

Matrix Teams



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Module 14B: Matrix Teams

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
Topic 1.2	Request Matrix Team from "Reports To" Manager
Topic 1.3	"Reports To" Manager Approves Matrix
Topic 1.4	Manage and Inactivate Matrix Teams

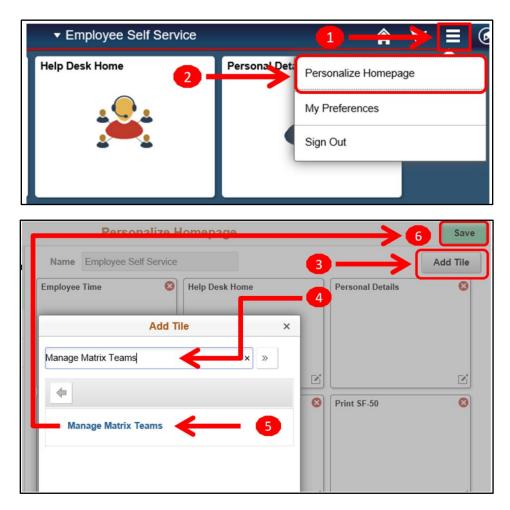


Topic 1.1: Add Matrix Team Tile

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 <u>HR Links</u> 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

	≮ Search Results	Manage Matrix Teams
	Matrix Teams	
	You do not own any matrix teams.	
2→	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.

S Manage Matrix Teams		New le	40111
- Team Details			
All teams are public by default. If you need	ed to make a team private, please contact you		
	"Name HRT2T (
3	Type Cross F	unctional •	
U	Description HRT2T	Aatrix Team	
	"Start Date 06/20/20	17	
- Members			
+ 1			
Name/Job Title	Start/End Date	Status	Role in Team/Team Lead
•	06/21/2017	Active	Owner
	NA	P 10,007 W	NA

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

4 Manage Matrix Teams		New Team
- Team Details		
All teams are public by default. If you need to make	a learn minute whence contact usure MD Administrator	
	Cancel P	erson Selector
5—	Essex	Search
	Search Results	
	15	
	Name / Title	Department / Location
- Members	Noelle Essex	Office of the Administrator
-Members 6	Hr Spec (Classification)	GSA Washington DC F St
+ T		

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

Back		Member De	tails 🧿-	-
→ No	elle Peterson	i i		
	Start Date	06/19/2018		
→	End Date	09/01/2018		
	Role in Team	Member		
	Team Lead	•		

Step 10: Click Save

Manage Matrix Teams		New Te	ım	(। २ ≡ (
				10-	Save
Team Details					
All teams are public by default. If you	u need to make a team private, plea	e contact your HR Administrator.			
	"Name	Test			
	Туре	Global Matrix 💟 0			
	Description	0			
	*Start Date	06/19/2018			
- Members					
					2 rows
+ *					2 rows
+ T	Start/End Date	Status	Role in Team/Team Lead	Email/Phone	ti.
	Start/End Date 06/19/2018		Owner	EmailiPhone	
Name/Job Title		Status Active		Email/Phone	ti.
Name/Job Title	06/19/2018		Owner	Email/Phone xxxx.Peterson@va.gov	ti.

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.

Approvals	
	0

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

۲	Manager Self Service			Pending Approvals	â	۲	
	View By Type	•	Ŧ				
	All	1	All				1 row
**	Matrix Team	1	Matrix Team Noelle Essex	Add Member	1-	Routed	• •
			NOEIIE ESSEX			06/20/2	018

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

Pending Approvals	Matrix Team	🏫 🏲 🗏 🔇
Noelle Essex Management and Program Analyst		2 Approve Deny
Summary		
Add to Team Test	Requestor John Rogers	
Start Date 06/20/18	End Date 08/31/18	
- Additional Information		
Team Details >		
Approver Comments		



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.

Feam Details	make it private, please co	ontact your HR Administrator.
*Name		
Туре	HR Links Matrix Teams	0
Description		0
Start Date	02/08/2019	
4 Status	Inactive As Of 0)2/11/2019
Team Owner	Irena Matijevic	
	Change Owner	

End of Module 14B