



The Shift Function

Client Guide
Vol. 13

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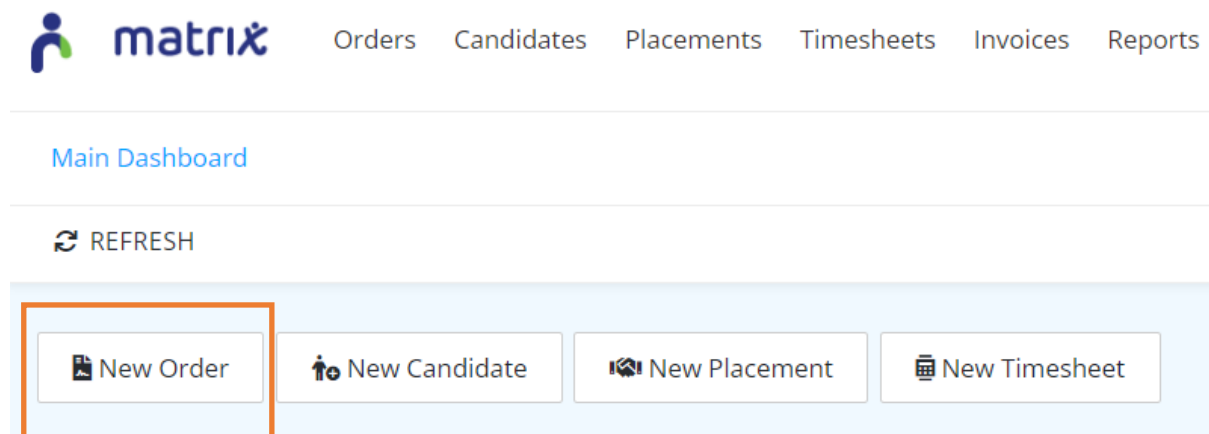


Purpose

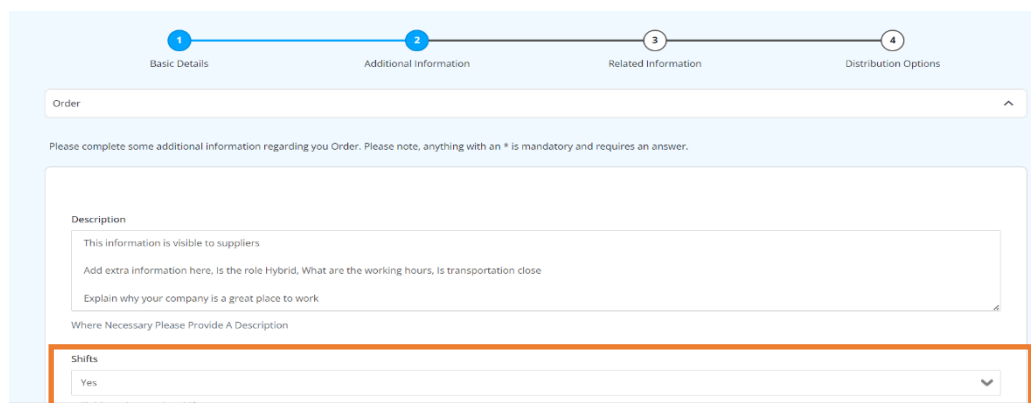
A guide to highlight the new best practice when using the shift functionality on Matrix CR.Net. The aim is to ensure you only have one Order per job title, per location. This will ensure a streamlined process resulting in efficiency, clear communication, and transparency on CR.Net.

Raising an Order with Shifts

1. Click on the “New Order” button at the top of your page, as you would when raising any order, to start the order creation. Fill in any of the fields with a red asterisk.



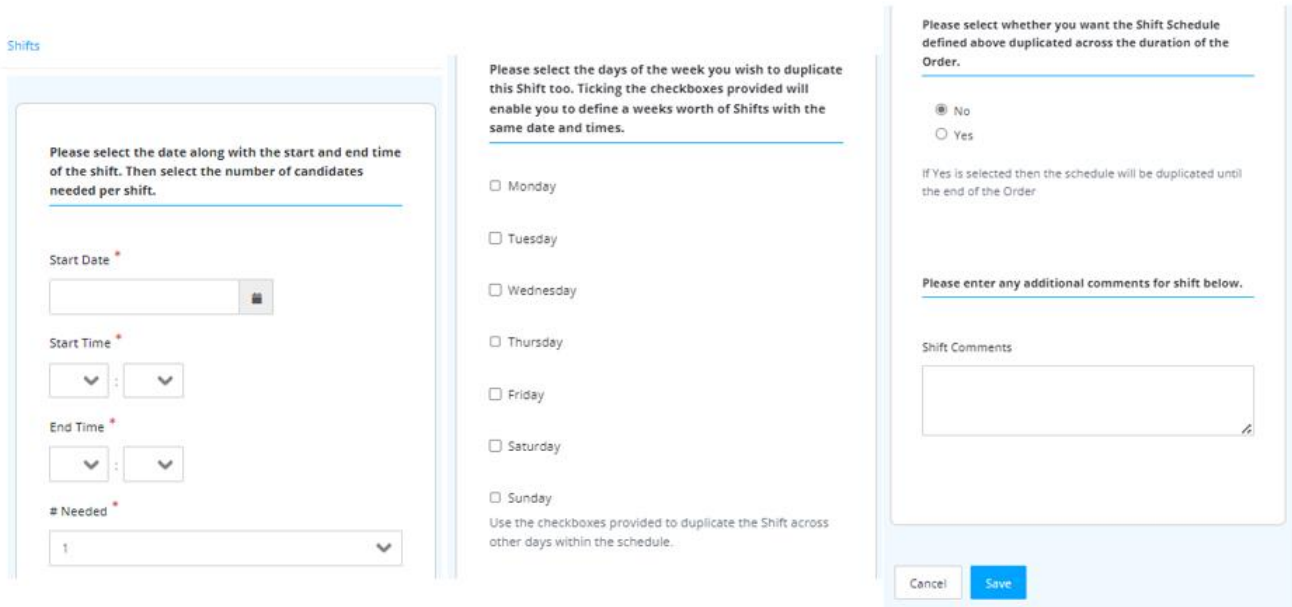
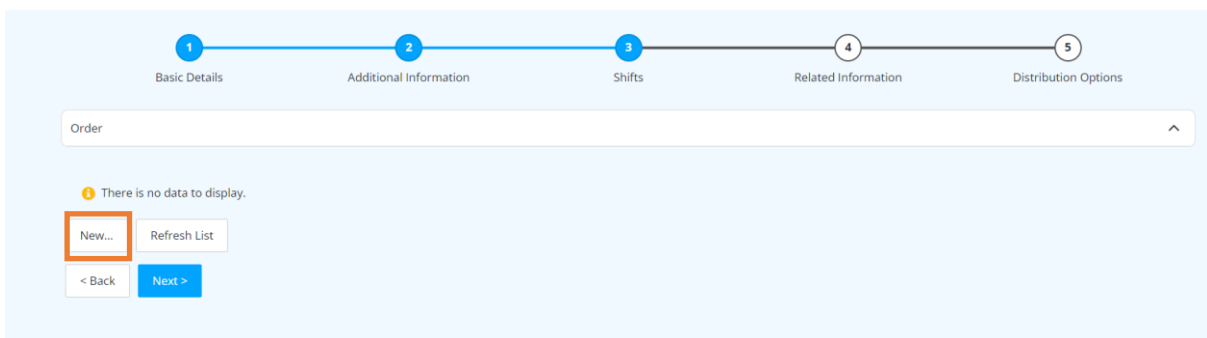
2. On the second page “Additional Information”, make sure that shifts are set to “Yes”. Continue to fill out all required fields with accurate information.



The screenshot shows the 'Additional Information' step of the order creation process. A progress bar at the top indicates four steps: 1. Basic Details, 2. Additional Information (current step), 3. Related Information, and 4. Distribution Options. Below the progress bar is a form with a 'Description' field and a 'Shifts' dropdown menu. The 'Shifts' dropdown is highlighted with an orange border and is set to 'Yes'.



- By selecting “Yes” on the shifts required drop down, the order Wizard will now add an additional step to obtain shift details. To add a shift to the order click “New” on the third page.
- Fill in the details of the shift by completing all fields with a red asterisk. The order wizard will ask you for the date of the shift, the start and end time of the shift along with the number of candidates you require to fill the shift. You will also be given the option to duplicate this shift across different days of the week and extend that for the entire length of the order. For example, if you know you need a worker every Tuesday and Wednesday from 12-6, you can fill in those details, select Tuesday and Wednesday and duplicate that shift schedule across the whole order as seen in the example below.



5. Continue to add shifts until all required shifts have been added to the order.

1
Basic Details

2
Additional Information

3
Shifts

4
Related Information

5
Distribution Options

Order ^

	Start Date	End Date	Start Time	End Time	Status	# Needed	Shift Comments
×	05/12/2023	05/12/2023	09:00	17:00	Open	1	
×	07/12/2023	07/12/2023	09:00	17:00	Open	1	
×	08/12/2023	08/12/2023	09:00	17:00	Open	1	
×	12/12/2023	12/12/2023	09:00	17:00	Open	1	
×	14/12/2023	14/12/2023	09:00	17:00	Open	1	
×	15/12/2023	15/12/2023	09:00	17:00	Open	1	
×	19/12/2023	19/12/2023	09:00	17:00	Open	1	
×	21/12/2023	21/12/2023	09:00	17:00	Open	1	
×	22/12/2023	22/12/2023	09:00	17:00	Open	1	

6. Complete the rest of the order as you would normally, by adding any additional information required and submit on the final page.

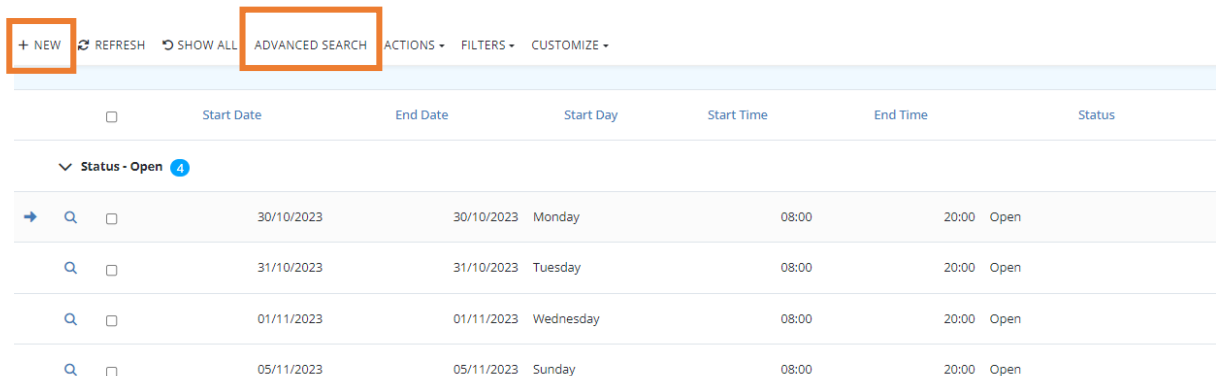


Adding Shifts Post Order Creation

- To add shifts to your order post order creation stage, navigate to the 'Shifts' section on your order;



- From here, you can see all the current shifts you have on your order through the advanced search, and you can add new shifts through the 'New' button where you will be taken through the same steps highlighted above when adding shifts at the order creation stage;



A screenshot of a table interface for managing shifts. At the top, there are several buttons: '+ NEW', 'REFRESH', 'SHOW ALL', 'ADVANCED SEARCH', 'ACTIONS', 'FILTERS', and 'CUSTOMIZE'. The 'ADVANCED SEARCH' button is highlighted with a red box. Below the buttons is a table with the following columns: Start Date, End Date, Start Day, Start Time, End Time, and Status. The table shows four rows of data for 'Open' status shifts.

	Start Date	End Date	Start Day	Start Time	End Time	Status
▼ Status - Open (4)						
→	30/10/2023	30/10/2023	Monday	08:00	20:00	Open
	31/10/2023	31/10/2023	Tuesday	08:00	20:00	Open
	01/11/2023	01/11/2023	Wednesday	08:00	20:00	Open
	05/11/2023	05/11/2023	Sunday	08:00	20:00	Open

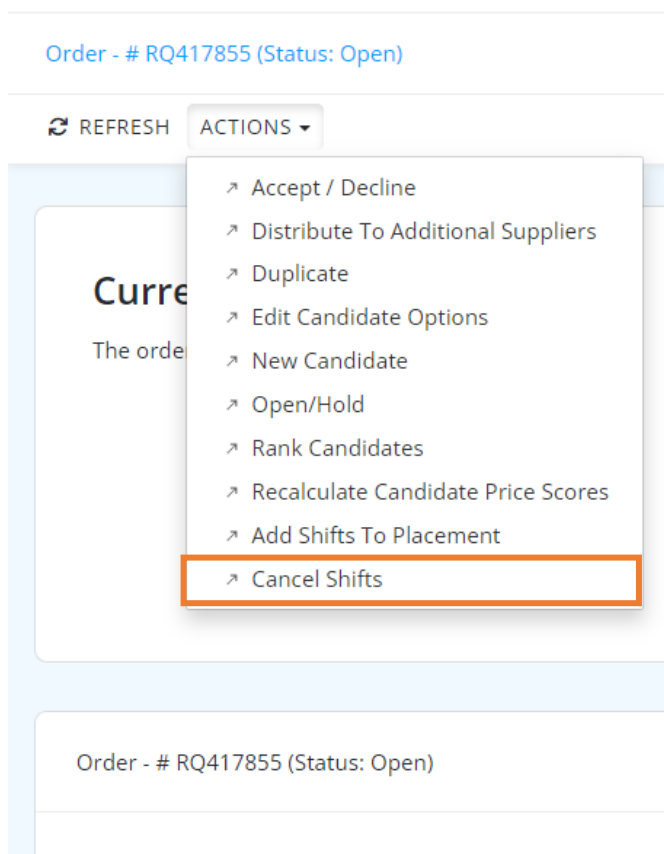


Cancelling Shifts – Order Level

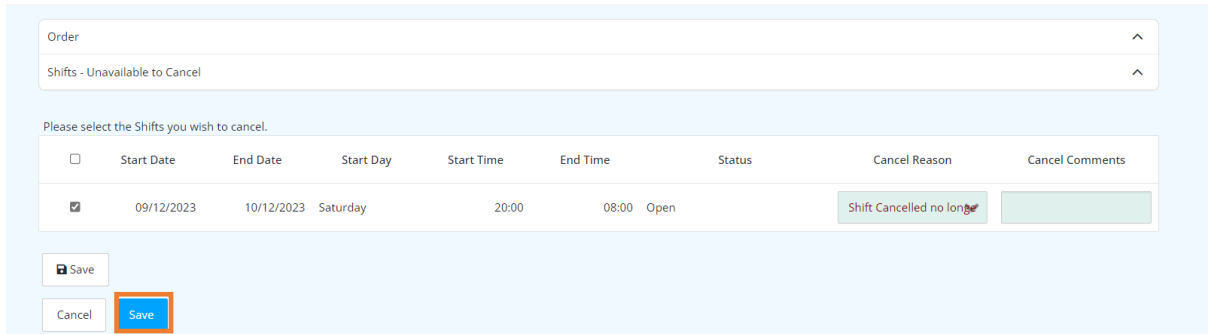
An option to cancel shifts listed against orders has been introduced. This allows for auditing of shift cancellations, rather than records being deleted entirely.

To cancel order shifts:

1. Click on the “Actions” button at the top of the order page and select the “Cancel Shifts” option.



- Select the shifts that you need to cancel by selecting the check box on the left, then choose a reason for the cancellation from the drop-down options. If you want to add a comment, this can be done in the free text box on the right-hand side.



Order

Shifts - Unavailable to Cancel

Please select the Shifts you wish to cancel.

<input type="checkbox"/>	Start Date	End Date	Start Day	Start Time	End Time	Status	Cancel Reason	Cancel Comments
<input checked="" type="checkbox"/>	09/12/2023	10/12/2023	Saturday	20:00	08:00	Open	Shift Cancelled no longer	

Save

Cancel Save

- Once you have done this for all the shifts you need to cancel, scroll down to the bottom and press save to remove the shifts from the order.
- Not all order shift records will be able to be cancelled immediately. If any order shift records are attached to a candidate offer, or existing placement, the system will block this cancellation.

<input type="checkbox"/>	Start Date	End Date	Start Day	Start Time	End Time	Status
▼ Status - Open 1						
<input type="checkbox"/>	20/12/2022	20/12/2022	Tuesday	08:00	18:00	Open
▼ Status - Filled 3						
<input type="checkbox"/>	21/12/2022	21/12/2022	Wednesday	05:00	10:00	Filled
<input type="checkbox"/>	22/12/2022	22/12/2022	Thursday	05:00	10:00	Filled
<input type="checkbox"/>	23/12/2022	23/12/2022	Friday	05:00	10:00	Filled
▼ Status - Pending Placement 2						
<input type="checkbox"/>	19/12/2022	19/12/2022	Monday	05:00	10:00	Pending Placement
<input type="checkbox"/>	20/12/2022	20/12/2022	Tuesday	05:00	10:00	Pending Placement

- If you wish to cancel any 'Unavailable to Cancel' shift records, please contact your Customer Success Executive

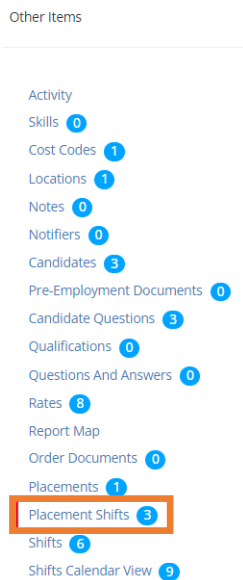


Placement Shifts – View Table

The *Placement Shifts* table is listed under an order’s *other items*, which allows you to see all shifts associated with any placements generated from that specific order. This is an exportable table and can be downloaded in an excel compatible format for ease of access.

To access this view:

1. Navigate to the appropriate order and select ‘Placement Shifts’



2. Once you have clicked the *Placement Shifts* button you will be navigated to the below view

Order - # RQ409977 (Status: Open) / Placement Shifts (Filtered on Parent) 3

REFRESH SHOW ALL **ADVANCED SEARCH** ACTIONS FILTERS CUSTOMIZE

Order #	Placement #	Placement Status	Shift Status	Worker	Start Date	End Date	Start Day	Start Time	End Time
RQ409977	SA393247	Active	Open	Candidate Six	21/12/2022	21/12/2022	Wednesday	05:00	10:00
RQ409977	SA393247	Active	Open	Candidate Six	22/12/2022	22/12/2022	Thursday	05:00	10:00
RQ409977	SA393247	Active	Open	Candidate Six	23/12/2022	23/12/2022	Friday	05:00	10:00



3. The above table shows all associated placement shifts, including details on the worker's name, shift dates & times, shift statuses.
4. You can also navigate directly to any associated placements by clicking the hyperlinked SA# in column 2.
5. You can search this data and apply your applicable filters by clicking 'Advanced Search' which will allow you to type in the free text boxes for your search;

Order - # RQ409977 (Status: Open) / Placement Shifts (Filtered on Parent) 3

REFRESH SHOW ALL ADVANCED SEARCH ACTIONS FILTERS CUSTOMIZE

Export to Excel

Order #	Placement #	Placement Status	Shift Status	Worker	Start Date	End Date	Start Day	Start Time	End Time
RQ409977	SA393247	Active	Open	Candidate Six	21/12/2022	21/12/2022	Wednesday	05:00	10:00
RQ409977	SA393247	Active	Open	Candidate Six	22/12/2022	22/12/2022	Thursday	05:00	10:00
RQ409977	SA393247	Active	Open	Candidate Six	23/12/2022	23/12/2022	Friday	05:00	10:00

6. To export this data, click the Actions button, and select 'Export to Excel'.



Approving Placement Shift Requests

Providing you have added all required shifts to your order, agencies have the ability to request these shifts for their candidates already in post without the need to create a new placement. Once an agency has requested these shifts, you will be able to see this in your priority items on your home page;

Priority Items - Click this link for full list of active transaction items

Priority	Steps Status	Relevant Date	#	Worker			
On Track	Open Orders with No Candidates	15-Aug-22	RQ507229	n/a			
On Track	Open/On-Hold Orders with Candidates Pending Client Review	26-Nov-21	RQ480706	n/a			
On Track	Timesheet Pending Approval	08-Aug-22	SR7155602				
On Track	Placement Shift Pending Approval	27-Jul-23	SA457669	Candidate Five			
On Track	Placement Shift Pending Approval	26-Jul-23	SA457669	Candidate Five			

1. Click the above highlighted hyperlink to be directed to the placement where you can approve the shifts through the 'Actions' button and select which shifts you approve via the tick boxes

Placement - # SA457669 (Status: Active)

REFRESH ACTIONS

- Cancel
- Edit Linked Data
- End
- Extend
- Approve Shifts
- Reject Shifts
- Cancel Shifts

Please select the Shifts you are approving. The ones selected will be eligible for the Placement.

	Start Date	End Date	Start Day	Start Time	End Time	Status
<input type="checkbox"/>	26/07/2023	26/07/2023	Wednesday	06:00	14:00	Pending Approval
<input type="checkbox"/>	27/07/2023	27/07/2023	Thursday	06:00	14:00	Pending Approval

Save Cancel Approve



- You are also able to approve the pending shifts through the 'Placement Shifts' section on your order;

Other Items

- Activity
- Skills 0
- Cost Codes 1
- Locations 1
- Notes 0
- Notifiers 0
- Candidates 3
- Pre-Employment Documents 0
- Candidate Questions 3
- Qualifications 0
- Questions And Answers 0
- Rates 8
- Report Map
- Order Documents 0
- Placements 1
- Placement Shifts 3**
- Shifts 6
- Shifts Calendar View 9

Order - # RQ406031 (Status: Open) / Placement Shifts (Filtered on Parent) 10

REFRESH SHOW ALL ADVANCED SEARCH ACTIONS FILTERS CUSTOMIZE

Order #	Placement #	Placement Status	Shift Status	Worker	Start Date	End Date	Start Day	Start Time	End Time
→ RQ406031	SA391018	Active	Open	Hans Bellos	09/05/2022	09/05/2022	Monday	08:00	12:00
RQ406031	SA391018	Active	Open	Hans Bellos	10/05/2022	10/05/2022	Tuesday	08:00	12:00
RQ406031	SA391018	Active	Open	Hans Bellos	11/05/2022	11/05/2022	Wednesday	08:00	12:00
RQ406031	SA391018	Active	Open	Hans Bellos	12/05/2022	12/05/2022	Thursday	08:00	12:00

- If you click the SA hyperlink as highlighted above, you can approve the pending shifts through the 'Actions' button on the placement as explained in previous steps in this guide.

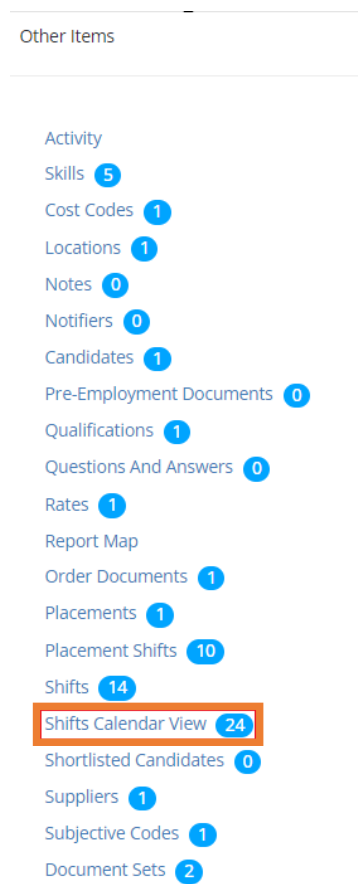


Shifts Calendar View

The *Shifts Calendar View* is a new feature, listed under an order's *other items*, which allows you to view all shifts – at both an order, and placement level – in a stylized calendar/Rota design. The calendar view has interactive elements, and a colour scheme to indicate the status of the displayed shift records (i.e. if shifts are filled, unfilled or pending approval/acceptance).

To access this view:

1. Navigate to the appropriate order – Find the new view under other items,



- Once you have clicked the *Shifts Calendar View* button you will be navigated to the below view

Calendar

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1 May	2	3	4	5	6	7
8	9 Filled (Shift) 08:00 - 12:00 Hans Bellos (Placement) 08:00 - more...	10 Filled (Shift) 08:00 - 12:00 Hans Bellos (Placement) 08:00 - more...	11 Filled (Shift) 08:00 - 12:00 Hans Bellos (Placement) 08:00 - more...	12 Filled (Shift) 08:00 - 12:00 Hans Bellos (Placement) 08:00 - more...	13 Filled (Shift) 08:00 - 12:00 Hans Bellos (Placement) 08:00 - more...	14
15	16 more...	17 more...	18 more...	19 more...	20 more...	21
22	23	24	25	26	27	28
29	30	31	1 Jun	2	3	4

- The above table provides an overview of all logged order and placement shift records which are associated with the applicable RQ#.
- To obtain further details you can click on any of the visible shift objects (order and placement), and a pop-up box will appear providing additional information.

matrix Orders Candidates Placements Timesheets Invoices Reports Accreditations Enrolments Admin Help

der - # RQ406031 (Status: Open) / Shifts Calendar

Calendar

Sun	Mon	Tue
1 May	2	3
8	9 Filled (Shift) 08:00 - 12:00 Hans Bellos (Placement) 08:00 - 12:00 more...	10 Filled (Shift) 08:00 - 12:00 Hans Bellos (Placement) 08:00 - more...
15	16 more...	17 more...
22	23	24
29	30	31

Placement Shift

Shift Status
Filled

Start Date
09/05/2022

End Date
09/05/2022

Start Time
08:00

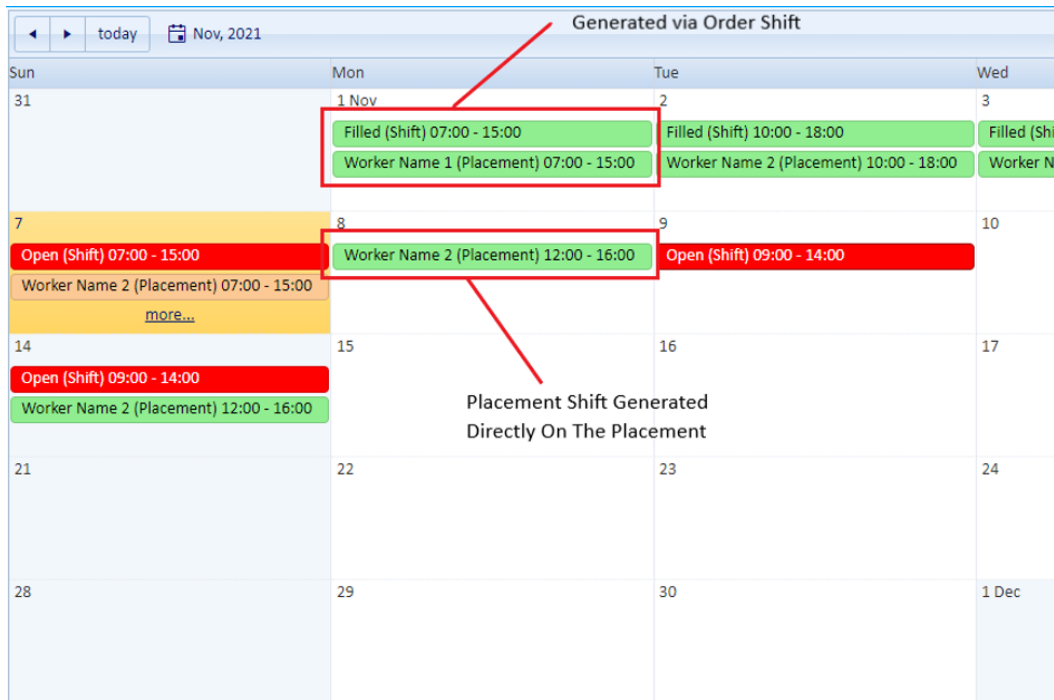
End Time
12:00

Num Met
1

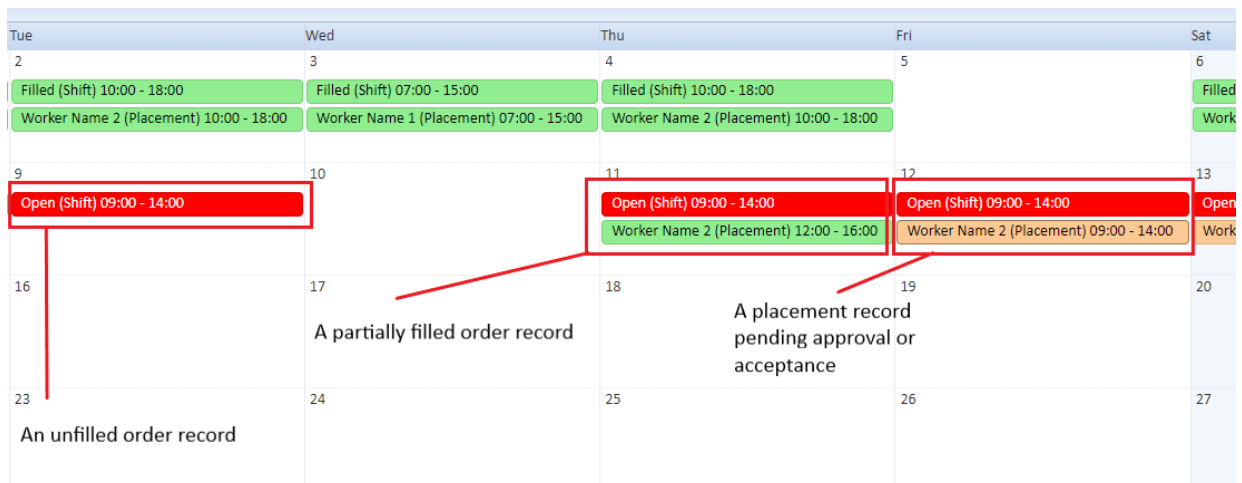
Num Needed
1



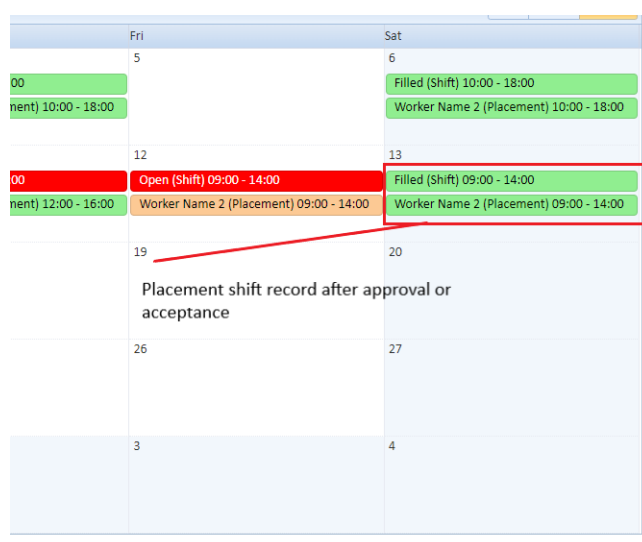
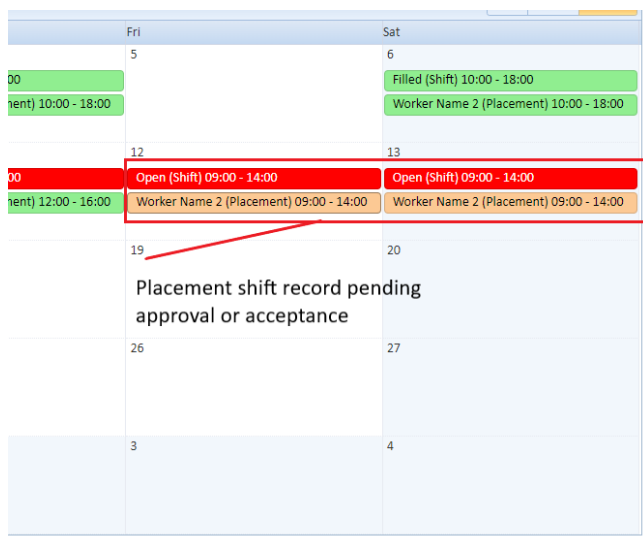
- Where a placement shift has been generated off a defined order shift you will see both the order shift record (displayed as *Filled (Shift) – Start time – End Time*) and the placement shift record (displayed as *Worker Name (Placement) – Start time – End Time*) stacked on one another.



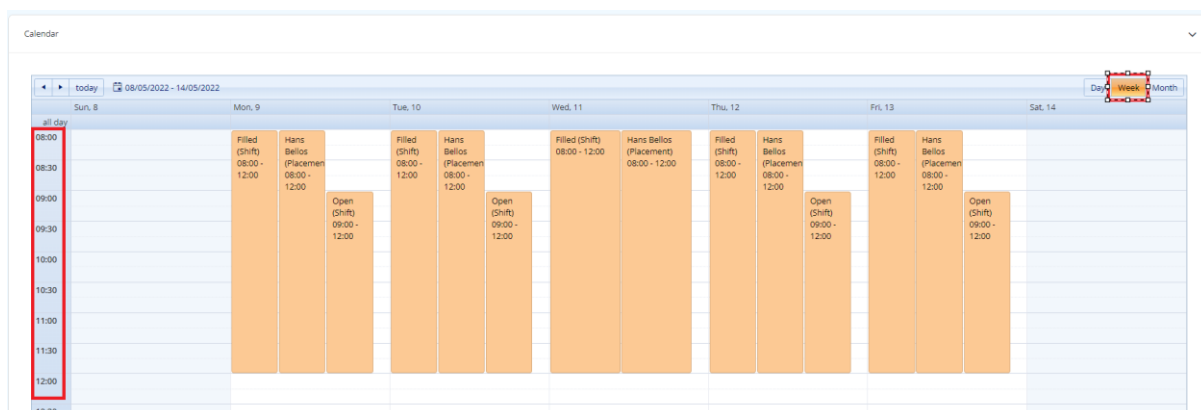
- An unfilled order shift record is displayed as red.
A partially filled order shift is displayed as red, with the relevant filled placement(s) shifts listed in green below.
A placement shift record pending client approval, or supplier acceptance, is displayed in Amber.



- Where a pending shift is accepted or approved, and moves to open on the placement, the record will update from a red order record and amber placement record to a green order record and green placement record.



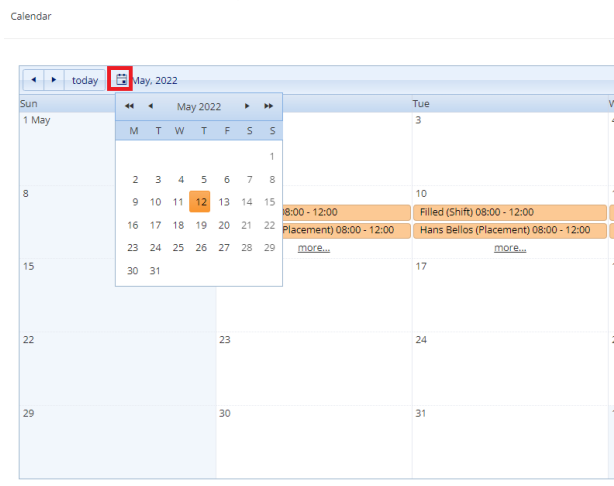
- Various elements on the calendar can be toggled. The default calendar view is set to a Monthly view, but this can also be amended too Daily and Weekly. To amend the view, simply click one of the 'Day', 'Week' or 'Month' buttons in the top right-hand corner.



Whilst viewing under one of the daily or weekly view options, you will also be provided with a visual indication of the shifts' hourly breakdowns. This can also be toggled between business hours, or 24-hour views.

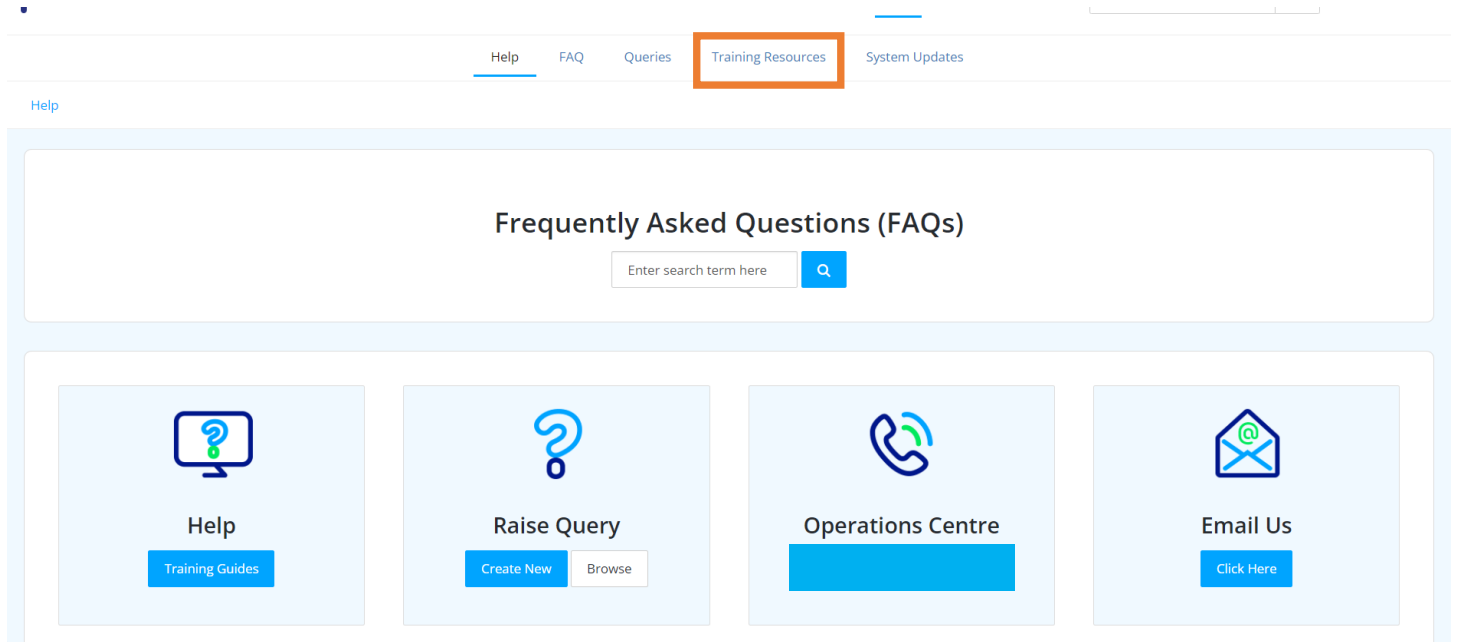


9. You can change the day, week, or month you are viewing by simply clicking the calendar icon found at the top of the calendar view.



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.

