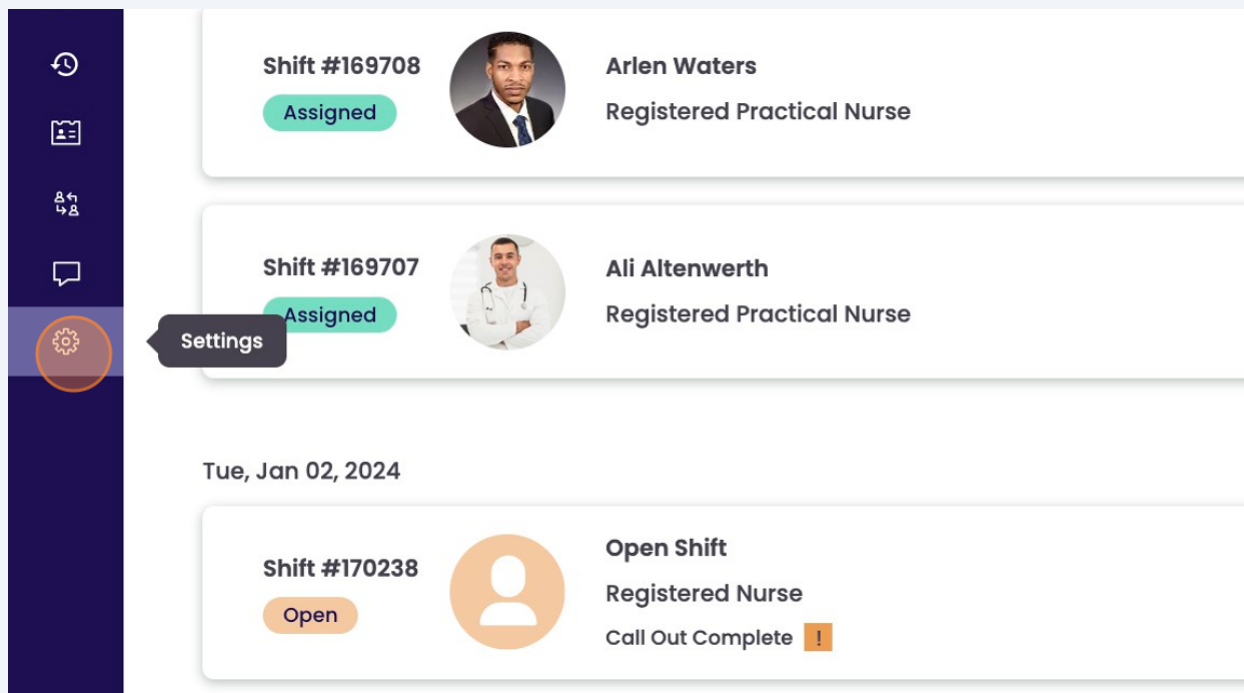


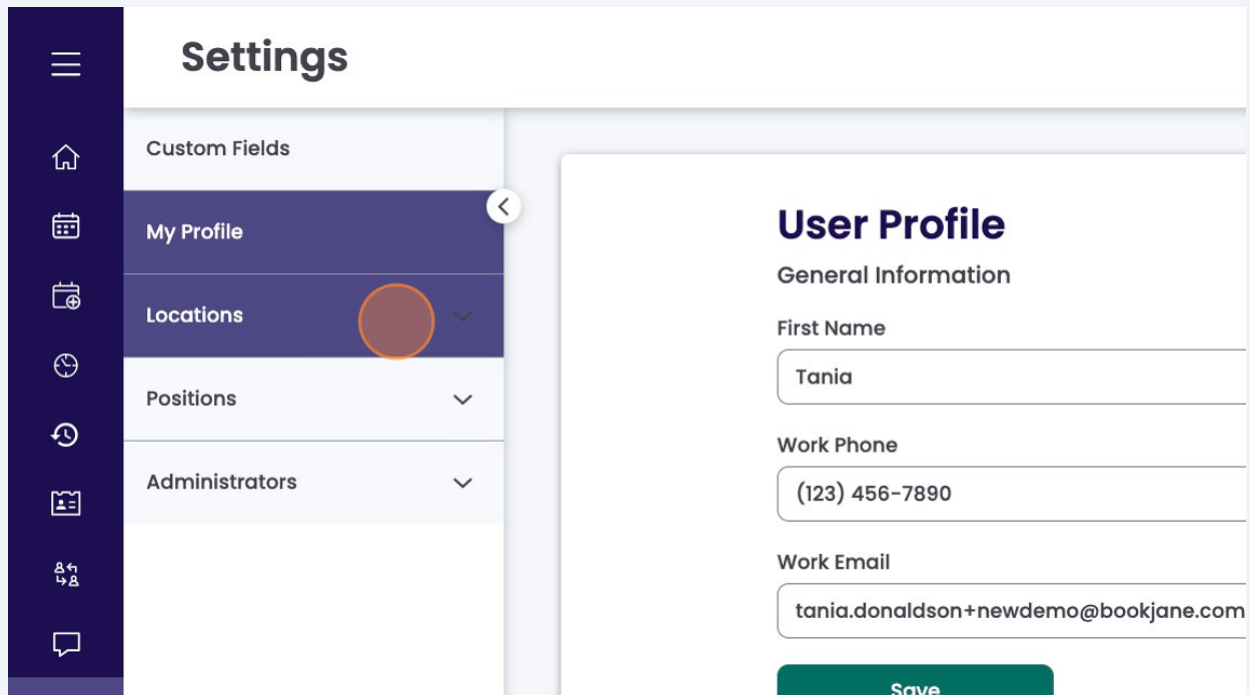
Create and Manage a Dynamic Group

1 Navigate to bookjanej360.com

2 Click on the **Settings** icon.



3 Click on **Locations**.



The screenshot shows a 'Settings' page with a dark purple sidebar on the left. The sidebar contains a hamburger menu icon at the top, followed by icons for Home, Calendar, Add Calendar, Clock, Repeat, People, Add People, and Chat. The main content area is white and titled 'Settings'. It has a list of menu items: 'Custom Fields', 'My Profile', 'Locations', 'Positions', and 'Administrators'. The 'Locations' item is highlighted with a dark purple background and a red circle. To the right of the sidebar, the 'User Profile' form is visible, showing fields for 'First Name' (Tania), 'Work Phone' ((123) 456-7890), and 'Work Email' (tania.donaldson+newdemo@bookjane.com). A green 'Save' button is at the bottom right of the form.

Settings

Custom Fields

My Profile

Locations

Positions

Administrators

User Profile

General Information

First Name

Tania

Work Phone

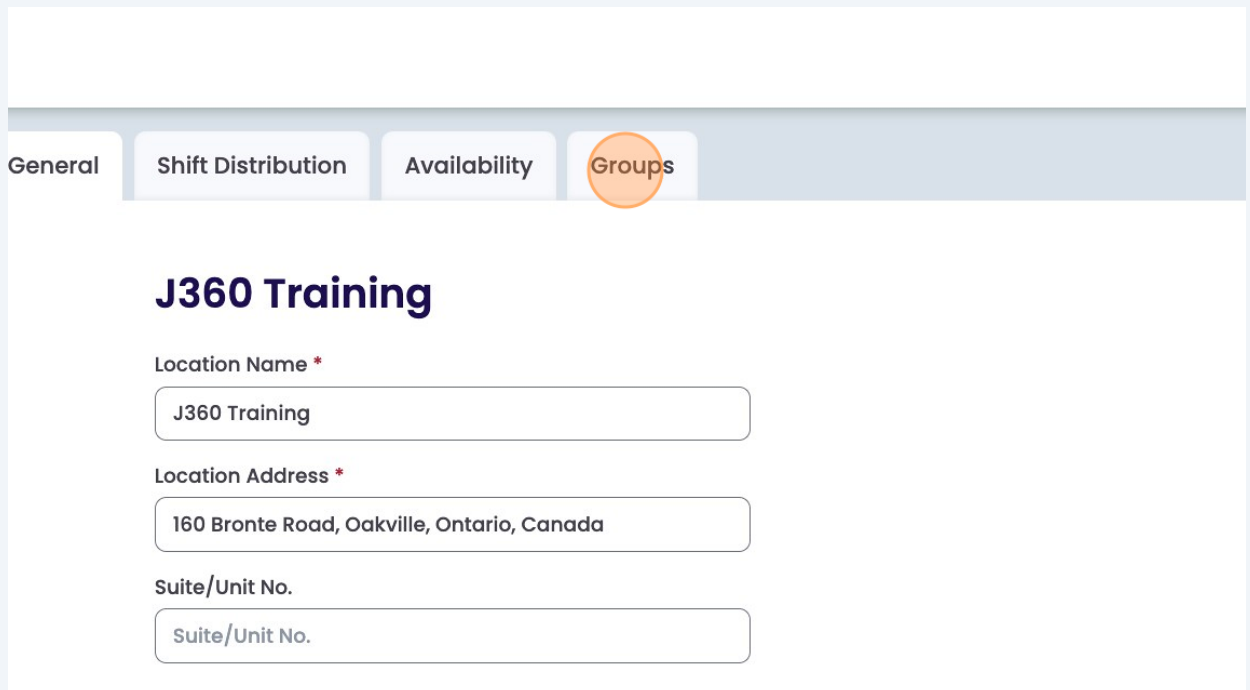
(123) 456-7890

Work Email

tania.donaldson+newdemo@bookjane.com

Save

4 Click "**Groups**"



The screenshot shows a form titled 'J360 Training'. At the top, there are four tabs: 'General', 'Shift Distribution', 'Availability', and 'Groups'. The 'Groups' tab is selected and highlighted with a red circle. Below the tabs, the form has three input fields: 'Location Name *' (J360 Training), 'Location Address *' (160 Bronte Road, Oakville, Ontario, Canada), and 'Suite/Unit No.' (Suite/Unit No.).

General

Shift Distribution

Availability

Groups

J360 Training

Location Name *

J360 Training

Location Address *

160 Bronte Road, Oakville, Ontario, Canada

Suite/Unit No.

Suite/Unit No.

5 Click "New Group"

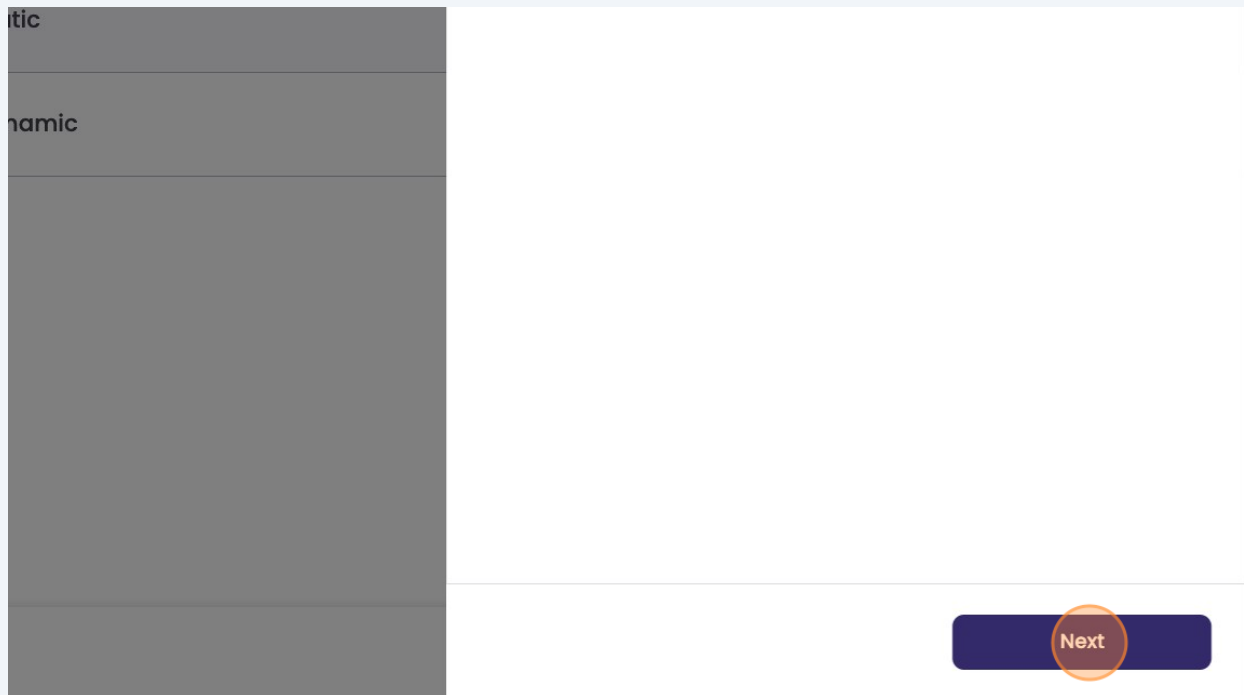
Static	View	Edit
Dynamic	View	Edit
New Group		

6 Click the "Group Name *" field; then type in your group name (e.g. Dynamic FT)

Static	The members of this group will be defined by the criteria you set, and will dynamically update. Ideal for shift distribution and cannot be used as page filters.
Dynamic	<input type="radio"/> By manually selecting each team member The members of this group will remain static, unless manually edited. Ideal for grouping team members by team, unit, etc.
Dynamic	
Static	Group Name * <input type="text" value="Enter a descriptive name"/>
Static	
Static	
Static	

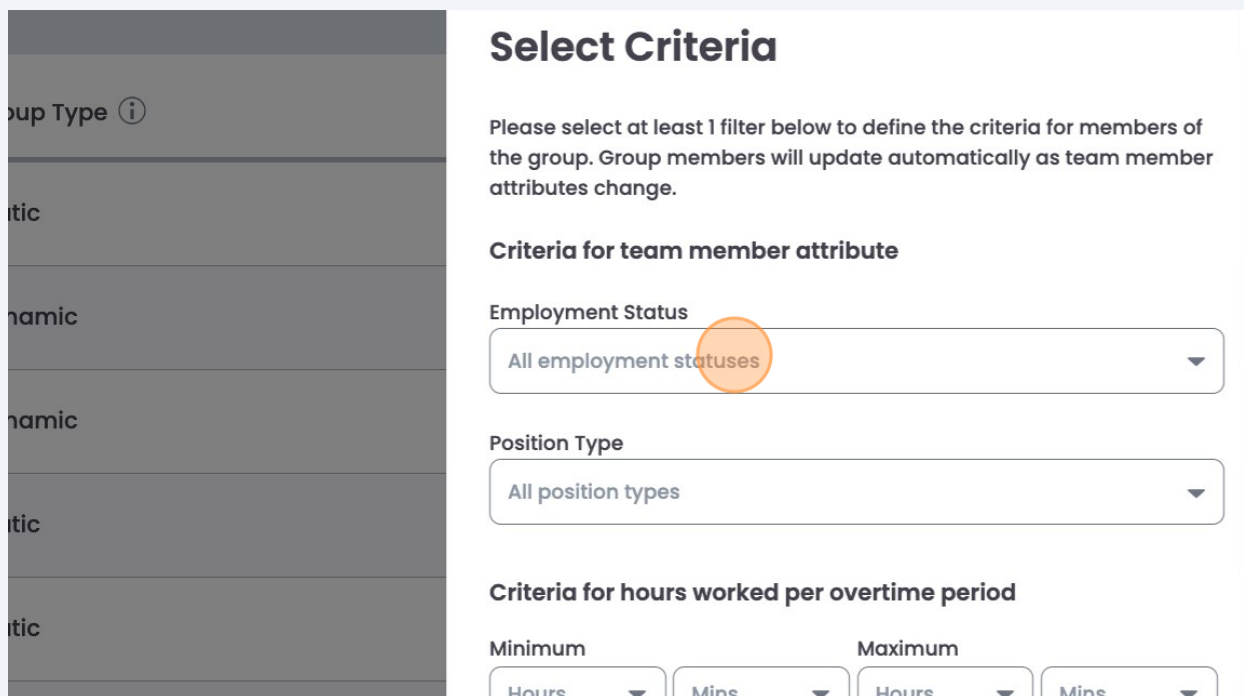
7

Click "Next"



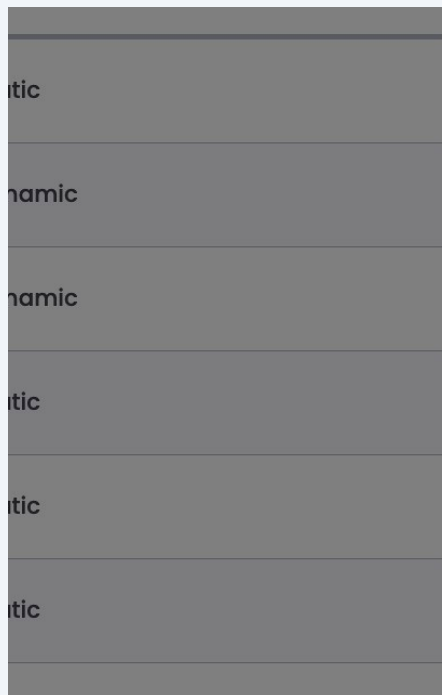
A screenshot of a form interface. On the left is a dark grey sidebar with some text like 'itic' and 'namic'. The main area is white. At the bottom right, there is a dark blue button with the word 'Next' in white. An orange circle highlights the 'Next' button.

8

Click the "**All employment statuses**" field; then add the employment statuses that you wish to include in this group.

A screenshot of a form titled 'Select Criteria'. The form has a dark grey sidebar on the left with text like 'Group Type', 'itic', 'namic', and 'namic'. The main area is white. The title 'Select Criteria' is in bold. Below it is a paragraph: 'Please select at least 1 filter below to define the criteria for members of the group. Group members will update automatically as team member attributes change.' There are two sections: 'Criteria for team member attribute' and 'Criteria for hours worked per overtime period'. Under the first section, there are two dropdown menus: 'Employment Status' and 'Position Type'. The 'Employment Status' dropdown is currently set to 'All employment statuses' and is highlighted with an orange circle. Under the second section, there are four dropdown menus: 'Minimum Hours', 'Minimum Mins', 'Maximum Hours', and 'Maximum Mins'.

9 Click "Full Time"



Please select at least 1 filter below to define the criteria for members of the group. Group members will update automatically as team member attributes change.

Criteria for team member attribute

Employment Status

All employment statuses

☐ Casual

☒ Full Time

☐ Part Time

Criteria for hours worked per overtime period

Minimum

Hours

Maximum

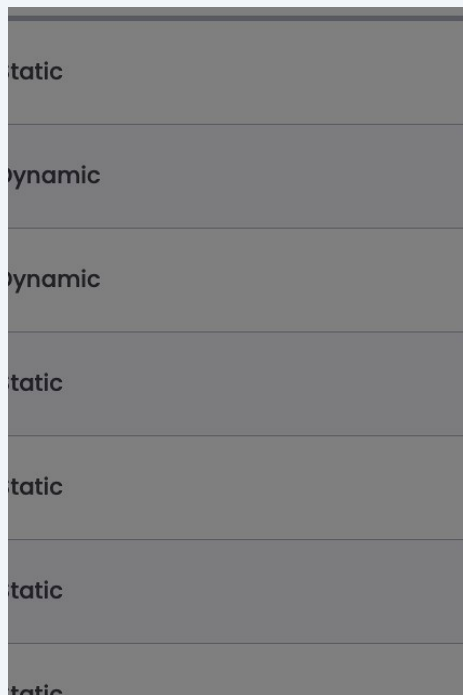
Mins

Hours

Mins

Criteria for hours worked per day

10 Click the "All position types" field.



the group. Group members will update automatically as team member attributes change.

Criteria for team member attribute

Employment Status

Full Time X

Position Type

All position types

Criteria for hours worked per overtime period

Minimum

Hours

Maximum

Mins

Hours

Mins

Criteria for hours worked per day

Minimum

Maximum

11 Click to include "**Primary**" (Secondary or both).

Criteria for team member attribute

Employment Status

Full Time X

Position Type

All position types

☒ Primary

☐ Secondary

Minimum Maximum

Hours Mins Hours Mins

Criteria for hours worked per day

Minimum Maximum

Hours Mins Hours Mins

12 Under the **Criteria for hours worked per overtime period** click the Minimum "Hours" field.

Full Time X

Position Type

Primary X

Criteria for hours worked per overtime period

Minimum Maximum

Hours Mins Hours Mins

Criteria for hours worked per day

Minimum Maximum

Hours Mins Hours Mins

- 13 Click **"30 hrs"** (or the minimum hours you wish to be included for the OT period)

Static

Static

Static

Static

Static

Dynamic

Primary X

Criteria for hours worked per overtime period

Minimum Maximum

Hours Mins Hours Mins

29 hrs

30 hrs

31 hrs

32 hrs

Hours worked per day

Maximum

Mins Hours Mins

- 14 Click the Minimum **"Mins"** field.

Dynamic

Static

Static

Static

Static

Static

Full Time X

Position Type

Primary X

Criteria for hours worked per overtime period

Minimum Maximum

30 hrs Mins 40 hrs Mins

Criteria for hours worked per day

Minimum Maximum

Hours Mins Hours Mins

15

Click "**0 mins**" (or the minimum minutes you wish to be included for the OT period)

dynamic

itic

itic

itic

itic

itic

itic

dynamic

Position Type

Primary X

Criteria for hours worked per overtime period

Minimum

30 hrs

Mins

0 mins

15 mins

30 mins

45 mins

Maximum

40 hrs

Mins

Criteria for hours worked per day

Minimum

Hours

Maximum

Hours

Mins

16

Click the Maximum "**Hours**" field.

dynamic

itic

itic

itic

itic

itic

dynamic

Full Time X

Position Type

Primary X

Criteria for hours worked per overtime period

Minimum

30 hrs

Mins

Hours

Mins

Minimum time cannot be more than maximum time.

Criteria for hours worked per day

Minimum

Hours

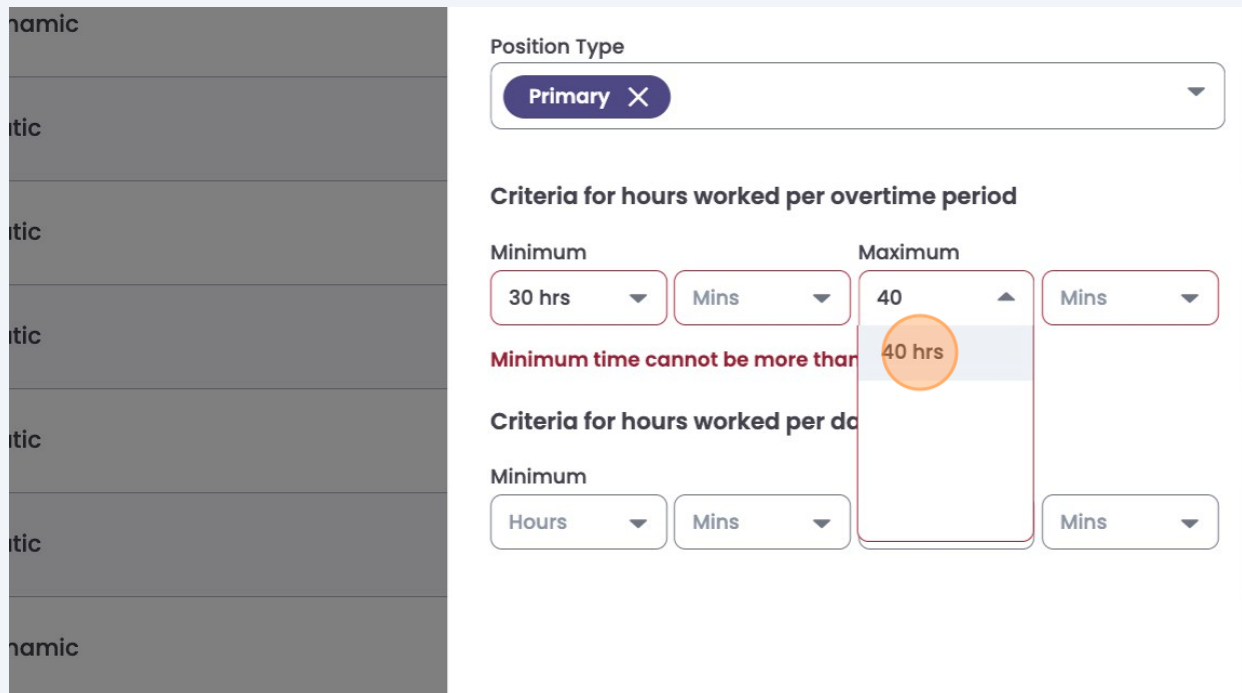
Mins

Maximum

Hours

Mins

- 17 Click "**40 hrs**" (or the maximum hours you wish to be included for the OT period)



Dynamic

Position Type

Primary X

Criteria for hours worked per overtime period

Minimum Maximum

30 hrs Mins 40 Mins

Minimum time cannot be more than 40 hrs

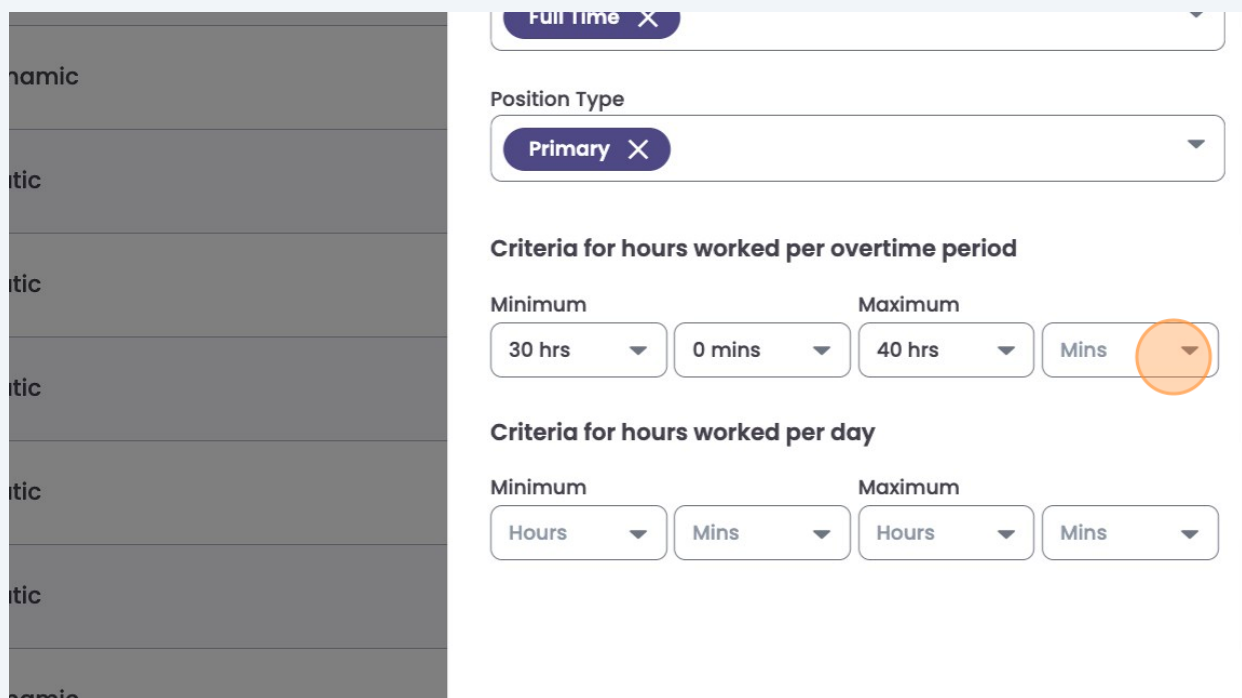
Criteria for hours worked per day

Minimum

Hours Mins

Dynamic

- 18 Click the Maximum "**Mins**" Field.



Full Time X

Position Type

Primary X

Criteria for hours worked per overtime period

Minimum Maximum

30 hrs 0 mins 40 hrs Mins

Criteria for hours worked per day

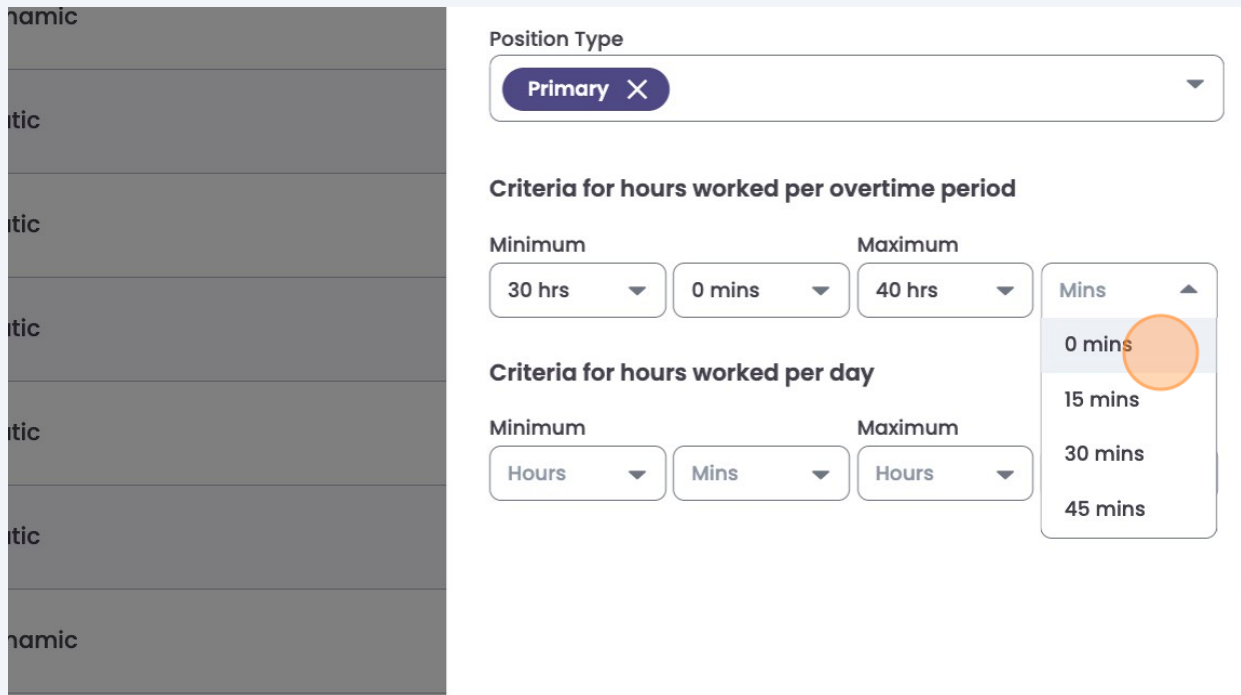
Minimum Maximum

Hours Mins Hours Mins

Dynamic

19

Click "**0 mins**" (or the maximum minutes you wish to be included for the OT period)



Position Type

Primary X

Criteria for hours worked per overtime period

Minimum Maximum

30 hrs 0 mins 40 hrs

Mins

0 mins

15 mins

30 mins

45 mins

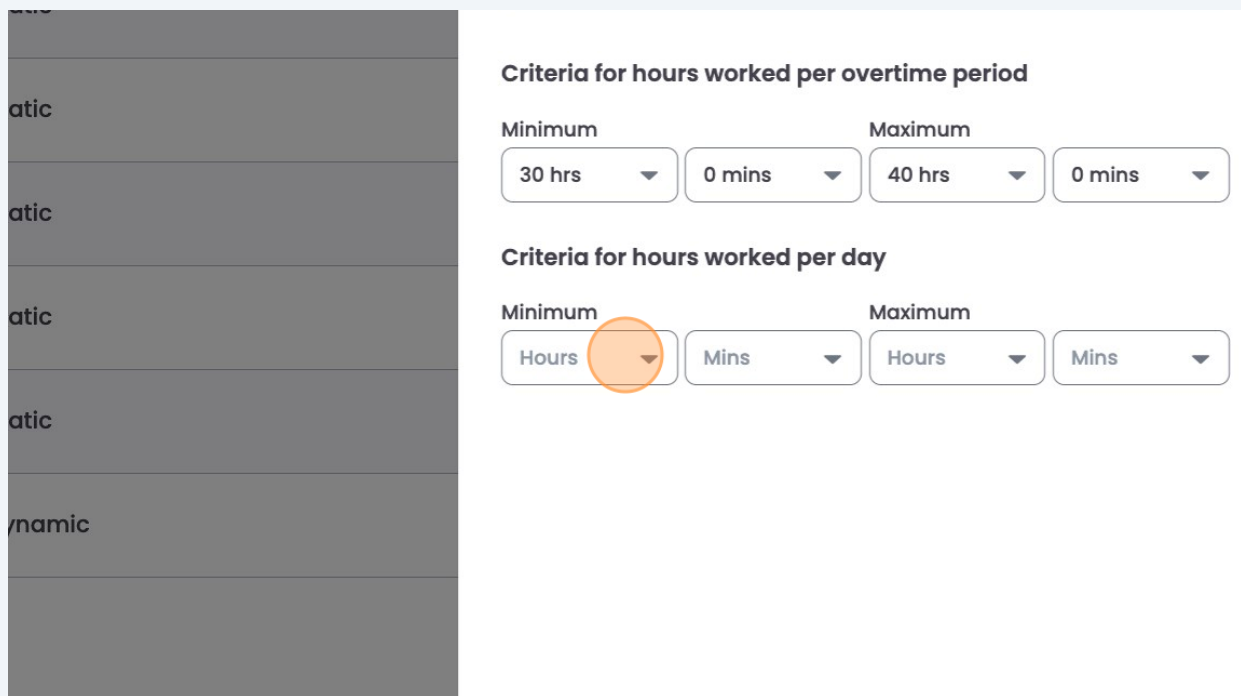
Criteria for hours worked per day

Minimum Maximum

Hours Mins Hours

20

Under the **Criteria for hours worked per day** field click the "**Hours**" field.



Criteria for hours worked per overtime period

Minimum Maximum

30 hrs 0 mins 40 hrs 0 mins

Criteria for hours worked per day

Minimum Maximum

Hours Mins Hours Mins

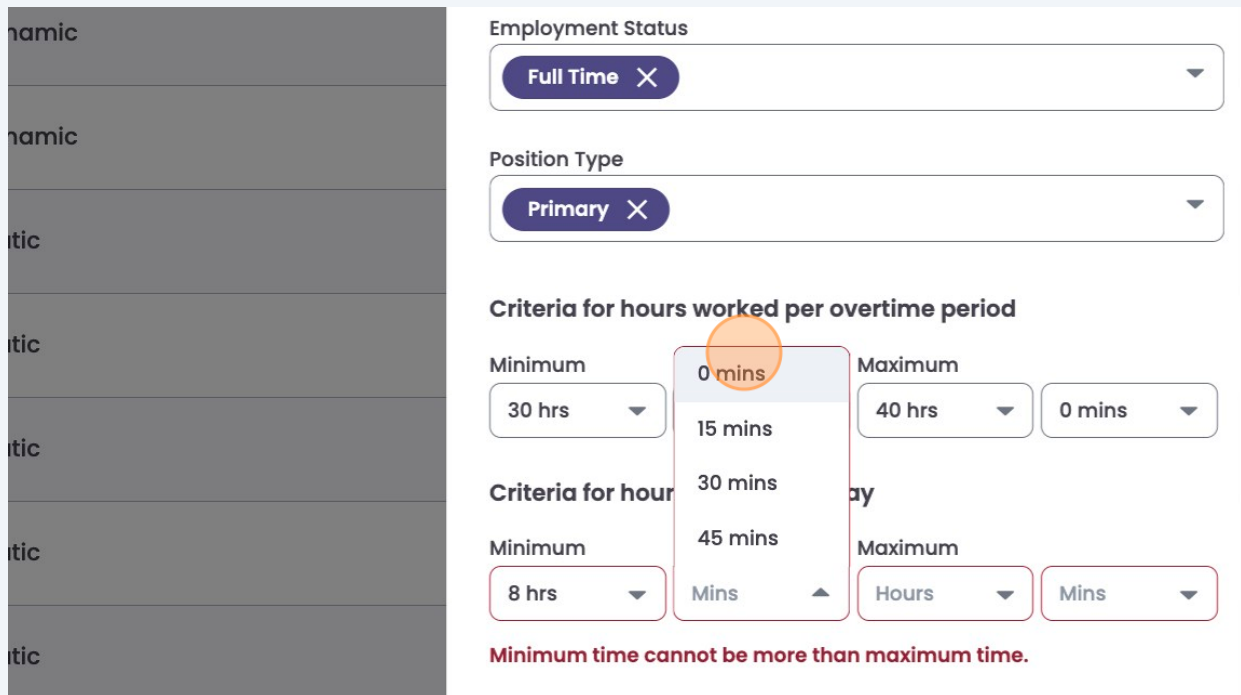
21 Type "**8 enter**" (or the minimum hours you wish to be included for the day)

22 Click the Minimum "**Mins**" field.

The screenshot shows a form with two main sections for setting overtime criteria. On the left, there is a vertical sidebar with several grey buttons, some of which are partially visible and labeled 'tic' and 'namic'. The main content area contains the following elements:

- Criteria for hours worked per overtime period**
 - Minimum**: Two dropdown menus. The first is set to '30 hrs' and the second to '0 mins'.
 - Maximum**: Two dropdown menus. The first is set to '40 hrs' and the second to '0 mins'.
- Criteria for hours worked per day**
 - Minimum**: Two dropdown menus. The first is set to '8 hrs'. The second is set to 'Mins' and is highlighted with an orange circle.
 - Maximum**: Two dropdown menus. The first is set to 'Hours' and the second to 'Mins'.
- Error Message**: A red text message below the 'per day' section states: 'Minimum time cannot be more than maximum time.'

23 Click "**0 mins**" (or the minimum mins you wish to be included for the day)



Dynamic

Dynamic

atic

atic

atic

atic

atic

atic

Employment Status

Full Time X

Position Type

Primary X

Criteria for hours worked per overtime period

Minimum 30 hrs

0 mins

15 mins

30 mins

45 mins

Maximum 40 hrs 0 mins

Criteria for hours worked per day

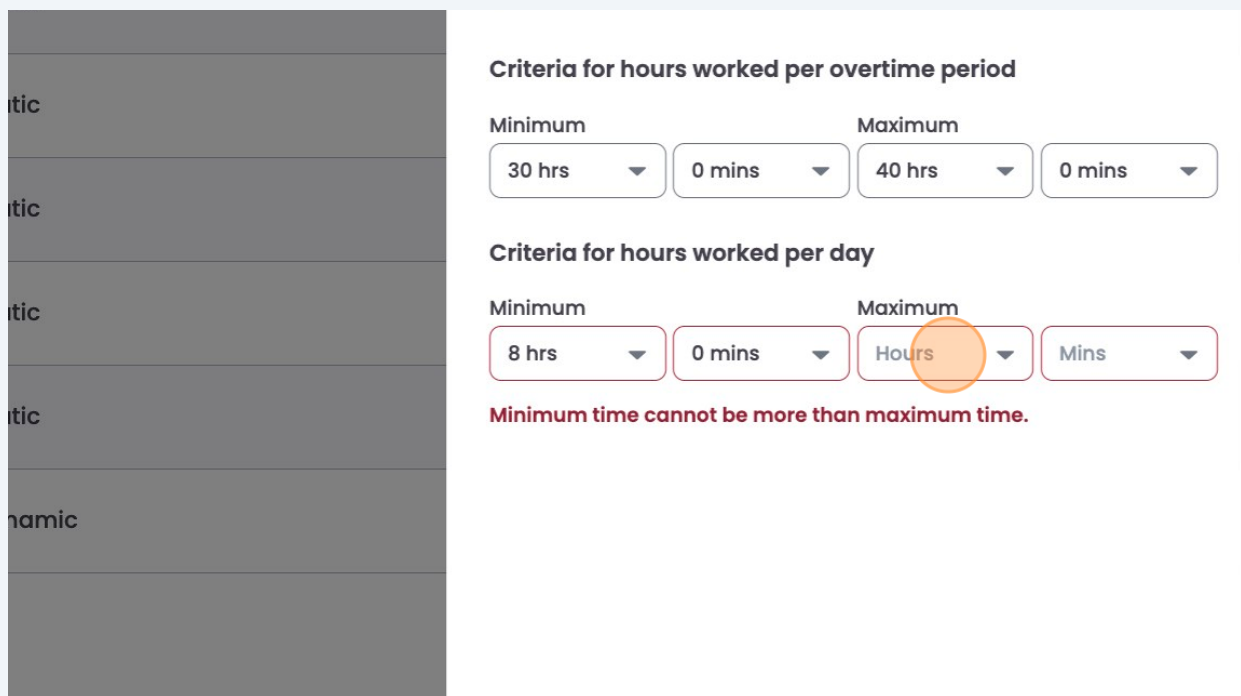
Minimum 8 hrs

Hours

Maximum Hours Mins

Minimum time cannot be more than maximum time.

24 Click the Maximum "**Hours**" field.



atic

atic

atic

atic

atic

Dynamic

Criteria for hours worked per overtime period

Minimum 30 hrs

0 mins

Maximum 40 hrs 0 mins

Criteria for hours worked per day

Minimum 8 hrs

0 mins

Hours

Mins

Minimum time cannot be more than maximum time.

25 Click "**12 hrs**" (or the maximum hours you wish to be included for the day)

Employment Status

Full Time X

Position Type

Primary X

Criteria for hours worked per overtime period

Minimum

30 hrs 0 mins

12 hrs

0 mins

Criteria for hours worked per day

Minimum

8 hrs 0 mins

12 Mins

Minimum time cannot be more than maximum time.

26 Click the Maximum "**Mins**" field.

Criteria for hours worked per overtime period

Minimum Maximum

30 hrs 0 mins 40 hrs 0 mins

Criteria for hours worked per day

Minimum Maximum

8 hrs 0 mins 12 hrs Mins

Minimum time cannot be more than maximum time.

27 Click **"0 mins"** (or the maximum mins you wish to be included for the day)

The screenshot shows a form with the following sections:

- Employment Status:** A dropdown menu with "Full Time" selected and a close icon (X).
- Position Type:** A dropdown menu with "Primary" selected and a close icon (X).
- Criteria for hours worked per overtime period:**
 - Minimum:** 30 hrs (dropdown)
 - 0 mins** (dropdown, highlighted with an orange circle)
 - Maximum:** 40 hrs (dropdown)
- Criteria for hours worked per day:**
 - Minimum:** 8 hrs (dropdown)
 - 0 mins** (dropdown)
 - Maximum:** 12 hrs (dropdown)
- 0 mins** (dropdown, highlighted with an orange circle)
- Mins** (dropdown, with an up arrow)

28 Click **"Save"**

The screenshot shows the same form as above, but with the "Save" button at the bottom right highlighted by an orange circle.

29 Click "View"

Static	View	Edit
Dynamic	View	Edit
Dynamic	View	Edit
Dynamic	View	Edit
Static	View	Edit
Static	View	Edit
Static	View	Edit

30

Group Type ⓘ
Static
Dynamic
Dynamic
Dynamic

Group Details

Dynamic Test
Dynamic Group ⓘ

Criteria for team member attribute

Employment Status

Position Type

Full Time

Primary

Criteria for hours worked

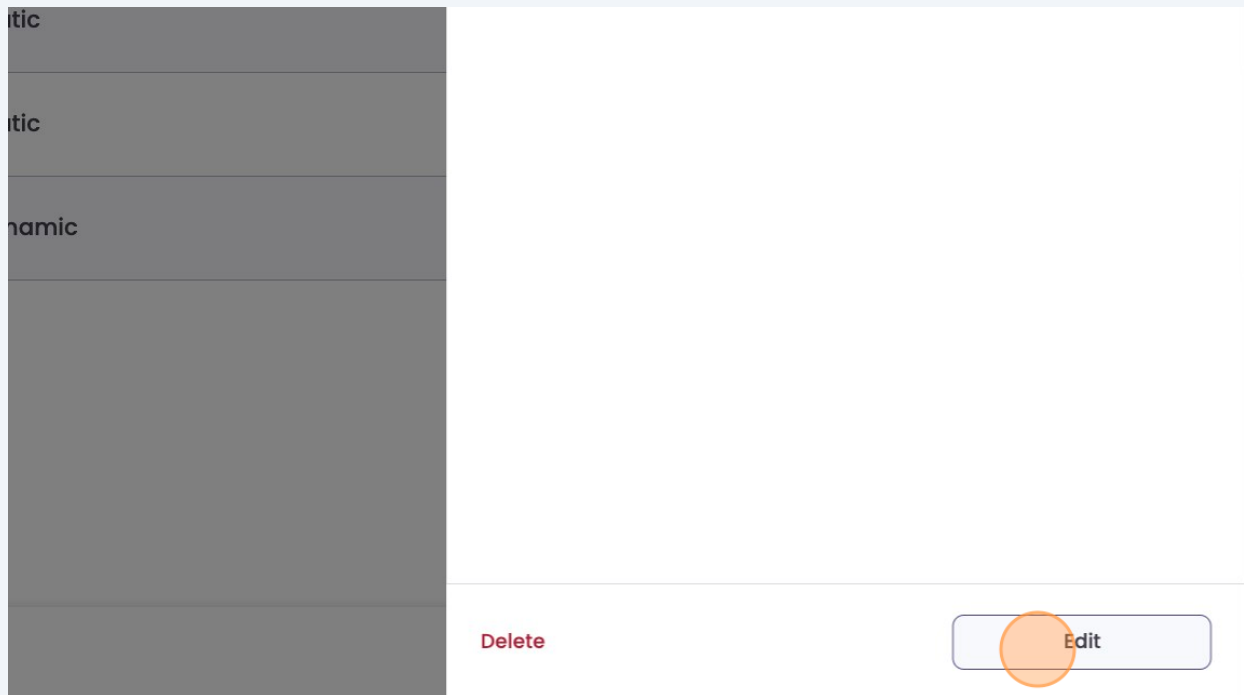
Within Overtime Period

Within One Day

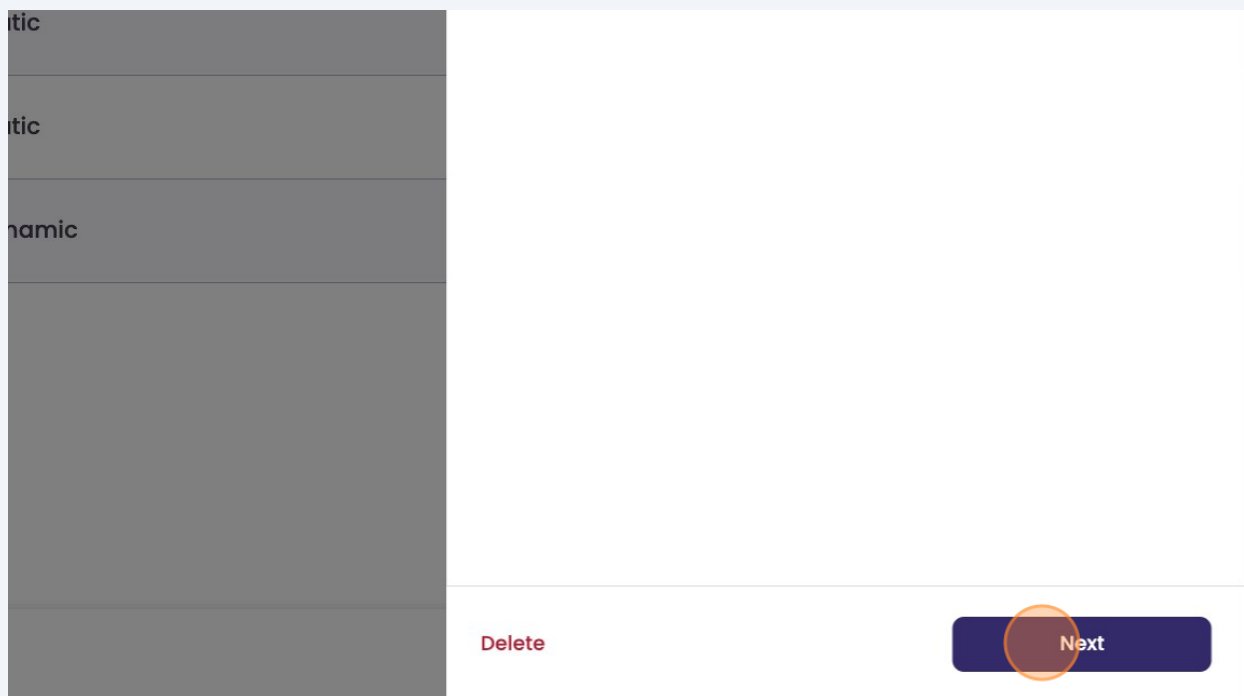
30 – 40 hr

8 – 12 hr

31 Click "**Edit**"

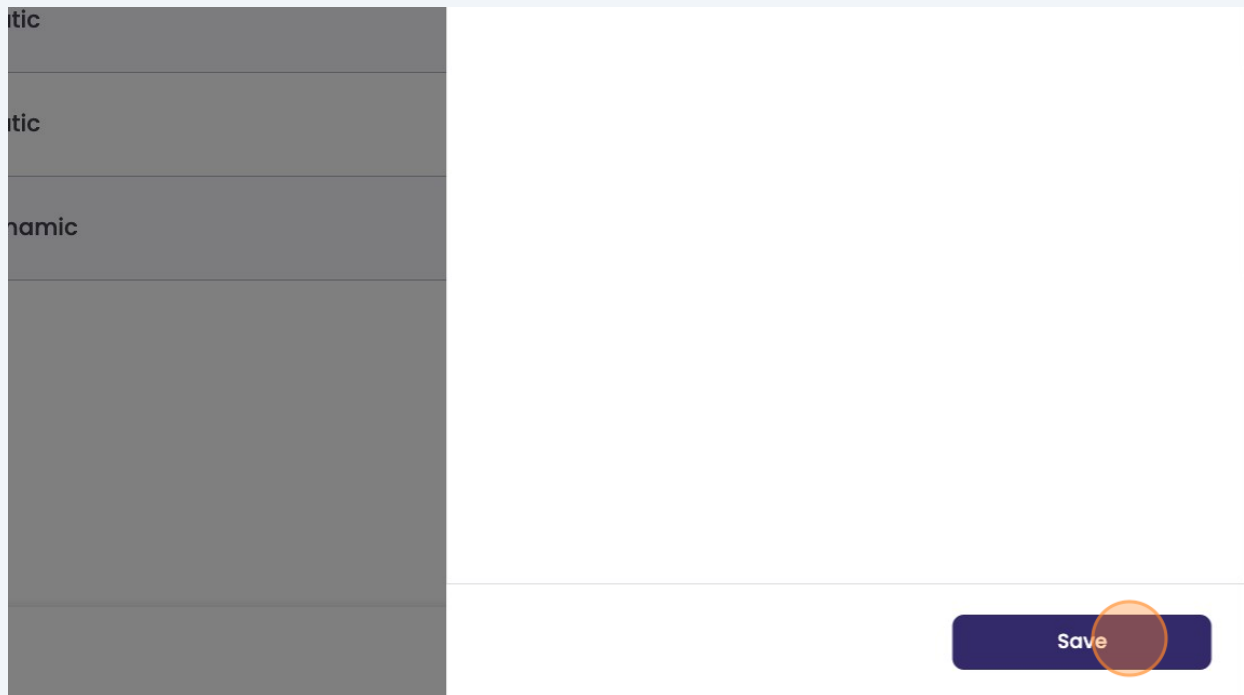


32 Make any change to the group name if applicable then click "**Next**"



33

Make any changes to the employment status, position type and max and min hours for weekly and daily OT limits then click "**Save**"



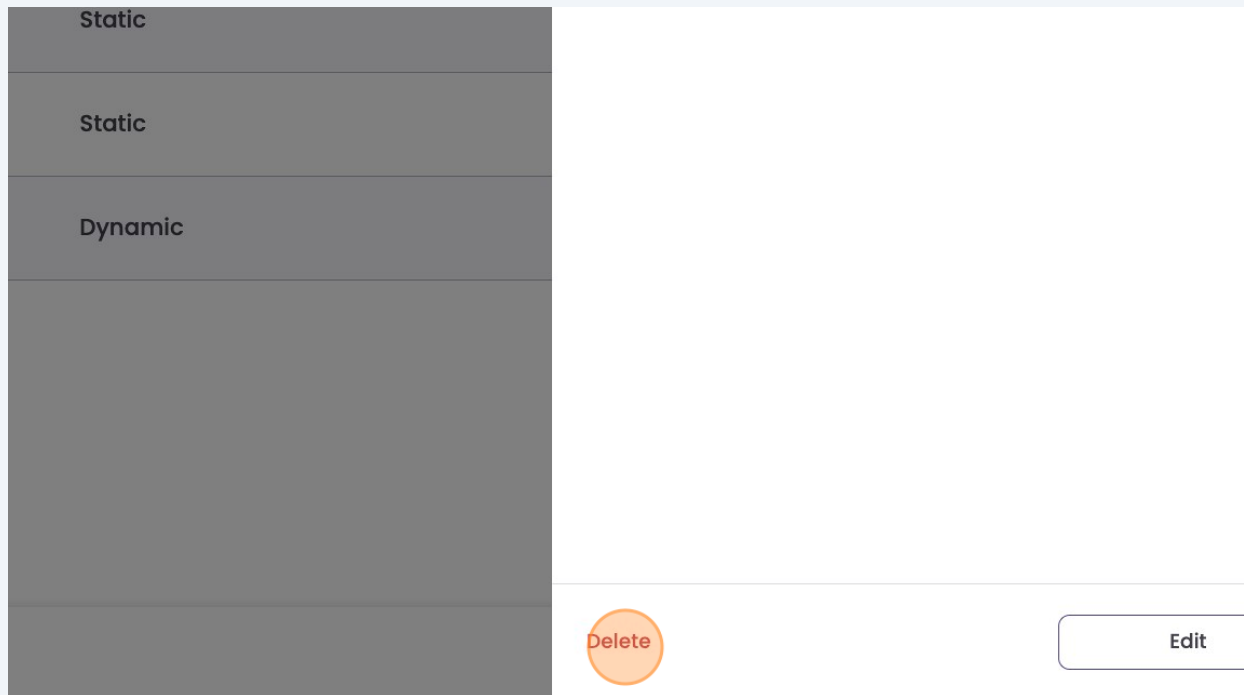
The screenshot shows a form with a dark grey sidebar on the left containing the text 'tic', 'tic', and 'namic'. The main area is white. At the bottom right, there is a dark blue button with the word 'Save' in white, which is circled in orange.

34

Click "**View**"

Static	View	Edit
Dynamic	View	Edit
Dynamic	View	Edit
Dynamic	View	Edit
Static	View	Edit
Static	View	Edit
Static	View	Edit

35 Click "**Delete**"



36 Click "**Cancel**" if you wish to keep your group or "**Delete**" to permanently remove the group.

