

Setting up Workflows for Approval



This guide walks through setting up workflows and workflow transactions for approvals connected to employee updates.

1

Navigate to <https://connect.threadhcm.com/default.aspx>

Menu

Employee Admin Tools

Employee Management

Management

Dashboard

My Page

History

Performance >

Management >

Tools >

Reports >

Settings >

Help >

Logout

Welcome Jen

MY PROFILE
Jen Verhoff
jverhoff@threadhcm.com

MY REMINDERS

MY ACCOUNT REPS

QUICK LINKS
As part of our agreement with our bank we are required to remind our clients of their responsibilities regarding electronic funds transfers on an annual basis. The following attachment is a summary of the most common NACHA "Rules"
[HR Consulting](#)
[I-9 - Employment Eligibility Verification](#)

ANNOUNCEMENTS

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 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 "Workflow Setup"

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** >
 - Mass Email Utility
- Payroll
- Reports
- Employee Self-Service

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jverhoff@threadhcm.com

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QUICK LINKS

As part of our agreement with o to remind our clients of their res electronic funds transfers on an following attachment is a summ common NACHA "Rules"

HR Consulting
I-9 - Employment Eligibility Verif

ANNOUNCEMENTS

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 Begin	Period End	Period	Run Type	Process
Biweekly	Bi-Weekly	04/30/2025	05/02/2025	04/14/2025	04/27/2025	01	Regular Payroll	View

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3 Click "Workflow Routes"

Employee Admin Tools

- Employee Management
- Client Management**
 - Executive Dashboard
 - Client Landing Page
 - Client Summary
 - Client Maintenance >
 - Expense Management >
 - Client Utilities >
 - Payroll >
 - Taxes >
 - Work Location >
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 - Labor & GL >
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 - HR Management >
 - Attendance Management >
 - Time Management >
 - Workflow Setup >
 - Client User Groups
 - Client Email Templates
 - Onboarding Templates
 - Onboarding Templates
 - Workflow Routes**
 - Workflow Transactions
 - Mass Email Utility
- Payroll
- Reports
- Employee Self-Service

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ANNOUNCEMENTS

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 Begin	Period End	Period	Run Type	Process
Biweekly	Bi-Weekly	04/30/2025	05/02/2025	04/14/2025	04/27/2025	01	Regular Payroll	View

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4 Click "Add New"

The screenshot shows the 'Workflow Routes' page in the 'isolved' system. The left sidebar contains a menu with options like 'Employee Admin Tools', 'Employee Management', and 'Client Management'. The main content area has a 'Workflow Routes' section with a table of routes. The 'Add New' button is highlighted with an orange circle. Below the table, there is an 'Identification' section with fields for 'Workflow Category', 'Name', and 'Description'. The 'Workflow Category' is set to 'Onboarding'. The 'Name' field contains 'Onboarding Certifications'. The 'Description' field contains 'Onboarding Certifications'. There is also an 'Inactive' checkbox.

Name	Category
Onboarding Certifications	Onboarding
Offboarding- no assets	Offboarding
Onboarding Welcome	Onboarding
Time Off Request	Employee Updates
Offboarding	Offboarding
1099 Onboarding	Onboarding
Employee Update	Notification Only

5 Select the "Employee Updates" option.

The screenshot shows the 'Workflow Routes' page in the 'isolved' system. The left sidebar contains a menu with options like 'Employee Admin Tools', 'Employee Management', and 'Client Management'. The main content area has a 'Workflow Routes' section with a table of routes. The 'Add New' button is highlighted with an orange circle. Below the table, there is an 'Identification' section with fields for 'Workflow Category', 'Name', and 'Description'. The 'Workflow Category' dropdown menu is open, and 'Employee Updates' is selected. The 'Name' field is empty. The 'Description' field is empty.

Name	Category
Onboarding Certifications	Onboarding
Offboarding- no assets	Offboarding
Onboarding Welcome	Onboarding
Time Off Request	Employee Updates
Offboarding	Offboarding
1099 Onboarding	Onboarding
Employee Update	Notification Only

6

Complete the Name and Description fields for your Workflow.

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Jen Verhoff 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 [isc]

→ Next ⌂ Cancel

Identification

* Workflow Category: Employee Updates

* Name:

* Description:

7

Click "Next"

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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 [isc]

→ Next ⌂ Cancel

Identification

* Workflow Category: Employee Updates

* Name: Direct Deposit Update

* Description: Direct Deposit Update

8 Select 'Employee' under Assigned User Type

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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 >
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 - Client User Groups
 - Client Email Templates
 - Onboarding Templates
 - Offboarding Templates
 - Workflow Routes**
 - Workflow Transactions
 - Mass Email Utility

Workflow Routes

← Previous Save Cancel

+ Initiates Updates

* Assigned User Type	* Action Taken	* Next Step	
Employee	Initiates Update	Pending Approval	✉ (0)

+ Pending Approval

* Assigned User Type	Allow Edits	* Action Taken	* Next Step	
	<input type="checkbox"/>	Approves	Complete - Transaction Approved	✉ (0) ⌵
	<input type="checkbox"/>	Rejects	Complete - Transaction Rejected	✉ (0) ⌵

Add New Step Hide all workflow step details

9 Click on the Envelope symbol to setup a notification email

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Workflow Routes

← Previous Save Cancel

+ Initiates Updates

* Assigned User Type	* Action Taken	* Next Step	
Employee	Initiates Update	Pending Approval	✉ (0)

+ Pending Approval

* Assigned User Type	Allow Edits	* Action Taken	* Next Step	
	<input type="checkbox"/>	Approves	Complete - Transaction Approved	✉ (0) ⌵
	<input type="checkbox"/>	Rejects	Complete - Transaction Rejected	✉ (0) ⌵

Add New Step Hide all workflow step details

10

Choose who should receive the notification when an employee is making a DD change (usually a Client Admin User)

The screenshot shows the 'Workflow Routes' configuration page. A modal dialog titled 'Email' is open, allowing the user to select a user type and a template for notifications. The dialog has two dropdown menus: '* User Type' and '* Template'. The '* User Type' dropdown is currently set to 'Employee'. The '* Template' dropdown is currently empty. There is an 'Add New' button next to the '* Template' dropdown. The dialog also has 'Save' and 'Cancel' buttons at the bottom right.

11

Select the "Direct Deposit Change Needs Approval*" option in the Template drop down.

The screenshot shows the 'Workflow Routes' configuration page. The 'Email' modal dialog is open, and the '* Template' dropdown is now set to 'Direct Deposit Change Needs Approval*'. The '* User Type' dropdown remains set to 'Employee'. The 'Add New' button is still visible next to the '* Template' dropdown. The 'Save' and 'Cancel' buttons are at the bottom right of the dialog.

12 Click "Save"

The screenshot shows a workflow configuration interface with two main sections: 'Initiates Updates' and 'Pending Approval'. The 'Initiates Updates' section has a dropdown for '* Assigned User Type' set to 'Employee', an 'Action Taken' of 'Initiates Update', and a 'Next Step' of 'Pending Approval'. The 'Pending Approval' section has a dropdown for '* Assigned User Type' set to 'Assigned Manager', an 'Action Taken' of 'Approves', and a 'Next Step' of 'Complete - Transaction Approved'. An 'Email' modal is open in the foreground, showing a dropdown for '* User Type' set to 'Assigned Manager' and a dropdown for '* Template' set to 'Direct Deposit Change'. The modal has 'Add New' and 'Save' buttons. The 'Save' button is highlighted with an orange circle.

13 Choose who should have the ability to approve the change from the Assigned User-Type drop down. This is usually the same user that was chosen to receive the email notification in the above steps.

The screenshot shows the 'Workflow Routes' configuration page in the 'isolved' system. The page has a sidebar with a search bar and a list of menu items: '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', and 'Mass Email Utility'. The 'Workflow Routes' section is active, showing a configuration table with columns for '* Assigned User Type', '* Action Taken', and '* Next Step'. The 'Initiates Updates' section has a dropdown for '* Assigned User Type' set to 'Employee', an 'Action Taken' of 'Initiates Update', and a 'Next Step' of 'Pending Approval'. The 'Pending Approval' section has a dropdown for '* Assigned User Type' set to 'Assigned Manager', an 'Action Taken' of 'Approves', and a 'Next Step' of 'Complete - Transaction Approved'. The 'Assigned Manager' dropdown is highlighted with an orange circle. The page also has 'Add New Step' and 'Hide all workflow step details' buttons.

14 If you would like for the Approver to make edits, check the Allow Edits box.

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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

← Previous Save Cancel

+ Initiates Updates

* Assigned User Type Employee

* Action Taken Initiates Update

* Next Step Pending Approval (1)

+ Pending Approval

* Assigned User Type Assigned Manager

* Action Taken Approves Rejects

* Next Step Complete - Transaction Approved Complete - Transaction Rejected (0) (0)

Allow Edits

Add New Step Hide all workflow step details

15 Click on the Envelope icon to setup a notification to let the Employee know their change has been approved.

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

Search the menu

- Employee Admin Tools
- Employee Management
- Client Management
 - Executive Dashboard
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 - Taxes >
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 - Client User Groups
 - Client Email Templates
 - Onboarding Templates
 - Offboarding Templates
 - Workflow Routes**
 - Workflow Transactions
 - Mass Email Utility

Workflow Routes

← Previous Save Cancel

+ Initiates Updates

* Assigned User Type Employee

* Action Taken Initiates Update

* Next Step Pending Approval (1)

+ Pending Approval

* Assigned User Type Assigned Manager

* Action Taken Approves Rejects

* Next Step Complete - Transaction Approved Complete - Transaction Rejected (0) (0)

Allow Edits

Add New Step Hide all workflow step details

16 Select the "Employee" option under User Type.

The screenshot shows the 'Workflow Routes' configuration page for 'Jen Vernotti - Jen Vernotti University Training Company'. The page has a sidebar menu on the left with options like 'Employee Admin Tools', 'Employee Management', 'Client Management', 'Executive Dashboard', 'Home Landing Page', 'Home Summary', 'Home Maintenance', 'Home Management', 'Home Utilities', 'Home Roll', 'Home es', 'Home k Location', 'Home es', 'Home or & GL', 'Home', 'Home efits', 'Home Management', 'Home ndance Management', 'Home e Management', 'Home kflow Setup', 'Home Client User Groups', 'Home Client Email Templates', 'Home nboarding Templates', 'Home fboarding Templates', 'Home kflow Routes', 'Home kflow Transactions', 'Home es Email Utility', and 'Home Payroll'. The main content area shows two steps: 'Initiates Updates' and 'Pending Approval'. The 'Initiates Updates' step has a dropdown for 'Assigned User Type' set to 'Employee', an 'Action Taken' dropdown set to 'Initiates Update', and a 'Next Step' dropdown set to 'Pending Approval'. An 'Email' modal is open, showing a dropdown for 'User Type' set to 'Employee' and a dropdown for 'Template' set to 'Your Direct Deposit Change was Approved*'. The modal has 'Add New', 'Save', and 'Cancel' buttons.

17 Select the "Your Direct Deposit Change was Approved*" message from the Template drop down.

The screenshot shows the 'Workflow Routes' configuration page for 'Jen Vernotti - Jen Vernotti University Training Company'. The page has a sidebar menu on the left with options like 'Employee Admin Tools', 'Employee Management', 'Client Management', 'Executive Dashboard', 'Home Landing Page', 'Home Summary', 'Home Maintenance', 'Home Management', 'Home Utilities', 'Home Roll', 'Home es', 'Home k Location', 'Home es', 'Home or & GL', 'Home', 'Home efits', 'Home Management', 'Home ndance Management', 'Home e Management', 'Home kflow Setup', 'Home Client User Groups', 'Home Client Email Templates', 'Home nboarding Templates', 'Home fboarding Templates', 'Home kflow Routes', 'Home kflow Transactions', 'Home es Email Utility', and 'Home Payroll'. The main content area shows two steps: 'Initiates Updates' and 'Pending Approval'. The 'Initiates Updates' step has a dropdown for 'Assigned User Type' set to 'Employee', an 'Action Taken' dropdown set to 'Initiates Update', and a 'Next Step' dropdown set to 'Pending Approval'. An 'Email' modal is open, showing a dropdown for 'User Type' set to 'Employee' and a dropdown for 'Template' set to 'Your Direct Deposit Change was Approved*'. The modal has 'Add New', 'Save', and 'Cancel' buttons.

18 Click "Save"

The screenshot shows a workflow configuration interface with two main sections: "Initiates Updates" and "Pending Approval". The "Initiates Updates" section has a table with columns: * Assigned User Type (Employee), * Action Taken (Initiates Update), and * Next Step (Pending Approval). The "Pending Approval" section has a table with columns: * Assigned User Type (Assigned Manager), * Action Taken (Approves), and * Next Step (Complete - Transaction Approved). An "Email" modal dialog is open in the foreground, showing * User Type (Employee) and * Template (Your Direct Deposit Chn). The "Save" button in the modal is highlighted with an orange circle.

19 Choose who should have the ability to reject the change from the Assigned User-Type drop down. This is typically the same user that was chosen to receive the email notification in the above steps.

The screenshot shows the "Workflow Routes" configuration interface. The left sidebar contains a menu with items like "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", and "Mass Email Utility". The main content area shows the "Workflow Routes" configuration with two sections: "Initiates Updates" and "Pending Approval". The "Initiates Updates" section has a table with columns: * Assigned User Type (Employee), * Action Taken (Initiates Update), and * Next Step (Pending Approval). The "Pending Approval" section has a table with columns: * Assigned User Type (Assigned Manager), * Action Taken (Approves), and * Next Step (Complete - Transaction Approved). The "Assigned Manager" dropdown in the "Pending Approval" section is highlighted with an orange circle.

20

Click on the Envelope icon to setup a notification to let the Employee know their change has been rejected.

Workflow Routes

← Previous Save Cancel

+ Initiates Updates

* Assigned User Type	* Action Taken	* Next Step	
Employee	Initiates Update	Pending Approval	✉ (1)

+ Pending Approval

* Assigned User Type	Allow Edits	* Action Taken	* Next Step	
Assigned Manager	<input checked="" type="checkbox"/>	Approves	Complete - Transaction Approved	✉ (1)
Assigned Manager		Rejects	Complete - Transaction Rejected	✉ (0)

Add New Step Hide all workflow step details

21

Select the "Employee" option under User Type.

Workflow Routes

← Previous Save Cancel

+ Initiates Updates

* Assigned User Type	* Action Taken	* Next Step	
Employee	Initiates Update	Pending Approval	✉ (1)

+ Pending Approval

* Assigned User Type	Allow Edits	* Action Taken	* Next Step	
Assigned Manager	<input checked="" type="checkbox"/>	Approves	Complete - Transaction Approved	✉ (1)
Assigned Manager		Rejects	Complete - Transaction Rejected	✉ (0)

Add New Step Hide all workflow step details

Email

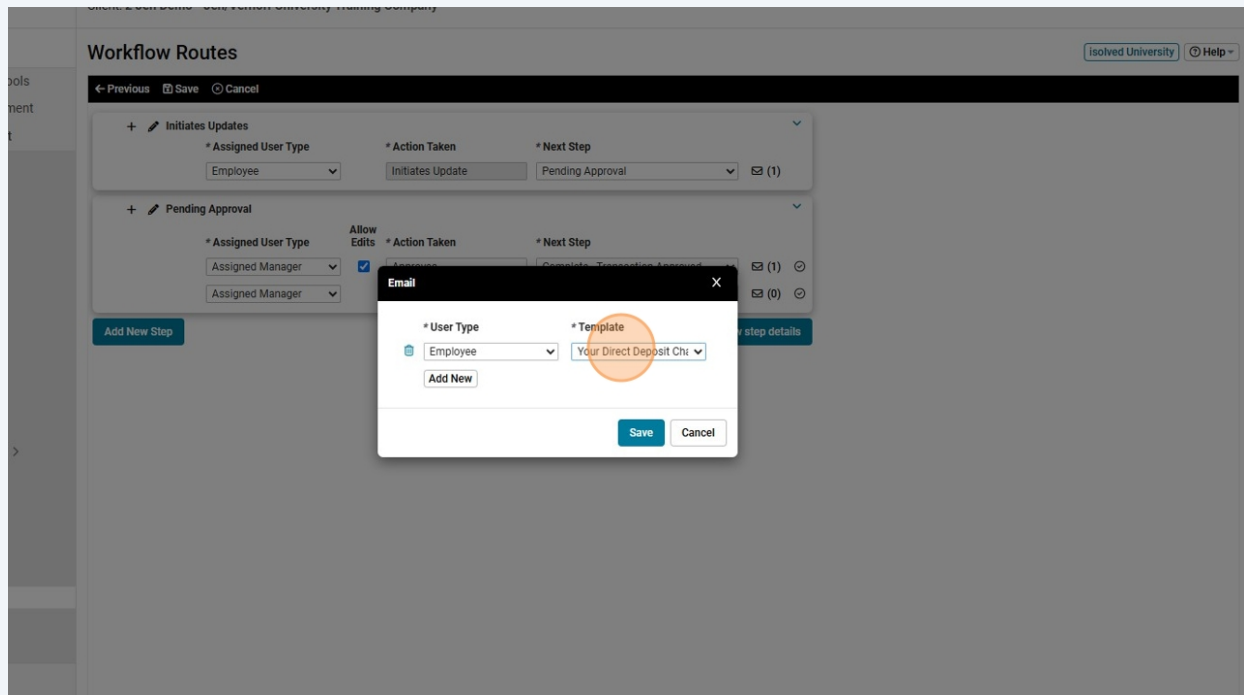
* User Type Employee

* Template

Add New Save Cancel

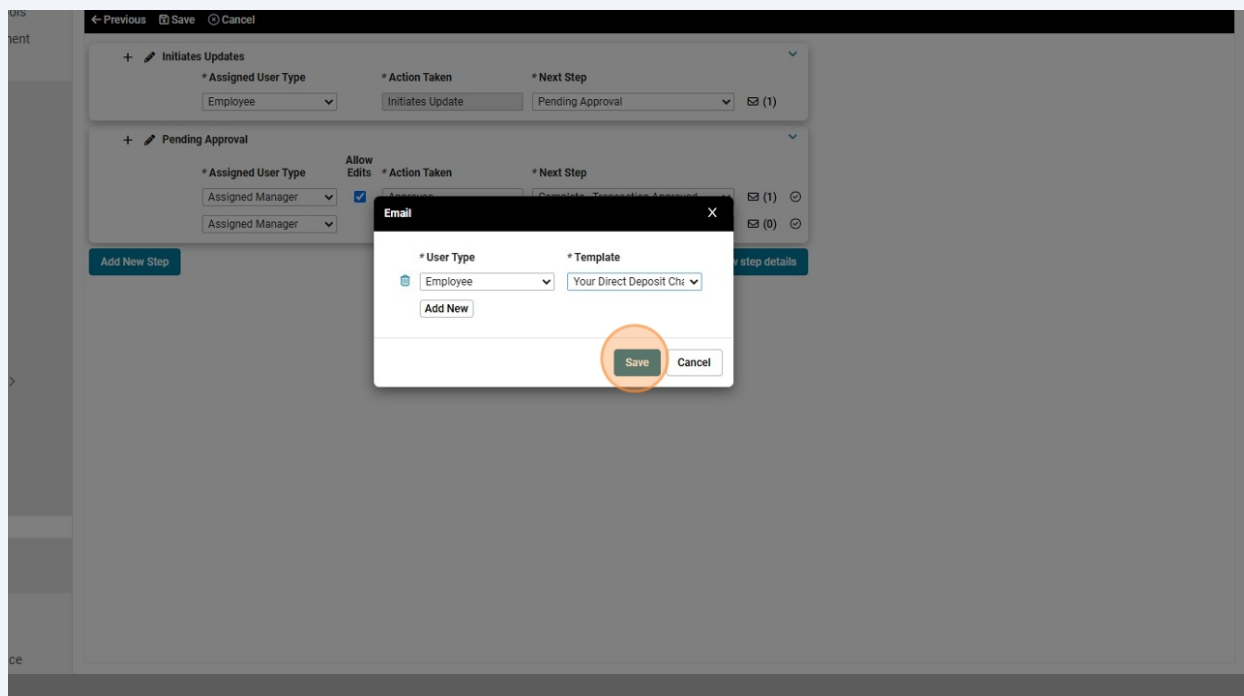
22

Select the "Your Direct Deposit Change was NOT Approved*" message from the Template dropdown.



23

Click "Save"



24 Click "Save" again to save the new Workflow Route.

Workflow Routes

← Previous **Save** Cancel

Initiates Updates

* Assigned User Type	* Action Taken	* Next Step
Employee	Initiates Update	Pending Approval (1)

Pending Approval

* Assigned User Type	Allow Edits	* Action Taken	* Next Step
Assigned Manager	<input checked="" type="checkbox"/>	Approves	Complete - Transaction Approved (1)
Assigned Manager		Rejects	Complete - Transaction Rejected (1)

Add New Step Hide all workflow step details

25 Every Workflow Route must have a Workflow Transaction to function correctly. Click on "Workflow Transaction"

Status: Active

Name	Category
Onboarding Certifications	Onboarding
Offboarding- no assets	Offboarding
Onboarding Welcome	Onboarding
Time Off Request	Employee Updates
Offboarding	Offboarding
1099 Onboarding	Onboarding
Employee Update	Notification Only
Direct Deposit Update	Employee Updates

Routes Process

+ Add New Edit Delete Refresh Save Cancel

Identification

Workflow Category: Employee Updates

* Name: Direct Deposit Update

* Description: Direct Deposit Update

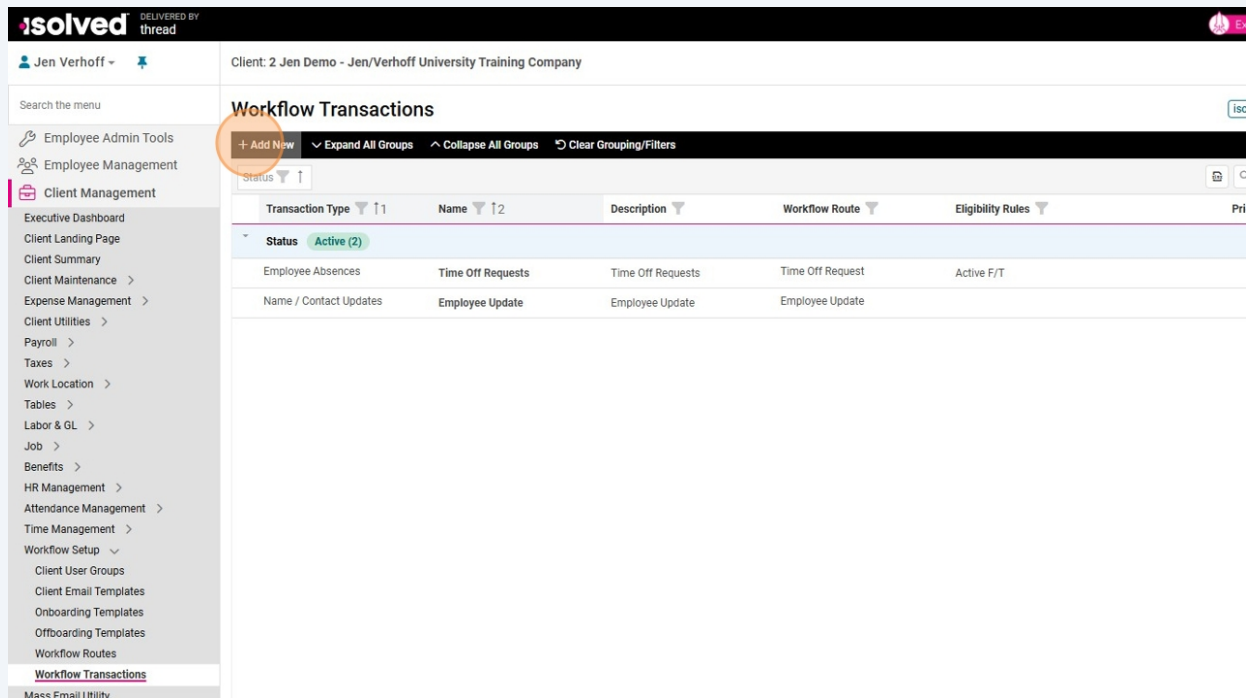
☐ Inactive

Associated Transactions

Active: No active transactions

Inactive: No inactive transactions.

26 Click "Add New"



The screenshot shows the 'Workflow Transactions' page in the 'isolved' system. The left sidebar contains a navigation menu with 'Client Management' selected. The main content area displays a table of workflow transactions. The 'Add New' button is highlighted with an orange circle.

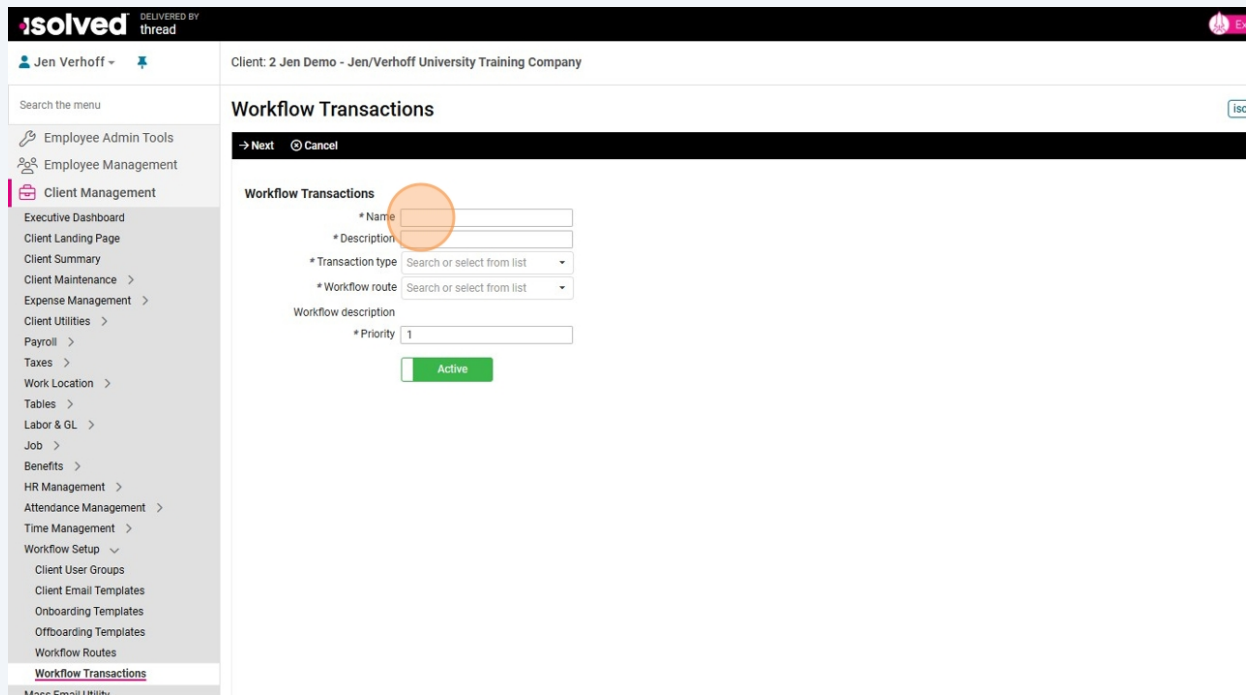
Workflow Transactions

Buttons: + Add New, Expand All Groups, Collapse All Groups, Clear Grouping/Filters

Status: Active (2)

Transaction Type	Name	Description	Workflow Route	Eligibility Rules	Pri
Employee Absences	Time Off Requests	Time Off Requests	Time Off Request	Active F/T	
Name / Contact Updates	Employee Update	Employee Update	Employee Update		

27 Complete the Name and Description fields.



The screenshot shows the 'Workflow Transactions' page in the 'isolved' system, displaying the 'Add New' form. The 'Name' and 'Description' fields are highlighted with orange circles.

Workflow Transactions

Buttons: → Next, ⌂ Cancel

* Name

* Description

* Transaction type: Search or select from list

* Workflow route: Search or select from list

Workflow description

* Priority: 1

Active

28

Choose the appropriate transaction type from the drop down, in this example we would need "Direct Deposit transactions".

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

Search the menu

- Employee Admin Tools
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 - Client Landing Page
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 - Expense Management >
 - Client Utilities >
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 - Attendance Management >
 - Time Management >
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 - Client User Groups
 - Client Email Templates
 - Onboarding Templates
 - Offboarding Templates
 - Workflow Routes
 - Workflow Transactions**
 - Mass Email Utility

Workflow Transactions

→ Next ⌂ Cancel

Workflow Transactions

* Name EE DD Update

* Description EE DD Update

* Transaction type Search or select from list

* Workflow route Beneficiary Updates
Deferred Compensation Updates
Direct Deposit transactions
Employee Absence

Workflow description

* Priority

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

29

Choose the Workflow Route you just created, in this example it is "Direct Deposit Update"

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

Search the menu

- Employee Admin Tools
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 - Executive Dashboard
 - Client Landing Page
 - Client Summary
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 - Client Utilities >
 - Payroll >
 - Taxes >
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 - Time Management >
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 - Offboarding Templates
 - Workflow Routes
 - Workflow Transactions**
 - Mass Email Utility

Workflow Transactions

→ Next ⌂ Cancel

Workflow Transactions

* Name EE DD Update

* Description EE DD Update

* Transaction type Direct Deposit transacti...

* Workflow route Search or select from list

Workflow description Direct Deposit Update

* Priority Employee Update
Time Off Request

Active

30 Enter a priority, it will default to "1" if not overridden.

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

Search the menu

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

Workflow Transactions

→ Next Cancel

Workflow Transactions

* Name EE DD Update

* Description EE DD Update

* Transaction type Direct Deposit transact...

* Workflow route Direct Deposit Update

Workflow description Direct Deposit Update

* Priority 1

Active

31 Click "Next"

isolved DELIVERED BY thread

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

Search the menu

- Employee Admin Tools
- Employee Management
- Client Management**
 - Executive Dashboard
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 - Client Summary
 - Client Maintenance >
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 - Client Utilities >
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 - Taxes >
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 - Offboarding Templates
 - Workflow Routes
 - Workflow Transactions**
 - Mass Email Utility

Workflow Transactions

→ Next Cancel

Workflow Transactions

* Name EE DD Update

* Description EE DD Update

* Transaction type Direct Deposit transact...

* Workflow route Direct Deposit Update

Workflow description Direct Deposit Update

* Priority 1

Active

32

If the Workflow Route applies to all employees, no Eligibility Rule is needed and the Workflow Transaction can be saved. If an Eligibility Rule is needed it can be chosen here. To setup a new Eligibility Rule please see the "How to Create Eligibility Rules" help doc.

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Jen Verhoff 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 Transactions

← Previous **Save** Cancel

Workflow Rule: **EE DD 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