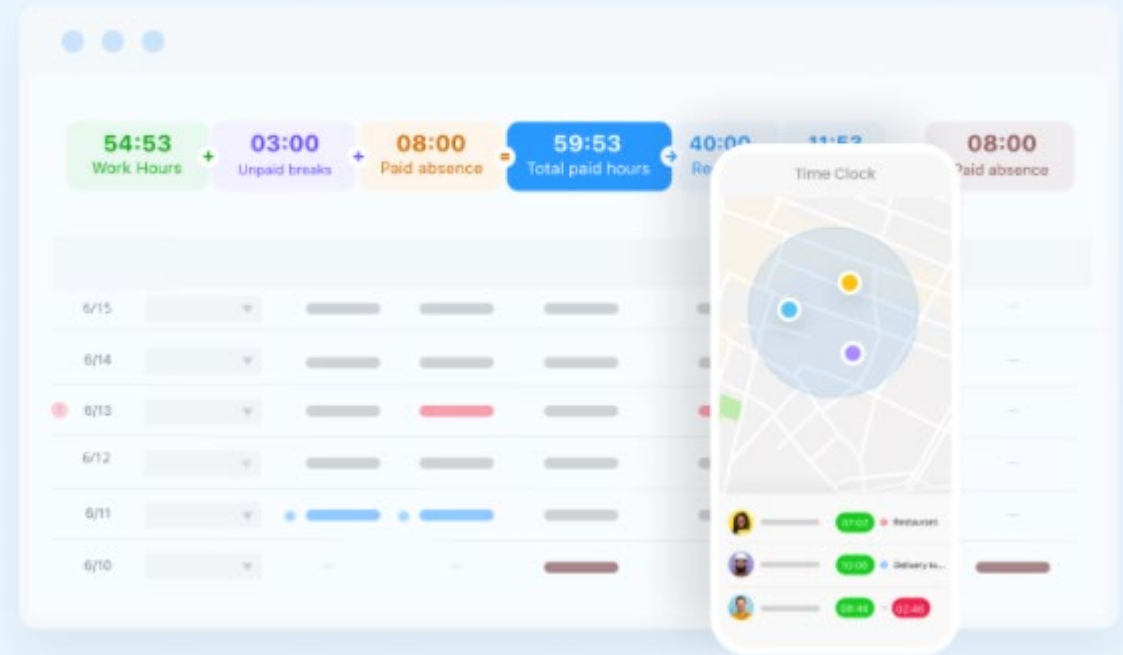


CONNECTEAM TRAINING Advanced

ADVANCED TRAINING TOPICS

- Schedule Management
- Task Management Functions
- Employee Timeline
- News Events Functions
- Library Functions
- Time Clock
- Quizzes
- Courses
- Breadcrumbs
- Recognitions
- Using/Understanding reports results




SCHEDULE MANAGEMENT

 Schedule Management lobby



 Mobile Preview


 Learn about this feature

 Active (1)

 Archived (0)

 Filter

Search 

 Add new

 Iowa upcoming activities  Synced with time clock: [Iowa Time clock](#)



 List view

 Activity

 Jobs

Options 

 Learn about this feature

Search users 



Week 


< Feb 14 - 20 >


Today



Actions 

Publish

Add shifts 

View by users 

Mon 2/14



Tue 2/15



Wed 2/16



Thu 2/17



Fri 2/18



Sat 2/19



Sun 2/20



Shifts without users 

There are a lot of different functions in schedule management. Play around with the buttons to see them.

SCHEDULE MANAGEMENT

 Schedule Management lobby




 Mobile Preview


 Learn about this feature

 Active (1)


 Archived (0)

 Filter


 Add new




Title this scheduler



Close

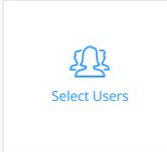
Publish By 

How would you like to publish?







Smart Groups


Publish to current and future users that match the groups rules set



Select Users

Publish to selected users



This is similar to adding reports. Same type of process.

SCHEDULE MANAGEMENT

Select from your user list

Need Help

You have to assign users to the schedule.

Filter







Search

Select...

Type here

or

+ X

	First name	Last name	State	Position	Title	Region	DBID #	Date added
			NM	Recruiter, Administrator, IDR Coordinator, Service Provider copy 1, State Director	IDRC Director	NM		12/01/2020
				Administrator				12/01/2020
			WA	IDR Coordinator	ID&R Supervisor			12/01/2020
			OH	IDR Coordinator	State ID&R Coordinator	Statewide		12/01/2020
			IA	Recruiter, Service Provider, State Coordinator, Administrator, IDR Coordinator, Service Provider copy 1, State Director	Iowa State ID&R Coordinator	Statewide	IA1006	12/01/2020
			IND	Recruiter	Lead Recruiter	3		12/01/2020
			NY	Recruiter		Mid Hudson		12/01/2020
			ID, IDRC, NJ	Administrator copy 1				12/01/2020
			DE	Recruiter, IDR Coordinator	State Recruiter			12/07/2020
			IA	Recruiter	Southwest Regional Recruiter	Southwest	IA1012	12/08/2020

SCHEDULE MANAGEMENT

Close

Settings



Notify employees via push notification

I am trying out the new scheduler tool on Connecteam. |



Show on feed by Posted by Jessica Castaneda

Close

Summary



Your asset is ready to go!

Asset will be assigned to: **3** users

Users will be notified:

"I am trying out the new scheduler tool on
Connecteam."

SCHEDULE MANAGEMENT

IDRC Staff Schedules



List view

Activity

Jobs

Options

Learn about this feature

Search users



Week

< Feb 28 - Mar 6 >

Today



Actions

Publish

Add shifts

View by users

Mon 2/28

Tue 3/1

Wed 3/2

Select...

Type here

Sun 3/6

Shifts without users

Jessica Castaneda

Select Template

+Add

Search

8a - 12p

Morning shift [Sample]

1p - 5p

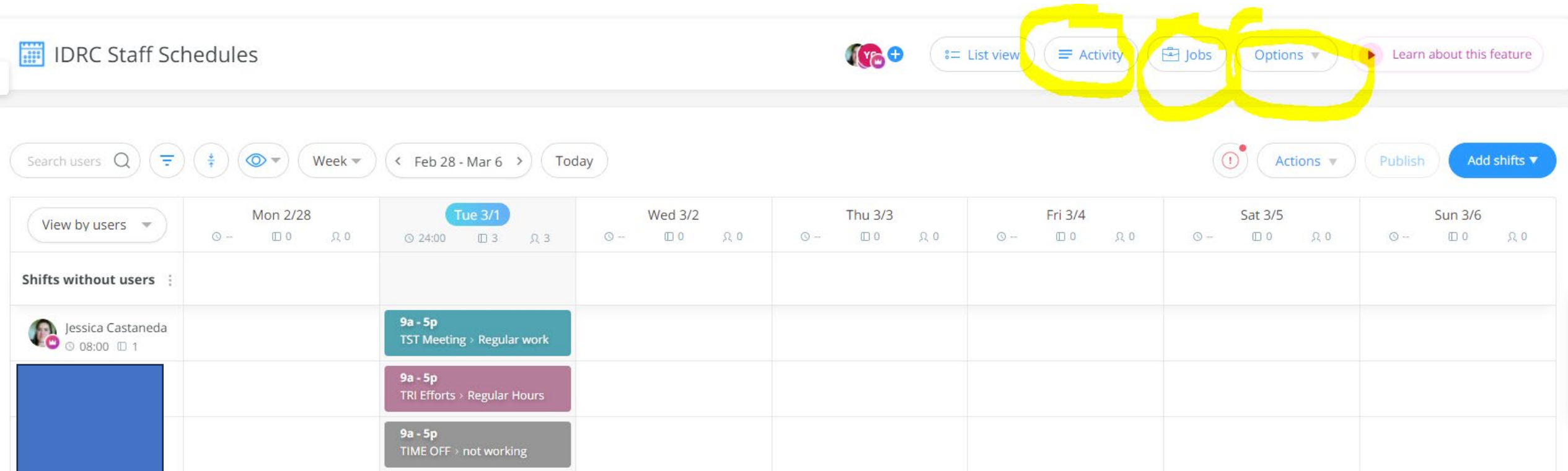
Evening shift [Sample]

9a - 11a

Project A Repair [Sample shift]

There are lots of buttons to check out and use here also.

SCHEDULE MANAGEMENT



IDRC Staff Schedules

Activity

Search users

Week

Feb 28 - Mar 6

Today

Actions

Publish

Add shifts

View by users	Mon 2/28	Tue 3/1	Wed 3/2	Thu 3/3	Fri 3/4	Sat 3/5	Sun 3/6
Shifts without users							
Jessica Castaneda 08:00 1		9a - 5p TST Meeting > Regular work					
		9a - 5p TRI Efforts > Regular Hours					
		9a - 5p TIME OFF > not working					

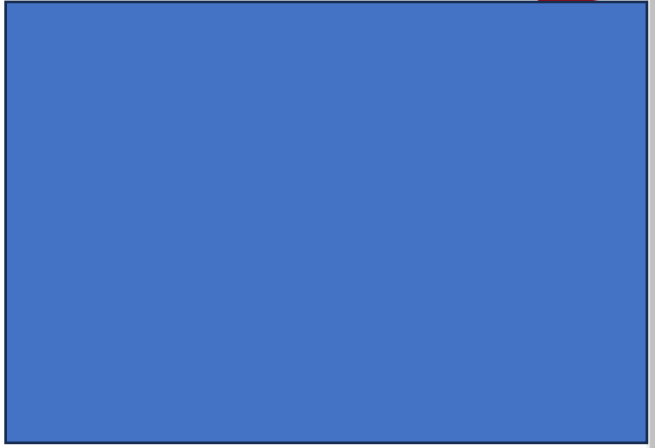
There are tabs for activities, types of jobs and options customization.



SCHEDULE MANAGEMENT

- 03/01
- 11:45 AM Jessica Castaneda published Melissa Schelah's shift - not working on 03/01 from 09:00 AM - 05:00 PM in the IDRC Staff Schedules scheduler
- 11:45 AM Jessica Castaneda created a shift for Melissa Schelah - not working on 03/01 from 09:00 AM - 05:00 PM in the IDRC Staff Schedules scheduler
- 11:44 AM [Redacted]
- 11:44 AM Jessica Castaneda published Jessica Castaneda's shift - Regular work on 03/01 from 09:00 AM - 05:00 PM in the IDRC Staff Schedules scheduler
- 11:44 AM Jessica Castaneda created a shift for Jessica Castaneda - Regular work on 03/01 from 09:00 AM - 05:00 PM in the IDRC Staff Schedules scheduler

Activity log interface with navigation tabs: List view, Activity, Jobs, Options. Includes buttons for Today, Actions, Publish, Add shifts, and a calendar grid for Wed 3/2, Thu 3/3, Fri 3/4, Sat 3/5, Sun 3/6.



SCHEDULE MANAGEMENT

A job can be a role in your business e.g shift manager, customer, type of job, worksite or any other frequently used addition to a shift's info.

Assign jobs to shifts to save time and better organize your scheduler

[Read more here](#)



List view

Activity






Jobs

Options


[Learn about this feature](#)
















Jobs

Import Export **Add job**

- Research and Project Bul... Settings 
- TIME OFF Settings 
- TRI Efforts Settings 
- TST Meeting Settings 
- Webinars Settings 

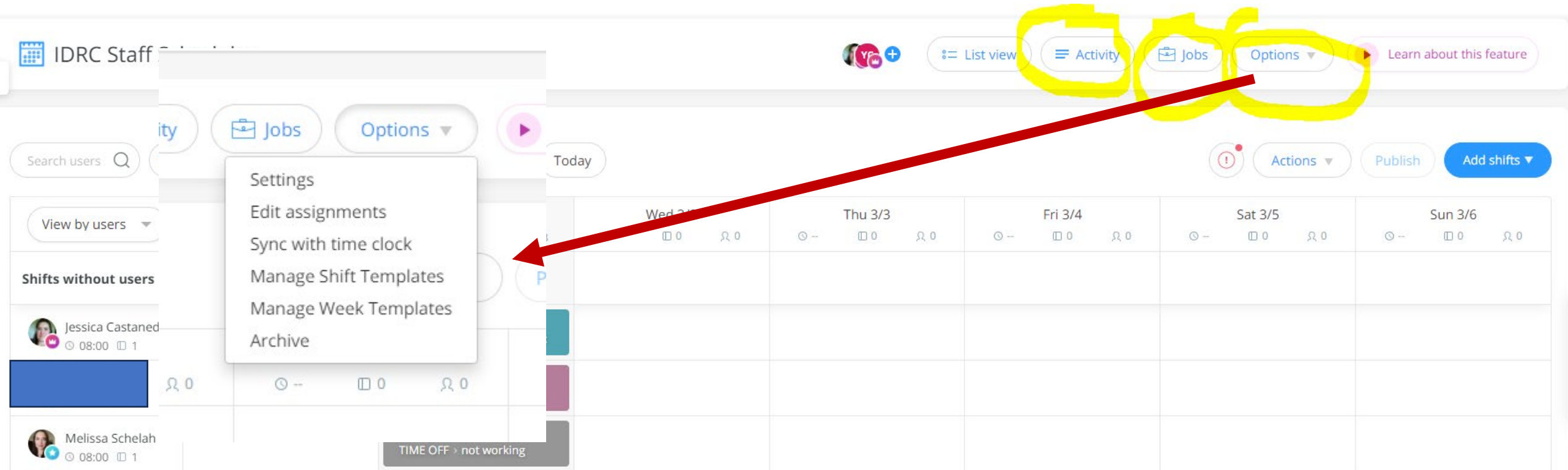
Today

 Actions Publish **Add shifts**

	Wed 3/2	Thu 3/3	Fri 3/4	Sat 3/5	Sun 3/6
	  0  0	  0  0	  0  0	  0  0	  0  0



SCHEDULE MANAGEMENT



The screenshot displays the IDRC Staff Scheduling interface. At the top right, there are navigation buttons for 'List view', 'Activity', 'Jobs', and 'Options'. The 'Options' button is highlighted with a yellow circle, and a red arrow points from it to a dropdown menu. The dropdown menu contains the following items: 'Settings', 'Edit assignments', 'Sync with time clock', 'Manage Shift Templates', 'Manage Week Templates', and 'Archive'. Below the navigation bar, there is a search bar for users, a 'View by users' dropdown, and a 'Shifts without users' section. The main area shows a calendar grid with columns for 'Wed 2/1', 'Thu 3/3', 'Fri 3/4', 'Sat 3/5', and 'Sun 3/6'. A 'TIME OFF' status is visible for a user, indicating 'not working'.

Search users

View by users

Shifts without users

Jessica Castaned
08:00 1

Melissa Schelah
08:00 1

TIME OFF not working

Options

- Settings
- Edit assignments
- Sync with time clock
- Manage Shift Templates
- Manage Week Templates
- Archive

Mobile app

Week & time

Notifications

Limitations

Review each page to see how
you can change the settings.

Users schedules 

- Users can view all schedules • [Except](#)
- Users can view only their personal schedules • [Except](#)

Enable Availability

Users will be able to mark when they're unavailable to work

*Admins will still have the ability to assign shifts to users even if marked as unavailable

Users mark unavailability

Users can mark when they're unavailable. Unmarked days mean they're available to work

Users mark unavailability and when they prefer to work

Users can mark when they're unavailable and when they prefer to work. Unmarked days mean they're available to work and have no specific preference

Enable Shift replacement requests

Users will be able to ask other users to replace them in shifts

- Add a **reject** button to the user's mobile schedule 

Settings

Mobile app

Week & time

Notifications

Limitations

Review each page to see how you can change the settings.

Week starts

Monday

Work hours

9:00am

to

5:00pm

Default shift length

8 Hours

Time zone

America/Chicago

Date format

MM/DD/YYYY

Time format

12-hour

Settings

- Mobile app
- Week & time
- Notifications
- Limitations

Review each page to see how you can change the settings.

Get notified when users:

  
Mobile Web push Email

A user has accepted a shift

A user has rejected a shift

A user has checked in to a shift

A user has completed a shift

A user has claimed/ unclaimed a shift

A user has completed a task

A user has completed all tasks

A user didn't accept a shift
 before shift start

- Mobile app
- Week & time
- Notifications
- Limitations

Review each page to see how you can change the settings.

Enable conflicts with other schedules
Create a conflict in this schedule if the user is assigned to a shift or is unavailable in another schedule

User limitations

- Users can't **reject** a shift less than Before it starts
- Users can't **un-claim** a shift less than Before it starts
- Users can only **check-in** to a shift up to Before it starts

Scheduler limitations

- Max work hours per user per **week** Hours
- Max number of shifts per user per **week** Shifts
- Max work hours per user per **day** Hours
- Max number of shifts per user per **day** Shifts

SYNCING THE SCHEDULE WITH TIME CLOCK



Sync with time clock

By syncing this schedule with a time clock, users will be able to clock in directly from a shift or job. Once clocked out, shift records will be added to their timesheets. [Learn more...](#)

Sync scheduler



Sync with time clock

By syncing this schedule with a time clock, users will be able to clock in directly from a shift or job. Once clocked out, shift records will be added to their timesheets. [Learn more...](#)

Time clock

Sync time clock

OR

Add a new time clock to sync this scheduler with

Add new time clock

Don't sync this scheduler

TASK MANAGEMENT FUNCTIONS

→ New task

Task details Sub tasks

Task title •

Description

Assign to •
 Create a separate task for each user

Frequency One-off task Recurring task

Start date

Due date

Tags

→ New task

Task details Sub tasks

Task title •

Description

Assign to •


Frequency

Start date

Due date

Tags

→ Tags ⓘ

 Tags are an easy way to organize, sort and filter tasks. It could be tasks related to a specific location, team or project

-
-
-
-
-
-
-
-
-

Active (19)

Archived (4)

Filter

EMPLOYEE TIME CLOCK

Export

+ Add new



Time clock

KY Sample time clock

Assigned Kentuck...

Admins

... [Access clock](#)



Time clock

Laurie Steward Draft Ti...

Assigned Alex Johnson

Admins

... [Access clock](#)



Time clock

Summer School MEP 2023

Assigned +12

Admins +1

... [Access clock](#)



3

Time clock

ESU9 Summer School Tea...

Assigned ESU 9 Su...

Admins

... [Access clock](#)



Time clock

ESU13 MEP Practice

Assigned EG

Admins

... [Access clock](#)



Time clock

Time clock

Assigned Delaware

Admins

... [Access clock](#)



Time clock

IDRC

Assigned Melissa Schel...

Admins

... [Access clock](#)



Time clock

IDRC

Assigned Jessica Castan...

Admins

... [Access clock](#)



Time clock

ID&R/Services

Assigned Not assigned

Admins

... [Access clock](#)



Time clock

Time clock

Assigned Not assigned

Admins

... [Access clock](#)



TODAY

TIMESHEETS

Filter

Search

0/1 employees clocked in today

[View requests](#)

<input type="checkbox"/>	First name	Job	Clock in	Clock out	Total hours	Regular hours	Overtime	Paid time off	
	Jessica	--	--	--	--	--	--	--	

All activity

Jobs:

03/20/2024

Today

Map indicators

All users that clocked in today

Search

All

No activity tracked today



TODAY

Filter

0/1 employees clocked in today

<input type="checkbox"/>	First name	Job	Clock in	Clock out
	Jessica	--	--	--

All activity | Jobs: | 03/20/2024 | Today

All users that clocked in today

Search All

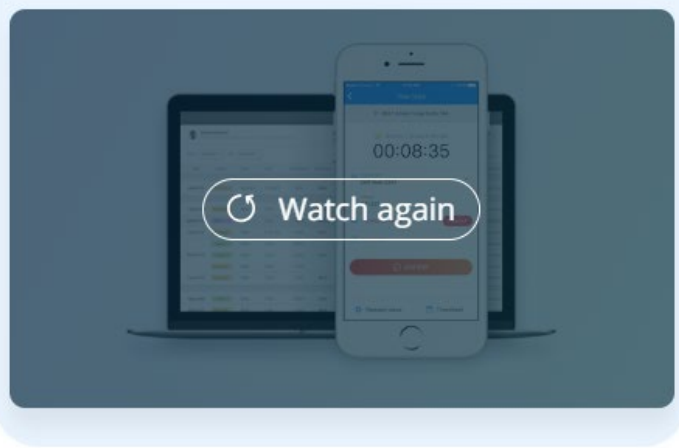
No activity tracked today



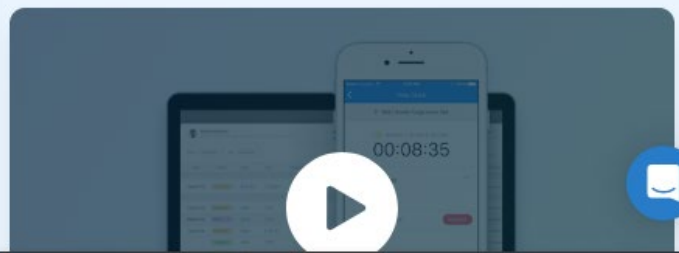
Become a Time Clock Wizard in no time!

We made 4 videos that will teach you everything you need to know to be a Time Clock Pro

✓ Get started with the basics



2 Customize the Time Clock to suit your business



More ▾

▶ Learn about this feature

Search

View requests

Paid time off

Map indicators ▾




EMPLOYEE TIME CLOCK

All users that clocked in today

Search S All

- Field ID&R S >
- Office Home S >
- Field ID&R S >
- Field ID&R S >
- Office Home S >

activities

Category admins  Settings More Learn about this feature

TIMESHEETS

Search

1 Pending requests

Clock out	Total hours	Regular hours	Overtime	Paid Absences
--	--	--	--	--
--	--	--	--	--
--	--	--	--	--
--	--	--	--	--
--	--	--	--	--

EMPLOYEE TIME CLOCK

- ⚙️ General
- 🔧 Customize
- 📅 Payroll
- 🕒 Overtime
- ☕ Breaks
- 📁 Jobs
- 📎 Shift attachments
- ⌚ Absences
- 📍 Geolocation
- 🕒 Reminders
- 🔔 Notifications
- 📄 Auto reports
- 👤 Limitations
- 🔗 Integrations

Direct integrations

Connect with your preferred payroll software and export your timesheets with one click

 **QuickBooks Online** [Connect](#)

 **Gusto** [Connect](#)

 **Xero (AU)** [Connect](#)

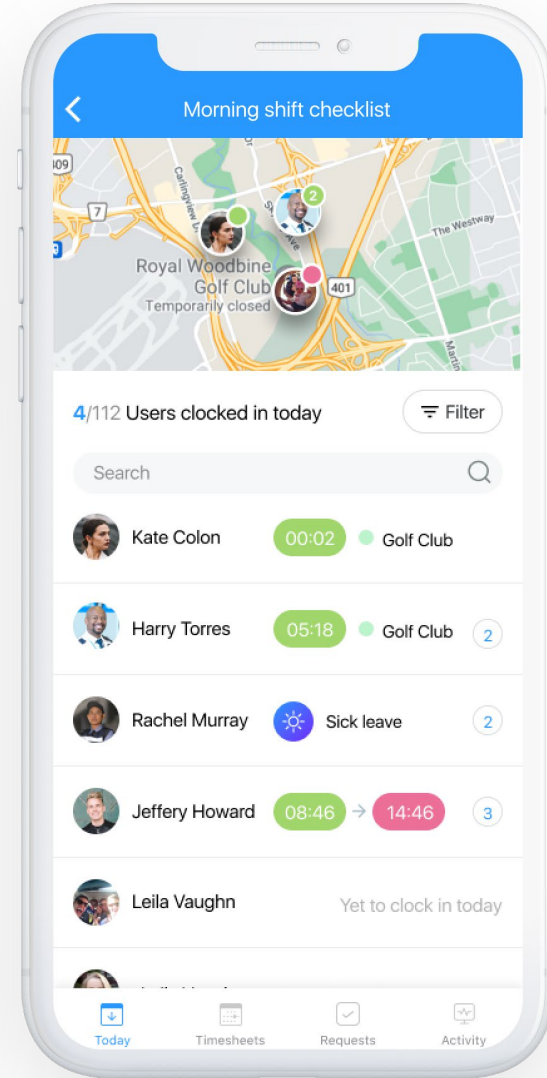
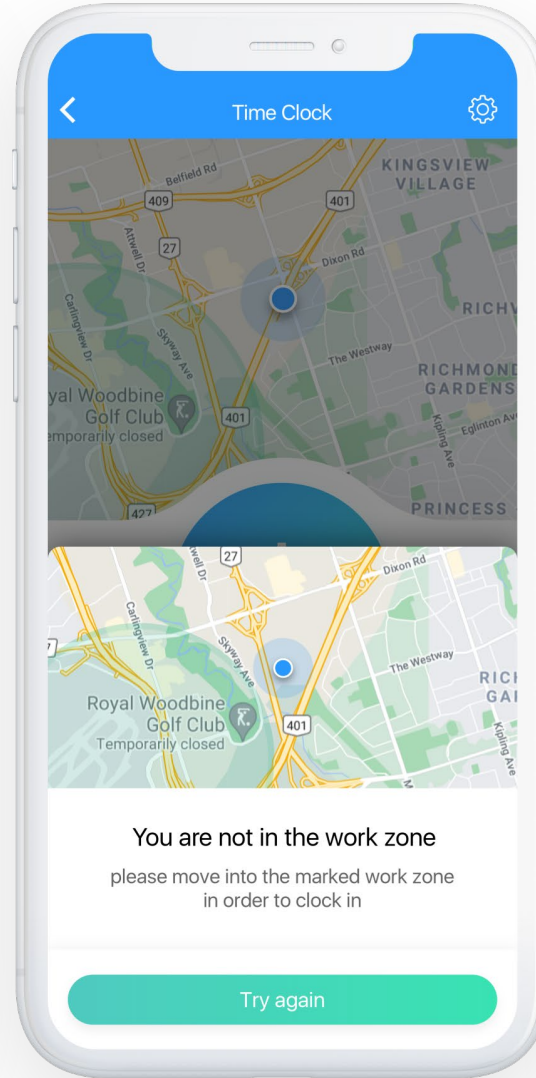
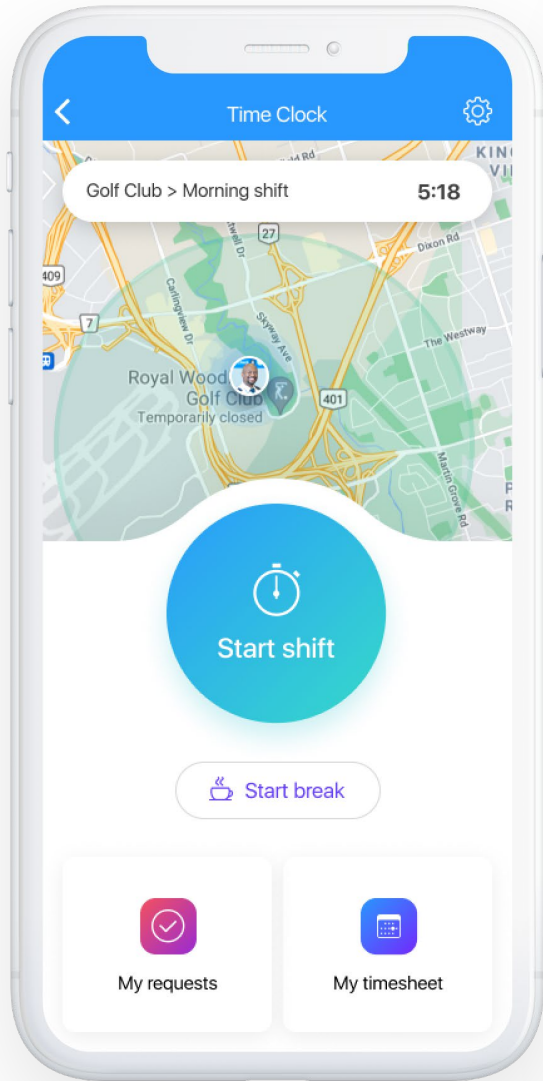
 **Xero (UK)** [Connect](#)

 **Paychex Flex** [Connect](#)

[Request an integration](#)

Export-templates

Export your timesheets according to your payroll provider's format. After completing the setup, the template will be available in the Export menu



EMPLOYEE TIME CLOCK

General

Customize

Payroll

Overtime

Breaks

Jobs

Shift attachments

Absences

Geo location

Reminders

Notifications

Auto reports

Limitations

Integrations

Review each page to see how you can change the settings.

Work days: ?

S M T W T F S

8 8 8 8 8 8 8

Default work day hours: ?

From: 7:00am To: 7:00pm

Daily limit

You'll be notified when a limit is exceeded

11 Hours

Auto clock out

Employees exceeding this limit will be automatically clocked out

12 Hours

Enable day locking

An admin can lock a day, preventing users and other admins from editing entries after they are approved

Select who can lock days

No users selected

Select who can unlock days

No users selected

Payroll export time format

Time (04:30)

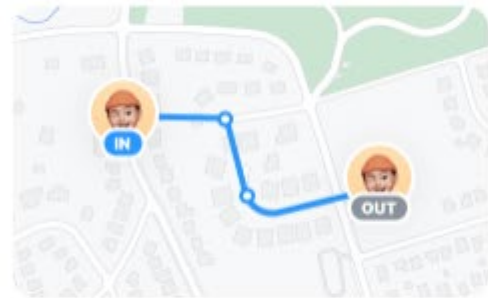
BREADCRUMBS

- General
- Customize
- Payroll
- Overtime
- Breaks
- Jobs
- Shift attachments
- Absences
- Geolocation
- Reminders
- Notifications
- Auto reports
- Limitations
- Integrations

This is only activated if you decide to turn it on.

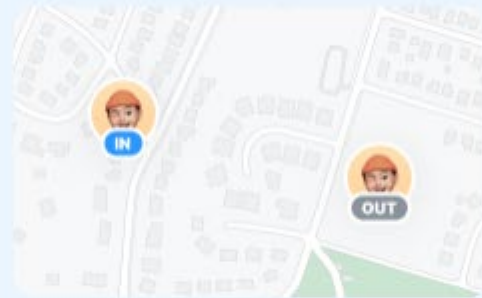
Geolocation

By enabling geolocation, you will receive the location where a clock in or clock out were performed



Breadcrumbs (live-tracking)

Track users' live location and route while they're on the clock



Clock in & out

Track users' clock in and clock out locations



Off

Don't track users' location at all

Users must enable location sharing in order to clock in & out



BREADCRUMBS

- ⚙️ General
- 🔧 Customize
- 📅 Payroll
- 🕒 Overtime
- ☕ Breaks
- 📁 Jobs
- 📎 Shift attachments
- ⌛ Absences
- 📍 Geolocation
- 🕒 Reminders
- 🔔 Notifications
- 📄 Auto reports
- 👤 Limitations
- 🔗 Integrations

Geo fence sites

Ensure your users can clock in and out only when they're physically in the work location.

+ Add sites



Employee Location

Clock in ▾ Jobs: All jobs ▾ 12/8/2021 ▾ Today

Dana Torres

Search hours or addresses 🔍

- 08:31
Clocked-in **Driving to client**
📍 3065 D Street, Roseville, MI
- 08:46
Pinned location
📍 177 Coolidge Street, Roseville, MI
- 09:01
Pinned location
📍 3089 Fittro Street, Roseville, MI
- 09:16

03:15pm • Pinned location Anaheim
📍 3089 Fittro Street, Roseville, MI

Office

1 In

2 Out

3 In

Active



BREADCRUMBS

- Users
- Smart groups

Communication

- Chat
- Updates
- Directory
- Surveys
- + Add new

#Position/Job Ope...

- Time Clock
- Schedule Manage...
- Task Management
- Mileage
- News Events
- Time Off**
- + Add new

State Reports

- Recruiter Reports/...
- Contacts/Services
- Employer Profiles

Time off

Approved Time off Insights

2024 All policy types

APPROVED TIME OFF

Add paid policy type

Select the policy type

You'll be able to add multiple policies to the type and assign each policy to the relevant users

Select type

- Sick leave
- Bereavement
- Personal day
- Parental leave
- Weather
- Learning & development
- Volunteering
- Non Paid Absence ✓ Type in use
- Sick leave - paid ✓ Type in use
- Flex time ✓ Type in use
- Military leave ✓ Type in use
- Flexible Schedule ✓ Type in use
- PTO ✓ Type in use
- Approved Leave ✓ Type in use

Unlimited

APPROVED TIME OFF

Create new policy

Policy name

Name your policy (e.g. Full-time employees, specific department etc.)

Units

Hours Days

Would you like to add balance to this time off policy?

Yes, there is a limit No, it's unlimited

Accrual settings

No accruing time happens in unlimited policies

Create new policy

Work days & hours

Select the applicable work days for this policy and set hours to calculate for each day. The longest day sets the standard for a full workday.

[Learn more](#)

Work days:

S	M	T	W	T	F	S
8	8	8	8	8	8	8

Day length: ⓘ

Time off request requires admins approval

If turned off, users time off requests will be automatically approved and their policy balance will be updated accordingly.

Time off limitations

Determine the minimum time in advance users may request a time off

A time off can be requested **no less than** before it starts

Position/Job Ope...

Time Clock

Schedule Manage...

Task Management

Mileage

News Events

+ Add new feature

Attending

Attending

Attending

Attending

Attending

Attending

Attending

Attending

Maybe Attending

Maybe Attending

NEWS EVENTS FUNCTIONS

Connecteam Training- This Thursday!! Published

Asset admins

Mobile Preview

Options



No comments to display



Write a comment...

18

Attending

2

Not Attending

2

Maybe Attending

Unlimited

Spots remain

Mobile App Engagement

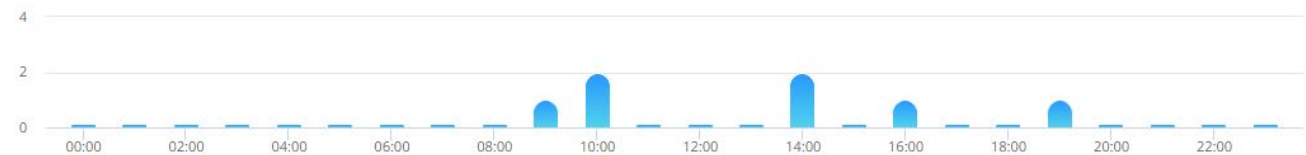
From: 02/15/2022

To: 03/01/2022

Users activity throughout the period



Users activity throughout this day



Active (1)

Archived (0)

Filter

From: 03/01/2022

To: 03/03/2022

Show upcoming

Search



Export

Add new

Close

New event creation

Need Help?

Event cover photo (optional)



Drag and drop here or browse
Recommended Image dimensions: 1125X750 pixels

Or use one of our covers

Clear selection



Event details

Event title

Write about the event

Attach

Event location

Event date & time

Start creating your Event to see a mobile preview

Create

Registration

Assign by





Recipients

Publish settings

Summary

Next

Staff Training

-  Quizzes
-  KS Module Training
-  Courses
-  Knowledge base

QUIZZES

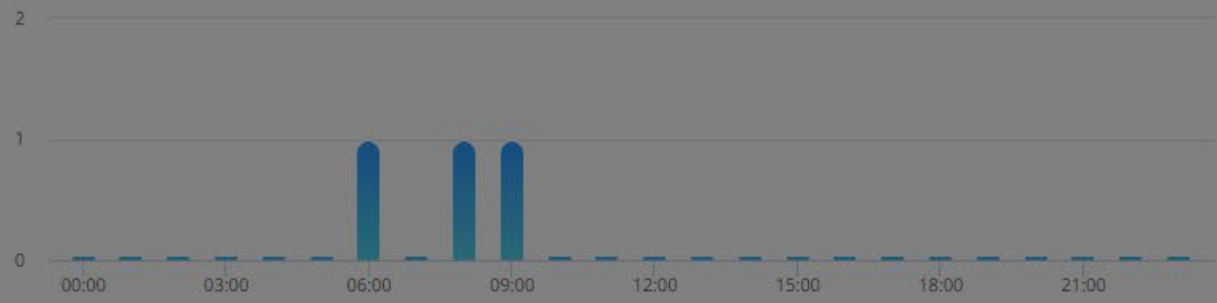
 Show entries ¹

0% 0 / 1 Use
2 users did

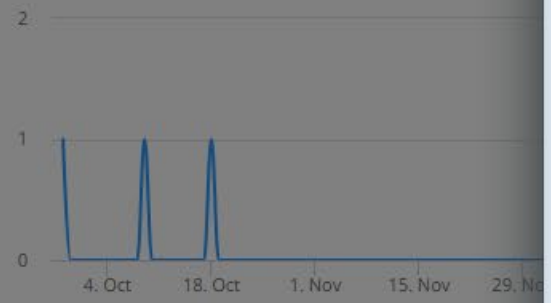
Mobile App Engagement

From: 0%

Users activity throughout this day



Users activity throughout the period



Mobile Preview

ID&R Quiz

1/1

What does the acronym NRG stand for?

Non-Regulatory Guide

Non-Regulated Goals

Non-Regulatory Guidance

Overall course statistics

Overall course statistics

Completion

Preview







20% **1** / 5 Have completed

20% **1** / 5 Are in progress

60% **3** / 5 Have not started

Filter

Search

	First name	Last name	Mobile phone	Last viewed	Status
				02/03/2022 01:48 PM	Completed
				--	Not started
				--	Not started
				--	Not started
				--	Not started
				02/16/2022 11:12 AM	In progress

Eligibility Flowchart

Eligibility Flowchart

Recruiter 101 Module: Migran...

Migrant Agricultural Worker

Staff Training

Quizzes

KS Module Training

Courses

Knowledge base

CREATE YOUR COURSES

Mobile Preview

Staff Training

- Quizzes
- KS Module Training
- Courses
- Knowledge base

Sample IDRC Training Course: Mi...

Eligibility Flowchart

- Eligibility Flowchart
- Recruiter 101 Module: Migrant Ag...
- Migrant Agricultural Worker

Overall course statistics >

Search 🔍

Eligibility Flowchart

- Eligibility Flowchart >
- Recruiter 101 Module: Migran... >
- Migrant Agricultural Worker >



Close



Company code: 42851



Jessica Castaneda

Edit course

Sample

Insert section title

+ Add object

+ Add section

CREATE YOUR COURSE

Mobile Preview

Sample



Settings

Save as template

Save

DOCUMENTS

 Documents


 Filter

Packs

Onboarding pack

NM Farm Lists

ESU 9 Summer School Team Documents

 Add

Users

Federal Form W-4

Driving License

Iowa Farm List

Add 

+

+














DOCUMENTS

Documents Settings

Document Packs

Manage which documents will be required to add to employees. You can create different packs of documents for different groups of users

Onboarding pack  

Federal Form W-4	 	Settings	
Driving License	 	Settings	
Iowa Farm List	 	Settings	

[Add document](#) ▼

Assign this pack to

- Allows you to create a pack of documents that you want a user to access.
- Assign the user to the specific pack.

DOCUMENTS

- <https://help.connecteam.com/en/articles/6712514-how-to-upload-documents-on-connecteam>

How to Upload Document Connecteam

Share this article with your employees



Written by Nechami Alexander

Updated over a week ago

Welcome to the Documents feature! Here you will be your admin request from you, straight from the app. Let's go over how this is done!

How to Upload Documents Step by Step:

1. Access your company's app. Click [here](#) to learn f
2. Navigate to your profile tab (at the bottom of the

KNOWLEDGEBASE- LIBRARY

Create a knowledge base

Need Help?

Folders

▼ IDRC Resources

+ Add

Search

The knowledge base is empty

Add folder

+ Add folder

Mobile Preview

02:10

IDRC Resources

Search

IDRC Resources

1

Save as template

Save

KNOWLEDGEBASE

IDRC Resources

Draft



Edit

Options

Overall statistics



IDRC Resources

Statistics

Preview

Search



IDRC Resources

0%

0

/ 0

Viewed this file

Views in the past month

Filter

Search



Export



First name

Last name

Groups

Mobile phone

Email

State

Position



HR



Courses



Documents



Recognitions



Celebrations

Jessica Castaneda recognized Evelyn Arrevalo



Well Done!

03/20/2024 at 02:58 PM

1 employee can see this

RECOGNITIONS

DESIGNING TOOLS THROUGH CONNECTEAM

- IDRC is here to help if you need assistance customizing Connecteam in your state.
- We will be doing a summer connecteam pilot with our member states.





Hi Jessica 🙌

We help companies connect deskless employees with an all-in-one employee app.

Start a conversation



Our usual reply time
🕒 Under 2 minutes

➤ Send us a message

• [See all your conversations](#)

Search for help

🔍 Search articles...

Suggested articles

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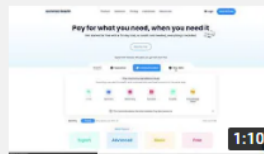
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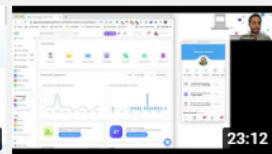
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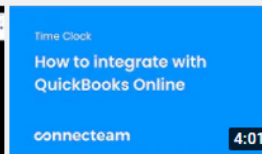
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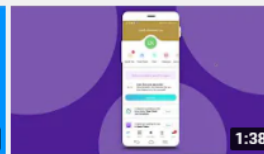
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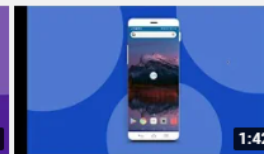
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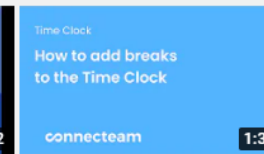
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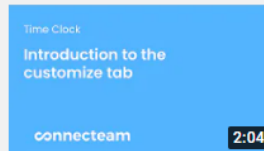
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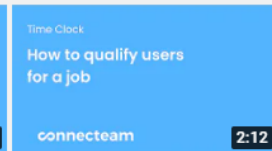
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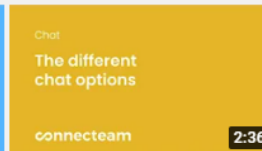
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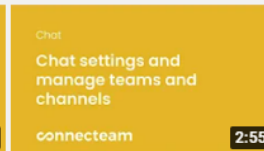
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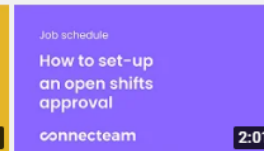
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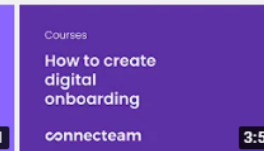
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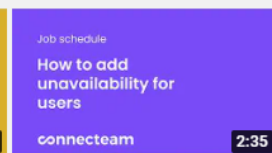
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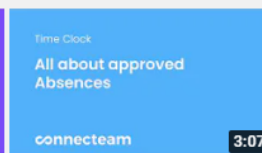
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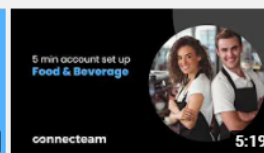
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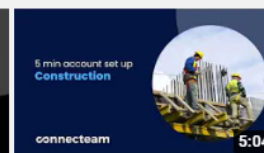
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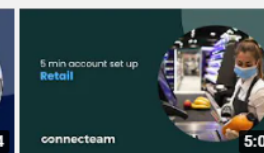
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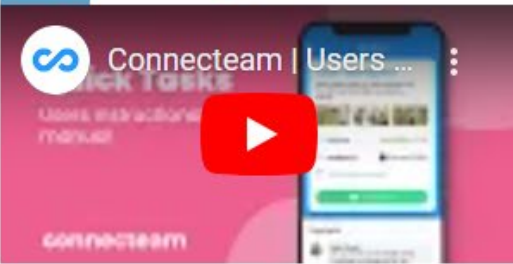
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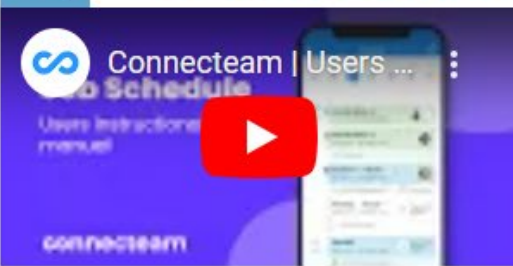
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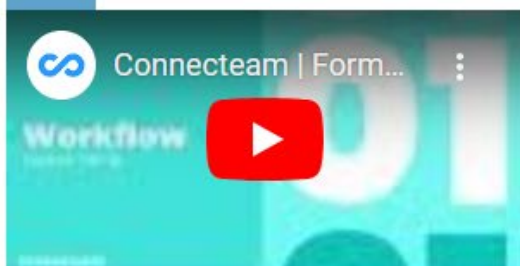
Using Job Scheduler



Filling Out Forms



Creating Forms



How to Add Users



Creating Courses



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Thank you