

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>

The screenshot displays the Thread HCM user interface. On the left is a navigation menu with options like 'Menu', 'Employee Admin Tools', 'Employee Management', 'Self-Service', 'Welcome', 'My Profile', 'My Reminders', 'My Account Reps', 'Quick Links', 'Announcements', 'Calendar', and 'Next Scheduled Payroll'. The main content area is titled 'Welcome Jen' and features a user profile for Jen Verhoff with the email jverhoff@threadhcm.com. Below the profile is a 'MY PROFILE' section. To the right of the profile are two empty boxes for 'MY REMINDERS' and 'MY ACCOUNT REPS'. Further right is a 'QUICK LINKS' section with links for 'HR Consulting' and 'I-9 - Employment Eligibility Verification'. Below these is an 'ANNOUNCEMENTS' section. In the center is a 'CALENDAR' for May 2025, showing dates 1 through 31. A legend indicates that blue squares represent 'Payroll Due', pink squares represent 'Pay Date', and black squares represent 'Run Date - Off Cycle Run'. The calendar shows 'Payroll Due' on the 14th and 28th, and 'Pay Date' on the 2nd, 16th, and 30th. At the bottom is a 'NEXT SCHEDULED PAYROLL' table.

| Pay Group | Frequency | Due In Date | Check Date | Period Begin | Period End | Period | Run Type | Processing Schedule |
|-----------|-----------|-------------|------------|--------------|------------|--------|-----------------|----------------------|
| Biweekly | Bi-Weekly | 04/30/2025 | 05/02/2025 | 04/14/2025 | 04/27/2025 | 01 | Regular Payroll | View |

2 Click "Client Management"

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thread

Jen Verhoff ▾

Client: 2 Jen Demo - Jen/Verhoff University Training Company Legal: Jen/Verhoff University Training Inc

Search the menu

Employee Admin Tools

Employee Management

Client Management

Payroll

Reports

Employee Self-Service

Employee Welcome

My Dashboard

Pay History

WOTC Questionnaire

W2/ACA/1099 Forms

Employee Profile


Employee Profile Picture

Employee Messages

Company Information

Direct Deposits

Welcome Jen



MY PROFILE
Jen Verhoff
jverhoff@threadhcm.com

MY REMINDERS

MY ACCOUNT REPS

CALENDAR

< MAY 2025 >

| | | | | | | |
|----|----|----|----|----|----|----|
| Su | Mo | Tu | We | Th | Fr | Sa |
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

Payroll Due

Pay Date

Run Date - Off Cycle Run

3 Click "Workflow Setup"

Client Management

Executive Dashboard

Client Landing Page

Client Summary

Client Maintenance >

Expense Management >

Client Utilities >

Payroll >

Taxes >

Work Location >

Tables >

Labor & GL >

Job >

Benefits >


HR Management >

Attendance Management >

Time Management >

Workflow Setup >

Mass Email Utility



MY PROFILE
Jen Verhoff
jverhoff@threadhcm.com

CALENDAR

< MAY 2025 >

| | | | | | | |
|----|----|----|----|----|----|----|
| Su | Mo | Tu | We | Th | Fr | Sa |
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

Payroll

Pay Da

Run Da

NEXT SCHEDULED PAYROLL

| | | | |
|-----------|-----------|-------------|----------|
| Pay Group | Frequency | Due In Date | Check D |
| Biweekly | Bi-Weekly | 04/30/2025 | 05/02/20 |

4 Click "Workflow Routes"

Payroll >

Taxes >

Work Location >

Tables >

Labor & GL >

Job >

Benefits >

HR Management >

Attendance Management >

Time Management >

Workflow Setup >

Client User Groups

Client Email Templates

Onboarding Templates

Offboarding Templates

Workflow Routes

Workflow Transactions

Mass Email Utility

Jen Verhoff

jverhoff@threadhcm.com

CALENDAR

<

MAY 2025

>

| | | | | | | |
|----|----|----|----|----|----|----|
| Su | Mo | Tu | We | Th | Fr | Sa |
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

Payroll Due

Pay Date

Run Date - Off Cycle Run

NEXT SCHEDULED PAYROLL

| Pay Group | Frequency | Due In Date | Check Date | Period Begi |
|-----------|-----------|-------------|------------|-------------|
| Biweekly | Bi-Weekly | 04/30/2025 | 05/02/2025 | 04/14/2025 |

Payroll

Reports

Employee Self-Service

isolved

© 2025

5 Click "Add New"

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Client: 2 Jen Demo - Jen/Verhoff University Training Company

Search the menu

Employee Admin Tools

Employee Management

Client Management

Executive Dashboard

Client Landing Page

Client Summary

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

Client Email Templates

Onboarding Templates

Offboarding Templates

Workflow Routes

Workflow Transactions

Mass Email Utility

Workflow Routes

Status: Active

| Name | Category |
|---------------------------|------------------|
| Onboarding Certifications | Onboarding |
| Offboarding- no assets | Offboarding |
| Onboarding Welcome | Onboarding |
| Time Off Request | Employee Updates |
| Offboarding | Offboarding |
| 1099 Onboarding | Onboarding |

Routes

Process

Override Permissions

+ Add New

Edit

Delete

Refresh

Save

Cancel

Identification

Workflow Category: Onboarding

* Name: Onboarding Certifications

* Description: Onboarding Certifications

Inactive

Associated Transactions

Active: Onboarding- Certification

Inactive: No inactive transactions.

6 Select the "Notification Only" option.

Verhoff ▾

Menu

Employee Admin Tools

Employee Management

Content Management

Dashboard

Ending Page

Summary

Maintenance >

Management >

Utilities >

>

>

Location >

>

GL >

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Workflow Routes

→ Next ⌂ Cancel

Identification

* Workflow Category: Notification Only ▾

* Name:

* Description:

7 Enter a Name and Description for the new notification.

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Menu

Employee Admin Tools

Employee Management

Content Management

Dashboard

Ending Page

Summary

Maintenance >

Management >

Utilities >

>

>

Location >

>

GL >

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Workflow Routes

→ Next ⌂ Cancel

Identification

* Workflow Category: Notification Only ▾

* Name:

* Description:

8 Click "Next"

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Search the menu

- Employee Admin Tools
- Employee Management
- Client Management**
 - Executive Dashboard
 - Client Landing Page
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 - Expense Management >
 - Client Utilities >
 - Payroll >
 - Taxes >
 - Work Location >
 - Tables >
 - Labor & GL >
 - Job >
 - Benefits >
 - HR Management >
 - Attendance Management >
 - Time Management >
 - Workflow Setup >
 - Client User Groups

Workflow Routes

→ Next ⌛ Cancel

Identification

* Workflow Category: Notification Only

* Name: Employee Update

* Description: Employee Update

9 Select the "Employee" option.

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Search the menu

- Employee Admin Tools
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 - Client User Groups

Workflow Routes

← Previous ⌨ Save ⌛ Cancel

+ Notification Only

| * Assigned User Type | * Action Taken | * Next Step |
|----------------------|------------------|---------------------------------|
| Employee | Initiates Update | Complete - Transaction Approved |

⌛ (0) ⌛

10 Click the Envelope icon.

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Workflow Routes

← Previous Save Cancel

+ Notification Only

* Assigned User Type

Employee

* Action Taken

Initiates Update

* Next Step

Complete - Transaction Approved

✉ (0)

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

Workflow Routes

← Previous Save Cancel

+ Notification Only

* Assigned User Type

Employee

* Action Taken

Initiates Update

* Next Step

Complete - Transaction Approved

✉ (0)

Email

* User Type

Assigned Supervisor

* Template

Add New

Save

Cancel

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.

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Workflow Routes

← Previous Save Cancel

+ Notification Only

* Assigned User Type Employee

* Action Taken Initiates Update

* Next Step Complete - Transaction Approved

✉ (0)

Email

* User Type Assigned Supervisor

* Template Name/Address Update

Add New

Save Cancel

13

Click "Save" within the popup screen.

Workflow Routes

← Previous Save Cancel

+ Notification Only

* Assigned User Type Employee

* Action Taken Initiates Update

* Next Step Complete - Transaction Approved

✉ (0)

Email

* User Type Assigned Supervisor

* Template Name/Address Update

Add New

Save Cancel

14 Click "Save" to complete the Workflow Route.

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Search the menu

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 - Tables >
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 - Job >
 - Benefits >
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 - Attendance Management >
 - Time Management >
 - Workflow Setup ▾
 - Client User Groups

Workflow Routes

← Previous **Save** Cancel

+ **Notification Only**

| * Assigned User Type | * Action Taken | * Next Step |
|----------------------|------------------|---|
| Employee ▾ | Initiates Update | Complete - Transaction Approved ▾ (1) ⌚ |

15 Click "Workflow Transactions"

| | | | |
|------------------------------|-----------------|-------------------|--|
| Expense Management > | 1099 Onboarding | Onboarding | |
| Client Utilities > | Employee Update | Notification Only | |
| Payroll > | | | |
| Taxes > | | | |
| Work Location > | | | |
| Tables > | | | |
| Labor & GL > | | | |
| Job > | | | |
| Benefits > | | | |
| HR Management > | | | |
| Attendance Management > | | | |
| Time Management > | | | |
| Workflow Setup ▾ | | | |
| Client User Groups | | | |
| Client Email Templates | | | |
| Onboarding Templates | | | |
| Offboarding Templates | | | |
| Workflow Routes | | | |
| Workflow Transactions | | | |
| Mass Email Utility | | | |
| Payroll | | | |
| Reports | | | |
| Employee Self-Service | | | |

16 Click "Add New"

isolved DELIVERED BY thread

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Client: 2 Jen Demo - Jen/Verhoff University Training Company

Search the menu

- Employee Admin Tools
- Employee Management
- Client Management**
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 - Client Summary
 - 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

Workflow Transactions

+ Add New ▾ Expand All Groups ^ Collapse All Groups ↻ Clear Grouping/Filters

Status ▾ ↑

| Transaction Type ▾ ↑ 1 | Name ▾ ↑ 2 | Description ▾ | Workflow Route ▾ | Eligibility Rules ▾ |
|--------------------------|-------------------|-------------------|------------------|---------------------|
| Status Active (1) | | | | |
| Employee Absences | Time Off Requests | Time Off Requests | Time Off Request | Active F/T |

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

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Search the menu

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 - Labor & GL >
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 - Benefits >
 - HR Management >

Workflow Transactions

→ Next ⏹ Cancel

Workflow Transactions

* Name

* Description

* Transaction type


* Workflow route


Workflow description

* Priority

☐ Active

18 Click this text field to enter a description.

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menu

Workflow Transactions

→ Next ⌂ Cancel

Workflow Transactions

* Name Employee Update

* Description Employee Update

* Transaction type Search or select from list

* Workflow route Search or select from list

Workflow description

* Priority 1

Active

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

Employee Management

Client Management

Executive Dashboard

Client Landing Page

Client Summary

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

Client Email Templates

Onboarding Templates

Offboarding Templates

Workflow Routes

Workflow Transactions

Mass Email Utility

Workflow Transactions

* Name Employee Update

* Description Employee Update

* Transaction type Search or select from list

* Workflow route Beneficiary Updates

Deferred Compensation Updates

Direct Deposit transactions

Employee Absences

Employee Asset Updates

Employee Award Updates

Employee Certification Updates

Employee Education Updates

Employee Job Updates

Employee Tax Category Updates

HSA Bank Updates

HSA Election Updates

Name / Contact Updates

PCP Updates

Prior Employment Updates

QTB Updates

Salary transactions

Skills Updates

Training Updates

20 Attach the Workflow Route to the Transaction.

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Search the menu

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- Taxes >
- Work Location >
- Tables >
- Labor & GL >
- Job >
- Benefits >
- HR Management >

Workflow Transactions

→ Next ⌛ Cancel

Workflow Transactions

* Name Employee Update

* Description Employee Update

* Transaction type Name / Contact Updates ⌛

* Workflow route Search or select from list ⌛

Workflow description Employee Update

* Priority Time Off Request

Active

21 Click "Next"

isolved DELIVERED BY thread

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Client: 2 Jen Demo - Jen/Verhoff University Training Company

Search the menu

- Employee Admin Tools
- Employee Management
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- Tables >
- Labor & GL >
- Job >
- Benefits >
- HR Management >

Workflow Transactions

→ Next ⌛ Cancel

Workflow Transactions

* Name Employee Update

* Description Employee Update

* Transaction type Name / Contact Updates ⌛

* Workflow route Employee Update ⌛

Workflow description Employee Update

* Priority 1

Active

22

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

isolved DELIVERED BY thread

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Search the menu

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 - Onboarding Templates
 - Offboarding Templates
 - Workflow Routes
 - Workflow Transactions**
 - Mass Email Utility

Workflow Transactions

← Previous **Save** Cancel

Workflow Rule: **Employee Update**

Eligibility Rules

Included Eligibility Rules are applied to employees. Employees meeting any of the Eligibility Rules selected will be included in this workflow.

Available Rules:

Active F/T

Selected Rules:

Eligible Employees

Report Export