



## Assign Matrix Organization - Workday

### OVERVIEW: How to Assign a Matrix Organization

Many Volunteers for the Diocese of San Jose volunteer at multiple locations. This process provides the steps to add an existing volunteer to another parish or school organization. Only the *Volunteer Coordinator*, at the volunteer's primary location (i.e. Supervisory Organization), can update the volunteer's record to include the additional service location.

You will need to contact the *Volunteer Coordinator* at the primary location and request that they add your parish or school to the volunteer's "Matrix Organization" if the individual is already in Workday.

### PRELIMINARY STEPS:

1. Ask the applicant if they have ever volunteered or worked previously within the Diocese.
2. If **YES**, use the Workday search box search Workday to see if they have an existing "Contingent Worker" record in Workday. You can refine your search by selecting "People" under "Categories."

The screenshot shows the Workday search interface. At the top, there is a search bar with the text 'kupka' and the Workday logo. Below the search bar, there are two main sections: 'Categories' on the left and 'Search Results' on the right. The 'Categories' section lists 'Common', 'Organizations', 'People', 'Processes', 'Procurement', and 'Security'. The 'People' category is highlighted with a red box. The 'Search Results' section shows '2 items' and lists two results: 'Alice Kupka (815096)[C]' with the role 'Contingent Worker' and 'Alice Kupka' with the role 'Pre-Hire'. A tip at the bottom of the search results area reads: 'Tip: try selecting another category from the left to see other results'.

**\*\*DO NOT CREATE DUPLICATE PROFILES – ASSIGN MATRIX ORGANIZATIONS\*\***

**\*\*IMPORTANT – PLEASE READ\*\***

If the volunteer record is found, and they have an active "Contingent Worker" profile at another location, use the "Assign Matrix Org" process outlined in this document.

**IMPORTANT:** *If the volunteer is found, but only as a "pre-hire" record, use the Volunteer "Contract Contingent Worker" process to re-engage the record in the Workday database and enter all of their data.*

If the volunteer record is NOT found, use the "Contract Contingent Worker" volunteer process to enter the volunteer into the Workday database along with all of their Safe Environment data.

## Assign Matrix Org, cont.

### HOW TO: Locate a Volunteer / Supervisory Organization

To locate the volunteer's "Supervisory Organization," search for the volunteer by name using the Workday search box. From the search results, click on the "Contingent Worker" name – "Supervisory Organization" will be listed next to the *Location Icon*.

### HOW TO: Locate Volunteer Coordinators

To locate the *Volunteer Coordinator* for Diocesan parishes and schools, please use the "Volunteer Coordinator" report. This report is assigned to all Workday *Volunteer Coordinators*. You can find this report under your "Shared Custom Reports."

#### To navigate to this option in Workday:

1. When signed into Workday, click on your name in the upper right hand corner of your screen. Doing so will provide you with a dropdown menu (*please review images below for guidance*).
2. Select the "Favorites" option to be taken to the "Shared Custom Reports" page.
3. From the "Shared Custom Reports" page, select the report: "Volunteer Coordinators."

**NOTE:** You may need to click the "More" option to see the full list of reports available to you.

4. Using the "Assignable Role" prompt, type in "Volunteer Coordinator" and click the ORANGE "OK" button to proceed. Upon doing so, Workday will generate a report listing all Diocesan *Volunteer Coordinators* from the database (*see below*).
5. Once you have the report, use the contact information to follow-up with the appropriate *Volunteer Coordinator* to complete the "Matrix Organization" assignment.

Organization	Role Assignments	Role Assigned To Workers	
	Role Name	Preferred Name in Reporting Display Format	Email - Work
<a href="#">Volunteer Org-Saint Joseph Parish</a>	Volunteer Coordinator	Wollants-Bayona, Diane V	✉ <a href="mailto:dbaycna@dsj.org">dbaycna@dsj.org</a>
<a href="#">Volunteer Org-Saint Joseph School</a>	Volunteer Coordinator	Walker, Lucille	✉ <a href="mailto:lwalker@dsj.org">lwalker@dsj.org</a>
<a href="#">Volunteer Org-Saint Julie Billiard Parish</a>	Volunteer Coordinator	Rosales, Andrea	✉ <a href="mailto:arosales@DSJ.org">arosales@DSJ.org</a>

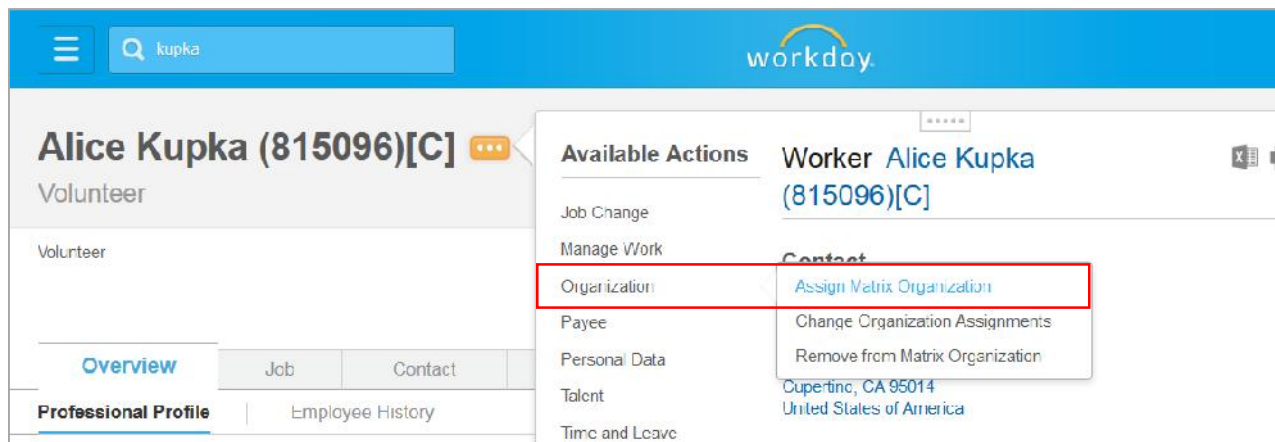
## Assign Matrix Org, cont.

**ASSIGN MATRIX ORGANIZATION (Step-By-Step Instructions):** The following steps are to be completed by the *Volunteer Coordinator* at the volunteer's Supervisory Organization.

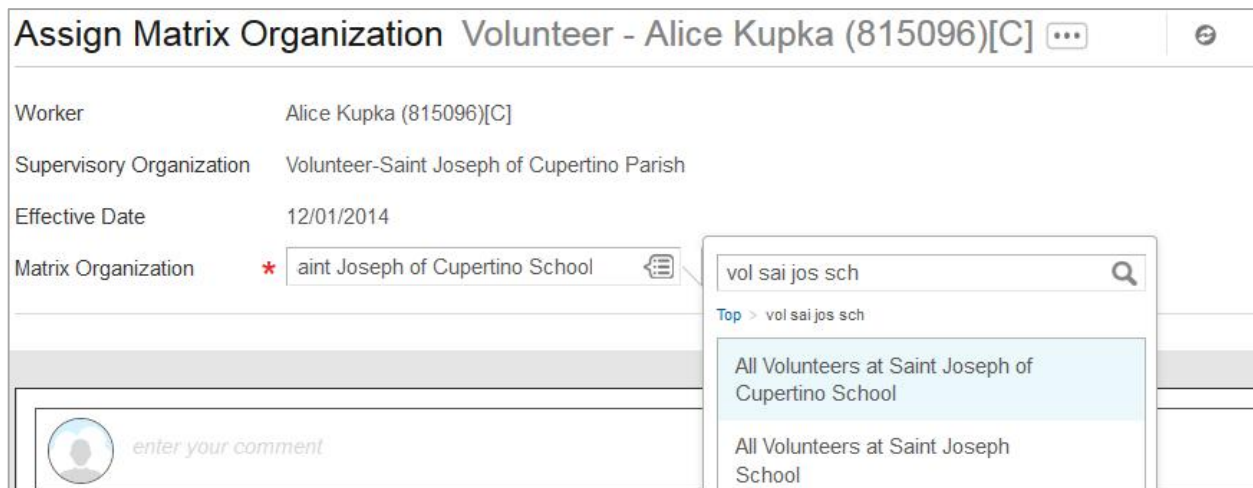
1. In Workday, use the search box to find the volunteer's **"Contingent Worker"** record.



2. Using the **"Related Actions"** option on the **"Contingent Worker"** profile page, please use the prompt to select: **"Organization" > "Assign Matrix Organization"** (click it to select it).



3. When prompted, enter the approximate **"Effective Date"** for the new organization.
4. Click the ORANGE **"OK"** button to proceed.
5. On the following screen, use the prompt in the **"Matrix Organization"** field to select the organization **"All Volunteers at Requested Site"** to assign the requested parish or school.



6. Click the GREEN **"SUBMIT"** button to complete the **"Assign matrix Organization"** task.

**7. CONGRATULATIONS – TASK COMPLETE!**

8. Repeat as needed for additional organizations.