

Set Up Team Settings in Matrix

Following this article invites another Matrix user onto your team so they can use your account with your permission. They sign in with their own login, then use Working As (top right) to switch into your account. Team members get full access to your Matrix account, including My Matrix.

When you add someone, choose how they work:

- Have this member Impersonate me - they work fully as you. Emails and activity appear as you.
- Have this member Work on Behalf of me - they work under your account; emails show as Sent on behalf of you.

Create a team and add a member

1. Open the Utility Menu (look for [Hello, Your Name] at the top right). Select Settings > Team Settings.
2. If the page says You have not created a team, select Click here to create a team.
3. Under Add Team Member, enter the person's User ID, then select Find.
4. Confirm the correct person is shown (name, email, office).
5. Select Have this member Impersonate me or Have this member Work on Behalf of me.
6. Select Add.
7. Optional: select Set a Formal Team Name if you want a named team.
8. Select Back to Settings when you are finished.

To add more people later, open Team Settings again and select Add.

Work as a team member

1. The teammate signs in with their own Matrix credentials.
2. They select Working As in the top right and choose your account.
3. They complete their work, then switch back to their own identity when finished.

Remove a team member

1. Open Team Settings.
2. Check the member, then select Delete.
3. To turn off team access entirely, select Disable this team feature.

Tips

- Never share passwords. Team Settings is the supported way to let someone work under your

account.

Source: <https://support.itsosystems.ca/kb/120>