Wizard** to follow the step by step order process.
Duplicate to copy details of this order and create a new one.
Submit to send the completed order for the internal approval (where applicable) or to distribute to the select suppliers.

- 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
- Once complete, to submit, click '**Actions**', '**Submit**'.



Refresh Actions

Current
This order is

- Cancel
- Complete New Wizard
- Duplicate
- Submit

3. You will return to this screen:



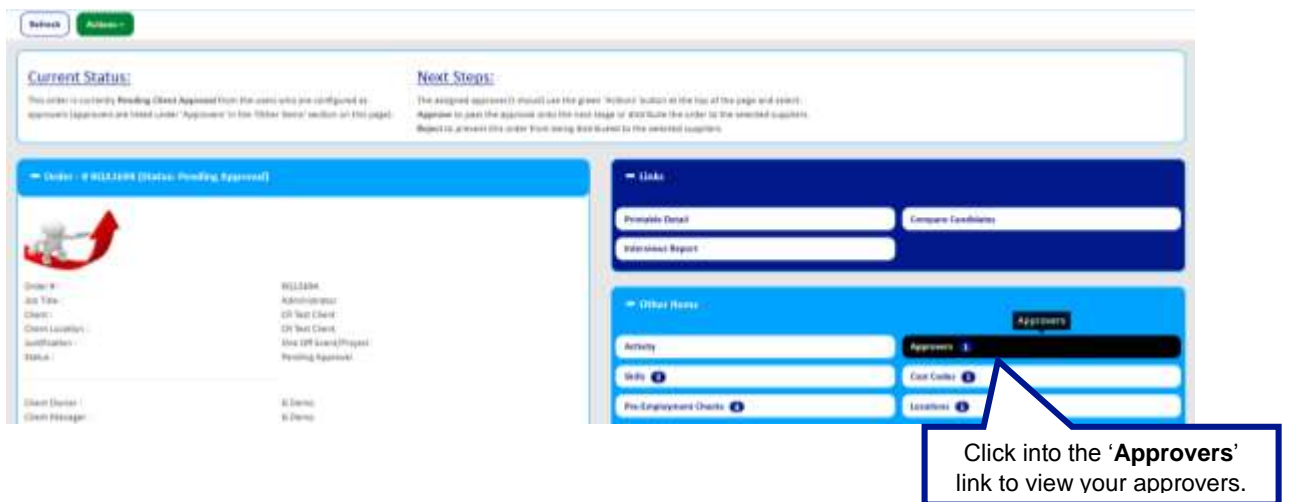
4. The Order is now 'Open' and the Supply Chain would have received an email notification.

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:



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.



Supplier Tiering

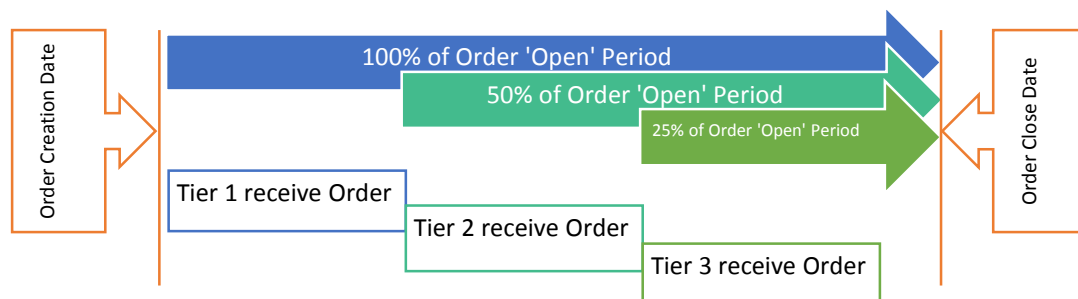
When an Order is progressed through the distribution process, the supply chain will receive notification of the Order and have access to create Candidate submissions against it.

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.

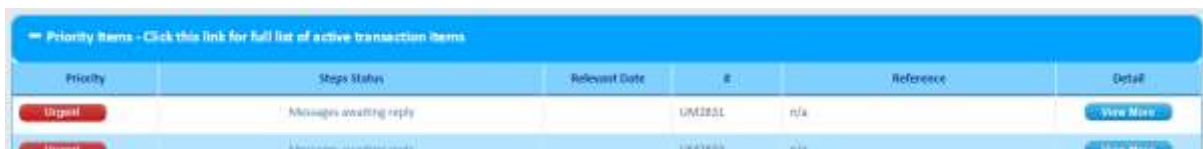
Order Messaging

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:

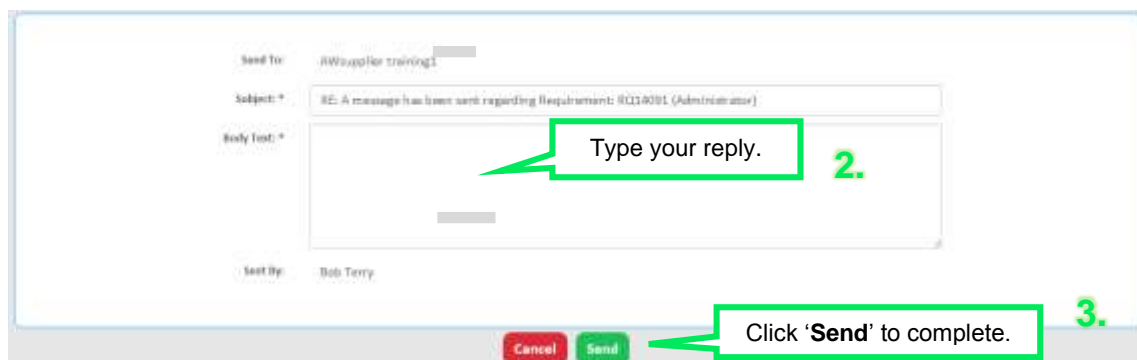


Priority	Steps Status	Release Date	#	Reference	Detail
Urgent	Messages awaiting reply		UM2321	n/a	View More
Urgent	Messages awaiting reply		UM2321	n/a	View More

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:



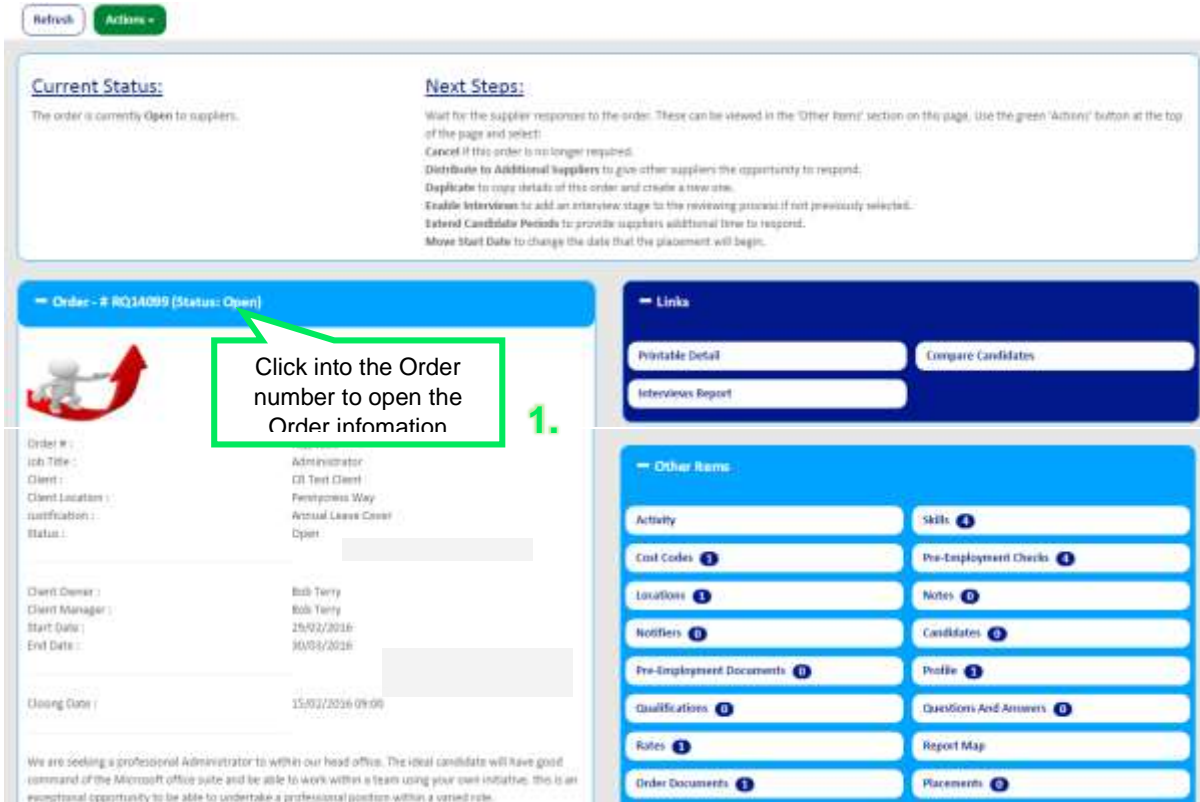
3. Draft a response:



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



Current Status:
The order is currently Open to suppliers.

Next Steps:
Wait for the supplier responses to the order. These can be viewed in the 'Other Items' section on this page. Use the green 'Actions' button at the top of the page and select:
 - Cancel if this order is no longer required.
 - Distribute to Additional Suppliers to give other suppliers the opportunity to respond.
 - Duplicate to copy details of this order and create a new one.
 - Enable Interviews to add an interview stage to the reviewing process if not previously selected.
 - Extend Candidate Periods to provide suppliers additional time to respond.
 - Move Start Date to change the date that the placement will begin.

Order - # RO14099 (Status: Open)

Click into the Order number to open the Order information 1.

Links:
 - Printable Detail
 - Compare Candidates
 - Interviews Report

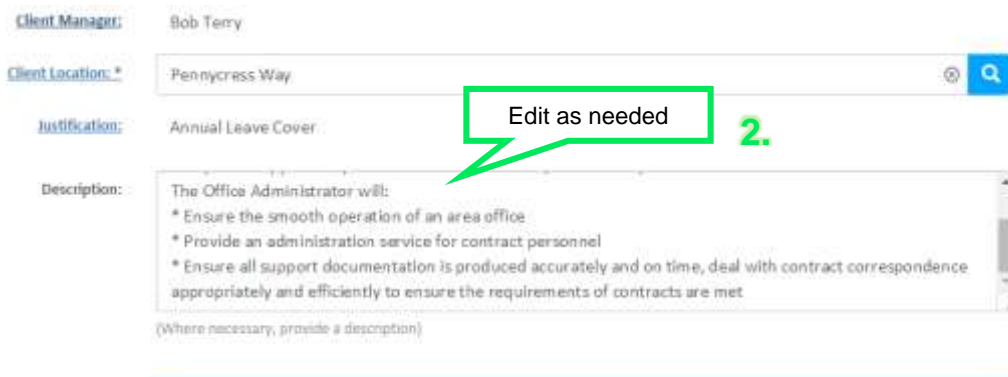
Other Items:
 - Activity
 - Skills
 - Cost Codes
 - Pre-Employment Checks
 - Locations
 - Notes
 - Notifiers
 - Candidates
 - Pre-Employment Documents
 - Profile
 - Qualifications
 - Questions And Answers
 - Rates
 - Report Map
 - Order Documents
 - Placements

Order #: [Redacted]
 Job Title: Administrator
 Client: CR Test Client
 Client Location: Pennycross Way
 Justification: Annual Leave Cover
 Status: Open
 Client Owner: Bob Terry
 Client Manager: Bob Terry
 Start Date: 25/02/2016
 End Date: 30/03/2016
 Closing Date: 15/02/2016 09:00

We are seeking a professional Administrator to within our head office. The ideal candidate will have good command of the Microsoft office suite and be able to work within a team using your own initiative, this is an exceptional opportunity to be able to undertake a professional position within a varied role.

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



Client Manager: Bob Terry

Client Location: Pennycross Way

Justification: Annual Leave Cover

Description:
 The Office Administrator will:
 * Ensure the smooth operation of an area office
 * Provide an administration service for contract personnel
 * Ensure all support documentation is produced accurately and on time, deal with contract correspondence appropriately and efficiently to ensure the requirements of contracts are met
 (Where necessary, provide a description)

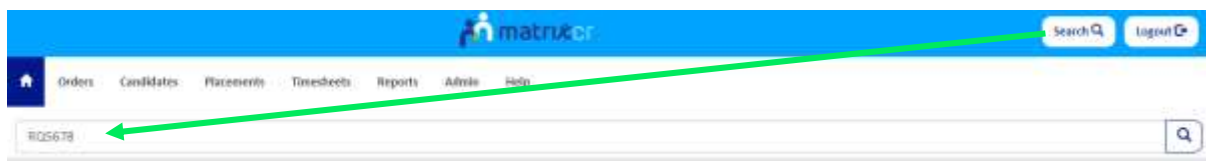
Edit as needed 2.

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.

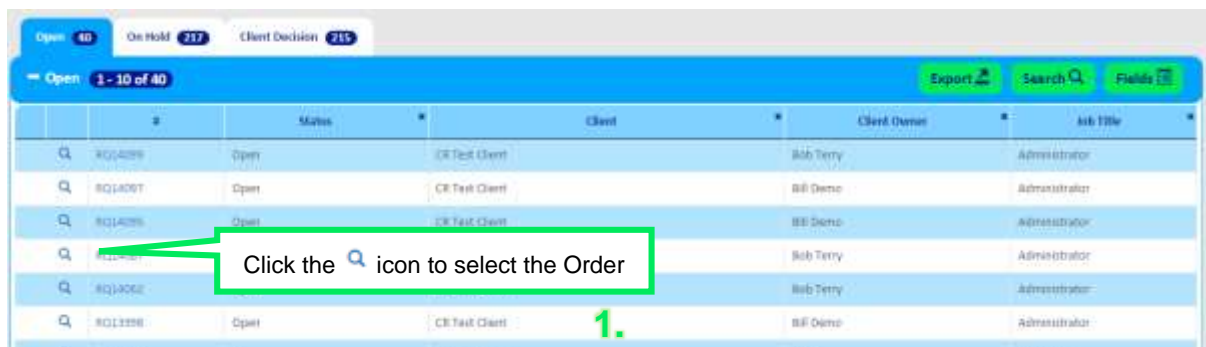
1. An old Order can be located by searching for the Order reference number using the search function within Matrix-CR.Net:



2. Or by searching through your previous from your homepage



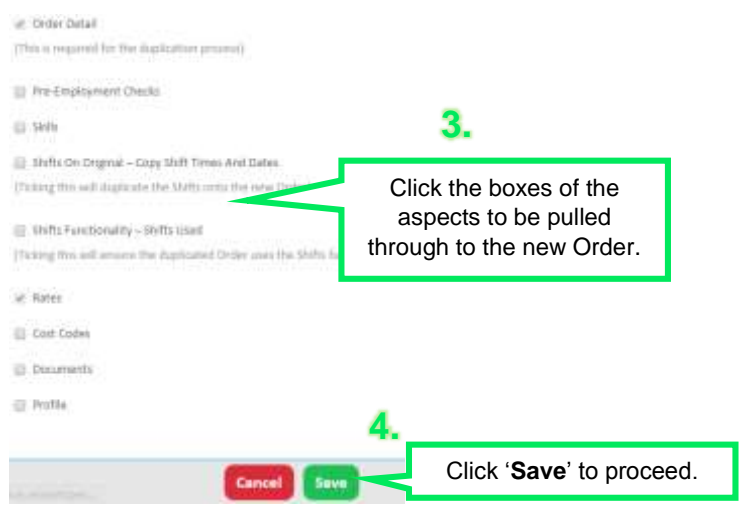
3. Select the Order you wish to copy



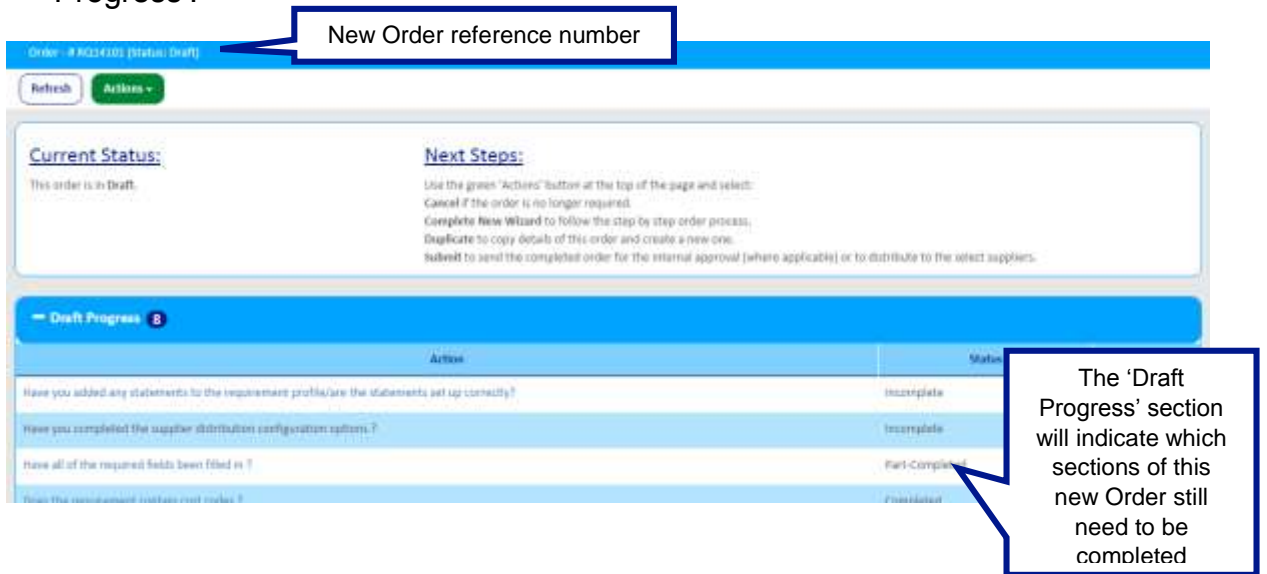
4. This will take you to the Order summary page:



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:

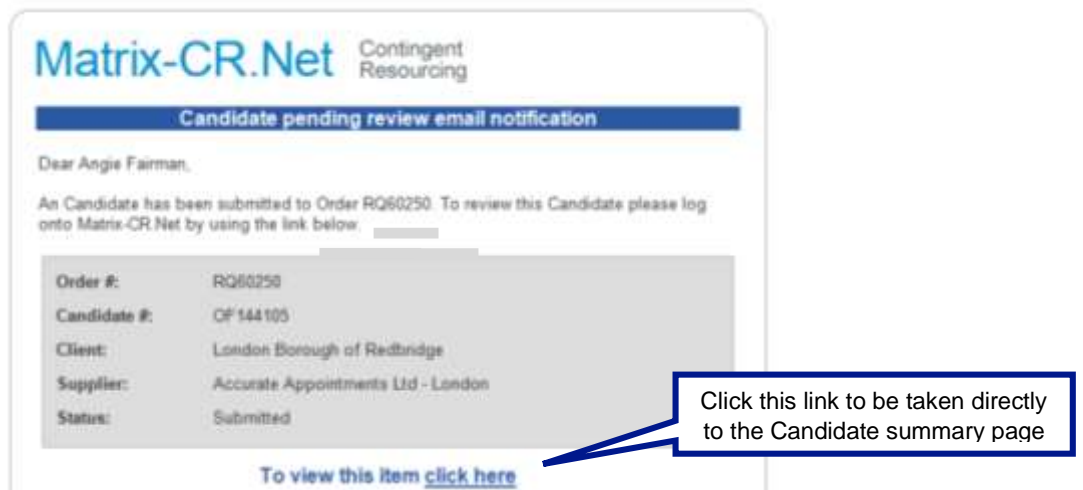
You will be sent an email notification when the 'Order Closing Date' has passed.

Reviewing Candidates

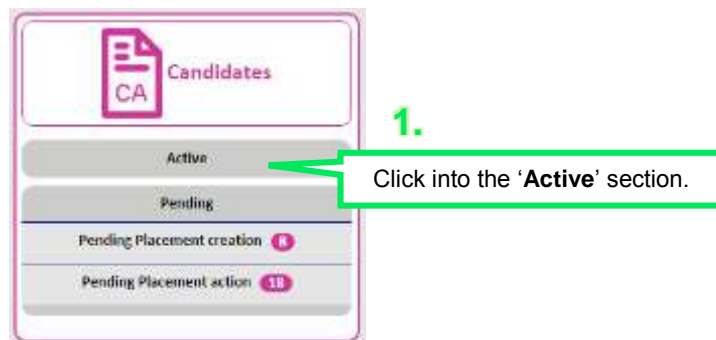
The Matrix-CR.Net system allows you to review Candidates in a number of different ways.

Candidate Summary Page:

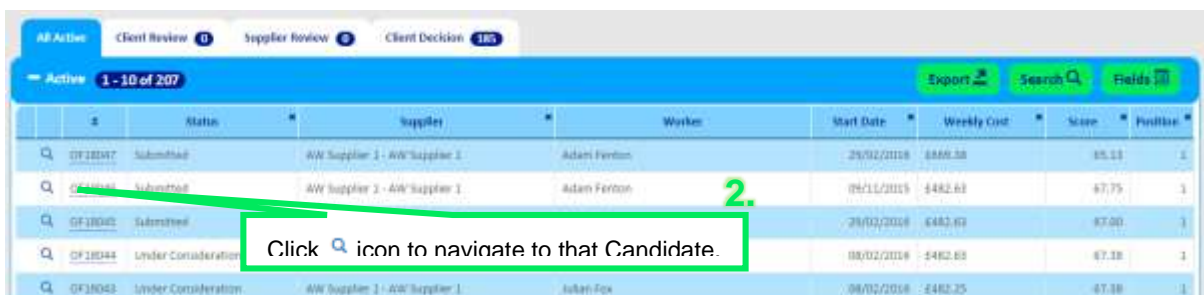
1. When a Candidate is submitted towards your Order, you will receive an email notification:



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'



ID	Status	Supplier	Worker	Start Date	Weekly Cost	Score	Profile
CF12347	Submitted	AW Supplier 1 - AW Supplier 1	Adam Fenton	29/02/2018	£886.38	85.13	1
CF12348	Submitted	AW Supplier 2 - AW Supplier 1	Adam Fenton	09/11/2015	£482.63	87.75	1
CF12349	Submitted	AW Supplier 2 - AW Supplier 1	Adam Fenton	29/02/2018	£482.63	87.00	1
CF12344	Under Consideration	AW Supplier 2 - AW Supplier 1	Adam Fenton	08/02/2018	£482.63	87.18	1
CF12343	Under Consideration	AW Supplier 2 - AW Supplier 1	Julian Fox	08/02/2018	£482.25	87.18	1

Click magnifying glass icon to navigate to that Candidate.

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

Candidate - # OF18047 (Status: Submitted)

Refresh Actions

Current Status:
This is currently pending your review. Once the Closing Date has passed you may accept or reject submissions. Alternatively you can request interviews at any time.

Next Steps:
Use the green 'Actions' button at the top of the page and select:
Accept to make this submission and successful and create a Placement (where available).
Reject to reject the submission (where available).
Request Interview to schedule an interview.

Candidate - # OF18047 (Status: Submitted)

Other Items

Run Candidate Report Report Map

Activity Pre-Employment Documents 4

Notes 3 Candidate Questions 1

Order - # RQ14099

Order # : RQ14099
Job Title : Administrator
Client Owner : Bob Terry
Client Manager : Bob Terry
Start Date : 29/02/2016
End Date : 30/03/2016

Supplier information.

Candidate information.

Pre-Employment Documents 4

Pre-Employment Checks 4

Attribute	Completed	Score
2 references including current	✓	100.00
6 full UK Driving License to be brought on site for checks (including counterpart)	✓	100.00
CRB Disclosure Number, Issue and Expiry Date	✓	100.00
Eligibility to work in UK confirmed	✓	100.00

Skills 4

Attribute	Value	Score
A working knowledge of the financial structure of Local Councils	Yes	100.00

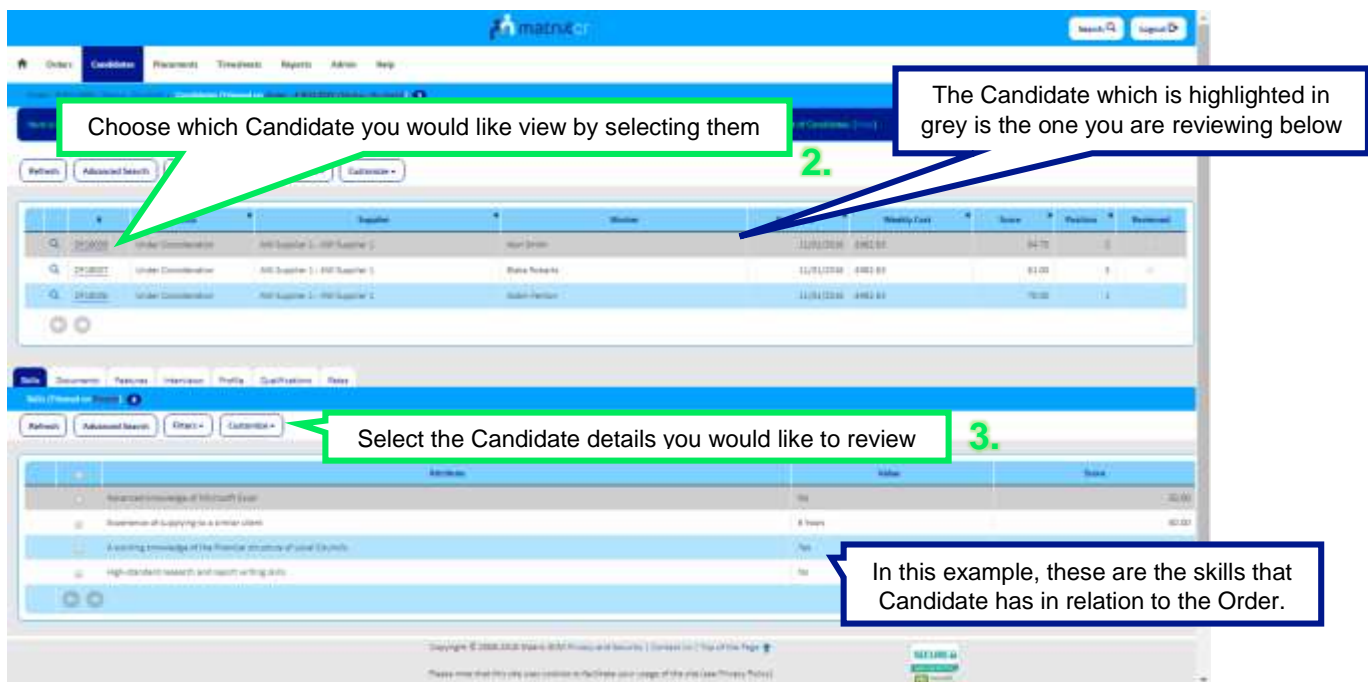
Candidate List View:


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

1. 

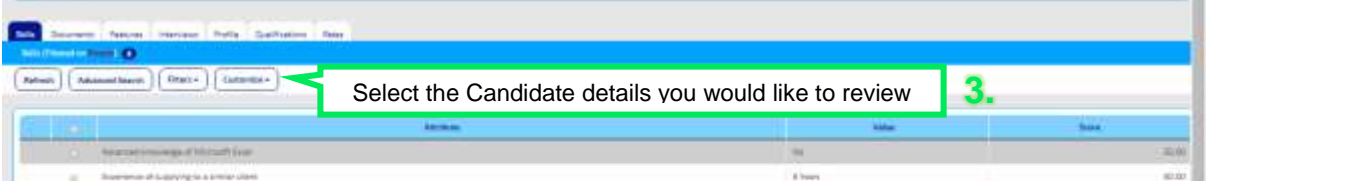
Candidate #	Status	Supplier	Worker	Start Date	Weekly Cost	Score	Position
CP18020	Under Consideration	AW Supplier 1 - AW Supplier 1	Adam Fenton	11/01/2016	£482.00	79.00	1
CP18028	Under Consideration	AW Supplier 1 - AW Supplier 1	Alan Smith	11/01/2016	£482.00	84.75	2
CP18027	Under Consideration	AW Supplier 1 - AW Supplier 1	Blake Roberts	11/01/2016	£482.00	81.00	3

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





2. 

Candidate #	Status	Supplier	Worker	Start Date	Weekly Cost	Score	Position	Postcode
CP18020	Under Consideration	AW Supplier 1 - AW Supplier 1	Adam Fenton	11/01/2016	£482.00	84.75	1	
CP18027	Under Consideration	AW Supplier 1 - AW Supplier 1	Blake Roberts	11/01/2016	£482.00	81.00	3	
CP18026	Under Consideration	AW Supplier 1 - AW Supplier 1	Adam Fenton	11/01/2016	£482.00	79.00	1	

3. 

Skills	Value	Score
Advanced knowledge of Microsoft Excel	Yes	80.00
Experience of supplying to a similar client	8 years	80.00
A working knowledge of the financial structure of local Councils	Yes	
High standard research and report writing skills	Yes	



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:

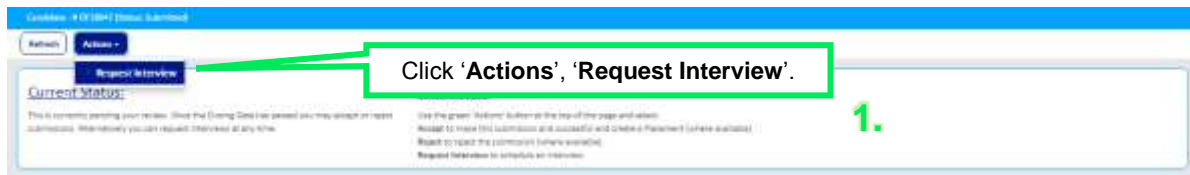
1. From your Order summary page select '**Compare Candidates**' report



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

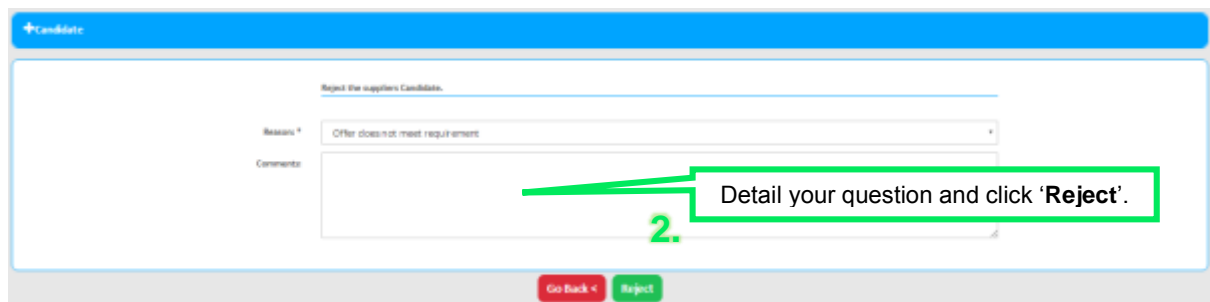
1. If required, interviews can be set up via the system. From the Candidate summary page:



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:



Candidate ID	Status	Supplier	Monitor	Start Date	Weekly Cost	Term	Position
2072296	Rejected	MA Supplier 1 - MA Supplier 2	Admin Function	08/11/2023	£402.00	01 FY	

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?

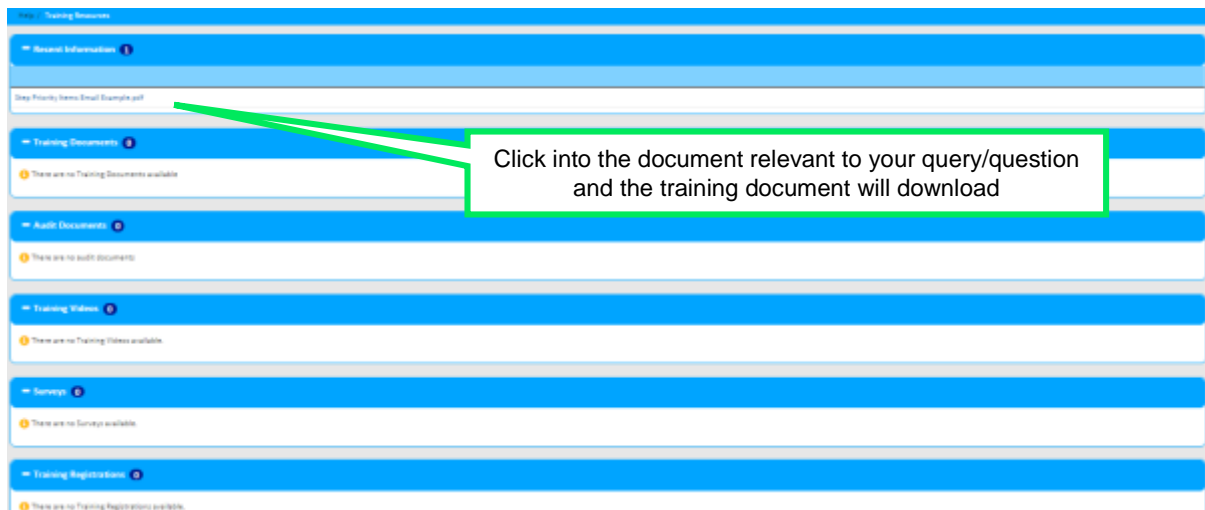
If you need more support regarding anything detailed in this guide, please use the help functions available within your Matrix-CR.Net account:



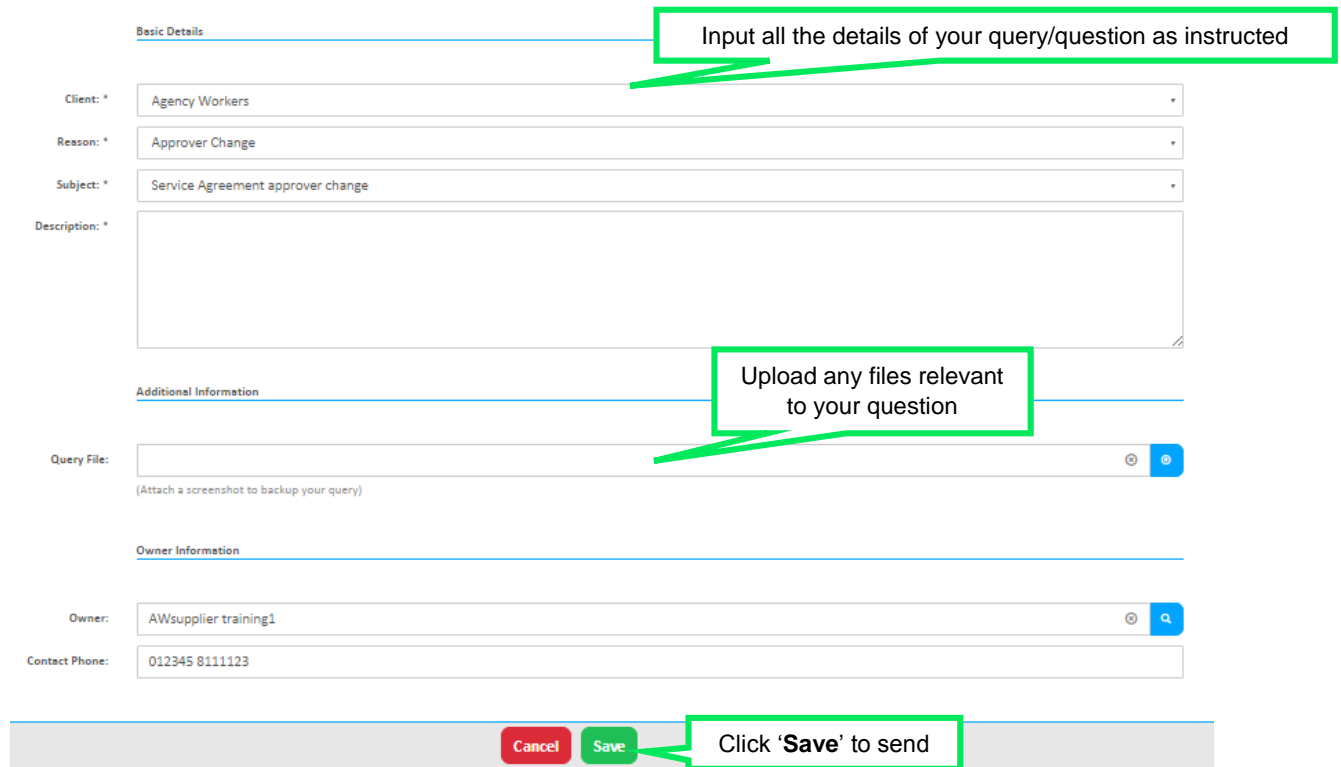
You will be taken to the help and support section where you have a number of different ways of finding the answer to any questions you may have:



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:



The screenshot shows a web form for raising a query. It is divided into three sections: 'Basic Details', 'Additional Information', and 'Owner Information'. The 'Basic Details' section includes dropdown menus for 'Client' (Agency Workers), 'Reason' (Approver Change), and 'Subject' (Service Agreement approver change), and a large text area for 'Description'. The 'Additional Information' section has a 'Query File' upload field with a note '(Attach a screenshot to backup your query)'. The 'Owner Information' section includes dropdowns for 'Owner' (AWsupplier training1) and a text field for 'Contact Phone' (012345 8111123). At the bottom, there are 'Cancel' and 'Save' buttons. Three green callout boxes provide instructions: 'Input all the details of your query/question as instructed' points to the description field; 'Upload any files relevant to your question' points to the query file field; and 'Click 'Save' to send' points to the save button.

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:



Welcome to Online Support! Please outline your 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](#)

Your Name: *

Your Company: *

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

Input your details and the details about your question as instructed

Click 'Start Chat' to bring up the instant chat

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

