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Job Aid:

Matrix Teams

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This Job Aid provides an overview of how to request a Matrix Team from the existing "Reports To" Manager.

The Acting Manager requests a Matrix Team from the existing "Reports To" Manager.

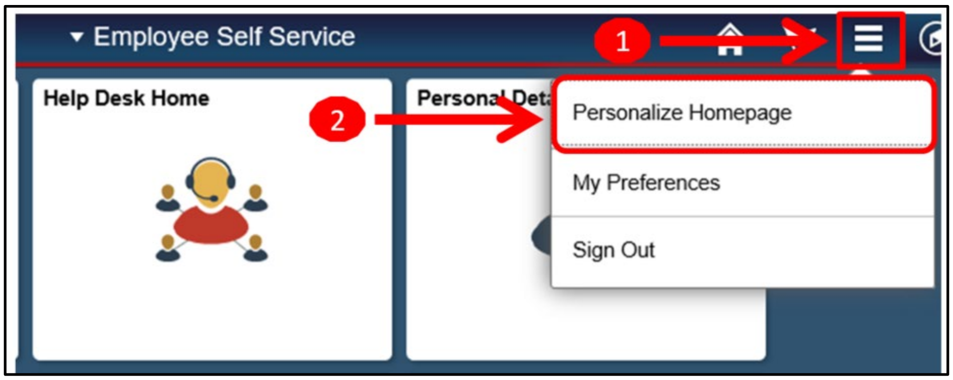
Once the Matrix Team is approved by the "Reports To" Manager, the Acting Manager will submit/approve time related actions or performance evaluations for the employees in his Matrix Team.

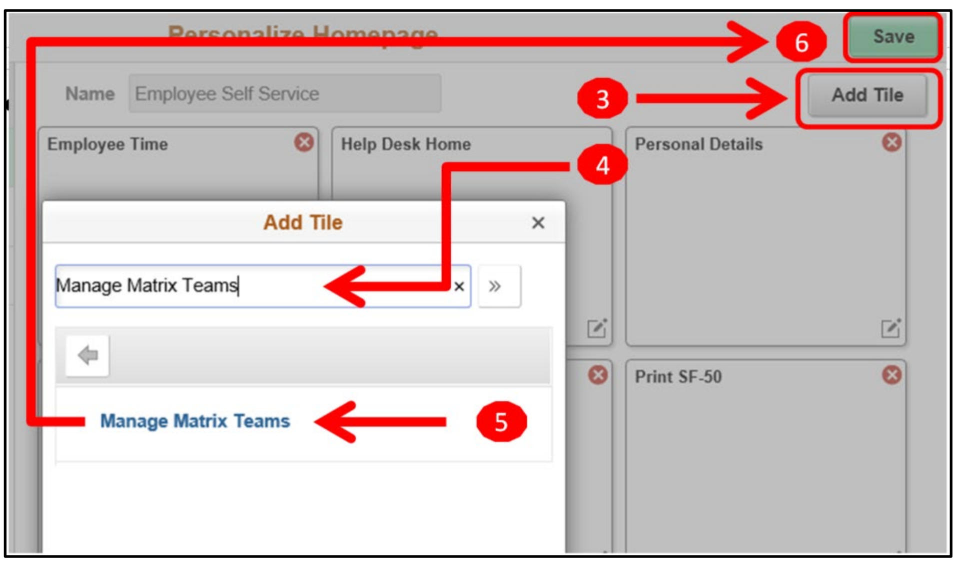
The following topics will be covered in this Job Aid:

Topic 1.1: Add Matrix Team Tile

The Acting Manager will access the “Manage Matrix Team” tile to create the Matrix. Follow the below steps to add the Matrix Team Tile if you do not have the “Manage Matrix Team” tile.

Step 1: Log In to HR Links and click the Actions List Icon
Step 2: Select Personalize Homepage
Step 3: Select Add Tile
Step 4: Search for “Manage Matrix Team”
Step 5: Add the “Manage Matrix Team” Tile
Step 6: Click Save



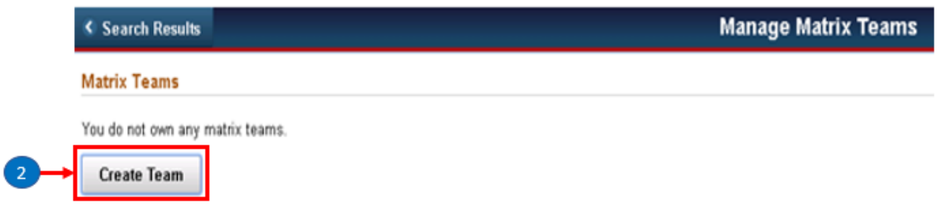


Topic 1.2: Request Matrix Team from “Reports To” Manager

The Acting Manager requests a Matrix Team from the existing “Reports To” Manager. To do this, the Acting Manager will navigate to the Manage Matrix Team tile. Please note that once the matrix is approved, the matrix manager and the "reports to" manager will receive the same T&A notifications.

Step 1: From the HR Links Manager Self Service homepage or Employee Self Service homepage, click on the **Manage Matrix Teams** tile

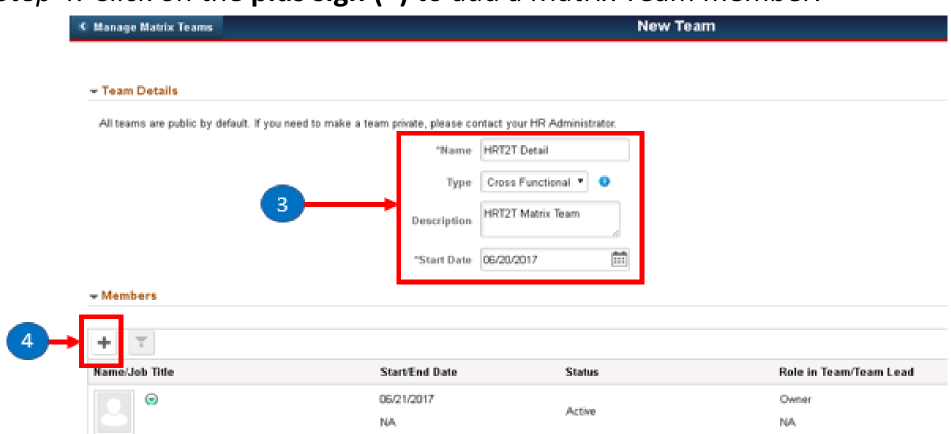
Step 2: Click on **Create Team**



Step 3: Acting Manager enters the **Name**, **Type Description**, and **Start Date**. Click **Save** before proceeding to next steps.

Note: The Matrix Team Type should be **HR Links Matrix Teams**.

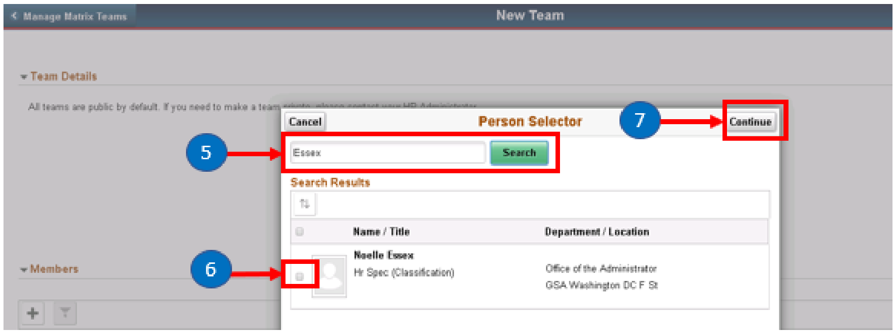
Step 4: Click on the **plus sign (+)** to add a Matrix Team member.



Step 5: Enter **employee email** to search for the Detail employee to be added to the Matrix Team.

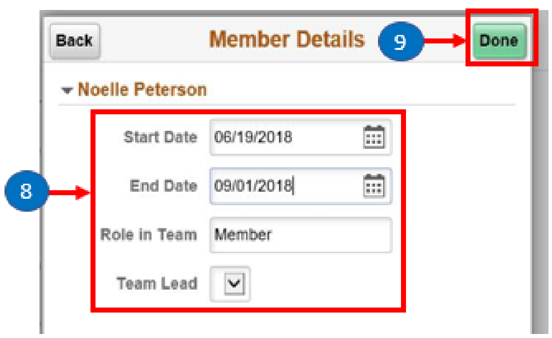
Step 6: Click the **checkbox** next to the name of the person you are looking for

Step 7: Click **Continue** when done

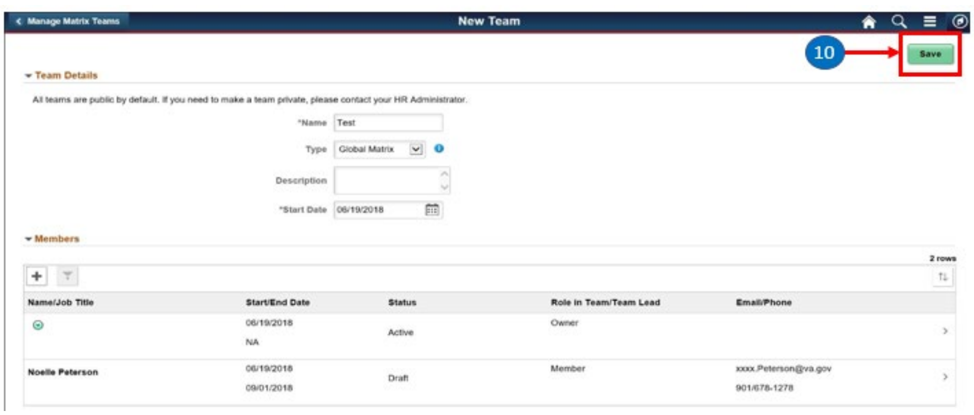


Step 8: The Acting Manager enters the **Start Date**, **End Date** (NTE Date) of the detail assignment, and whether they are a **Team Lead**. <u>The **Role in Team** should remain "Member".</u>

Step 9: Click **Done**



Step 10: Click **Save**

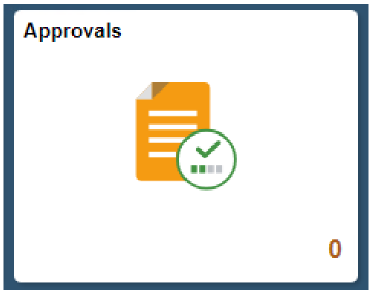


The transaction will be sent to the employee's "Reports To" Manager for approval. Once approved, the Acting Manager has the same access as the "Reports To" Manager to approve time or submit a performance evaluation for the Matrixed employee.

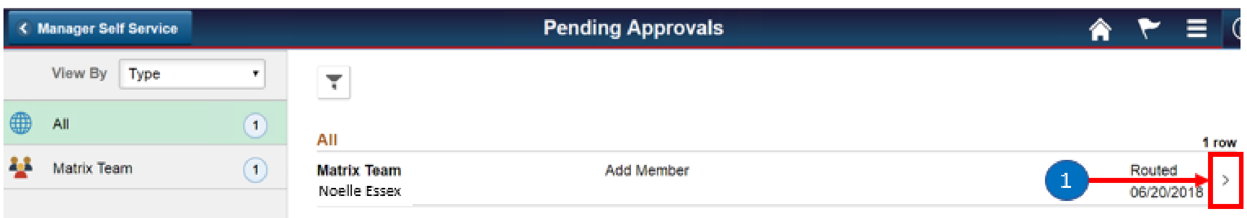
Topic 1.3: “Reports To” Manager Approves Matrix

Once the Acting Manager has entered the information for the Matrixed employee, the “Reports To” Manager approves the Matrix assignment.

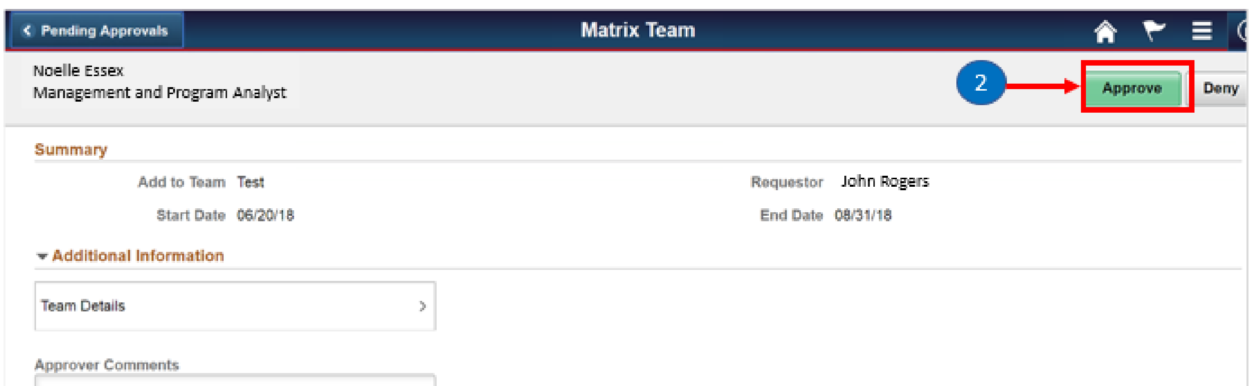
From the HR Links Manager Self Service homepage, click on the **Approvals** tile.



Step 1: Select the name of the person being Matrixed by clicking on the **arrow** on the right side of the person’s name



Step 2: Click **Approve** to approve the Matrix Team assignment (or Deny, as needed)



Topic 1.4: Manage and Inactivate Matrix Teams

Once the Matrix Team is approved and active, the Acting Manager can approve time and labor, or performance management actions through the standard Manager Self Service homepage. Please note that once the matrix is approved, the matrix manager and the "reports to" manager will receive the same T&A notifications

Once the Matrix Team is no longer needed, the Acting Manager needs to update the status to "Inactive". **This step is only required if a Matrix Team is ending early, or the end date was left blank when the Matrix Team was set up.**

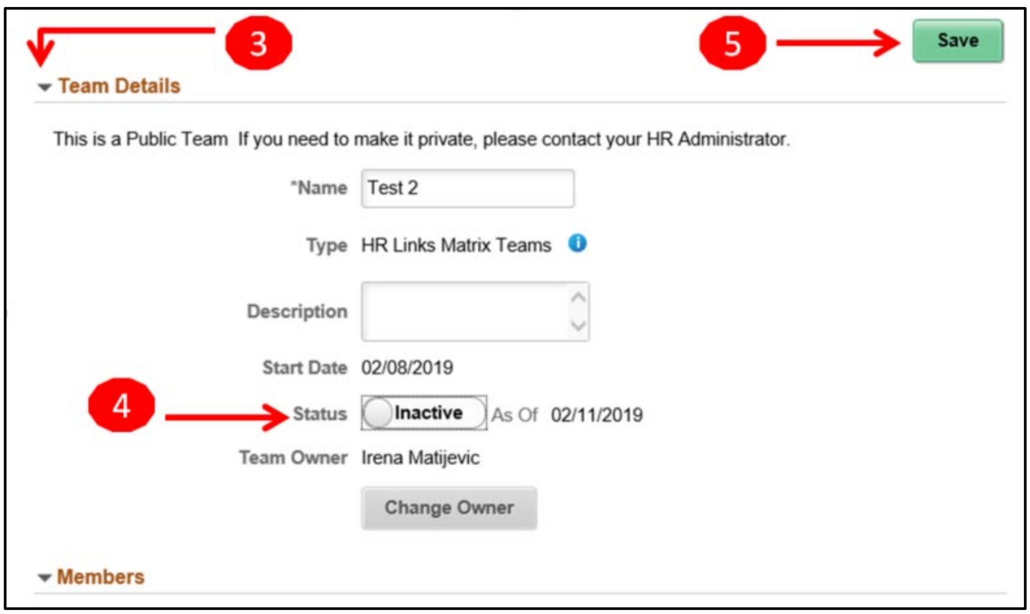
Step 1: From the HR Links Manager Self Service, click on the **Manage Matrix Teams** tile.

Step 2: Click on the Active Matrix Team.

Step 3: Expand the Team Details Section.

Step 4: Update the Status to Inactive.

Step 5: Click Save.



End of Module 14B