matrixcr

'How To' Guide

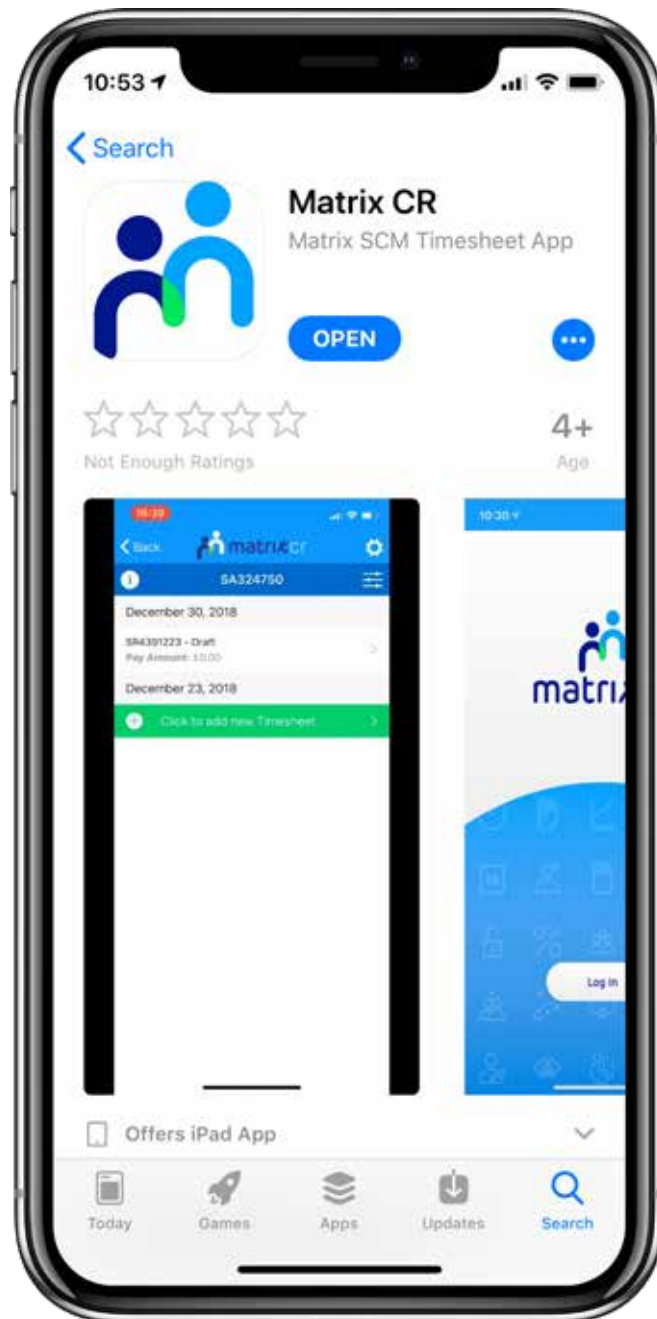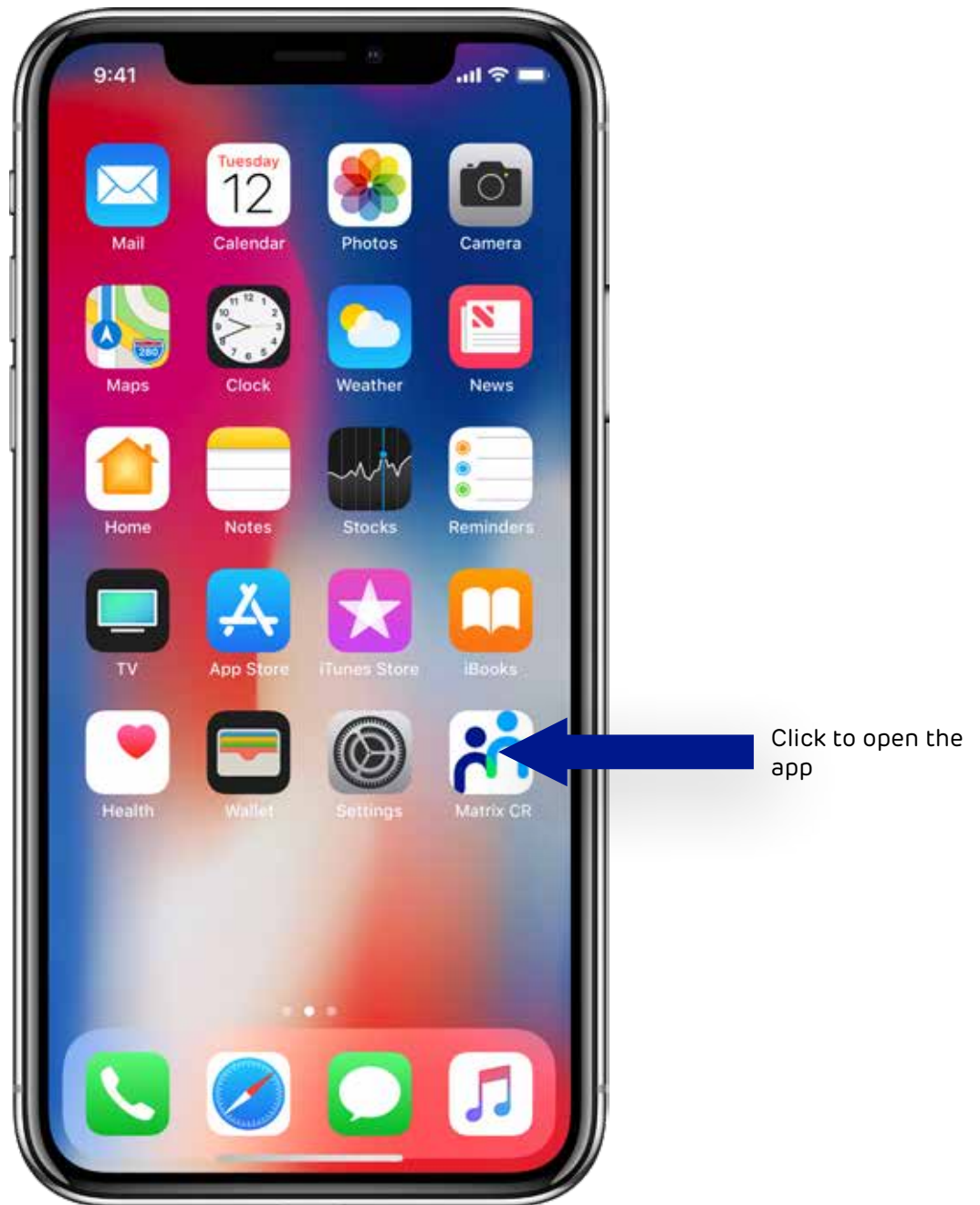# Downloading The Matrix CR App

Visit the App Store (iOS) or Android Store to download the Matrix CR app.

Installing The App
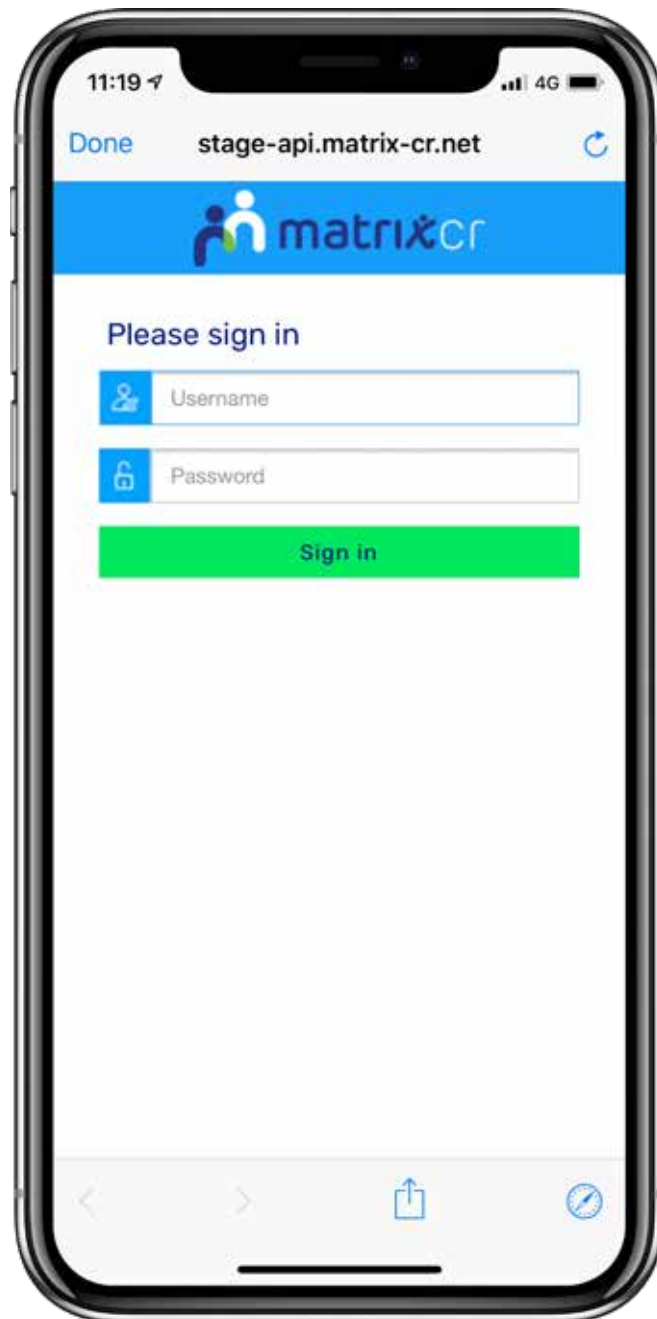

Click to open the app

Once installed, open up the Matrix CR app.

Logging In

Click to log in

When you click the login button, you will be directed to the Matrix CR login page. (Please note this can take a while to connect when you login for the first time).
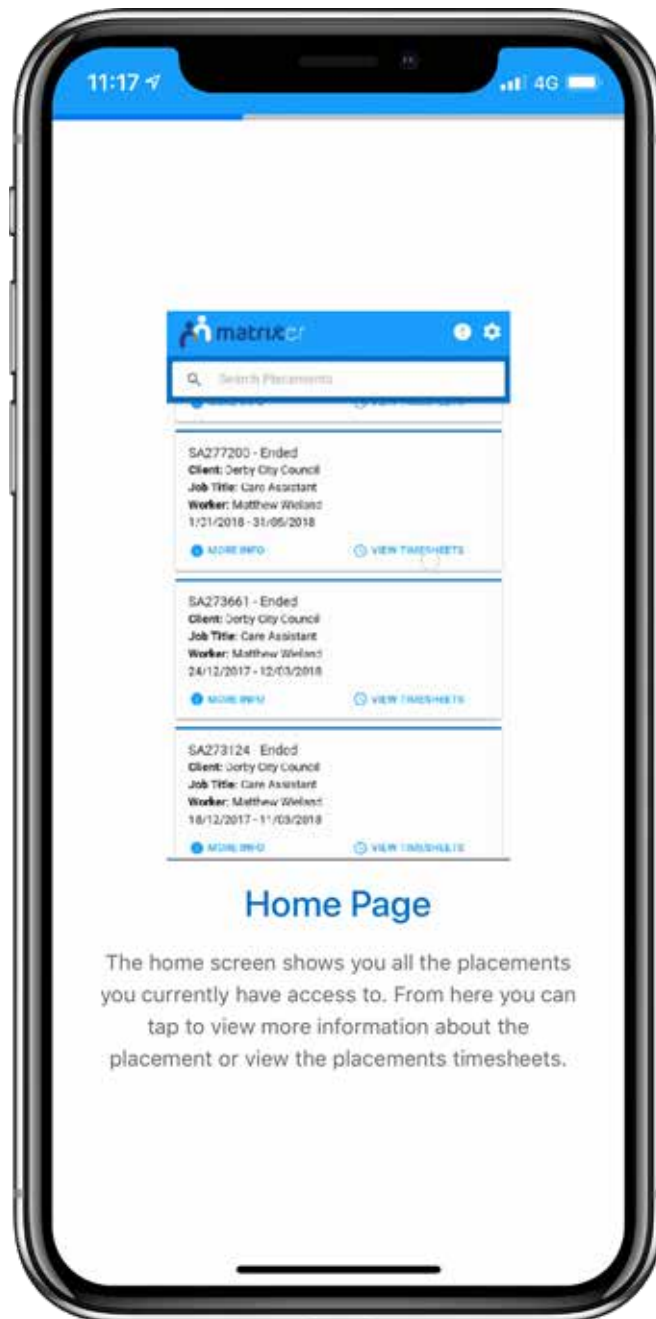
Signing In

From here you can login with your Matrix CR username and passwords and access your timesheets on the app.

If you are having a problem with your password, you won't be able to reset it within the app so you will need to login Matrix CR through a different means i.e. laptop etc.

Tutorial

Home Page

The home screen shows you all the placements you currently have access to. From here you can tap to view more information about the placement or view the placements timesheets.

The placement page shows all placements that the user has access too within Matrix CR. To navigate the placements, you can use the search bar to find a placement, we recommend searching by; statuses, clients, job titles etc.

Search For Placements And View Timesheets

System settings

Search for placement
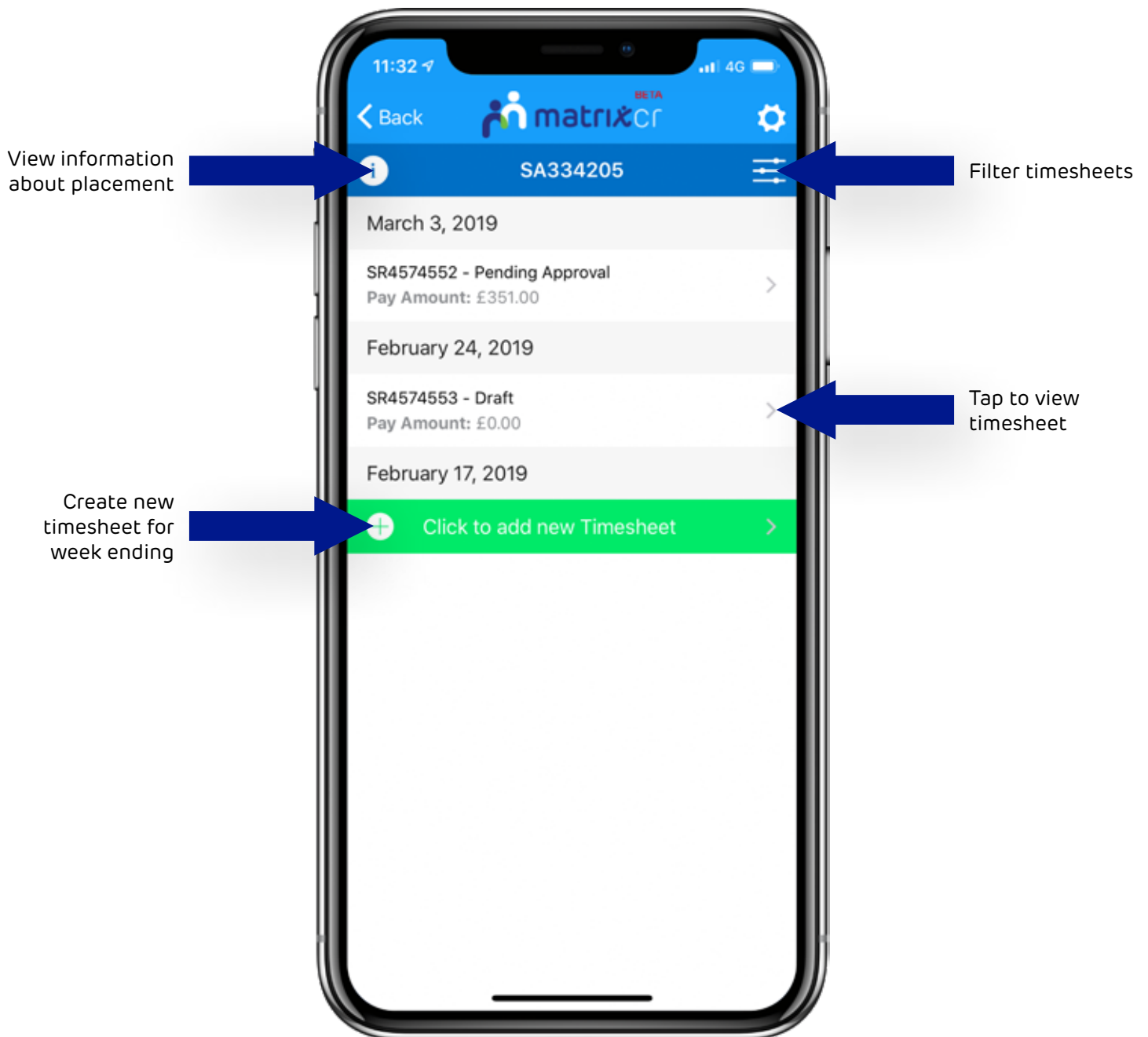
SA334210 - Cancelled
Client: Client Matrix
Job Title: Account Manager
Worker: Chris Kerrison
25/02/2019 - 22/03/2019

View more information about placement

ⓘ More Info   🕐 View Timesheets

View timesheets for placement

SA334209 - Failed Pre-Employment Check
Client: Cambridgeshire County Council
Job Title: Project Manager (P4)
Worker: Steven Bown
22/02/2019 - 17/05/2019

ⓘ More Info   🕐 View Timesheets

SA334208 - Pending Supplier Acceptance
Client: Hampshire County Council
Job Title: Domestic/General Assistant (00672 - A)
Worker: ABANG ADRAINSYAH
10/02/2019 - 2/03/2019

ⓘ More Info   🕐 View Timesheets

SA334207 - Pending Pre-Employment Check
Client: Hampshire County Council
Job Title: Care Assistant (02295 - C)
Worker: Ashmita Chamling
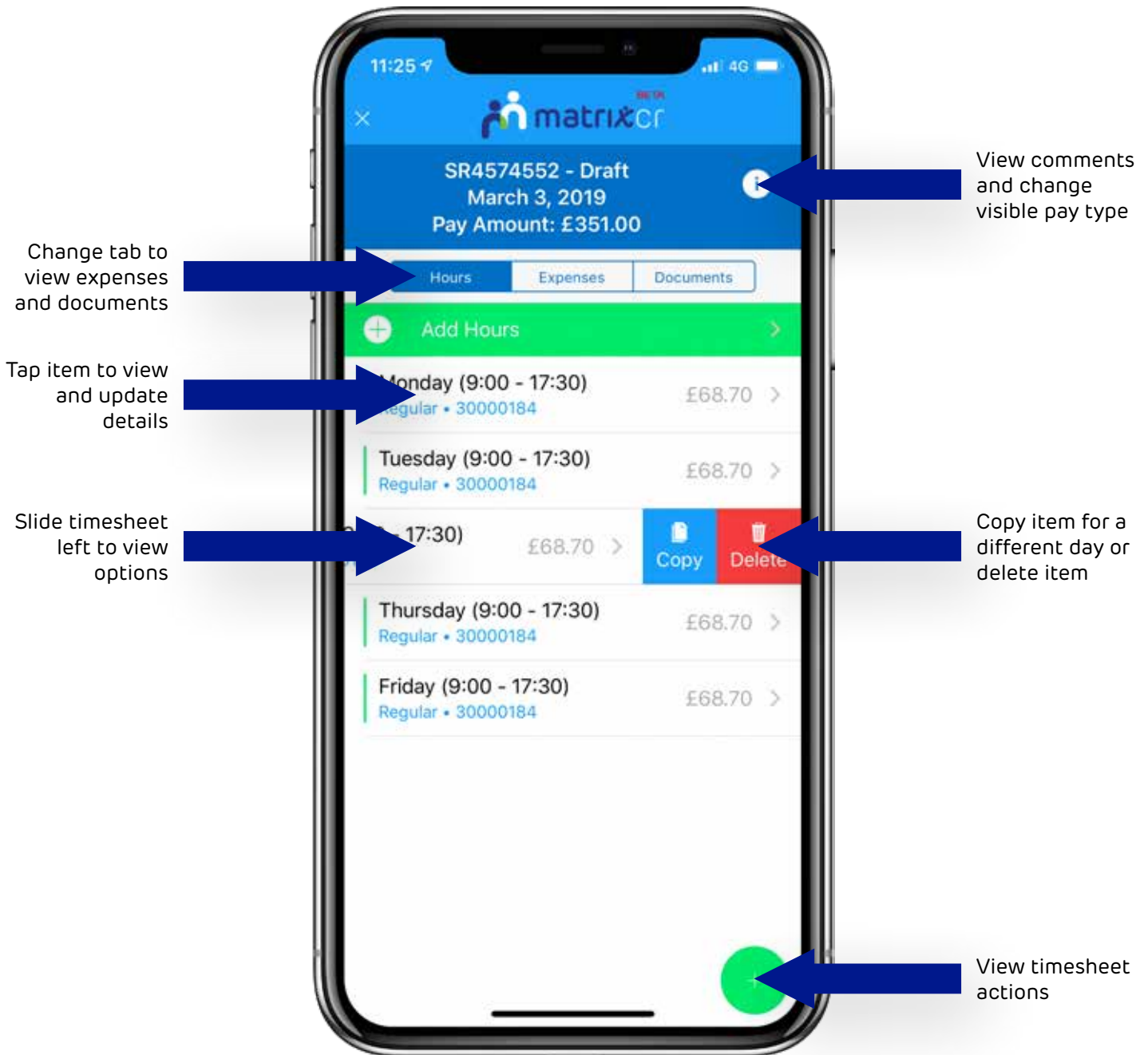28/02/2019 - 28/02/2019

When you click view timesheets, you will be taken to the timesheets page. From here you can instantly create a timesheet for that week-ending or the user can click an existing timesheet to see all the details.

Timesheets

View information about placement

Filter timesheets

Tap to view timesheet

Create new timesheet for week ending

Screen contents:

11:32

matrixcr BETA

< Back   ⚙

SA334205

March 3, 2019

SR4574552 - Pending Approval
Pay Amount: £351.00

February 24, 2019

SR4574553 - Draft
Pay Amount: £0.00

February 17, 2019

⊕ Click to add new Timesheet   >

When you click view timesheets, you will be taken to the timesheets page. From here you can instantly create a timesheet for that week-ending or the user can click an existing timesheet to see all the details.
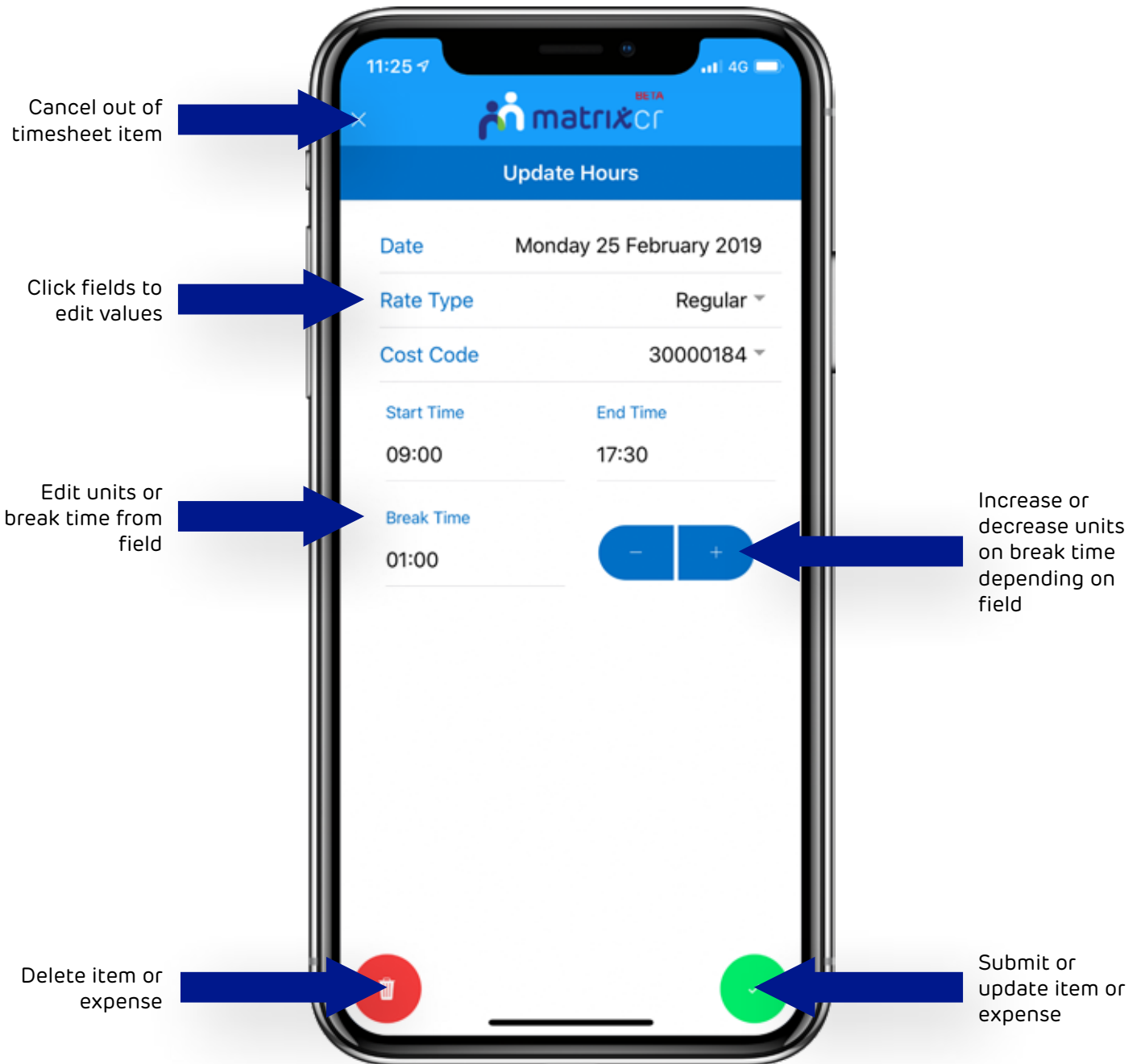
Timesheet Details

View comments and change visible pay type

Change tab to view expenses and documents

Tap item to view and update details

Slide timesheet left to view options

Copy item for a different day or delete item

View timesheet actions

Once you have selected to create a timesheet, all you need to do is add; days, hours, expenses and click submit. You can click expenses and adding documents here as well if your Matrix CR placement gives you access to them.

Please remember to click submit when you are sending your timesheet to be signed off.

Updating Hours

Cancel out of timesheet item

Click fields to edit values

Edit units or break time from field

Delete item or expense

Increase or decrease units on break time depending on field

Submit or update item or expense

If the timesheet is in draft (hasn't been submitted) or rejected by a manager, a green bar will show that will give you access to expenses. Upon clicking you will be taken to the following page where you can enter the day, cost code, hours/units, rate type, and include any documents related to the expense.

Adding Expenses And Documents

Click to add a
new expense

Delete
document

Users can copy previously created items for different days of the week. Simply slide the already created item to the left to reveal the additional options for the item. This can only be done when a timesheet is in Draft or Rejected status. You can also delete an item from this menu. If the user has access to expenses, it is sometimes required to also add a document as proof.

Timesheets To Be Actioned

Timesheets to be actioned
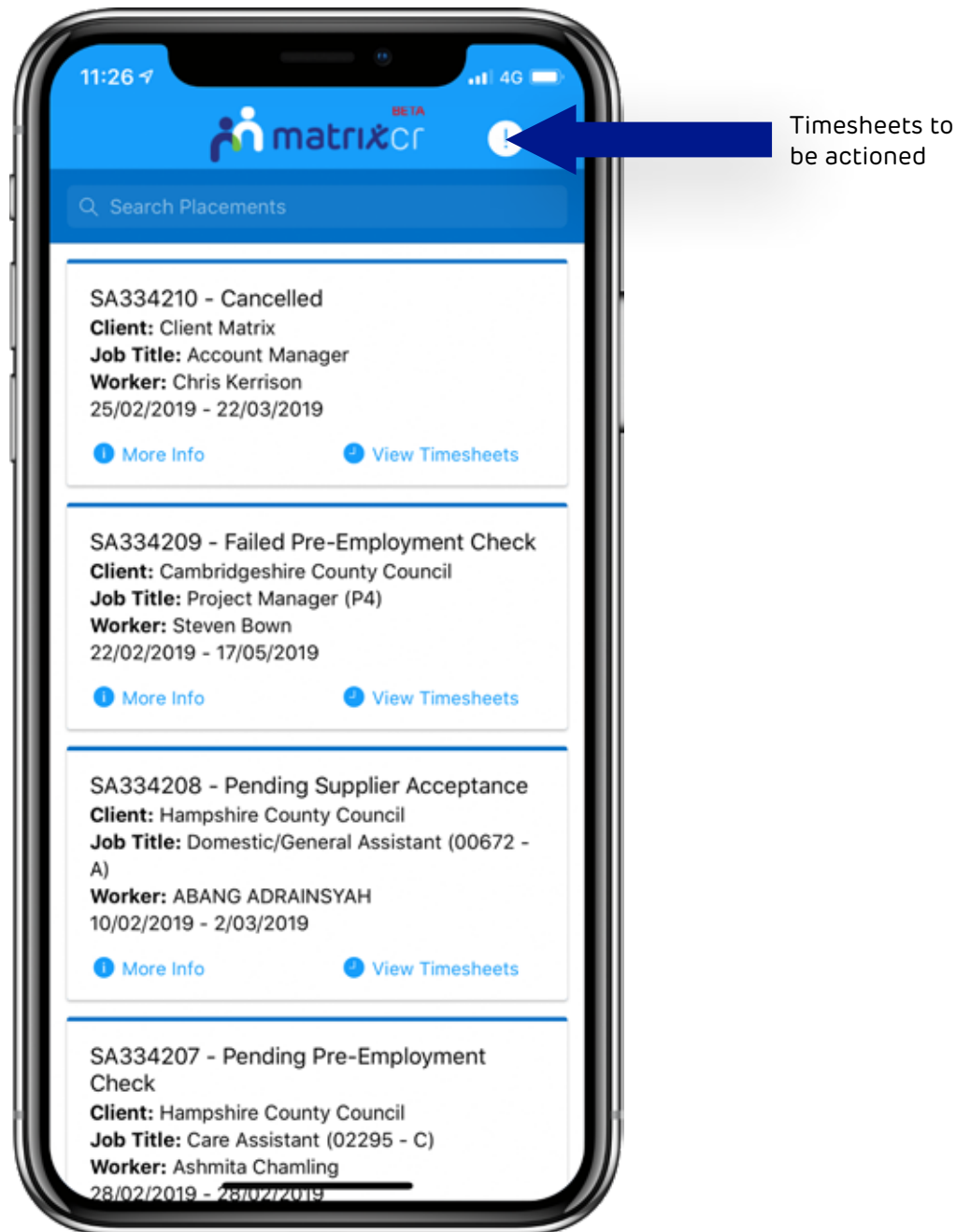
Any timesheets that require the user's intervention can be found on the timesheet action page. This can be accessed via the Placement page by clicking the 'i' icon in the top right next to the settings button.
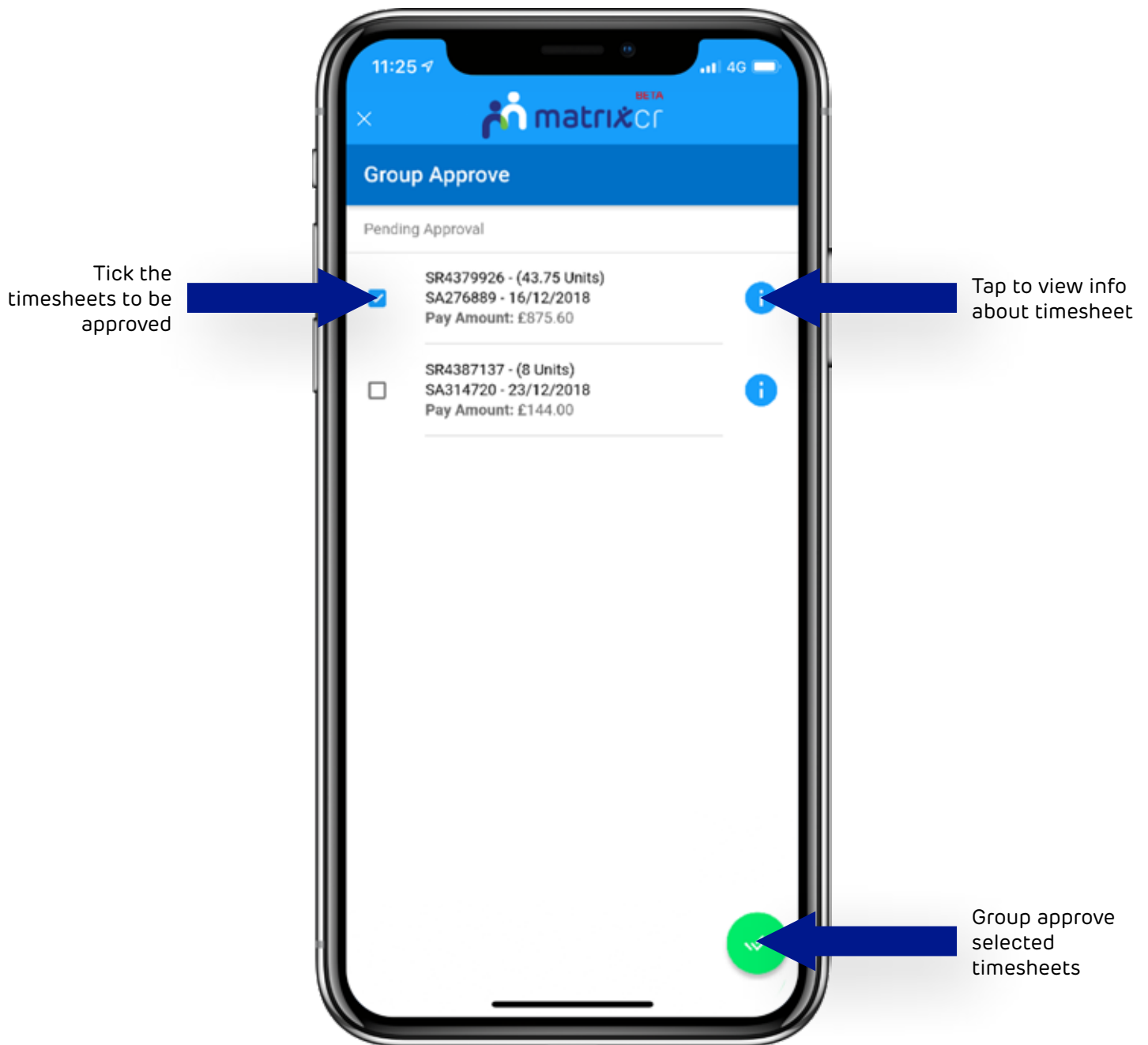
Worker / Supplier User
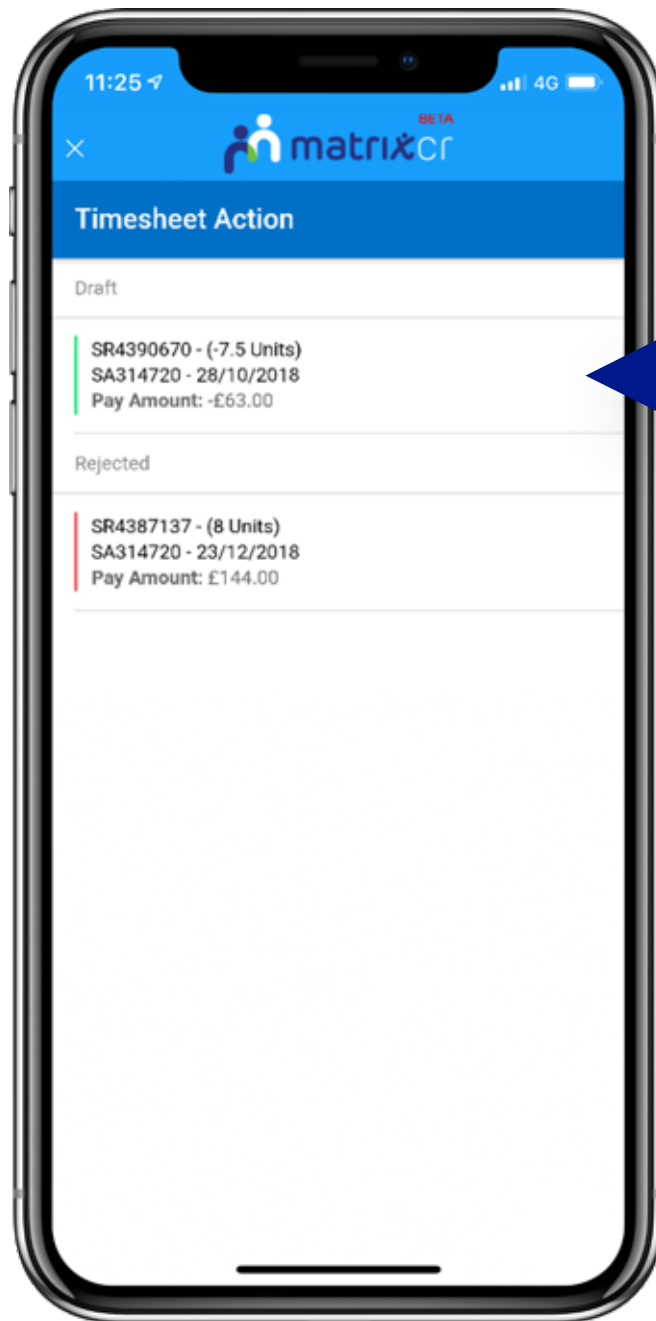
Tap to view timesheet and action

For a worker this will display any timesheets that are in Draft, Rejected or Withdrawn status as this will require them to intervene and either submit or cancel the timesheets.

Client Users - Group Approval

Tick the timesheets to be approved

Tap to view info about timesheet

Group approve selected timesheets

If a client manager is using this page it will give the user the ability to view all the timesheets and group approve them as shown below. Once selecting the green Group approve button at the bottom a dialog will appear asking the user to add a comment.

Notifications

Users will receive push notifications through to the app for anything that related to timesheets. This can be turned off via the option shown in the above image. When a notification appears you can either click or swipe it to jump straight to the relevant page within the Matrix CR App.