My Team Function: Delegation & Permissions

Client Guide

Vol. 12

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Content

Naming a Delegate Using My Team

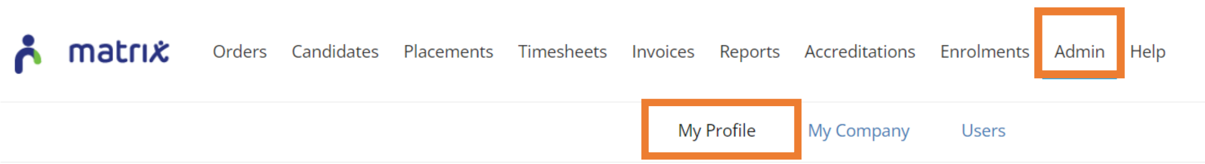
Access to items on Matrix-CR.net can be delegated to another user, for the purpose of covering or sharing workloads; for example, to cover for annual leave or sickness, or when the management of agency workers is shared.

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:

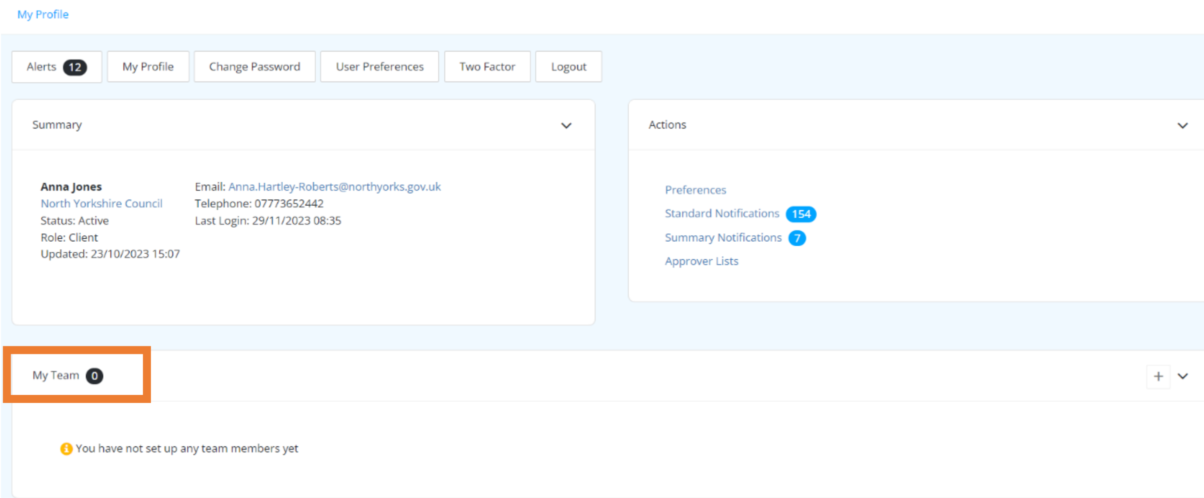
- Naming a delegate user using ‘My Team’
- Naming an additional manager
- Loading an additional timesheet approver

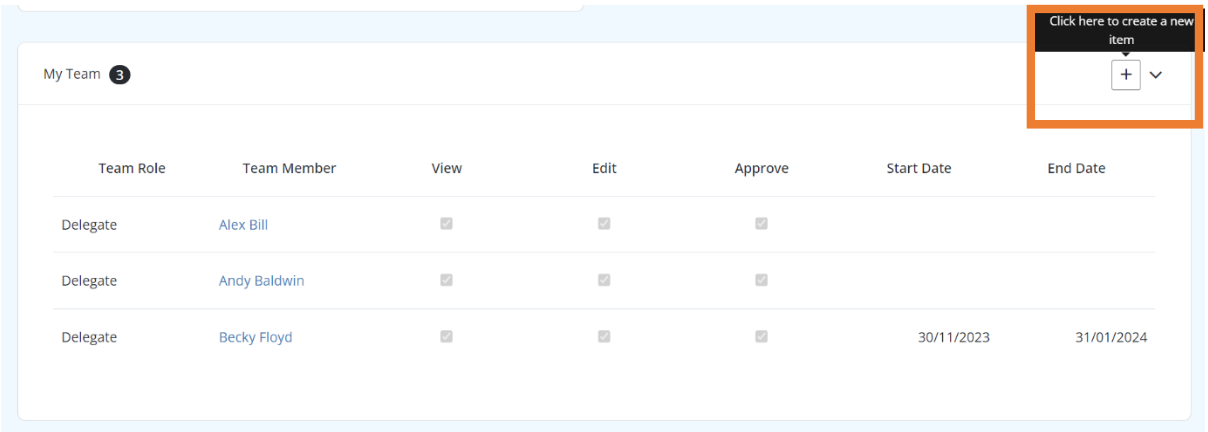
Adding a New Delegate

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.



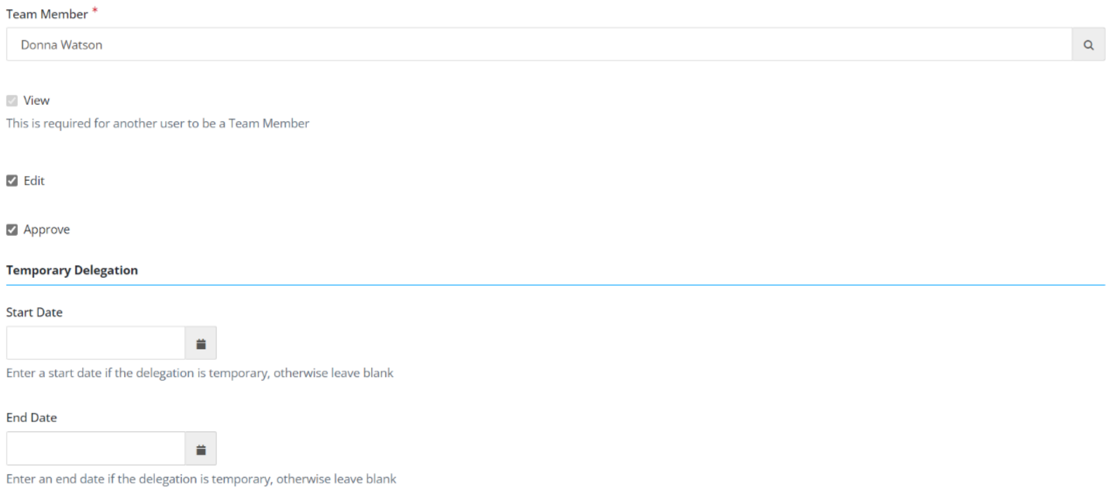


3. To add a new delegate, click on '+ sign' and use the icon to search for the user who you want to delegate access to.

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:

    a) Allowing delegates to **edit** any Orders or Placements which you have raised or are named against.
    b) Allowing delegates to **delete or cancel** any Orders or Placements which you have raised or are named against.
    c) Allowing delegates to **approve** Orders, Placements or Timesheets which you are a named approver for.

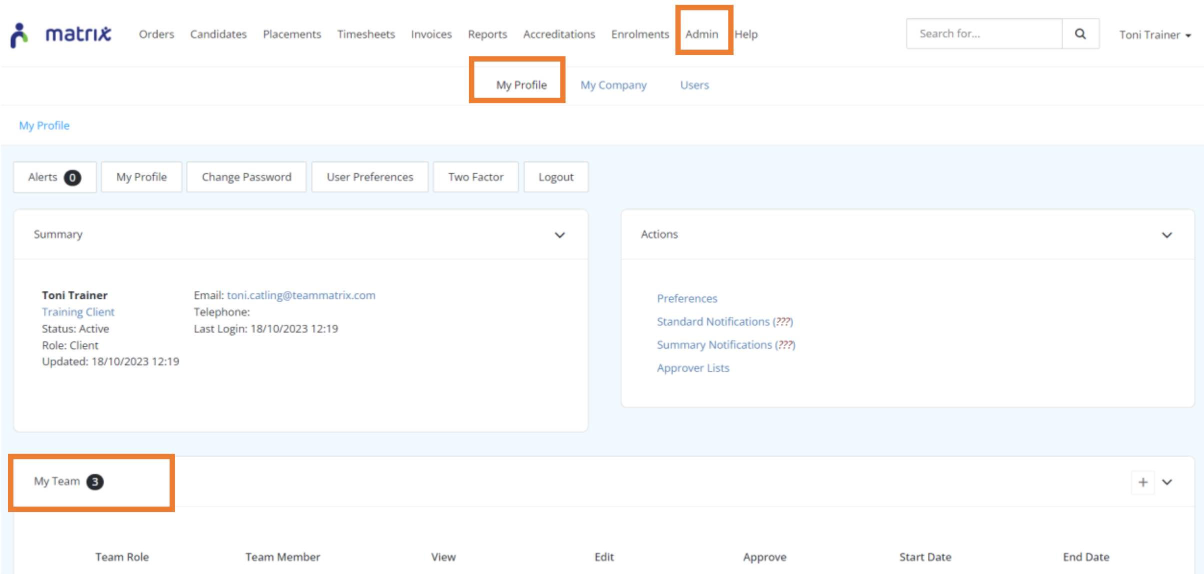


6. Click Save to delegate access to this user.

    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

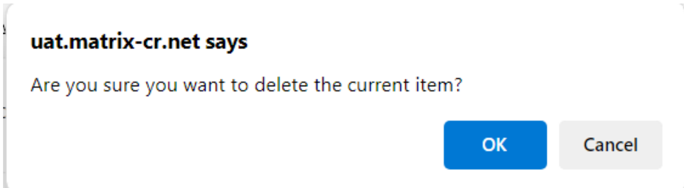
1. To amend the level of access for an existing delegate, navigate to the Admin Tab on your home screen and ensure 'My Profile' is selected.
2. Click into the My Team header and click on the icon against the delegate to amend the details.
3. Tick/untick the relevant boxes and click SAVE top left.



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 OK



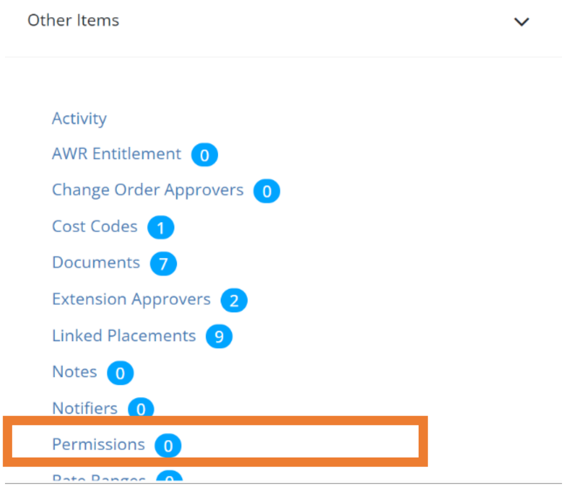
Permissions

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.

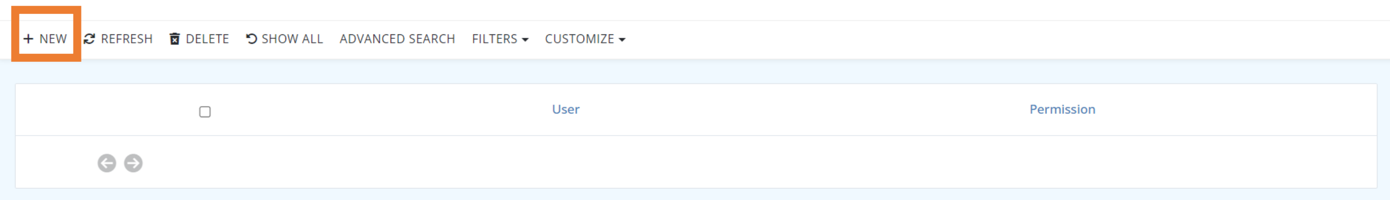
1. Locate the placement you require to add the delegate too.

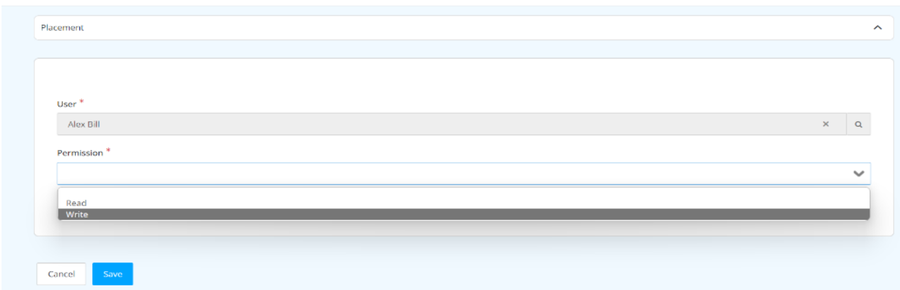
2. Click into Permissions under the ‘Other Items’ section.

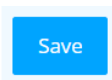


3. Click the New button on the top left.

4. Search the name of the user you wish to give permissions too.

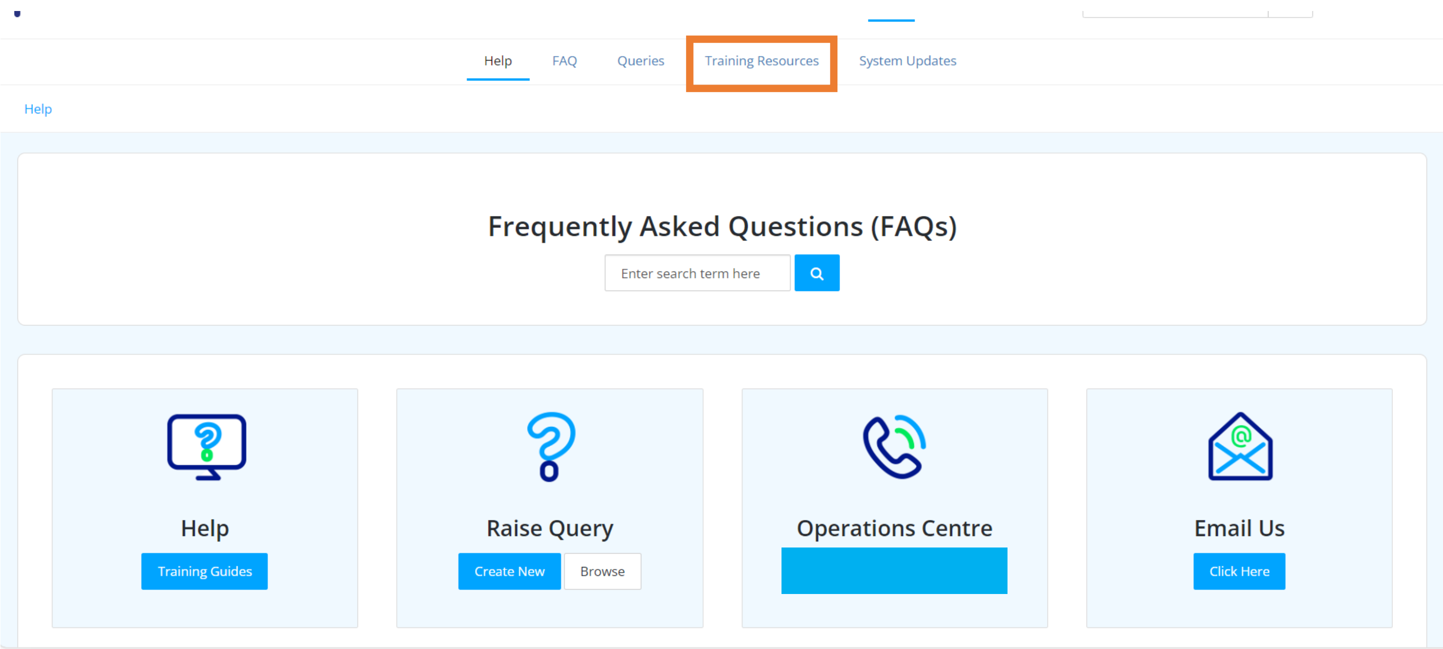




5. Click the  button.

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:



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.