



My Team Function: Delegation & Permissions

Client Guide
Vol. 12

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Naming a Delegate Using My Team

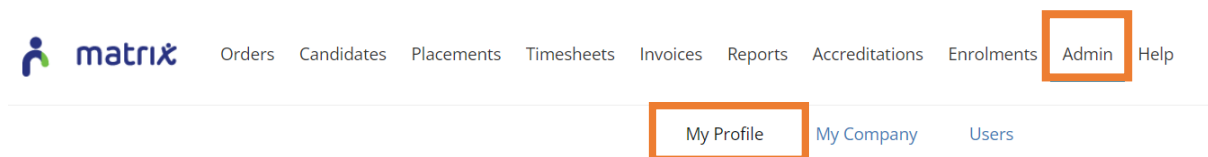
Access to items on Matrix-CR.net can be delegated to another user, for the purpose of covering or sharing workloads; for example, to cover for annual leave or sickness, or when the management of agency workers is shared.

This user guide is a step-by-step walk through of delegating access and management for an agency worker placement on Matrix-CR.net, and includes:

- Naming a delegate user using 'My Team'
- Naming an additional manager
- Loading an additional timesheet approver

Adding a New Delegate

1. On the Matrix-CR.net homepage, click on the 'My Profile' button from the admin tab on the Navigation bar.



2. Navigate to the 'My Team' section on the My Profile page.

My Profile

Alerts **12** My Profile Change Password User Preferences Two Factor Logout

Summary

Anna Jones
North Yorkshire Council
Status: Active
Role: Client
Updated: 23/10/2023 15:07

Email: Anna.Hartley-Roberts@northyorks.gov.uk
Telephone: 07773652442
Last Login: 29/11/2023 08:35

Actions

Preferences
Standard Notifications **154**
Summary Notifications **7**
Approver Lists

My Team **0** +

You have not set up any team members yet

My Team **3** +

Click here to create a new item

Team Role	Team Member	View	Edit	Approve	Start Date	End Date
Delegate	Alex Bill	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Delegate	Andy Baldwin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Delegate	Becky Floyd	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30/11/2023	31/01/2024

3. To add a new delegate, click on '+ sign' and use the icon to search for the user who you want to delegate access to.

4. To search a new delegate, click the  button and select the user who you want to delegate access to.



5. You can tailor what you delegate access to using the tick boxes. All delegates will be able to view items on Matrix-CR.net which are named against your profile, but you can change what you want delegates to action on the system for you, such as:
- Allowing delegates to **edit** any Orders or Placements which you have raised or are named against.
 - Allowing delegates to **delete or cancel** any Orders or Placements which you have raised or are named against.
 - Allowing delegates to **approve** Orders, Placements or Timesheets which you are a named approver for.

Team Member *

Donna Watson

View
This is required for another user to be a Team Member

Edit

Approve

Temporary Delegation

Start Date

Enter a start date if the delegation is temporary, otherwise leave blank

End Date



Enter an end date if the delegation is temporary, otherwise leave blank

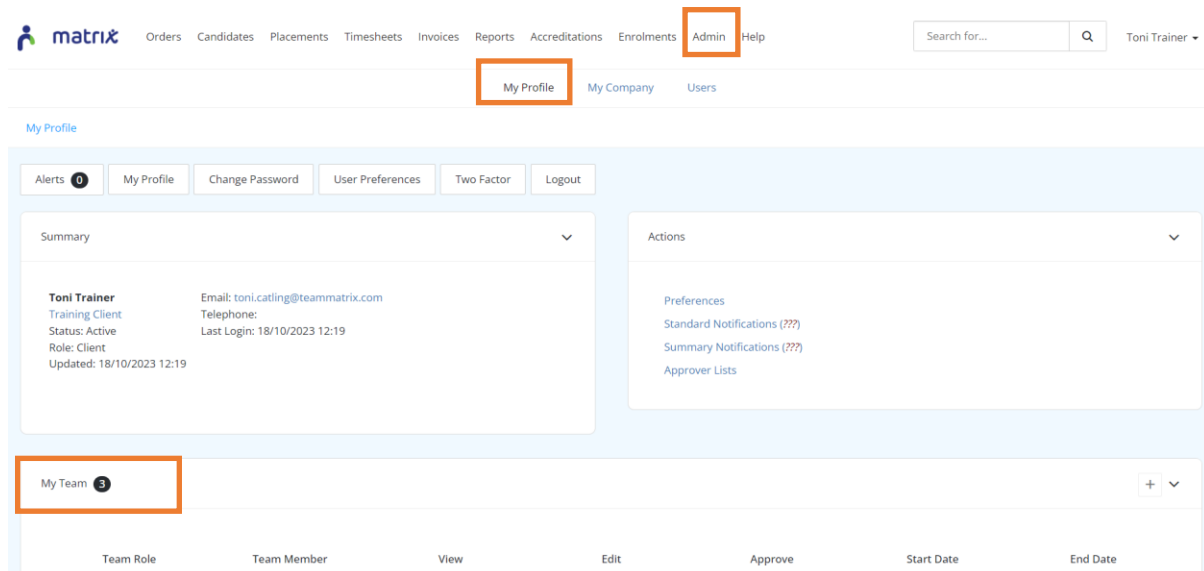
6. Click Save to delegate access to this user.

Note: any users named as a delegate will receive notifications for items they have access to, including items they have been delegated access to.



Amending Delegate Access




1. To amend the level of access for an existing delegate, navigate to the Admin Tab on your home screen and ensure 'My Profile' is selected.
2. Click into the My Team header and click on the  icon against the delegate to amend the details.
3. Tick/untick the relevant boxes and click  top left.

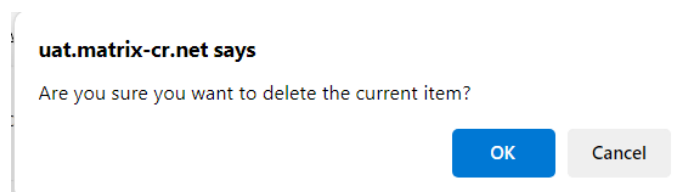


The screenshot displays the Matrix Admin interface. At the top, the navigation menu includes 'Orders', 'Candidates', 'Placements', 'Timesheets', 'Invoices', 'Reports', 'Accreditations', 'Enrolments', 'Admin', and 'Help'. The 'Admin' tab is highlighted with an orange box. Below the navigation, there is a search bar and the user name 'Toni Trainer'. The main content area is titled 'My Profile' and contains several sections: 'Alerts', 'My Profile', 'Change Password', 'User Preferences', 'Two Factor', and 'Logout'. The 'My Profile' section is expanded, showing details for 'Toni Trainer' (Training Client, Status: Active, Role: Client, Updated: 18/10/2023 12:19) and 'Actions' (Preferences, Standard Notifications (??), Summary Notifications (??), Approver Lists). Below this, the 'My Team' header is highlighted with an orange box, showing a table with columns for Team Role, Team Member, View, Edit, Approve, Start Date, and End Date.



Removing a Delegate

1. As above, click into the My Team header and click on the  icon against the delegate you wish to remove
2. Navigate to the  **DELETE** button in the top left corner, once selected It will ask if you wish to confirm click 

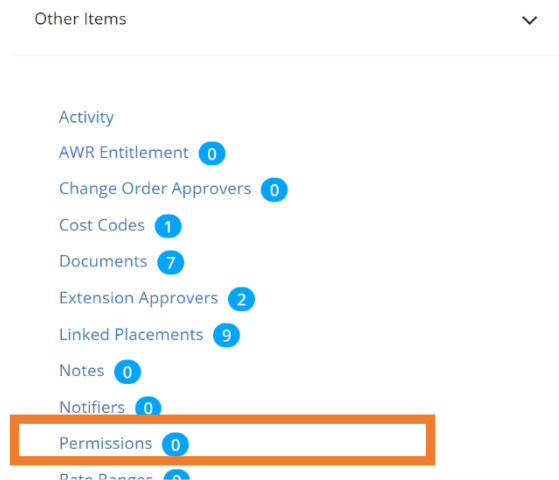


Permissions

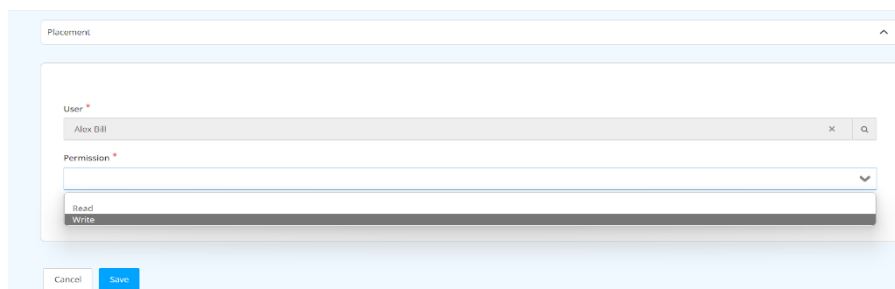
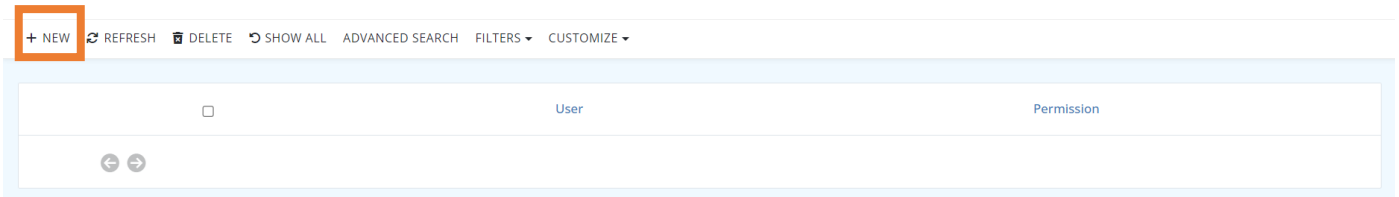
Instead of using the My Team function which enables a delegate access to all the managers items on the system i.e.. Orders, Placements, and Timesheet actions, you are also able to add a delegate to individual placements. This is essentially an extension of the Client Owner/Manager on a Placement.

Through this, you can grant 'read' access which enables the delegate to view that placement, or you can grant 'write' access which allows the delegate to view and raise extensions on that placement. Please be aware, this permissions access does not allow timesheet approval, delegates will still need to be added as a timesheet approver to the placement.

1. Locate the placement you require to add the delegate too.
2. Click into Permissions under the 'Other Items' section.



3. Click the New button on the top left.
4. Search the name of the user you wish to give permissions too.

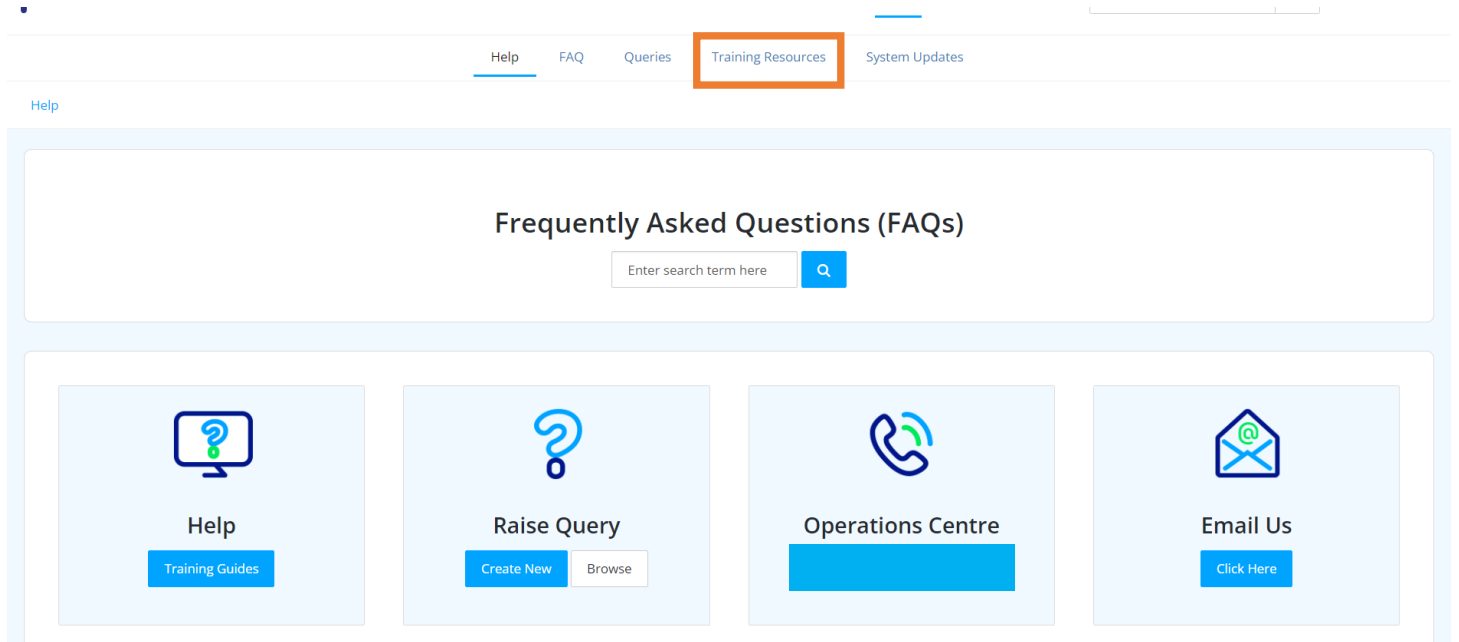


5. Click the  button.



Need more support?

You can contact your Matrix Customer Success Executive or another member of the Customer Success Team for assistance with Matrix-CR.net through the following options:



The screenshot shows a navigation menu with the following items: Help, FAQ, Queries, Training Resources (highlighted with an orange box), and System Updates. Below the menu is a 'Frequently Asked Questions (FAQs)' section with a search bar containing the text 'Enter search term here' and a magnifying glass icon. Below the search bar are four main support options, each with an icon and a button:

- Help**: Icon of a monitor with a question mark. Button: Training Guides
- Raise Query**: Icon of a question mark. Buttons: Create New, Browse
- Operations Centre**: Icon of a telephone handset. Button: [Redacted]
- Email Us**: Icon of an envelope with an @ symbol. Button: Click Here

Underneath your help tab you also have access to help guides and videos under 'Training Resources' as highlighted above.

The number for the Customer Success Team will be displayed on the live site.

