Syssero® Solution

Distributing Documents/Tasks using Matrix Organization
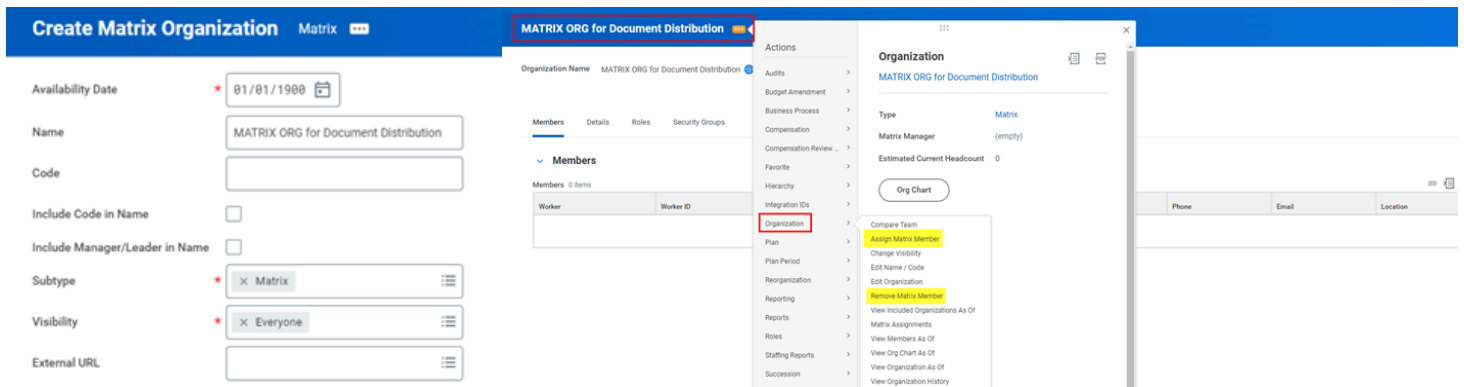
Solution Overview

Many times there is a need for workers to complete a Task like updating contact or license information, or to review and acknowledge a Document like a company policy. If the population of workers cannot be defined through a common identifier such as Supervisory Org, Cost Center, Pay Group, there is an option to use a Matrix Organization to complete the process. This situation may involve all workers within a specific Job Profile(s) who need to review a document or complete a task. Since there is no option to use Job Profile with **Distribute Documents or Tasks**, a Matrix Organization can be used for the distribution event.

What is a Matrix Organization?

Matrix organizations are typically used to create and manage dotted-line relationships between workers and managers, and to allow matrix managers to be involved in approvals of HCM business processes, such as job changes, merit increases, and performance reviews.

In this particular use case, matrix organizations can also be utilized to distribute a document or task to workers who belong to that matrix organization.

Once a Matrix Org has been created, workers can be added and removed to that Matrix Org. Be sure to understand that adding and removing members to the Matrix Org is a manual process.

You use this same task to assign or remove matrix members.

How does the process work?

Once a Matrix Organization is created and workers are assigned to that Matrix Organization, it can be used to distribute documents or tasks to those workers assigned to the matrix org.

After the distribution event, workers should be removed as members and the Matrix Org can be inactivated until needed again.

Did you know? An EIB can be utilized to easily assign and remove Matrix members to a Matrix Organization instead of doing it manually. The Web Service Operation for each update is:

-        Put Assign Matrix Organization (Web Service)

-        Put Remove Matrix Organization (Web Service)

Want to learn more or need help in this area? Contact Syssero Solutions Support