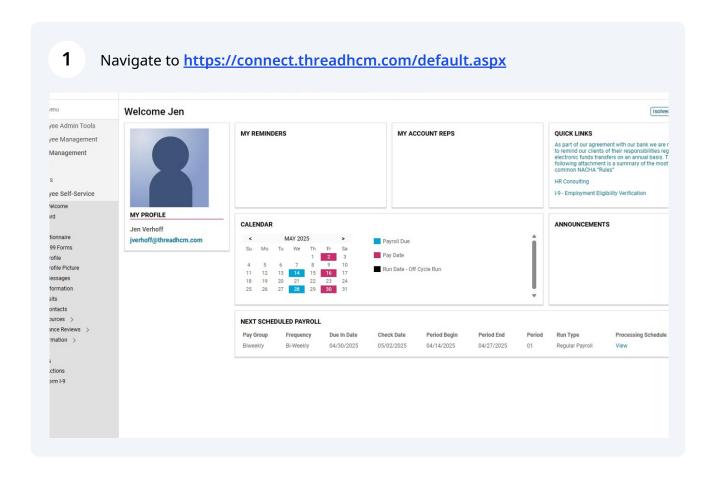
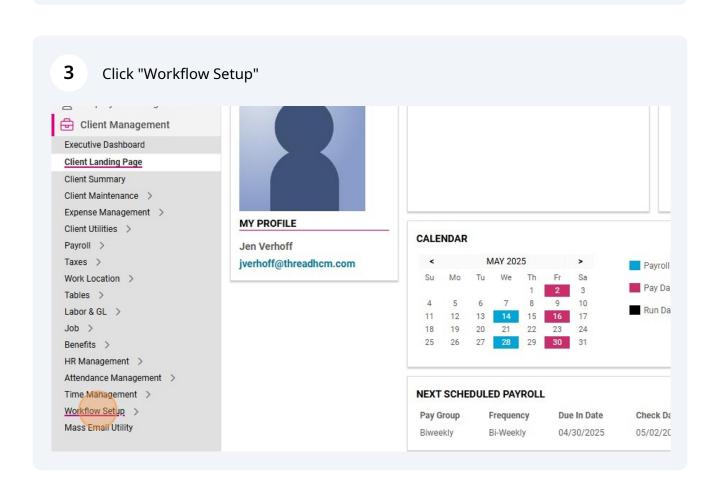
# **Creating Workflows**

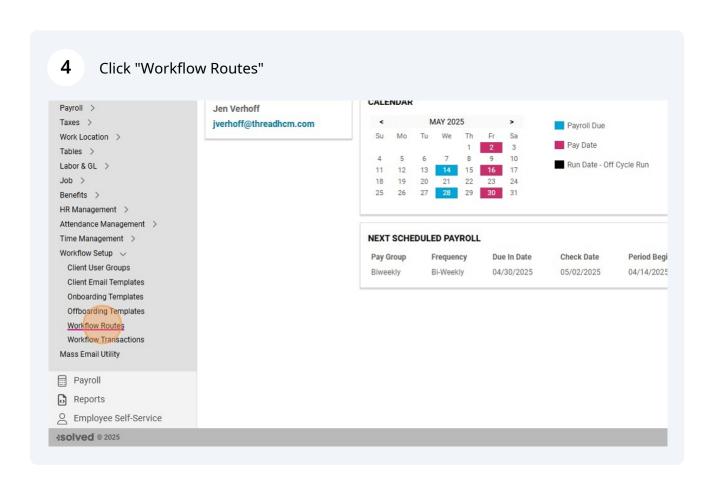


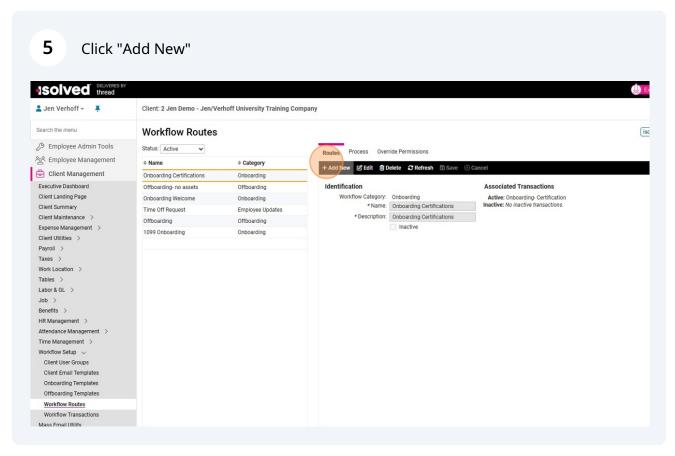
This guide will walk you through setting up general workflows including Workflow Routes and Workflow Transactions in isolved.



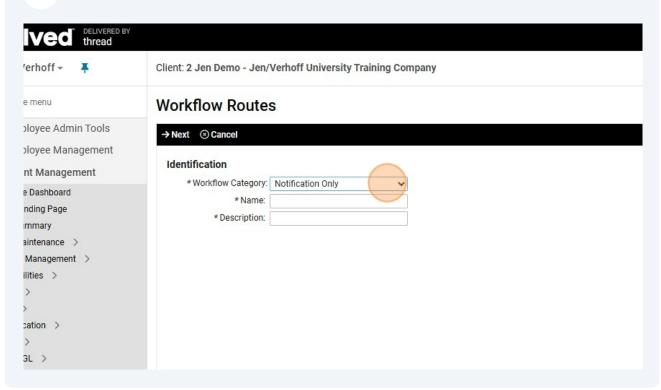
### 2 Click "Client Management" ISOIVED thread ≜ Jen Verhoff ▼ Client: 2 Jen Demo - Jen/Verhoff University Training Company Legal: Jen/Verhoff University Training Inc Search the menu Welcome Jen @ Employee Admin Tools MY REMINDERS MY ACCOUNT REPS డ్డి Employee Management Client Management Payroll Reports Employee Self-Service Employee Welcome MY PROFILE My Dashboard CALENDAR Pay History Jen Verhoff WOTC Questionnaire MAY 2025 jverhoff@threadhcm.com Payroll Due W2/ACA/1099 Forms Tu We Th Pay Date Employee Profile Employee Profile Picture Run Date - Off Cycle Run 13 14 15 16 17 20 21 22 23 24 12 11 Employee Messages 19 20 18 Company Information **Direct Deposits**



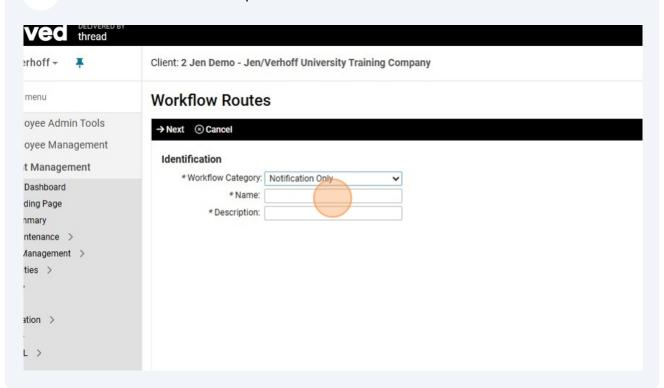




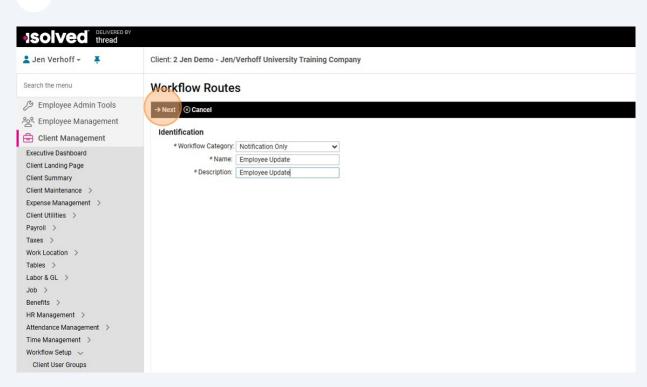
Select the "Notification Only" option.



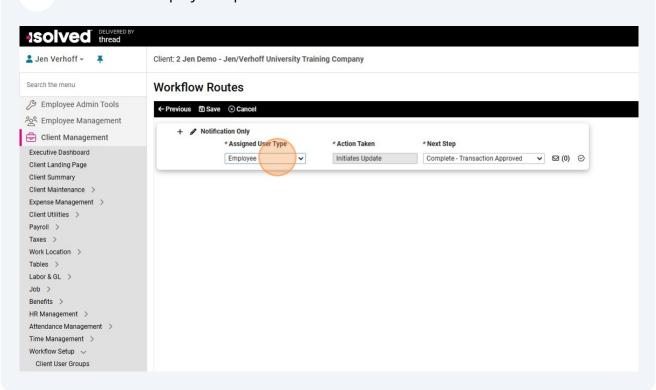
Enter a Name and Description for the new notification.



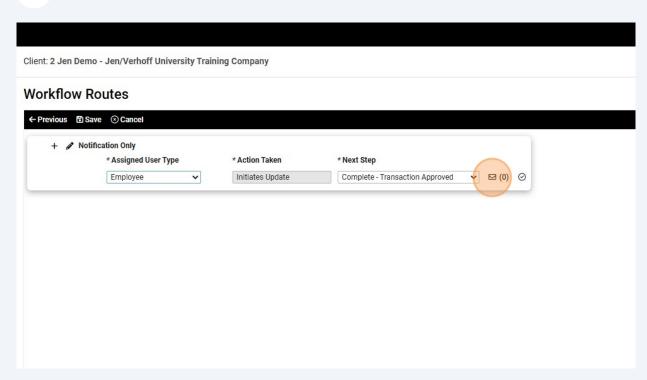
## 8 Click "Next"



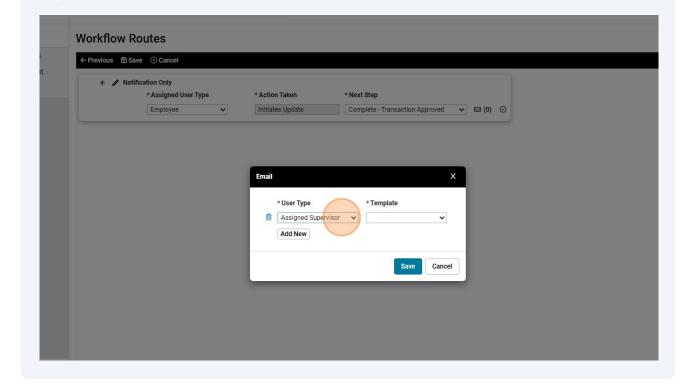
Select the "Employee" option.



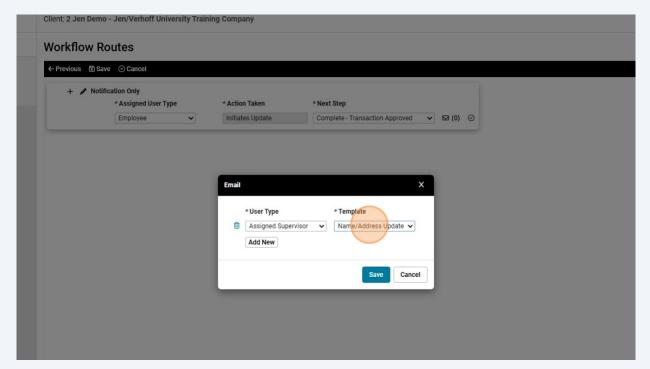
Click the Envelope icon.



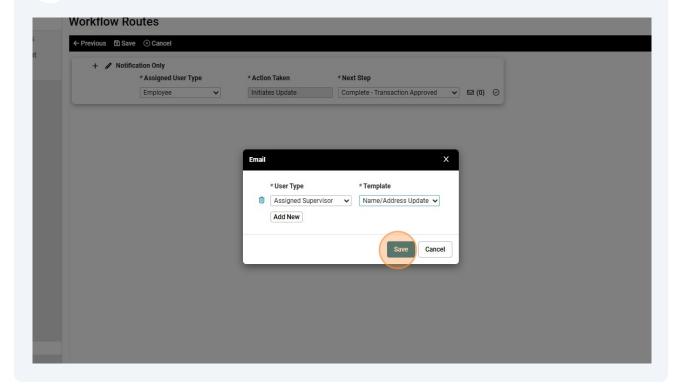
11 Select the user who should receive notification of the update/change.



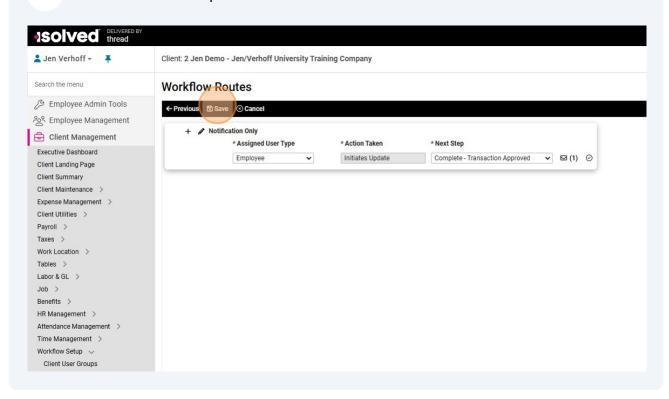
Select the E-mail template that best fits the notification option. \*\*If none fit, please see the "How to Create an Email Template" help document to create your own.

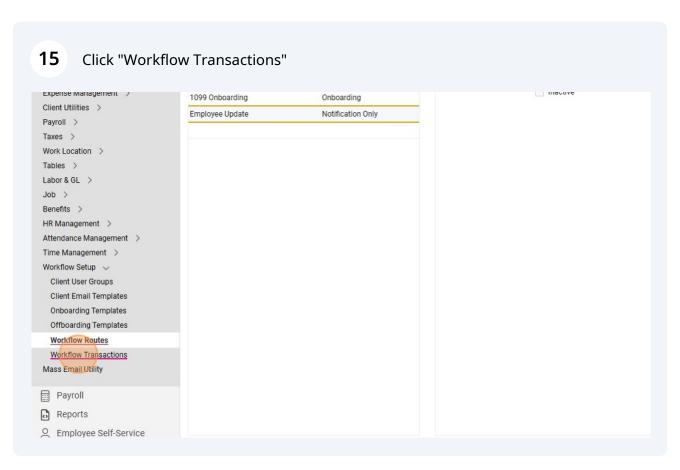


13 Click "Save" within the popup screen.



14 Click "Save" to complete the Workflow Route.





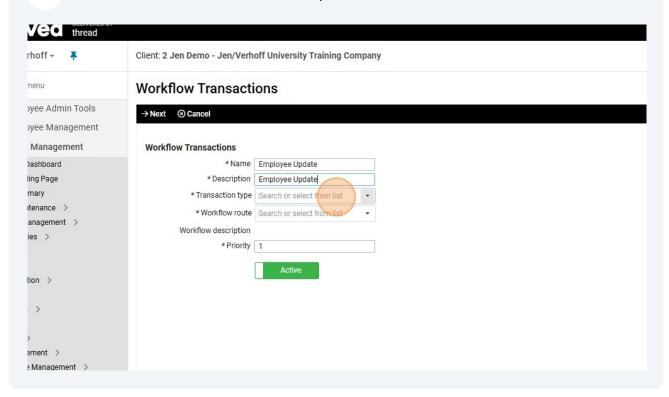
#### 16 Click "Add New" Isolved thread ≜ Jen Verhoff ▼ ▼ Client: 2 Jen Demo - Jen/Verhoff University Training Company Search the menu Workflow Transactions Employee Admin Tools + Add New VExpand All Groups Collapse All Groups Clear Grouping/Filters Employee Management Client Management Transaction Type 7 1 Name T 12 Description T Workflow Route **Eligibility Rules** Executive Dashboard Client Landing Page Status Active (1) Client Summary Employee Absences Time Off Request Time Off Requests Time Off Requests Active F/T Client Maintenance > Expense Management > Client Utilities > Payroll > Taxes > Work Location > Tables > Labor & GL >

Job >
Benefits >
HR Management >
Attendance Management >
Time Management >
Workflow Setup >
Client User Groups

Click the "Name" field to name the transaction similarly to the Workflow Route 17 DELIVERED BY thread **isolved** ≜ Jen Verhoff 

✓ Client: 2 Jen Demo - Jen/Verhoff University Training Company Search the menu Workflow Transactions Employee Admin Tools → Next ⊗ Cancel 208 Employee Management Client Management **Workflow Transactions** Executive Dashboard \* Name Client Landing Page \* Description Client Summary \* Transaction type | Search or select from list Client Maintenance > \* Workflow route | Search or select from list Expense Management > Workflow description Client Utilities > \* Priority 1 Payroll > Taxes > Work Location > Tables > Labor & GL > Job > Benefits > HR Management >

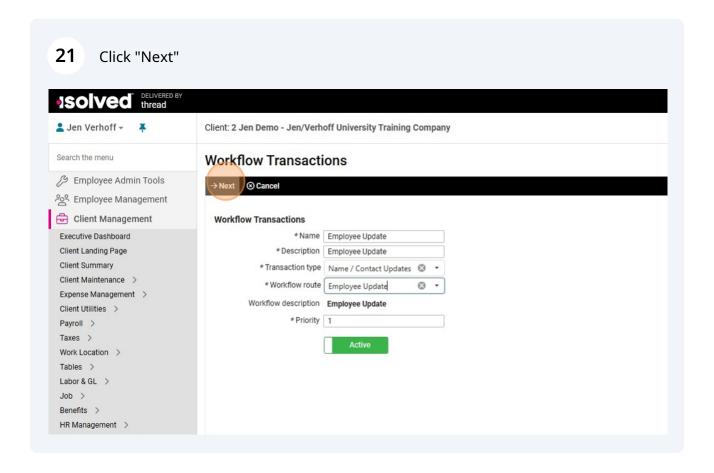
**18** Click this text field to enter a description.



19 Choose the Transaction Type that best fits with the Workflow Route setup. 2 Employee Management Client Management **Workflow Transactions** Executive Dashboard Client Landing Page \* Description | Employee Update Client Summary \* Transaction type Search or select from list Client Maintenance > \* Workflow route | Beneficiary Updates Expense Management > Workflow description Deferred Compensation Updates Direct Deposit transactions Client Utilities > \* Priority | Employee Absences Payroll > Employee Asset Updates Taxes > Employee Award Updates Work Location > Employee Certification Updates Tables > Employee Education Updates Labor & GL > Employee Job Updates Job > Employee Tax Category Updates HSA Bank Updates Benefits > HSA Election Updates HR Management > Name / Contact Updates Attendance Management > PCP Updates Time Management > Prior Employment Updates Workflow Setup ~ QTB Updates Client User Groups Salary transactions Client Email Templates Skills Updates Onboarding Templates Training Updates Offboarding Templates Workflow Routes Workflow Transactions Mass Email Utility

### 20 Attach the Workflow Route to the Transaction. n Verhoff -Client: 2 Jen Demo - Jen/Verhoff University Training Company h the menu Workflow Transactions Employee Admin Tools → Next ⊗ Cancel Employee Management **Workflow Transactions** Client Management utive Dashboard \* Name | Employee Update it Landing Page \* Description | Employee Update t Summary \* Transaction type Name / Contact Updates 😵 t Maintenance > \* Workflow route Search or select from list nse Management > Workflow description Employee Update t Utilities > \* Priority Time Off Request < Ilc s > Location > es > r&GL >

;fits >
fanagement >
ndance Management >



Click "Save" \*If no eligibility rule is applied, this Workflow will apply to all employees.

