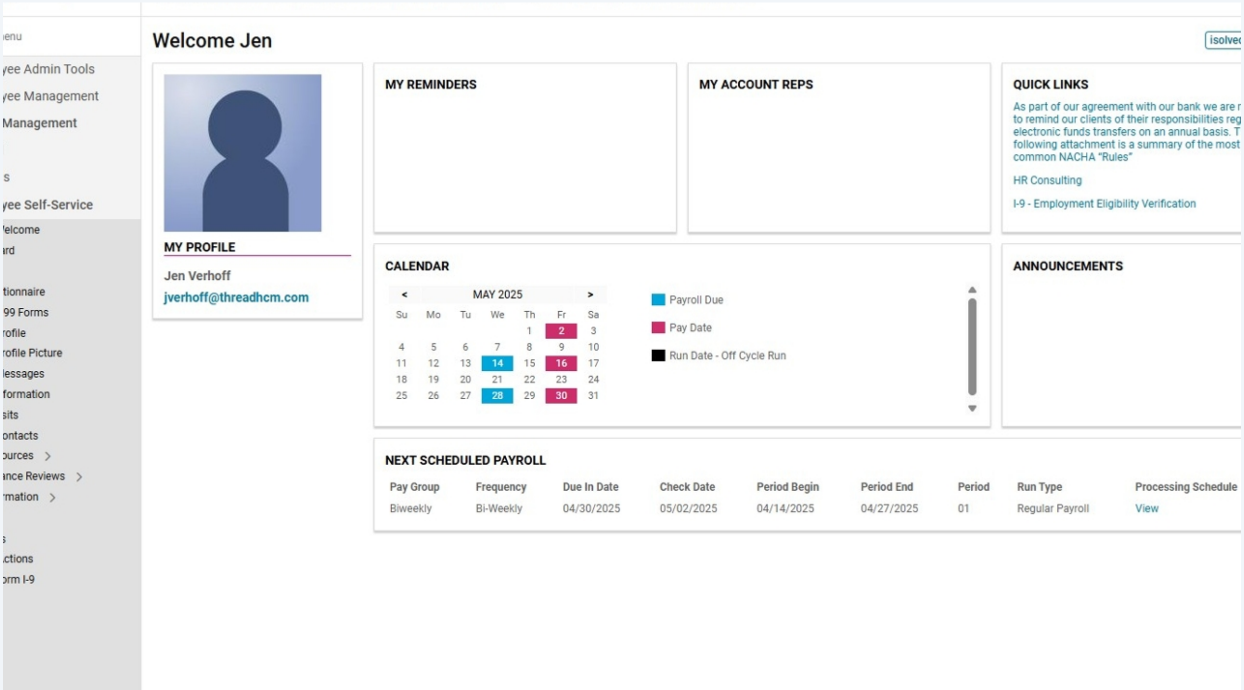
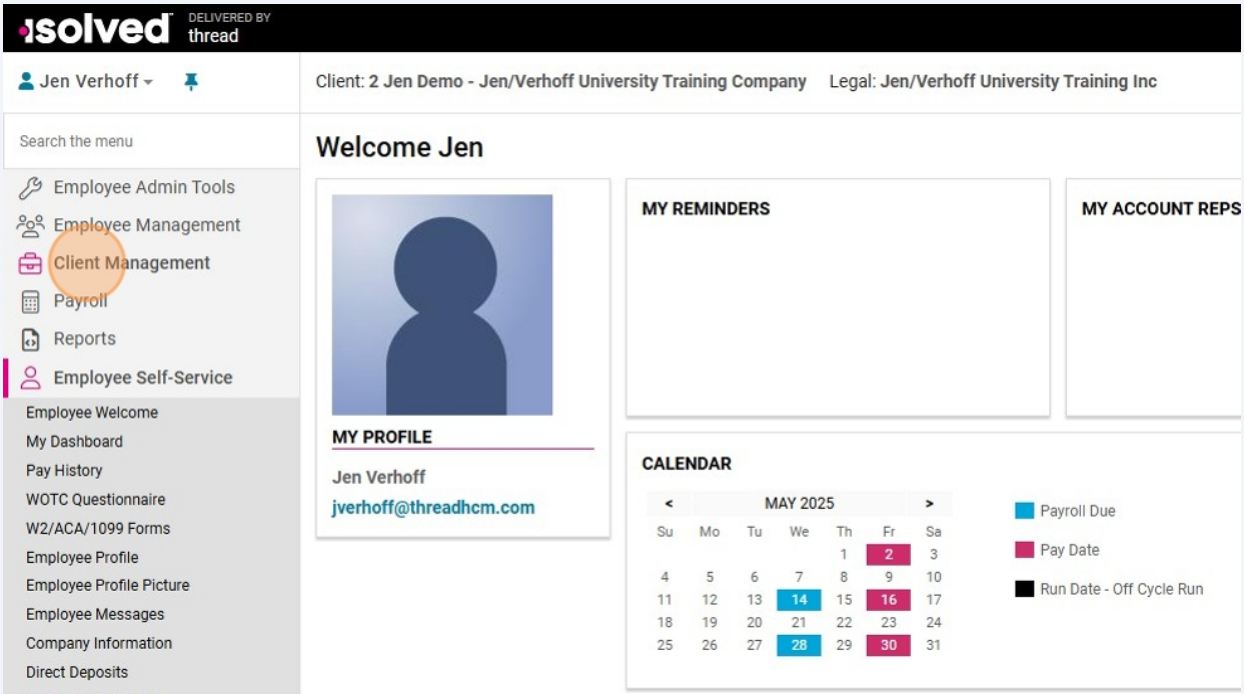
Creating Workflows

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

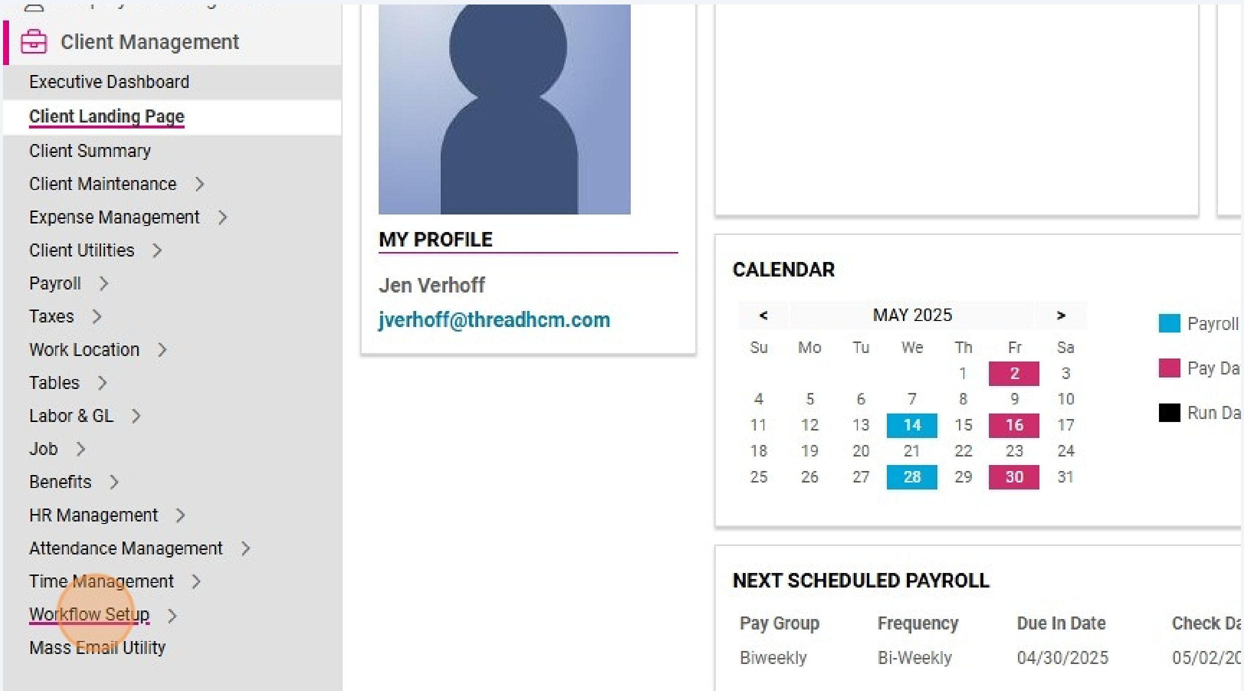
1 Navigate to https://connect.threadhcm.com/default.aspx



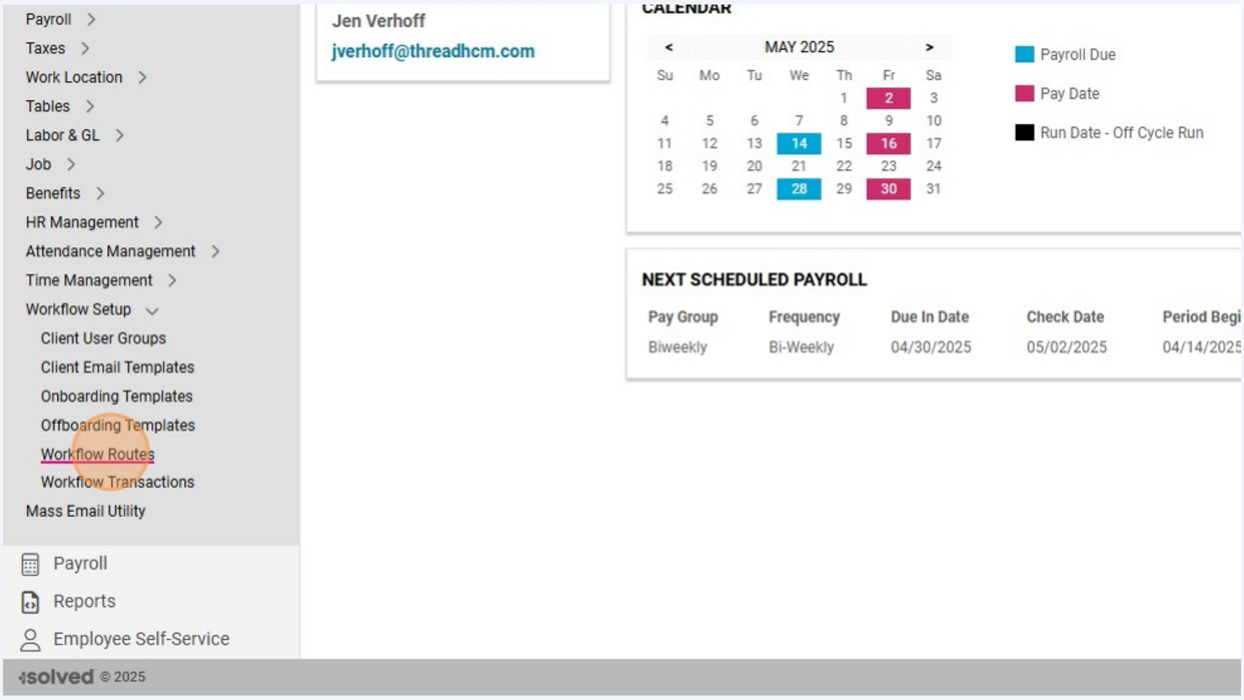
2 Click "Client Management"



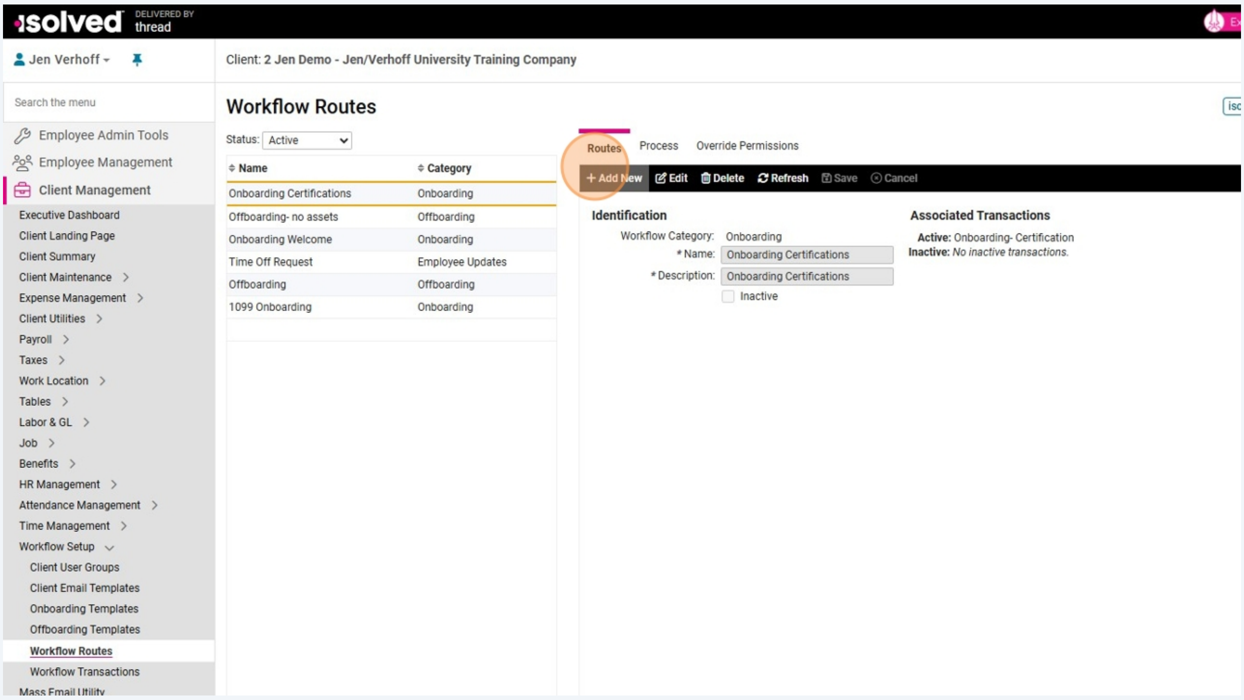
3 Click "Workflow Setup"



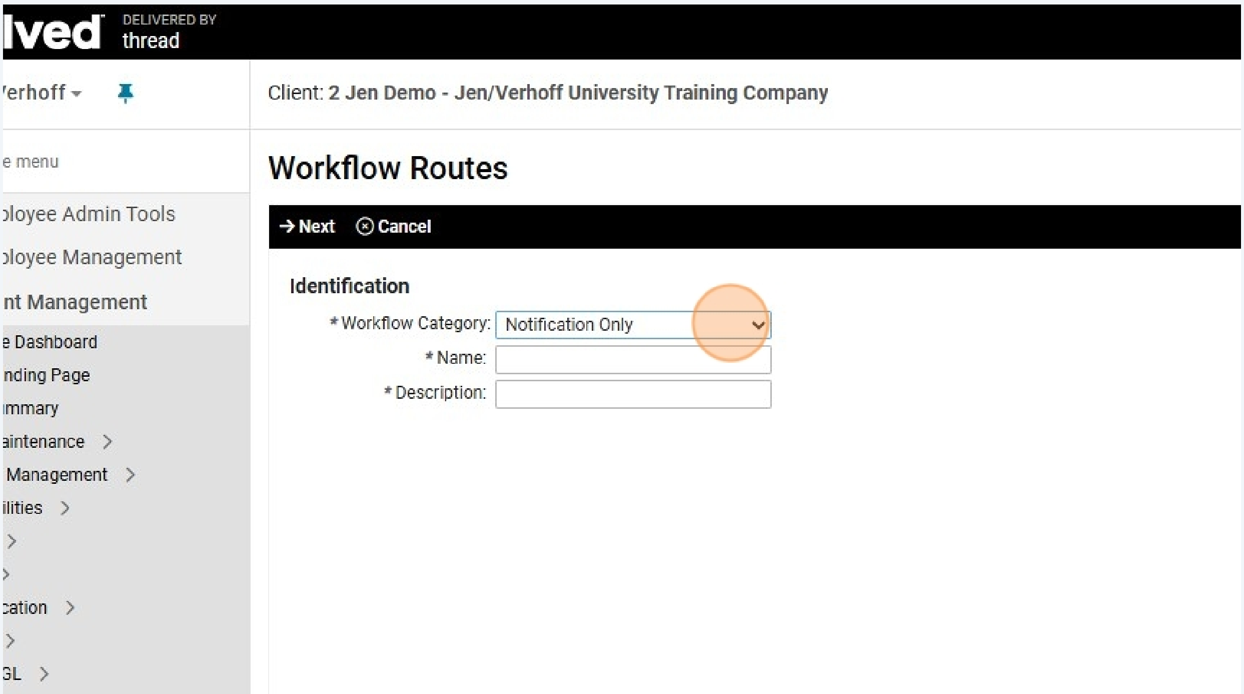
4 Click "Workflow Routes"



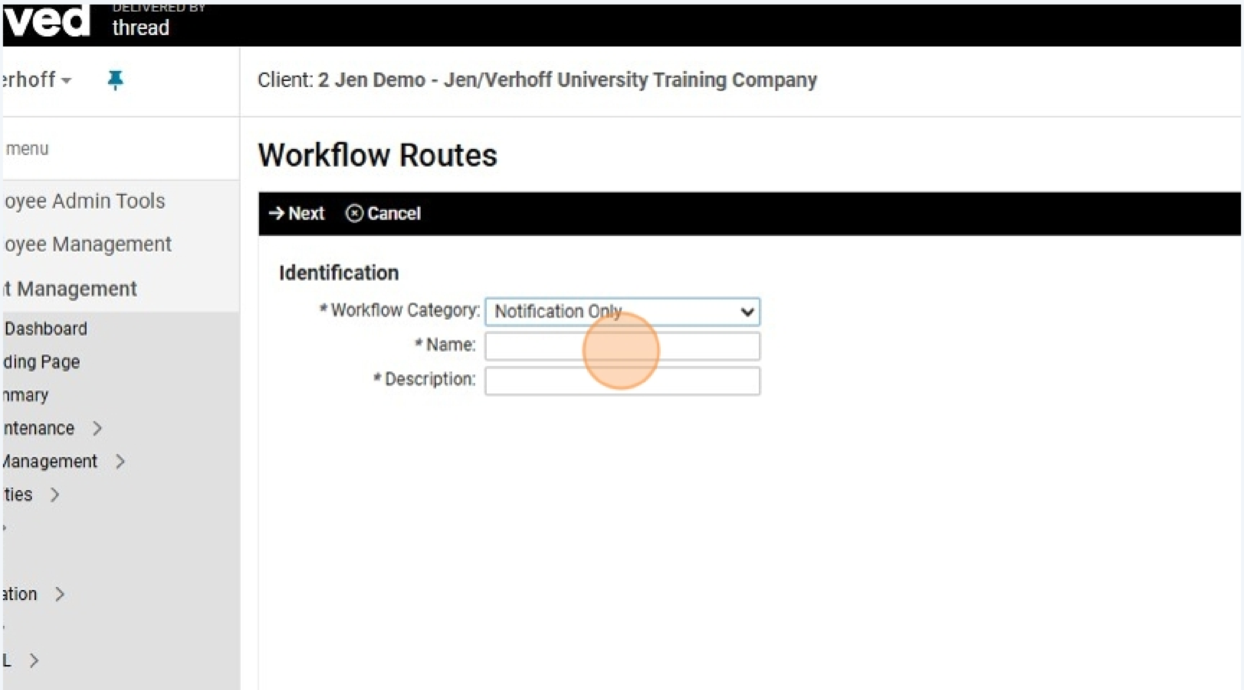
5 Click "Add New"



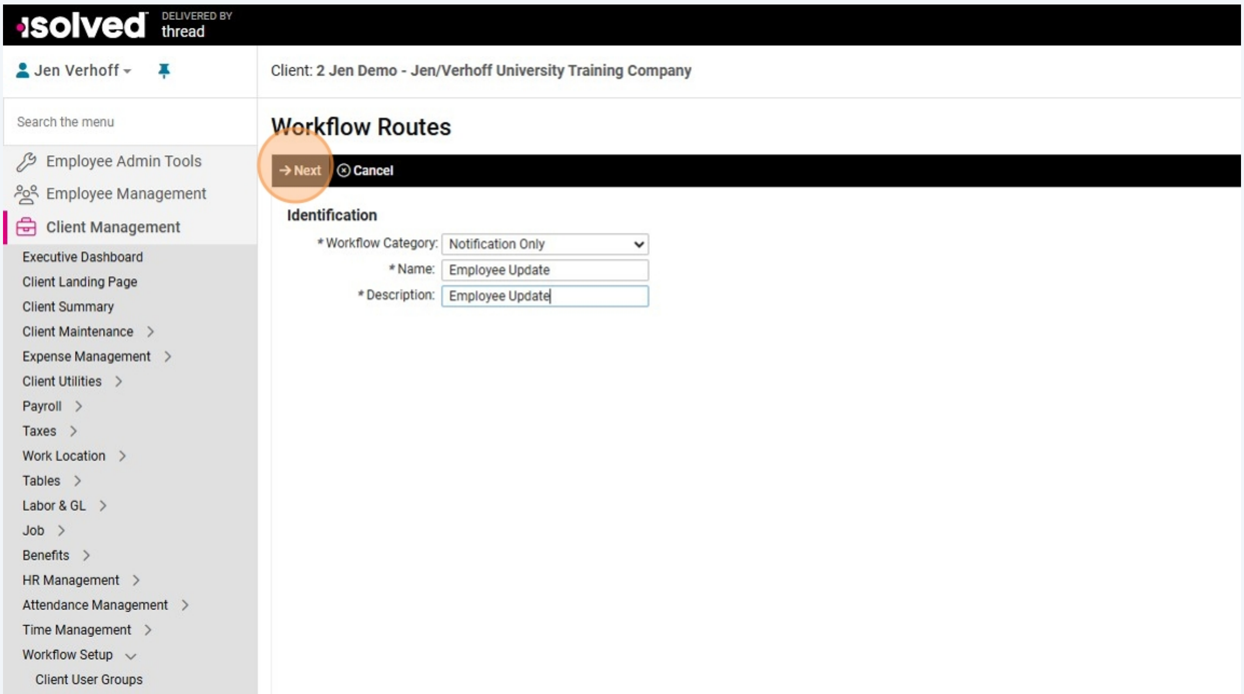
6 Select the "Notification Only" option.



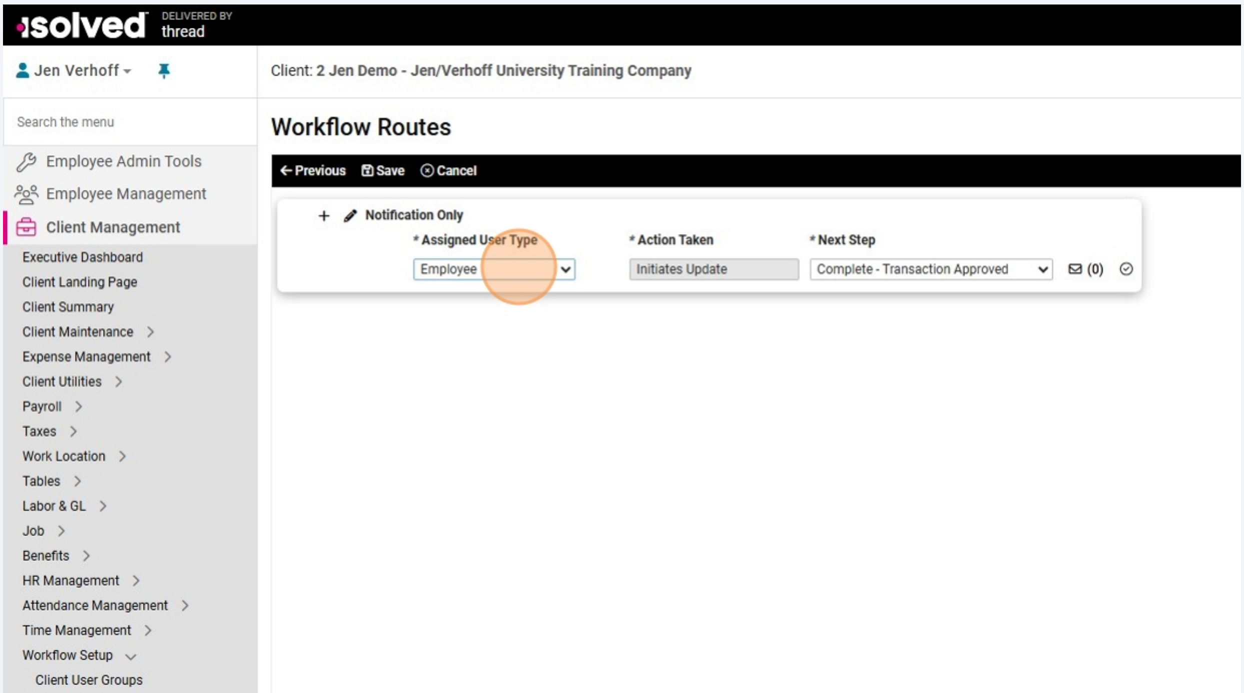
7 Enter a Name and Description for the new notification.



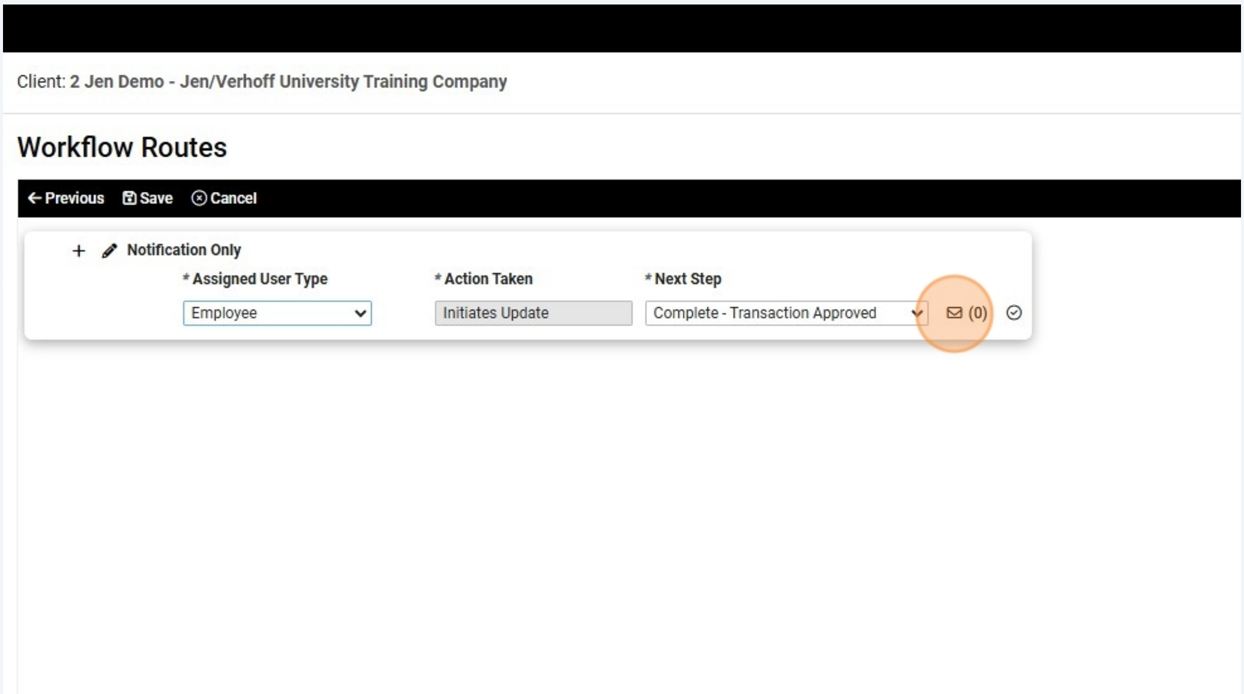
8 Click "Next"



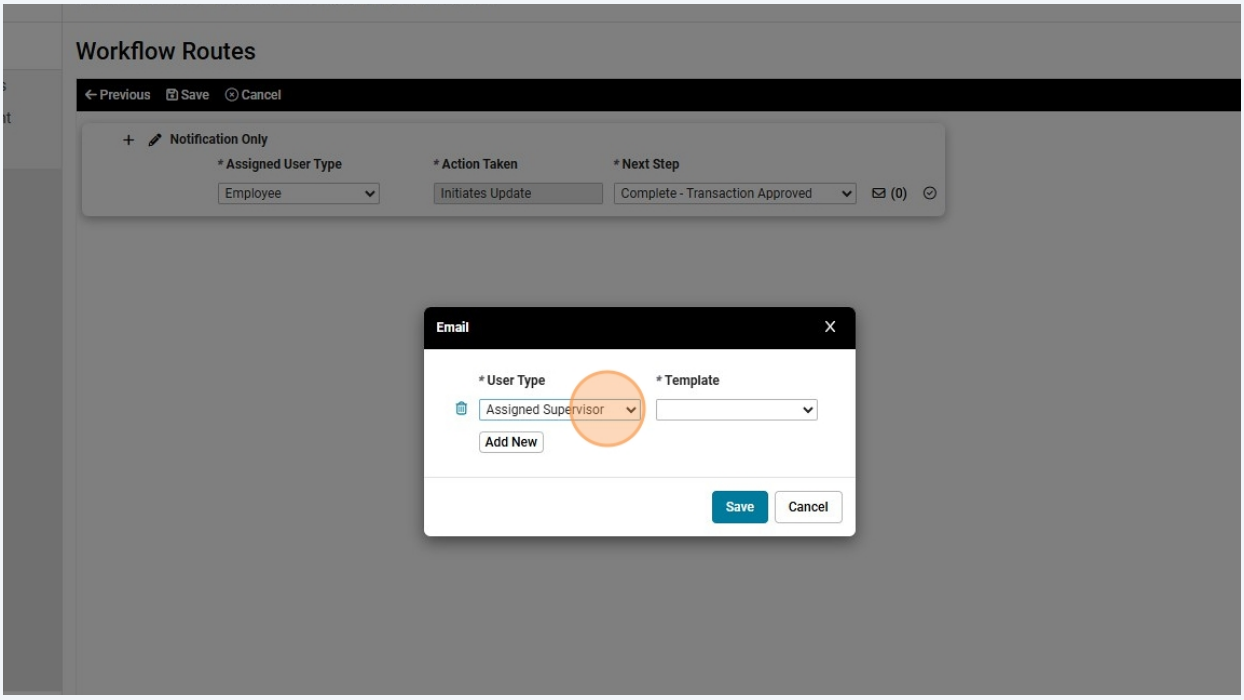
9 Select the "Employee" option.



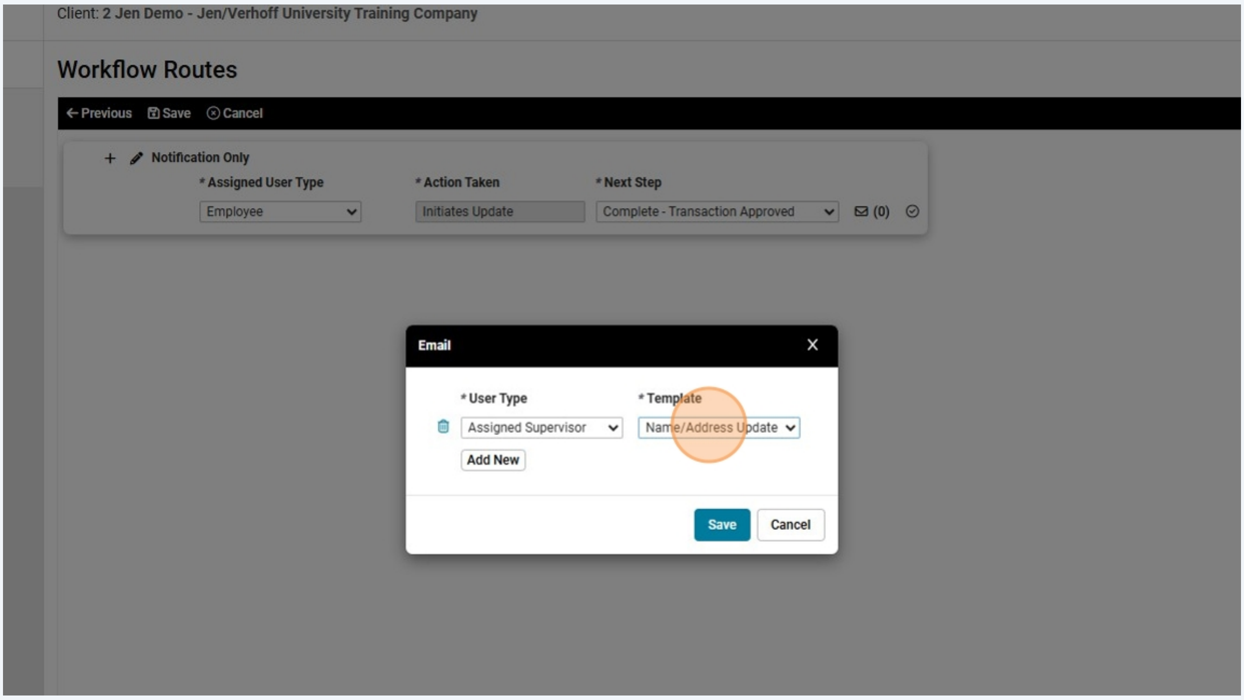
10 Click the Envelope icon.



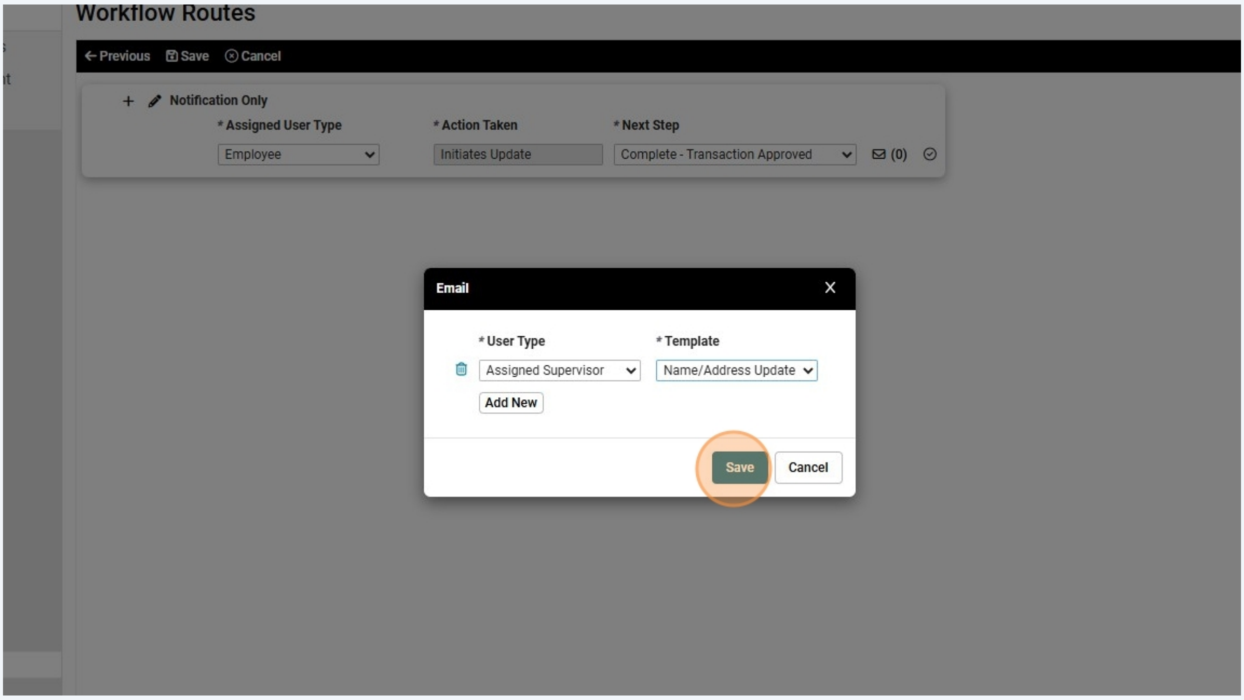
11 Select the user who should receive notification of the update/change.



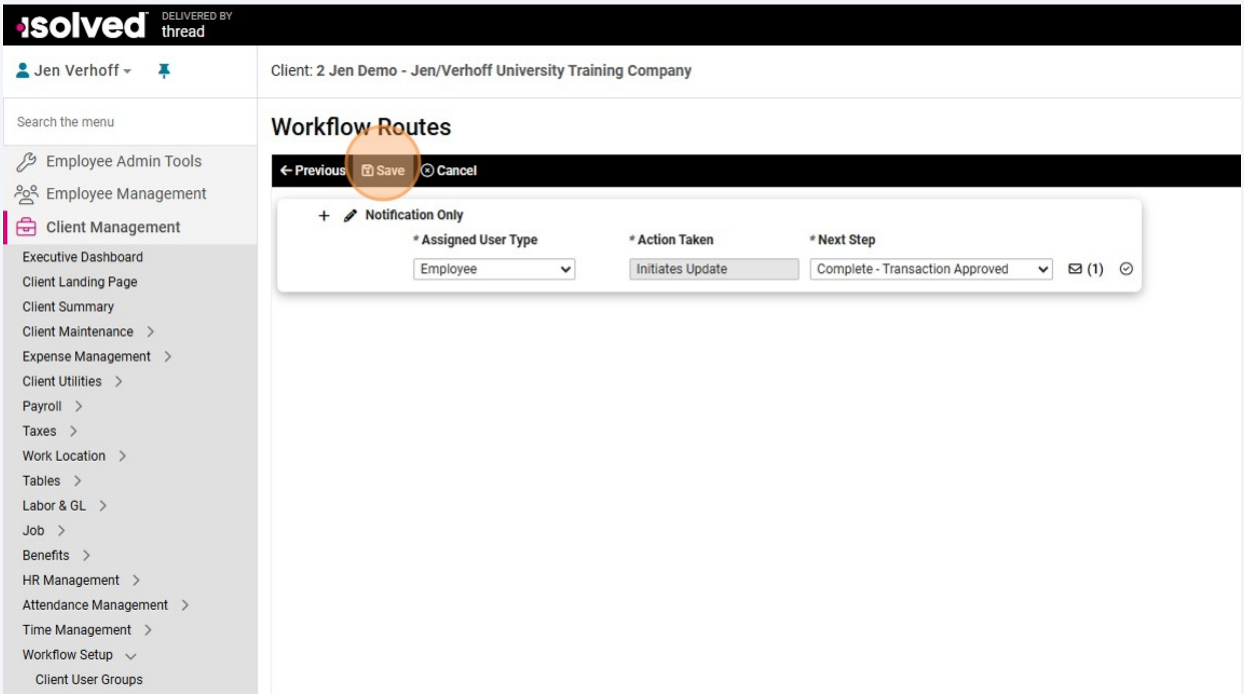
12 Select the E-mail template that best fits the notification option. **If none fit, please see the "How to Create an Email Template" help document to create your own.



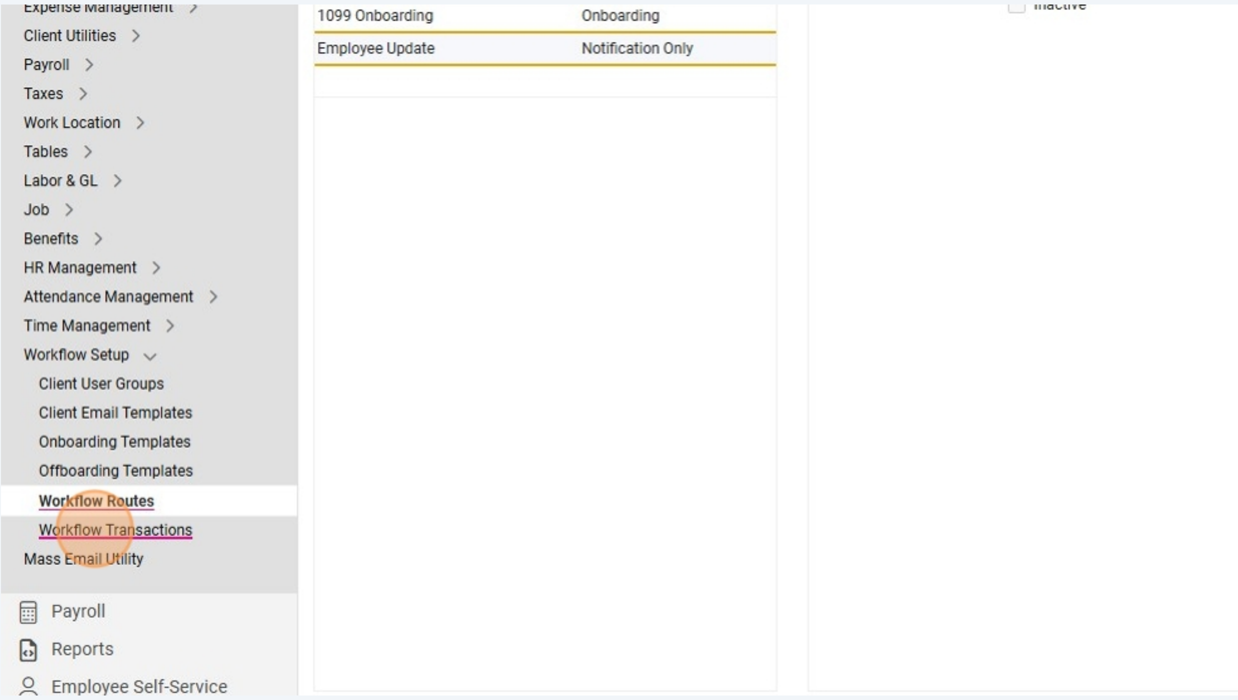
13 Click "Save" within the popup screen.



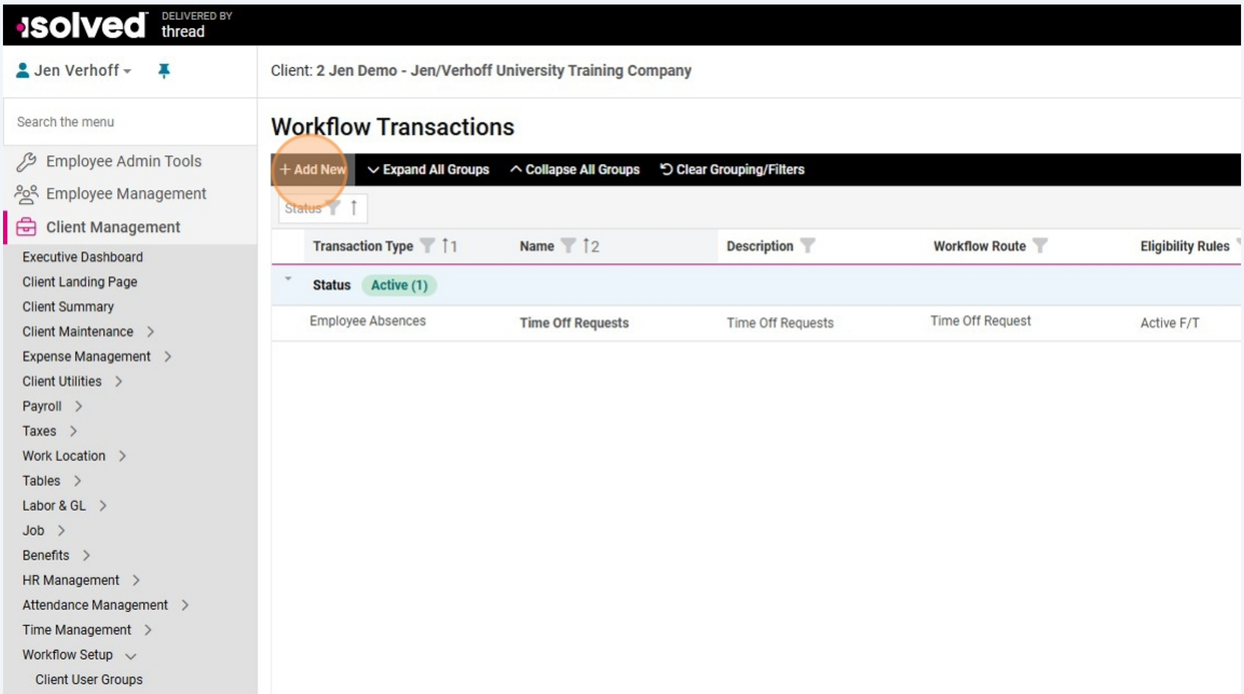
14 Click "Save" to complete the Workflow Route.



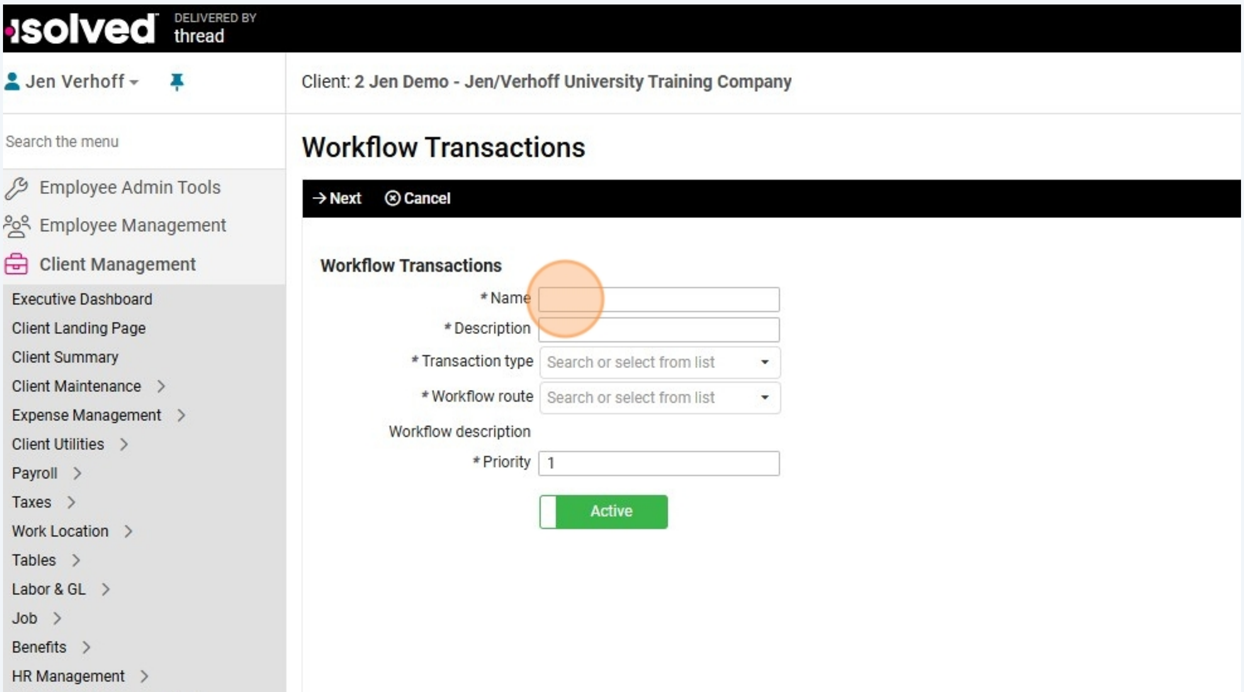
15 Click "Workflow Transactions"



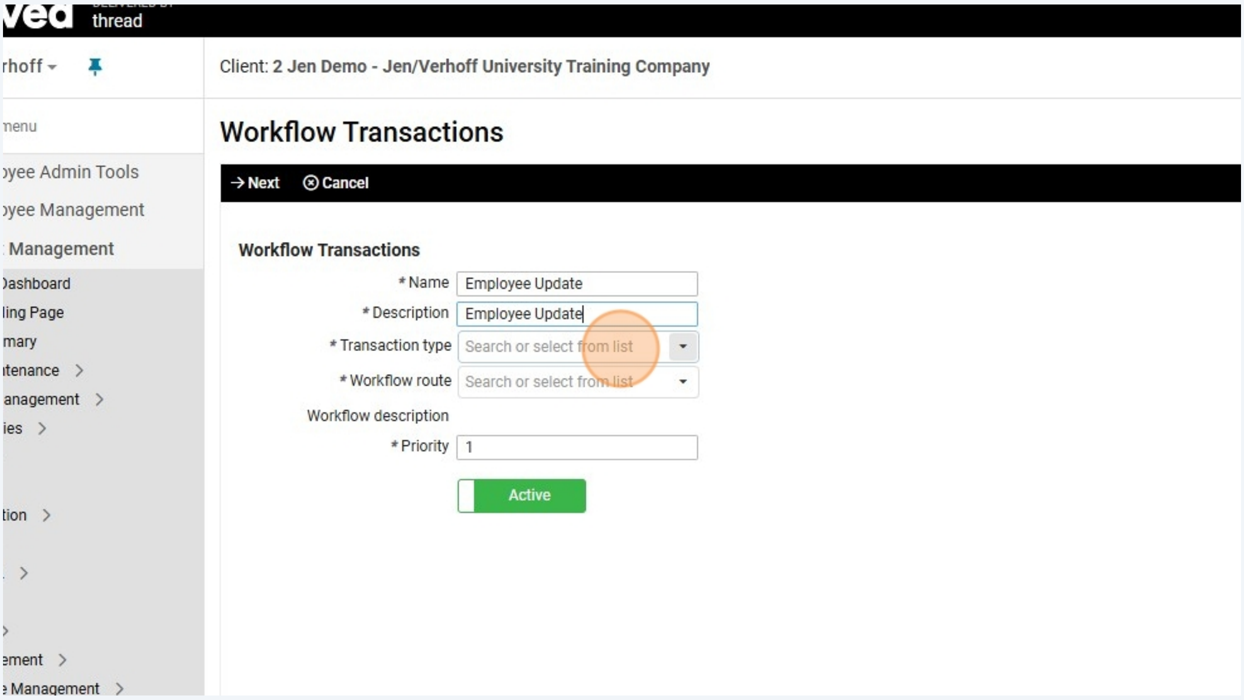
16 Click "Add New"



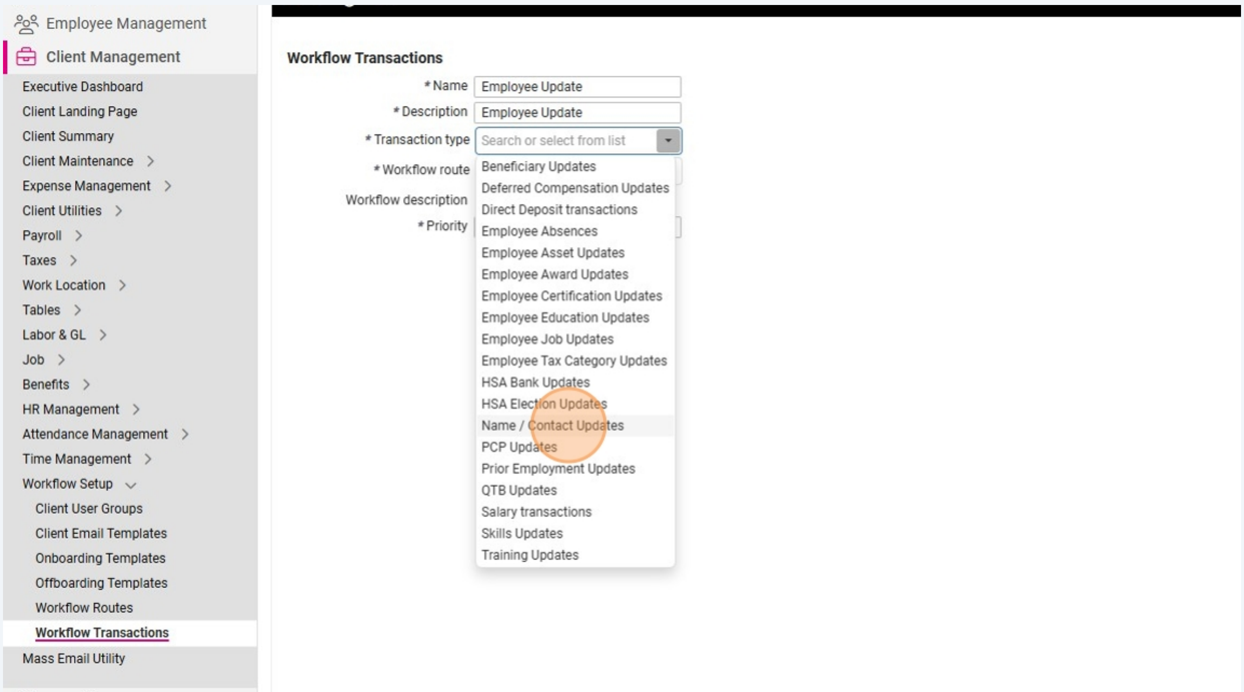
17 Click the "Name" field to name the transaction similarly to the Workflow Route name.



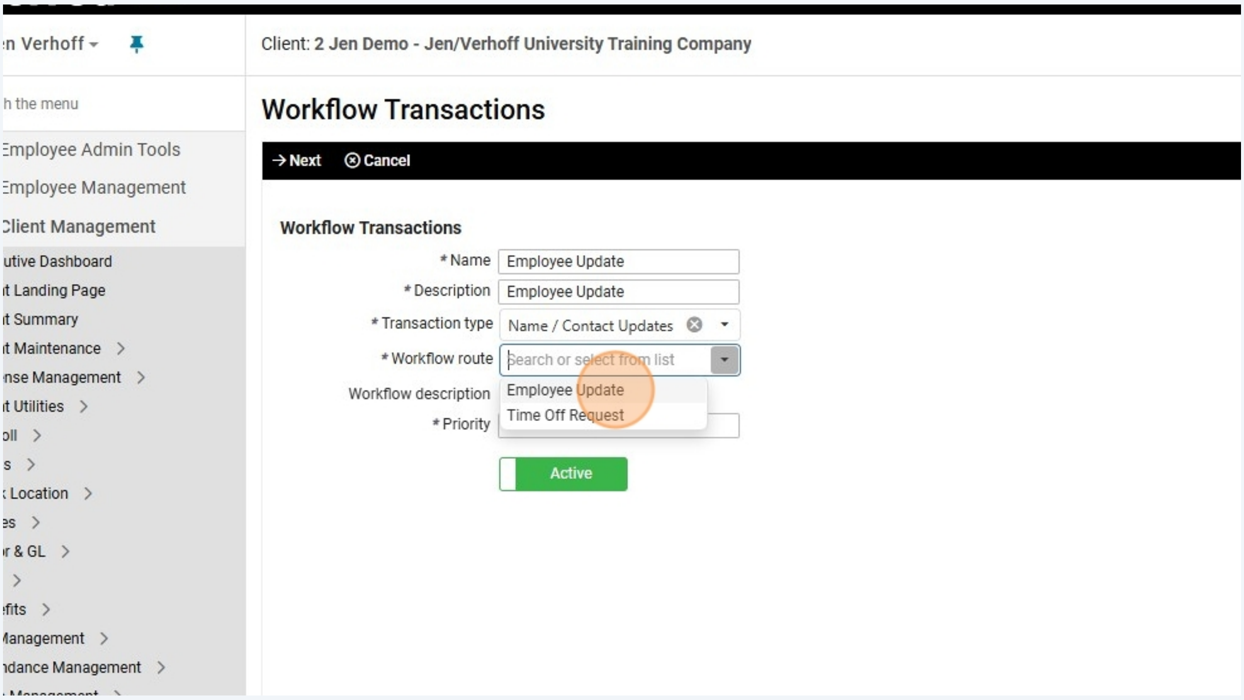
18 Click this text field to enter a description.



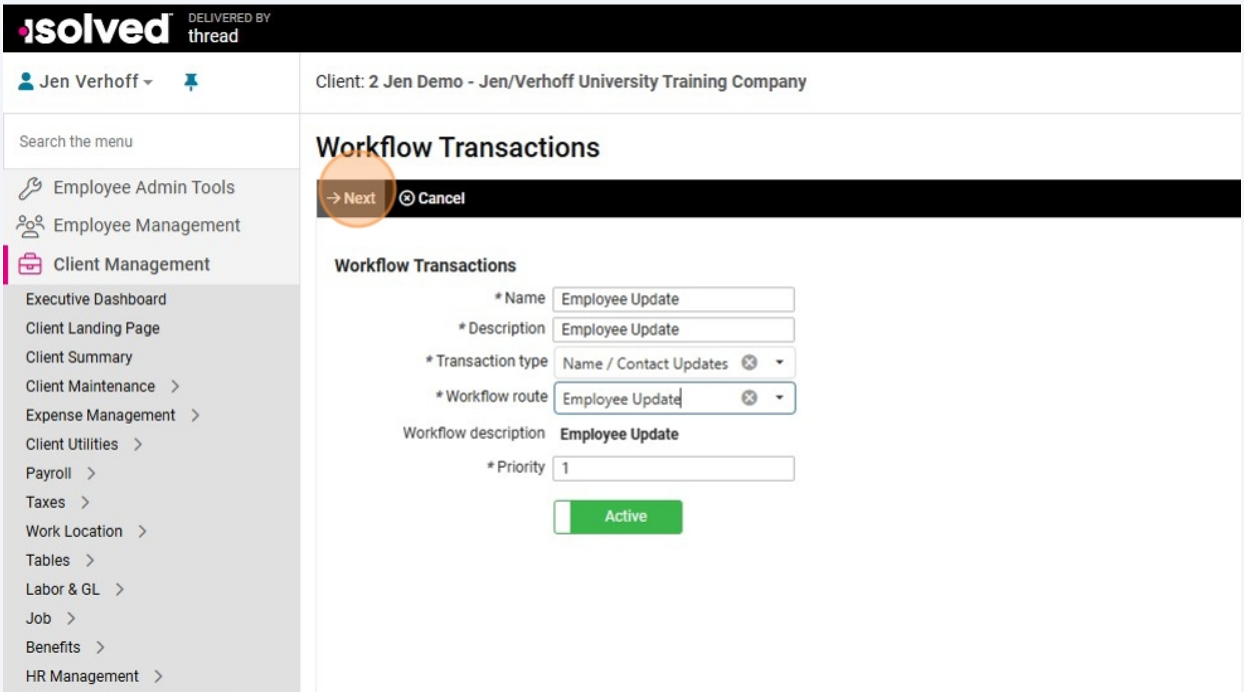
19 Choose the Transaction Type that best fits with the Workflow Route setup.



20 Attach the Workflow Route to the Transaction.



21 Click "Next"



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