Matrix

User Guide

For all persons who book holidays or record their time in Matrix.

BERGISCHE UNIVERSITÄT WUPPERTAL

Matrix User Guide
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Login to the Matrix web portal

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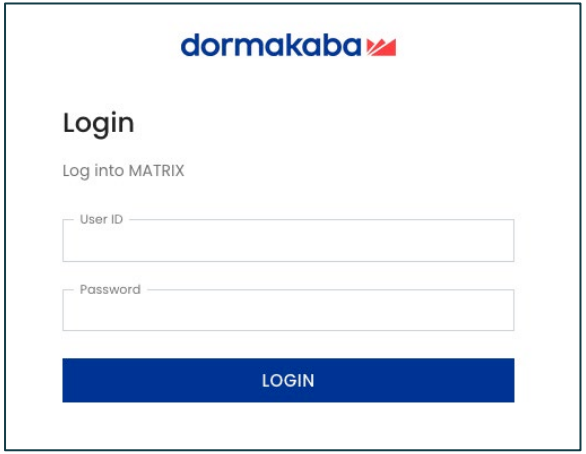
Matrix homepage: https://matrix.uni-wuppertal.de

- Log in with your **ZIM username** and **ZIM password**
- When **working from home**, you will need a **VPN** to access Matrix.



- If you encounter any problems, please contact:
  - Research staff: your **Matrix coordinator** or infodez41@uni-wuppertal.de
  - TuV employees: infodez41@uni-wuppertal.de

General
Add to favourites

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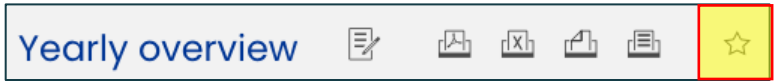
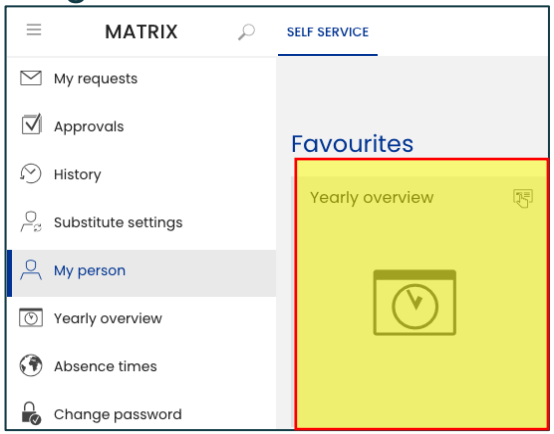
- Each menu item can be marked as **a favourite** by clicking on the **star**, which will then appear on your **dashboard**.





- Clicking on **MATRIX** in the top left corner will take you back to the home page.
- Favourites can be edited using the tool icon in the top right-hand corner of the home page:

General
View information

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Self Service → My requests:

- Overview of past and current **own requests**. Click on the applications to open a detailed view.

Self-service → Approvals:

- **Current approval requests**, for example as a substitute for a colleague. The letter icon in the header also indicates existing authorisation requests.

Self Service → History:

- Overview of **past** processed **approval requests**. Clicking on the requests opens a detailed view.

Self Service → My person:

- Overview of your own **holiday entitlement**

Self Service → Absence times

- Tabular overview of all your absences

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Workflow

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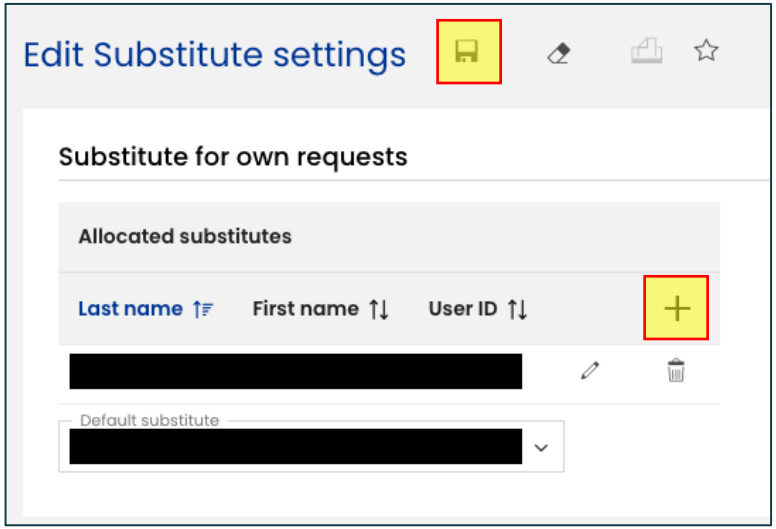
Workflow
Set holiday substitutes
Self Service → Substitute settings → Substitute for your own request

1. Add a new line using the **+**
2. Click on the surname field
3. Enter name
4. Select from the list
5. Confirm with ✓
6. Save with  (in the header)



You can select your **default substitute** in the drop-down menu below the table.

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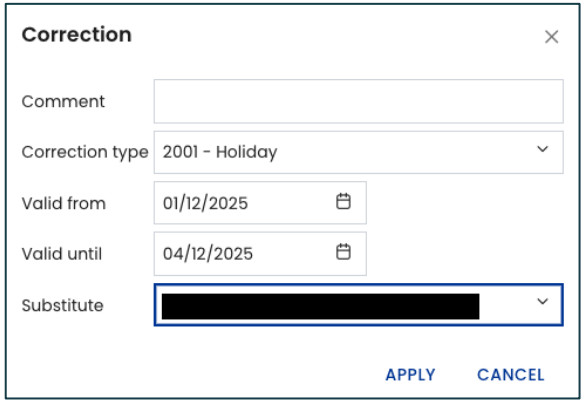
Workflow
Book holidays/flexible working days
Self Service → Yearly overview

1. In the yearly overview, you can select a time period by holding down the left mouse button and dragging. **Release** the left mouse button to select.

2. When you release the mouse button, the booking window opens, where you can **check and change** the data. Click on "Apply" to **start** the **workflow**.



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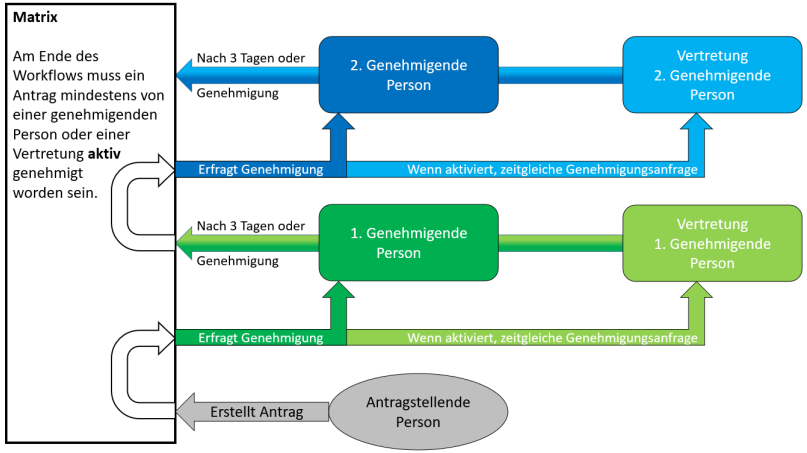
Workflow
General information about workflow in Matrix

- You will be notified by e-mail if you are a are a substitute or approver in a workflow. The e-mail contains a link to Matrix.
  - Approval takes place in the system; you must log in to do so.
  - After 3 days of waiting time with you, the request is forwarded to the next approval level. The information **"automatically forwarded"** is stored in the workflow.



- A workflow must **be <u>actively</u> approved** by at least **one approval level in the workflow**.

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Time recording

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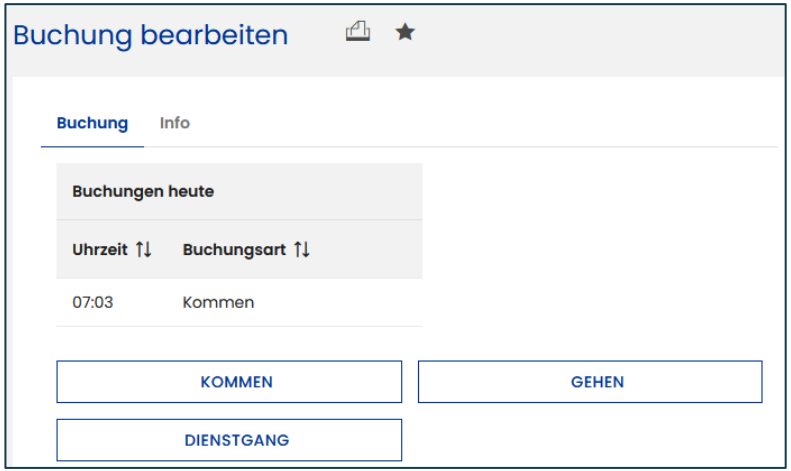
Time recording
Clock in and out online
Self-service → Booking

- When you click on the buttons (Arrive / Leave / Business trip), the corresponding booking is entered into the system with the **current time**.
- **No approvals** by supervisors required



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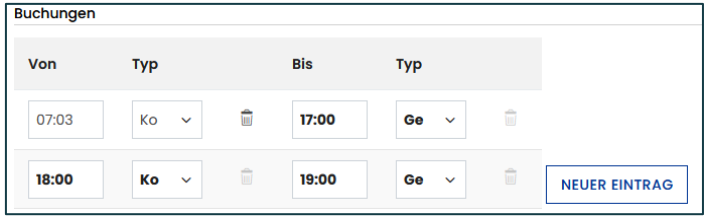
Time recording
Working time correction entry
Self-service → Monthly overview

1. In the monthly overview, click on a line for the relevant day
2. Scroll down in the booking view for the day.
3. Enter the correction in the Entries field.
   - Type Ko = Arrival
   - Type Ge = Departure
4. Confirm with Apply (at the top of the page)



- This is how **forgotten bookings** are added. If you need another pair of arrival and departure bookings to reflect your situation, use **New Entry** to create a new line.
- Existing bookings can also be changed by changing either the **time** or the **type**.
- A **separate workflow** is created for each arrival and departure.

Time recording
Doctor's appointments
Self-service → Monthly overview

Notes:
1. **Only enter doctor's appointments that have already taken place, not planned ones.**
2. **Doctor's appointments cannot generate time credits!**

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- Doctor's appointments are correction entries. The following examples show the easiest and most correct way to record them:

Example 1: **During work:** You left the office at 12:00 and returned at 13:30:

Change your **departure entry** (12:00) to a **doctor's appointment**.

The system will credit the time between the doctor's appointment (12:00) and your arrival entry (13:30).

Example 2: **Before work:** You had a doctor's appointment at 8:00 and arrived at work at 9:30:

Add a **doctor's appointment** (8:00):

The system will credit the time between the doctor's appointment (8:00) and your arrival booking (9:30).

Example 3: **After work:** You left the office at 2:00 p.m. and had a doctor's appointment until 4:00 p.m.

Change your **departure booking** (2:00 p.m.) to a **doctor's appointment** and **add** a **departure booking** for 4:00 p.m.

The system will credit the time between the doctor's appointment (2:00 p.m.) and your return (4:00 p.m.).

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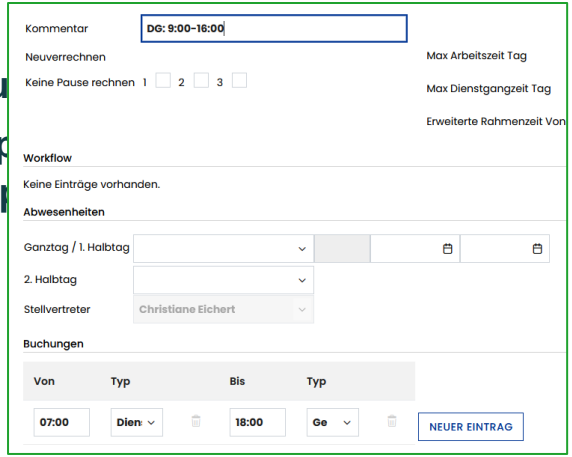
Time recording
Business trips
Self-service → Annual overview or monthly overview

In the annual overview or monthly overview, you can select the day of your business trip.

1. Under Bookings, enter the **start time** of your business trip under "From" and select **the type: Bu**
2. Under Bookings, enter the **end time of your business trip** of your business trip under "To" in the bookings section, **typ**
3. Enter the **time of the business trip** on that day as a comment: Example: DG: 9:00-18:00
4. The workflow is started by **clicking on Apply** (above).



Each day of the business trip is displayed in this way.

The booking is checked in the final instance by infodez41@uni-wuppertal.de to ensure that the business trip took place outside or during the standard working hours (7:00 a.m. – 7:30 p.m.).

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