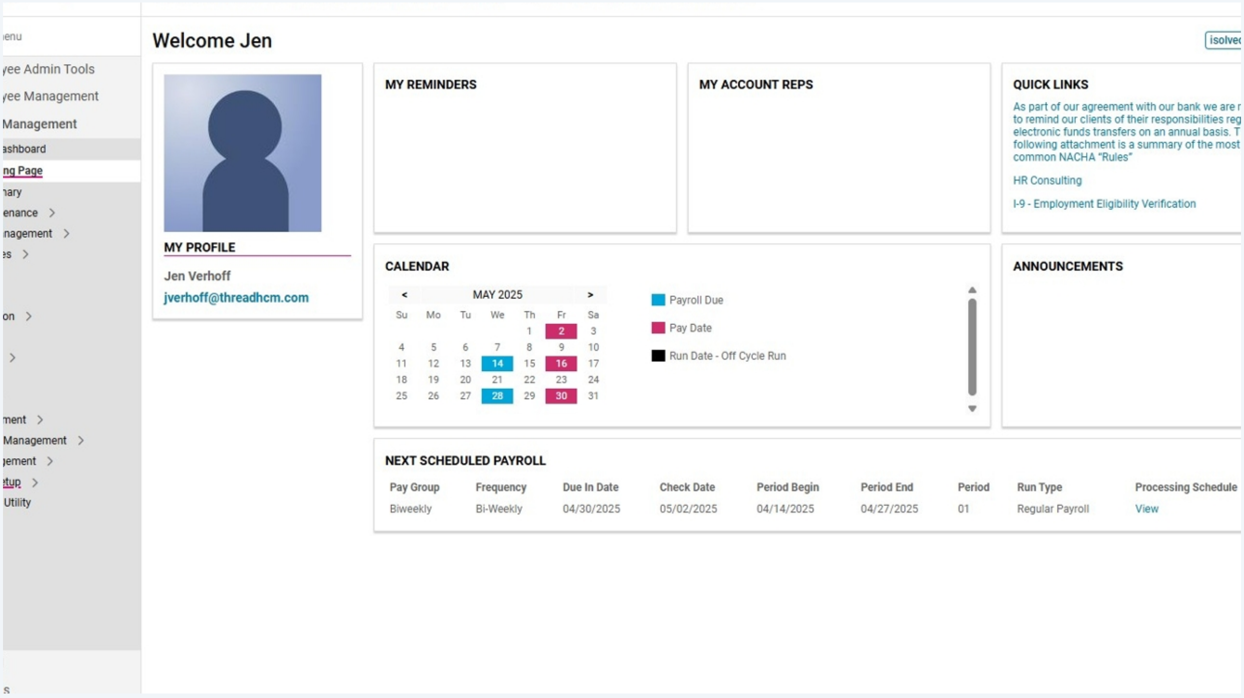
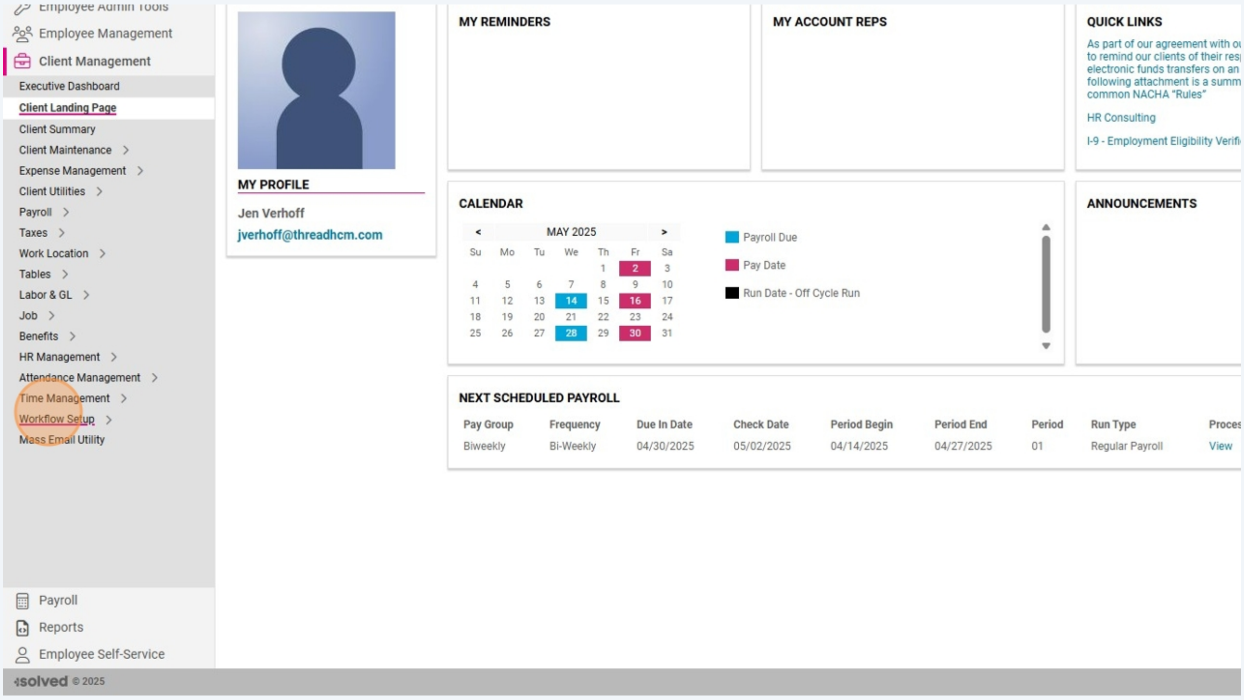
Setting up Workflows for Approval

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

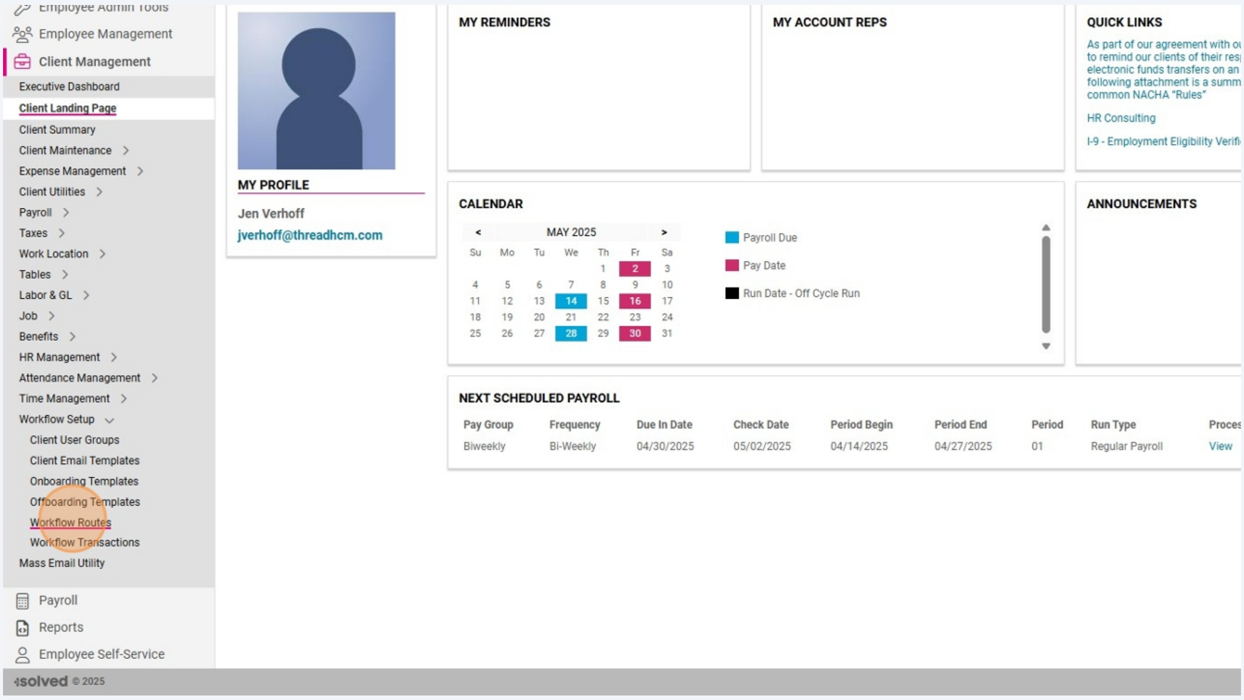
1 Navigate to https://connect.threadhcm.com/default.aspx



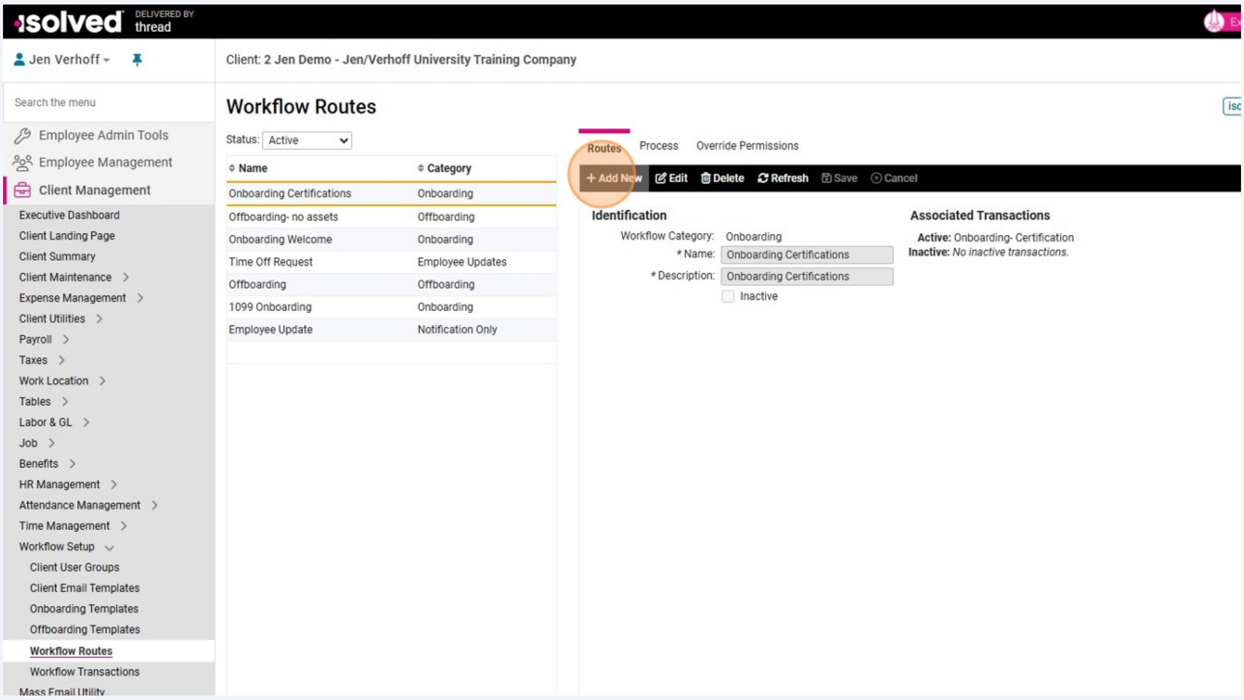
2 Click "Workflow Setup"



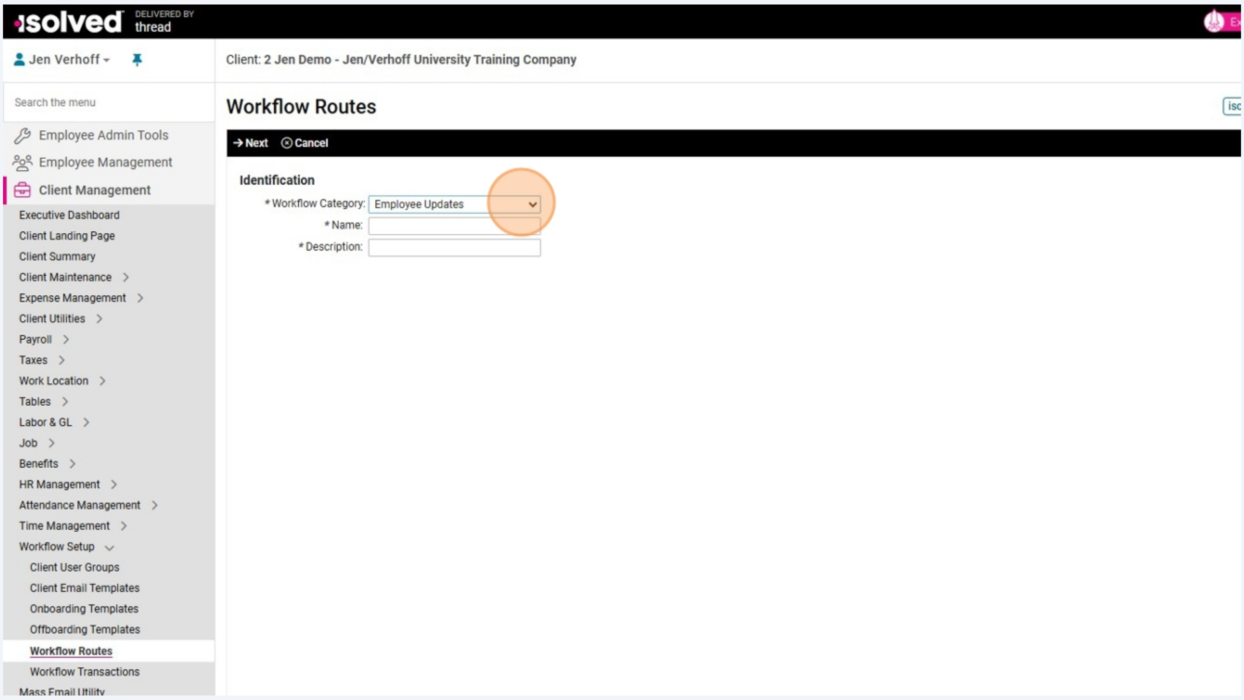
3 Click "Workflow Routes"



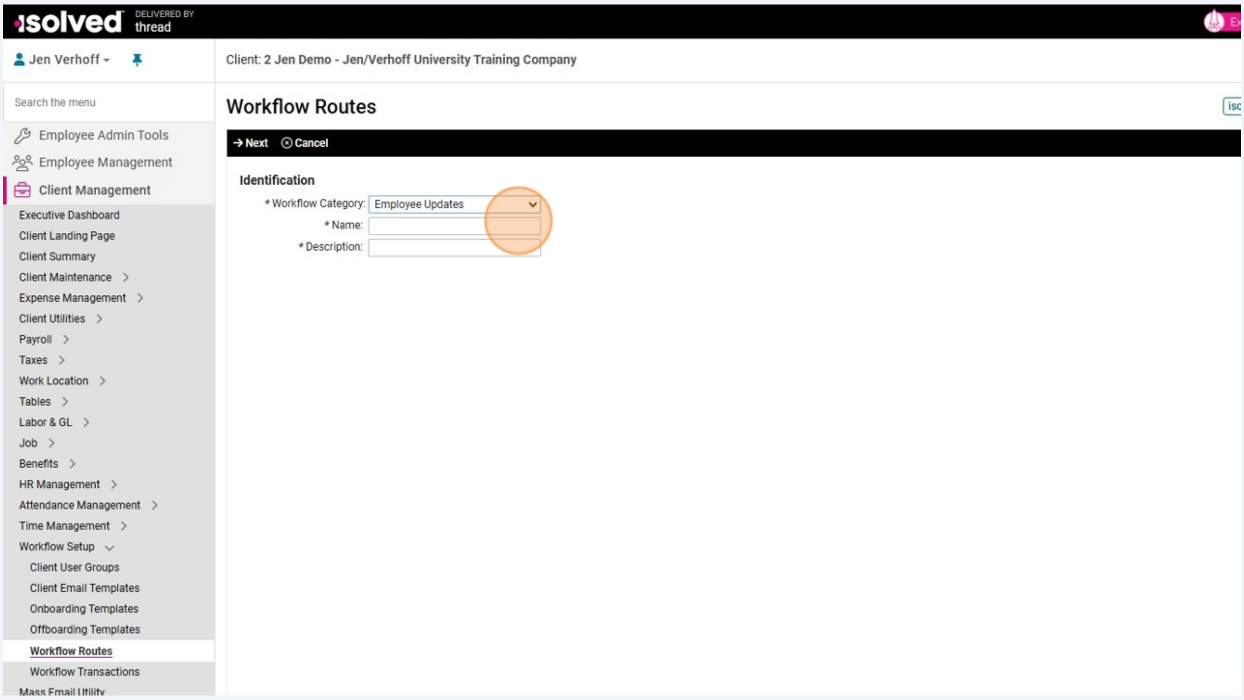
4 Click "Add New"



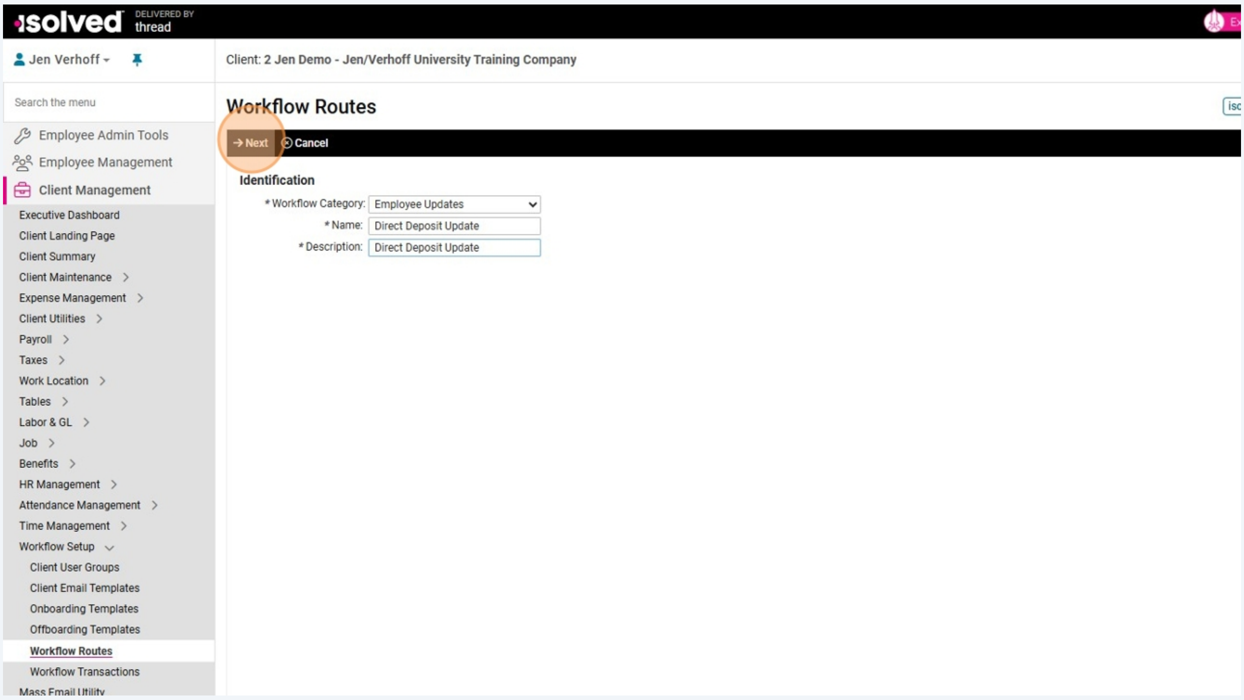
5 Select the "Employee Updates" option.



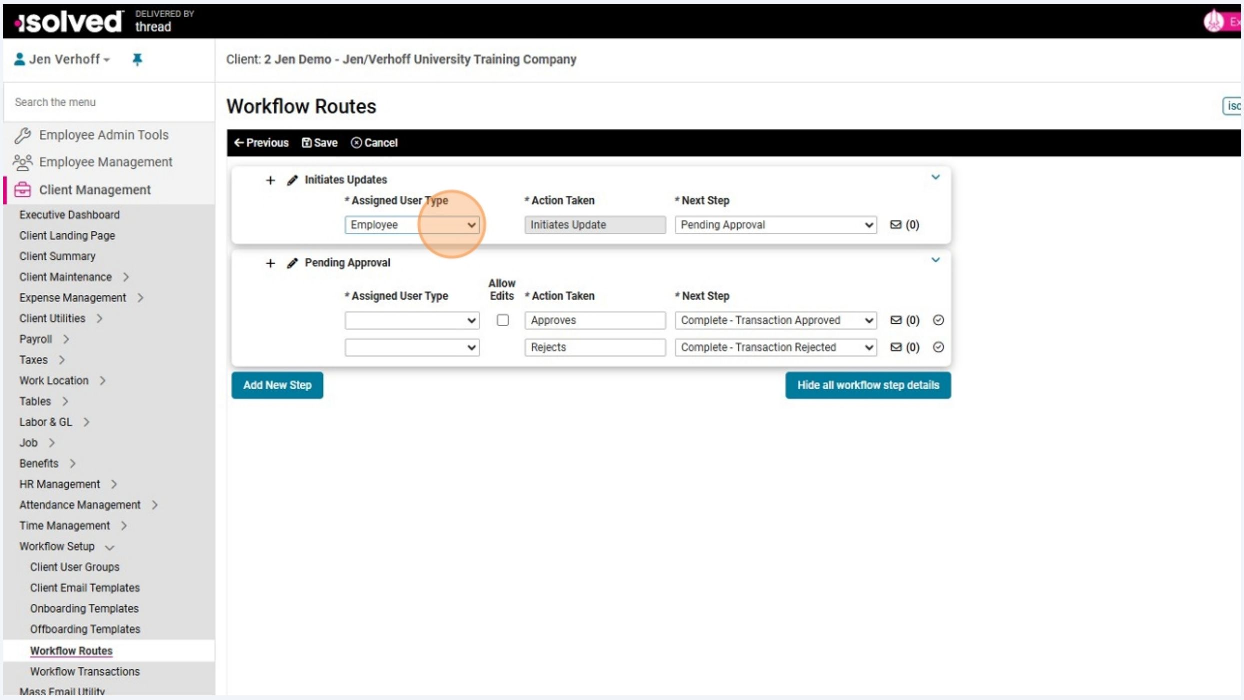
6 Complete the Name and Description fields for your Workflow.



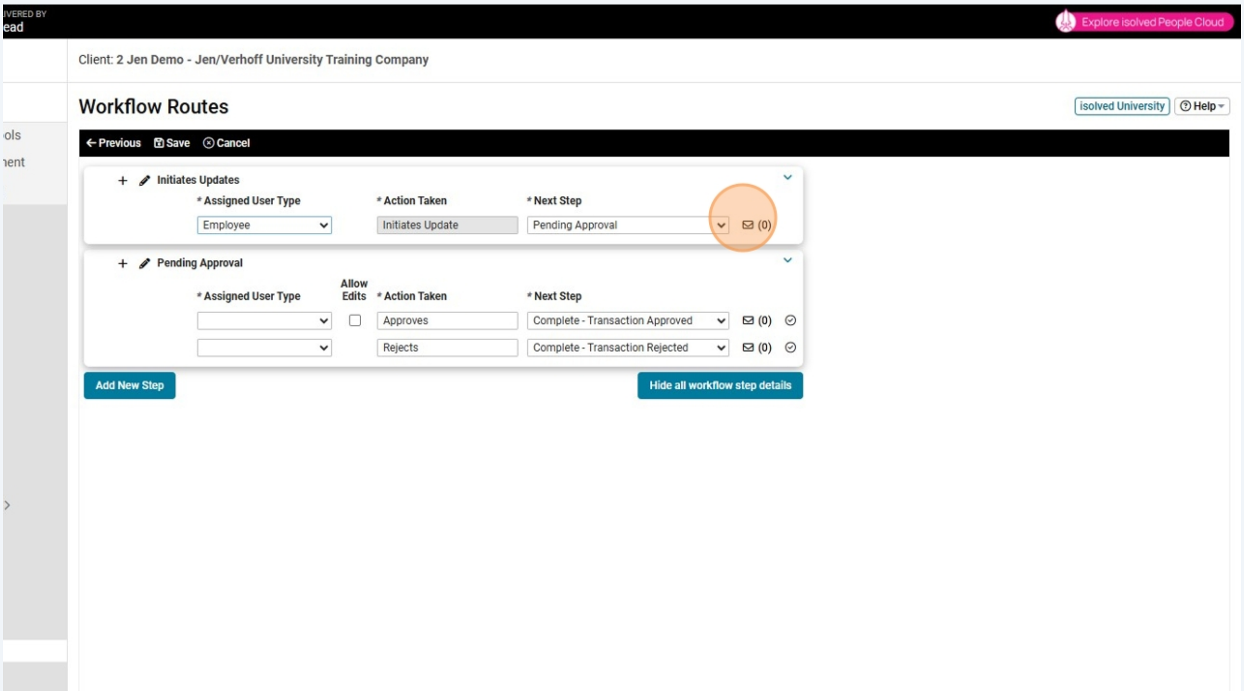
7 Click "Next"



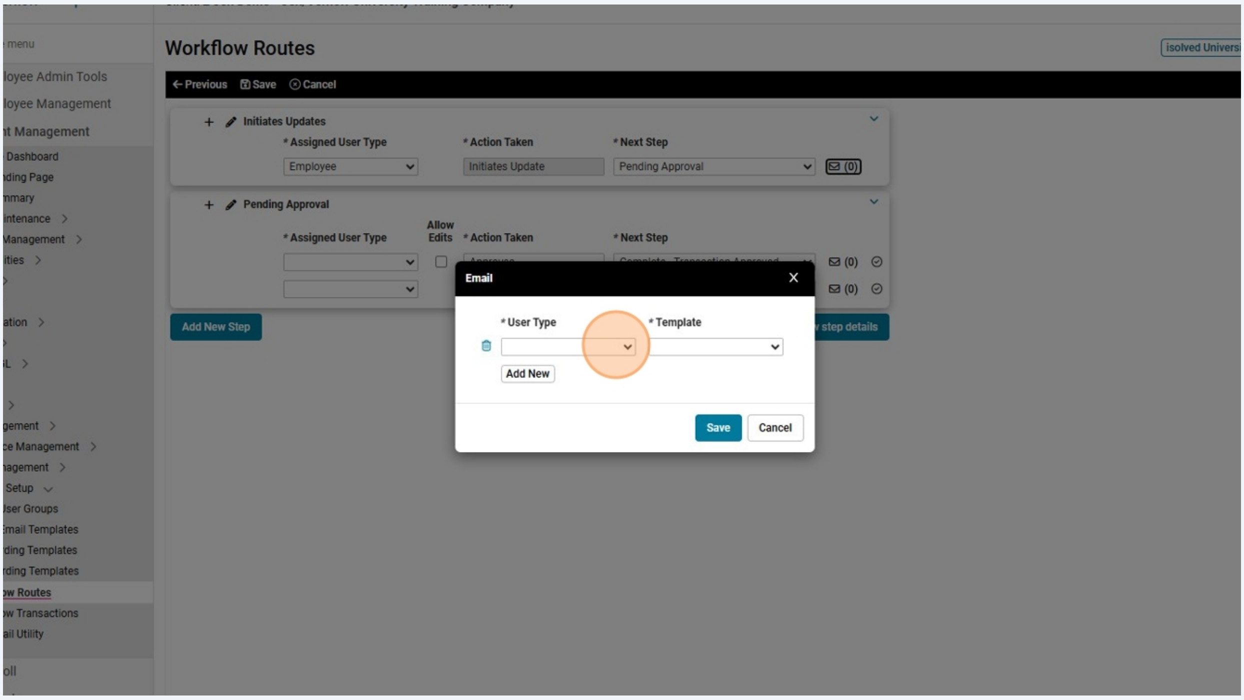
8 Select 'Employee' under Assigned User Type



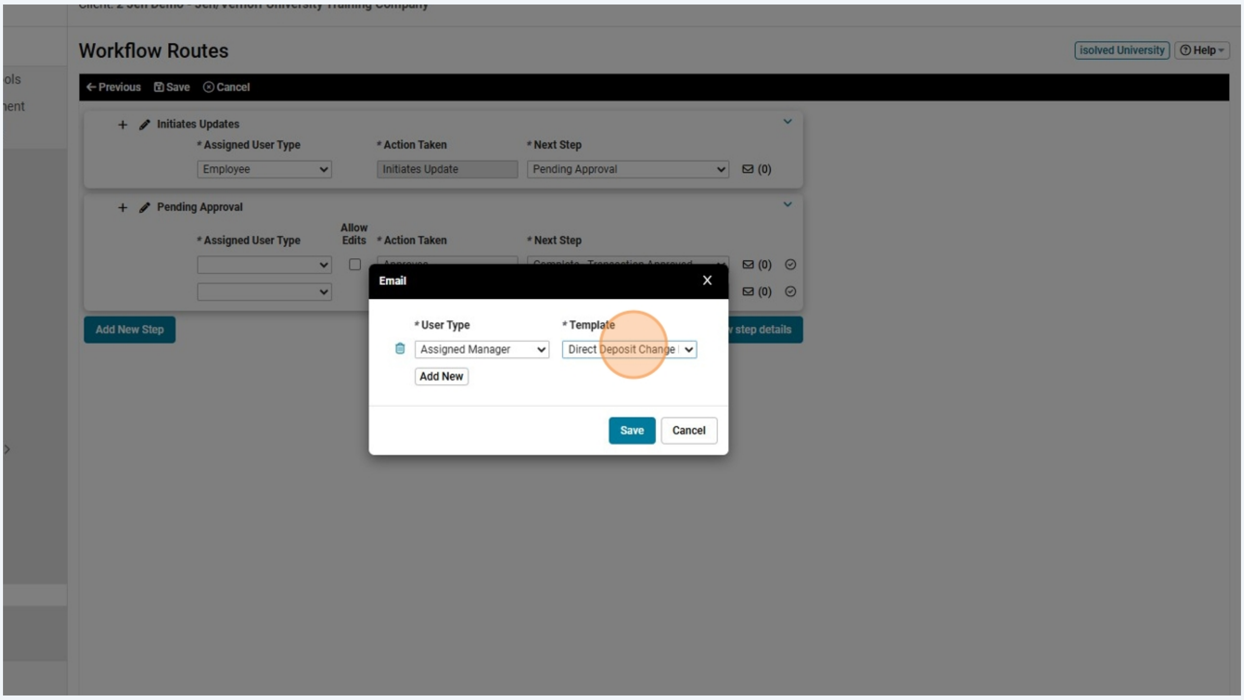
9 Click on the Envelope symbol to setup a notification email



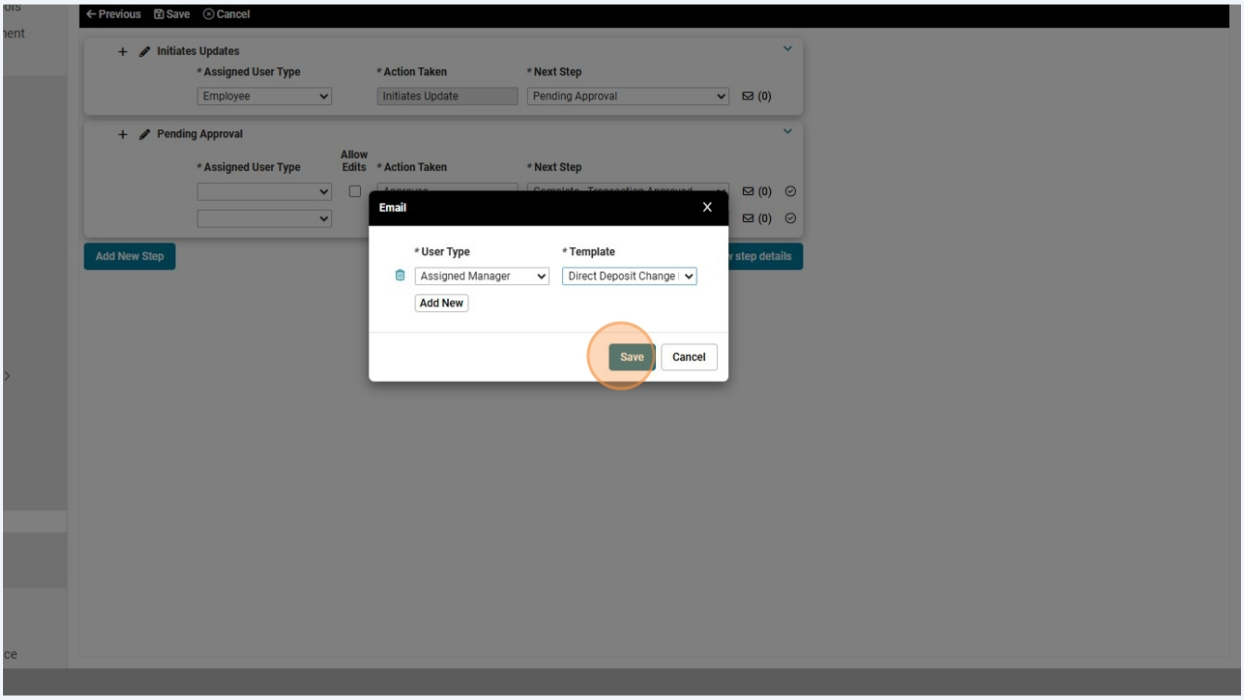
10 Choose who should receive the notification when an employee is making a DD change (usually a Client Admin User)



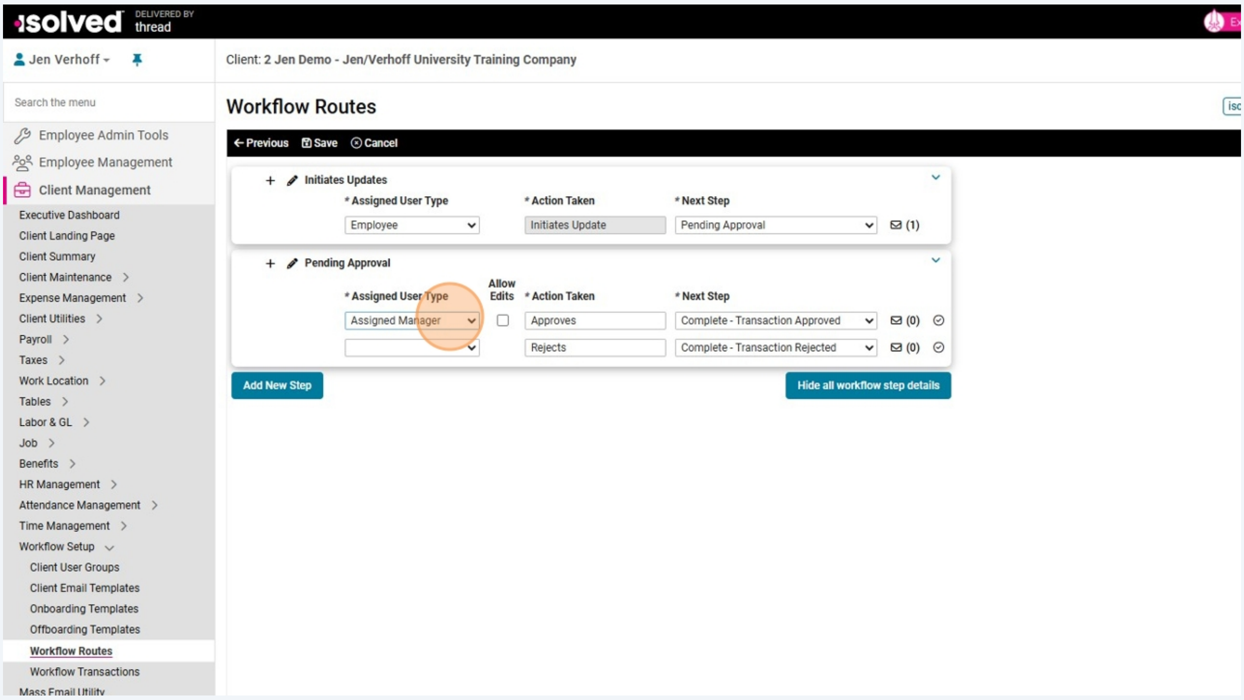
11 Select the "Direct Deposit Change Needs Approval*" option in the Template drop down.



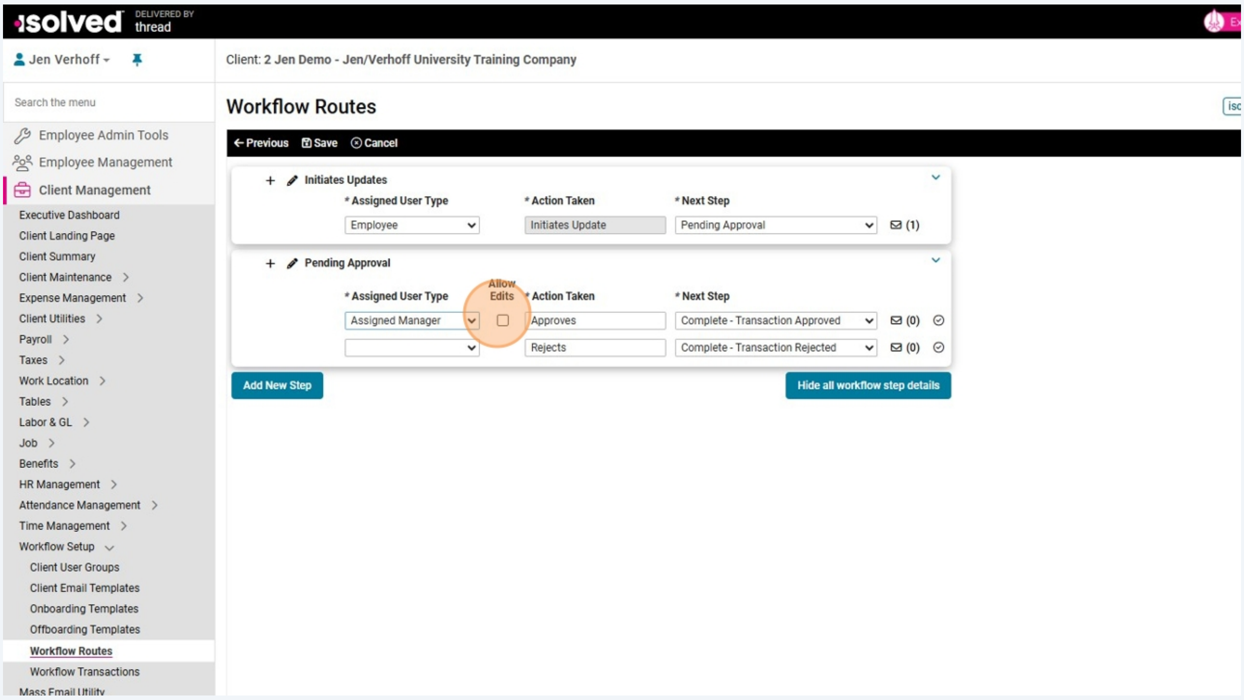
12 Click "Save"



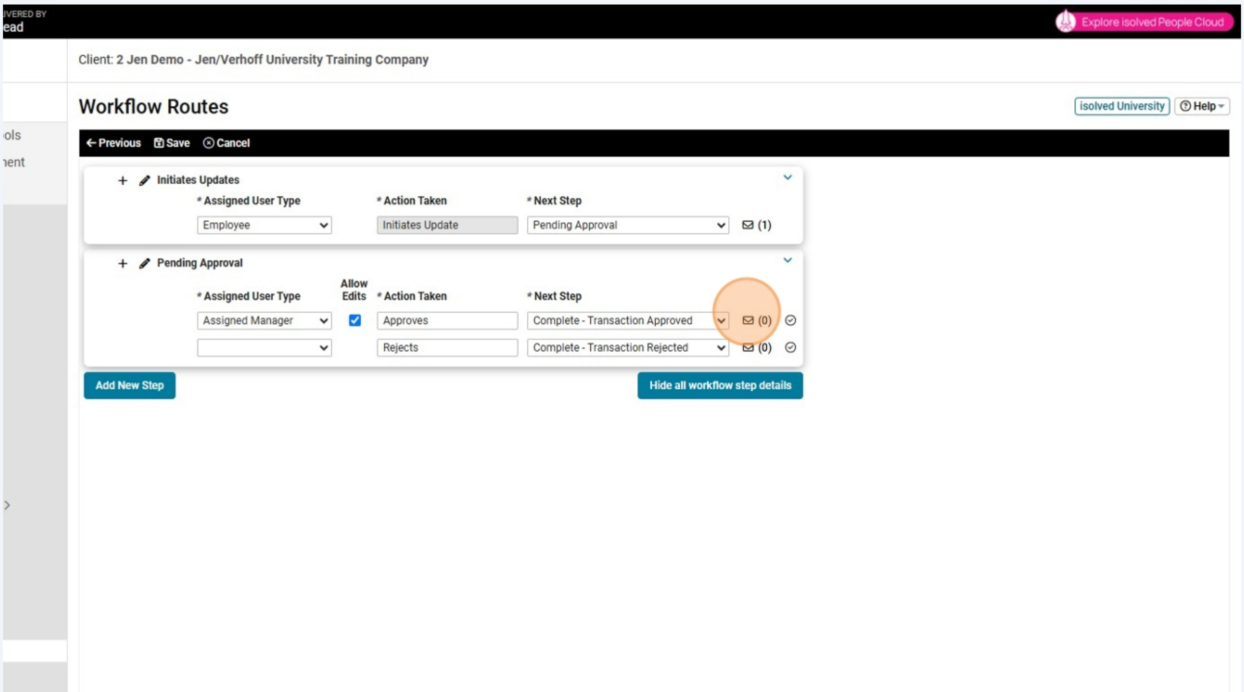
13 Choose who should have the ability to approve the change from the Assigned User-Type drop down. This is usually the same user that was chosen to receive the email notification in the above steps.



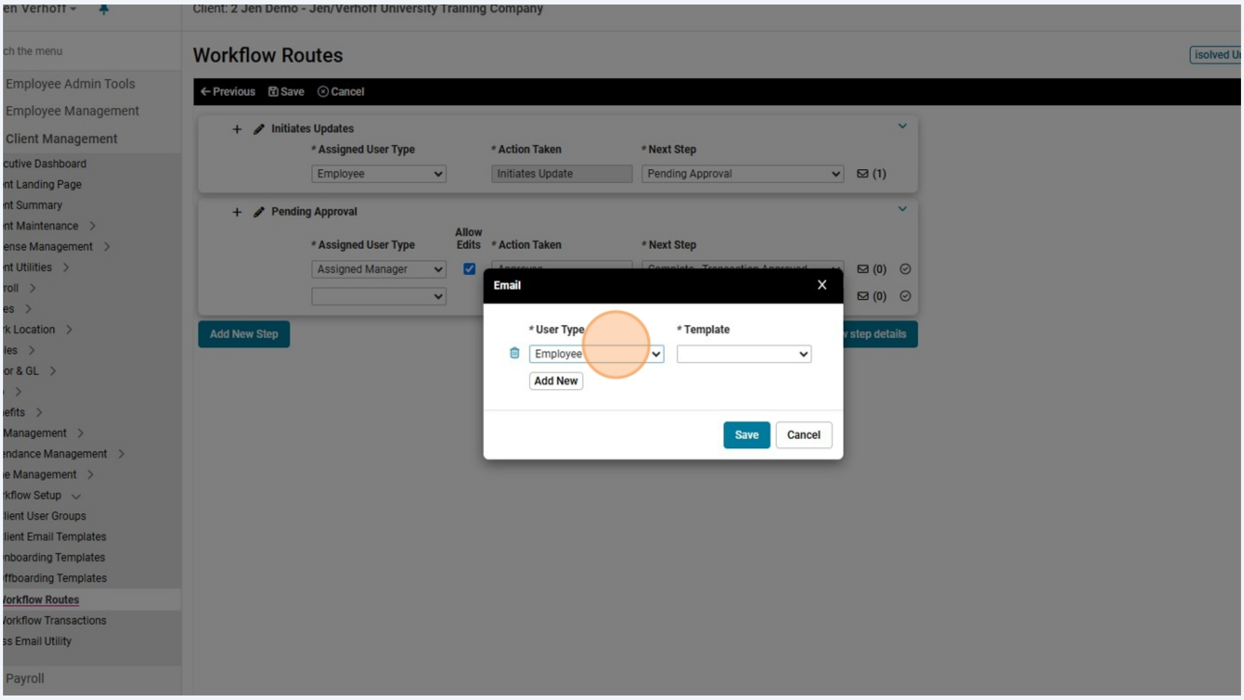
14 If you would like for the Approver to make edits, check the Allow Edits box.



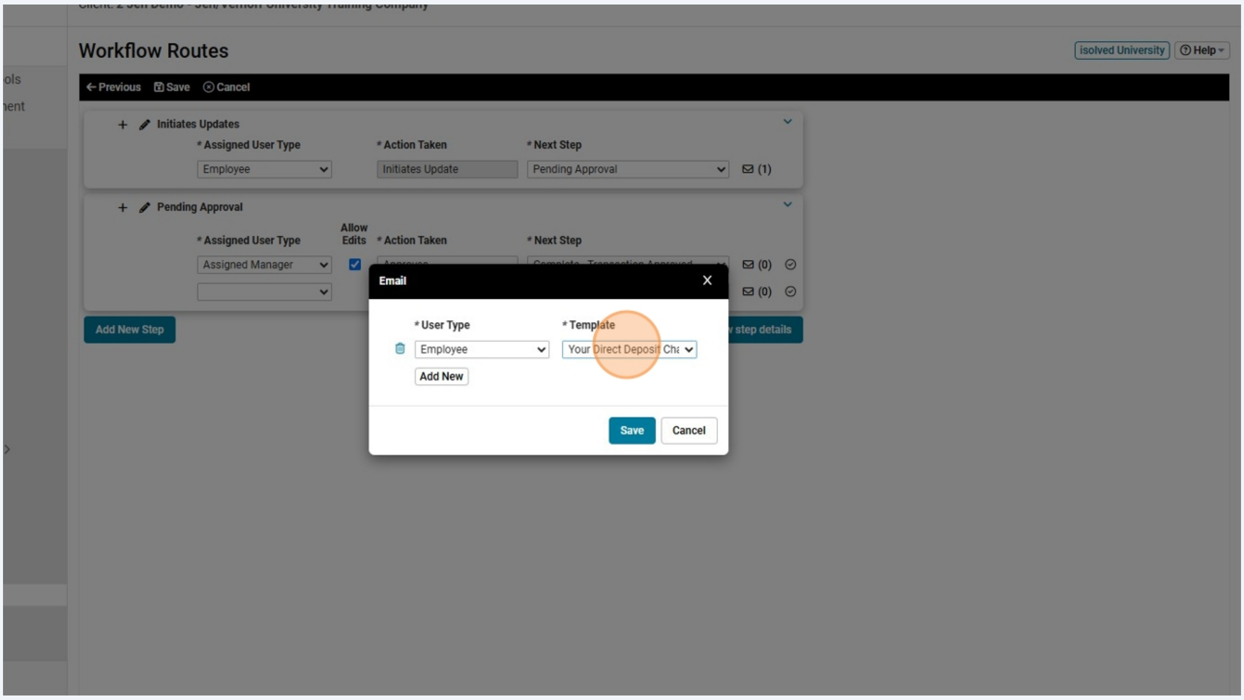
15 Click on the Envelope icon to setup a notification to let the Employee know their change has been approved.



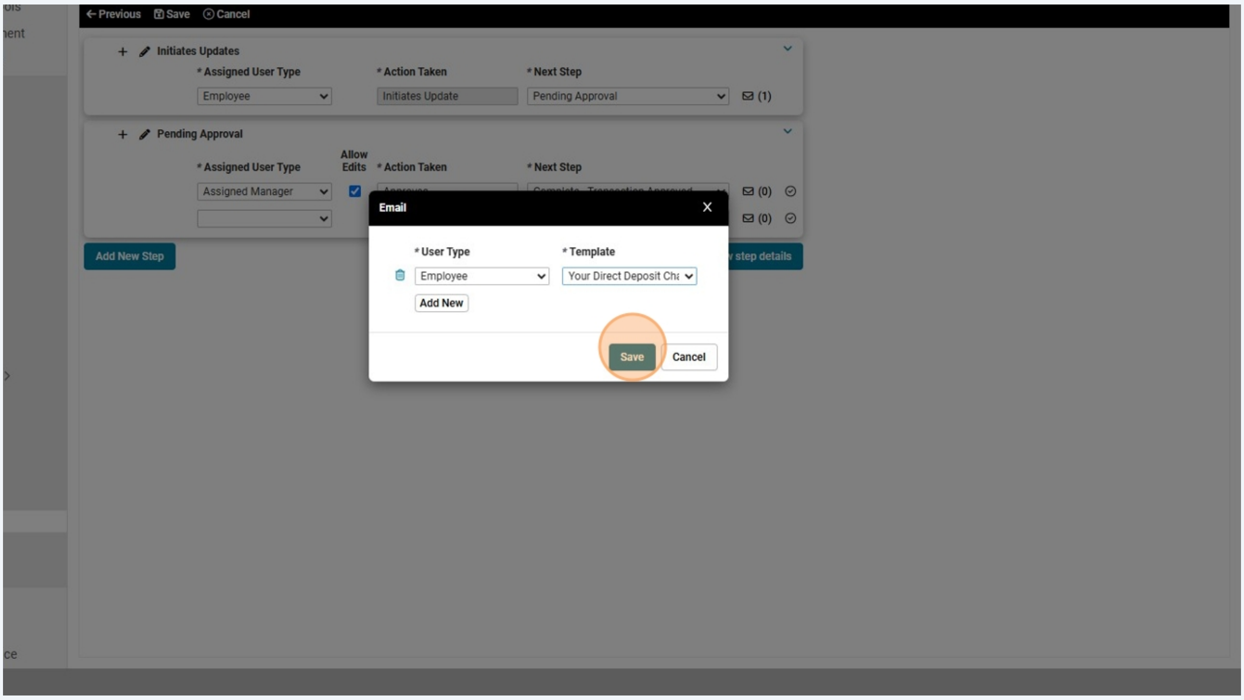
16 Select the "Employee" option under User Type.



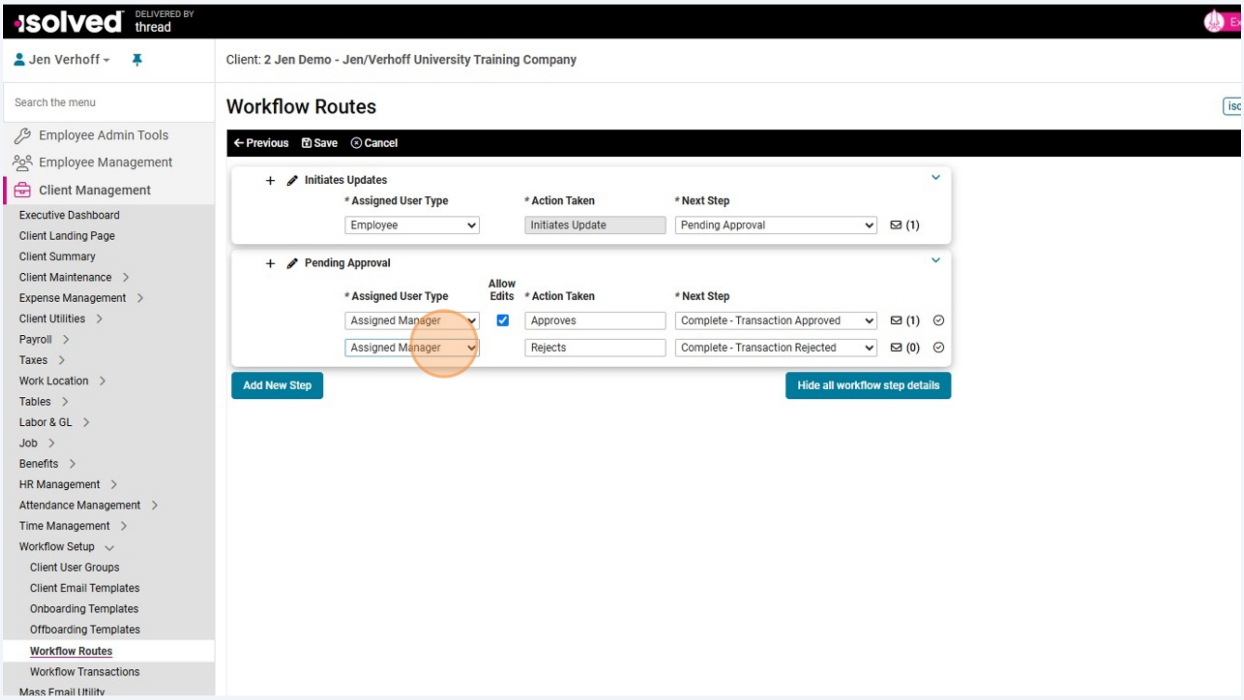
17 Select the "Your Direct Deposit Change was Approved*" message from the Template drop down.



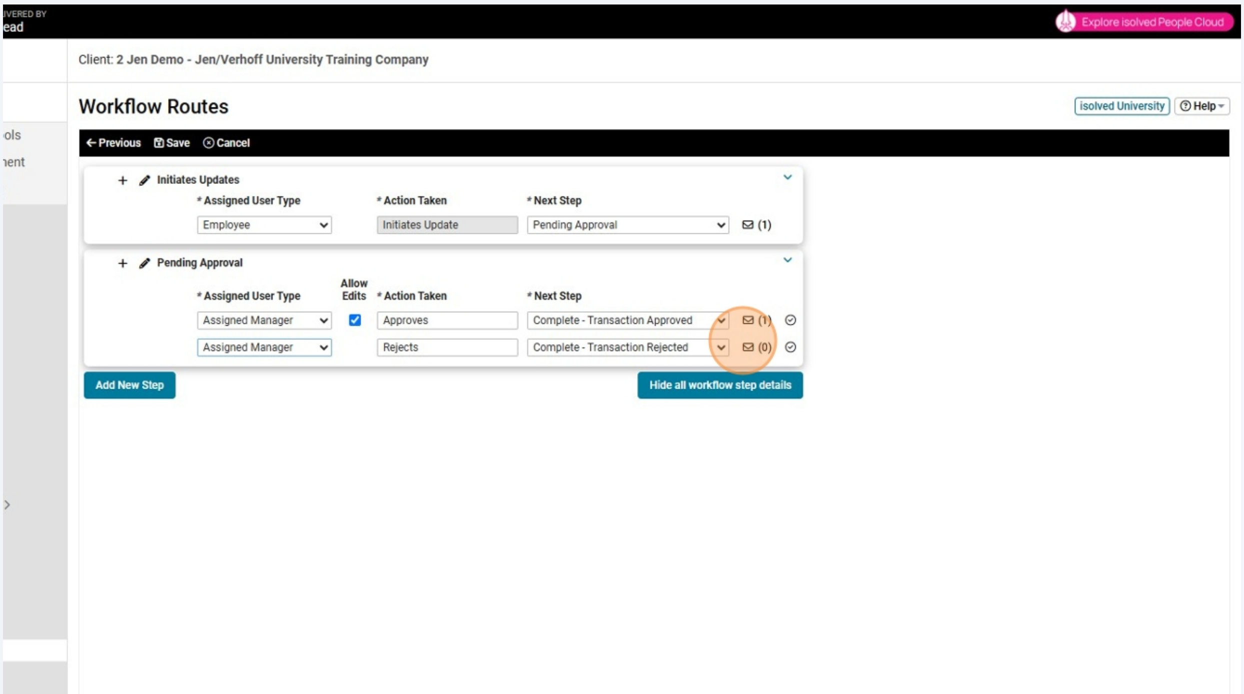
18 Click "Save"



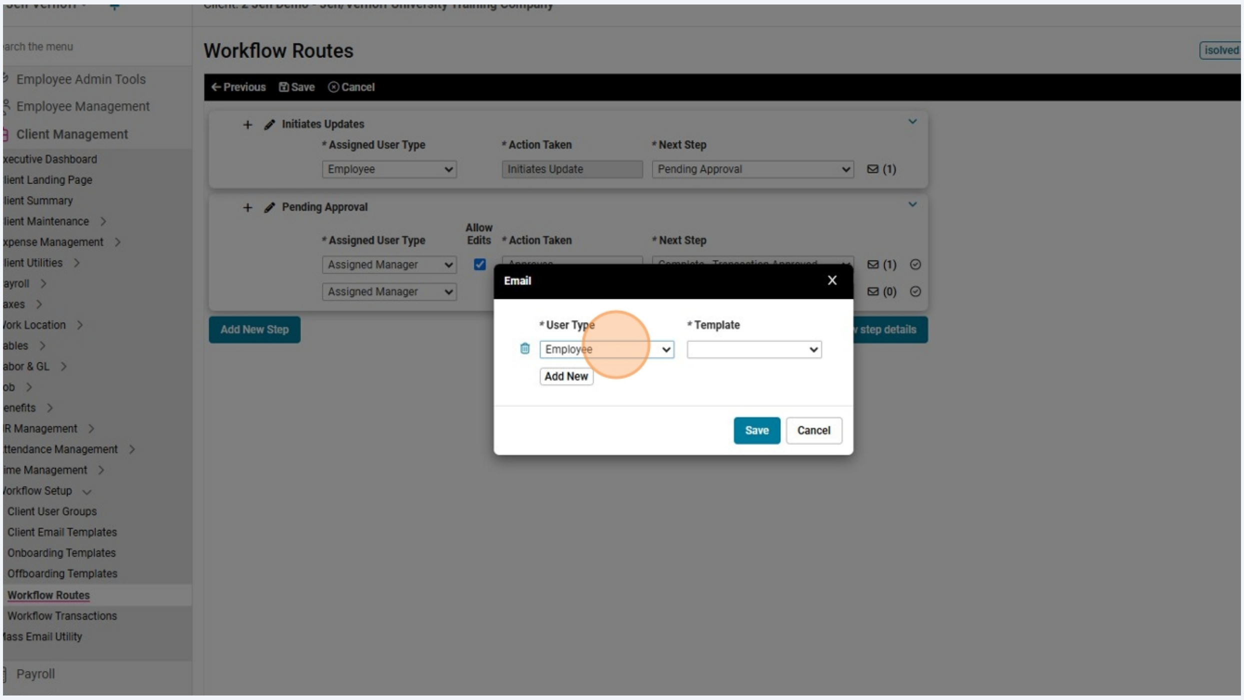
19 Choose who should have the ability to reject the change from the Assigned User-Type drop down. This is typically the same user that was chosen to receive the email notification in the above steps.



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

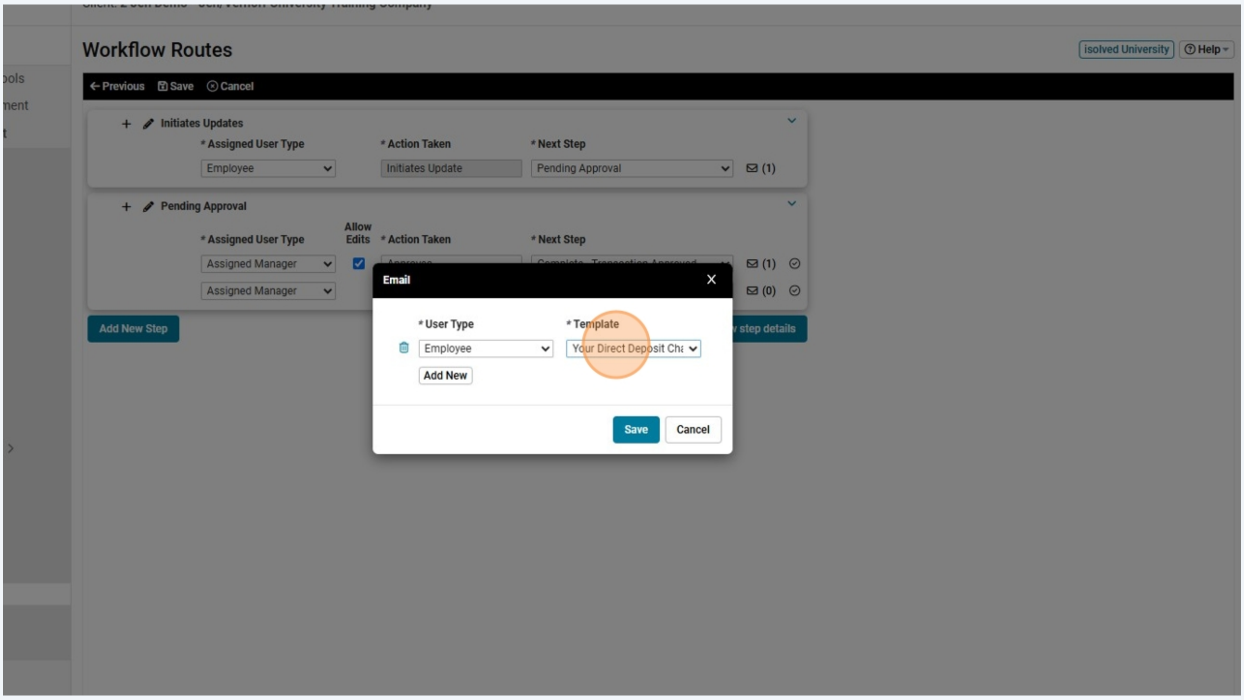


21 Select the "Employee" option under User Type.



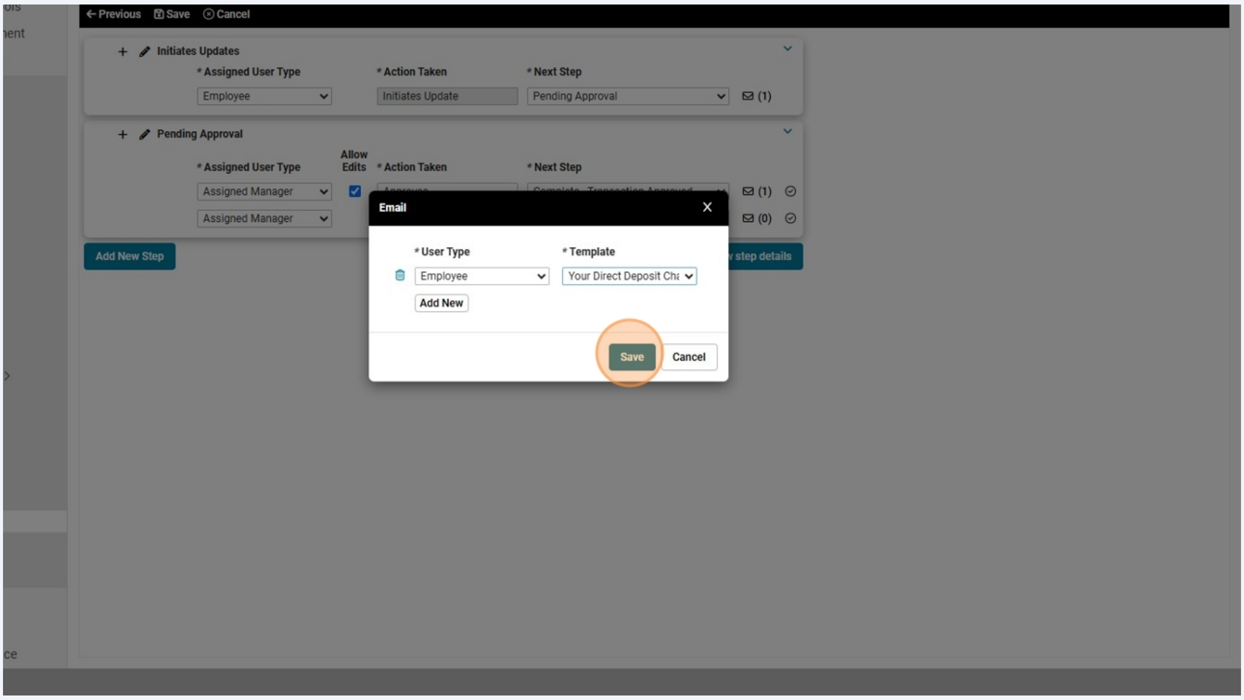
22

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

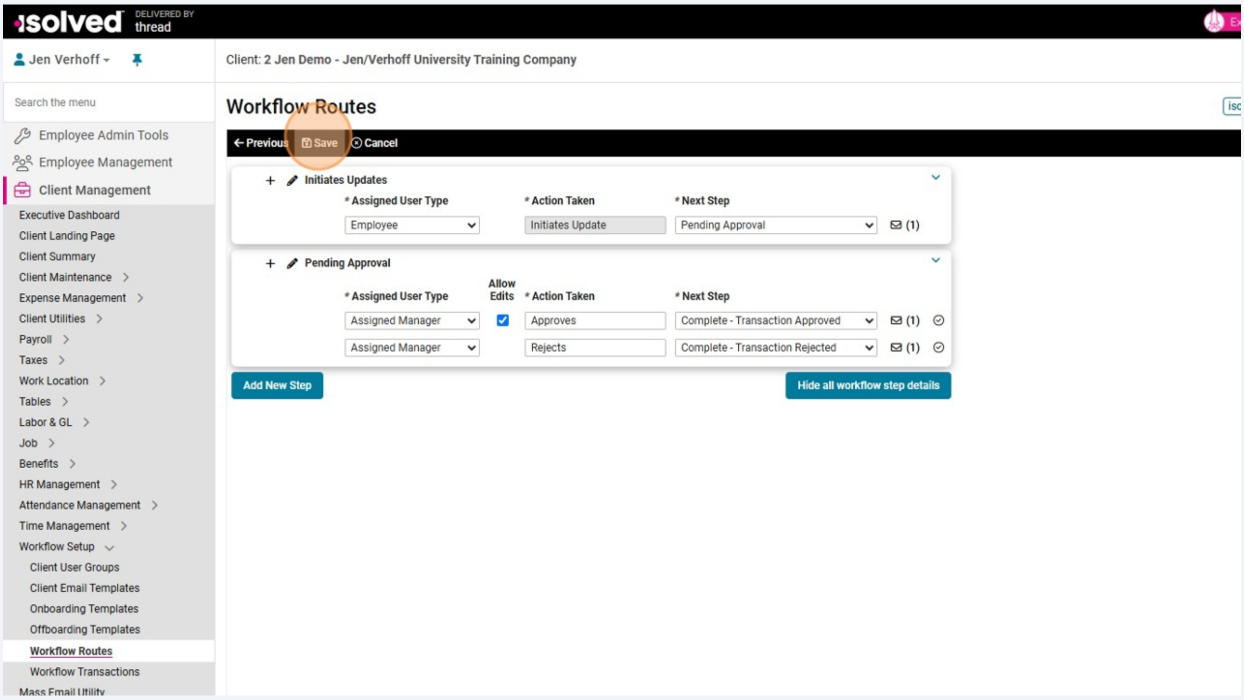


23

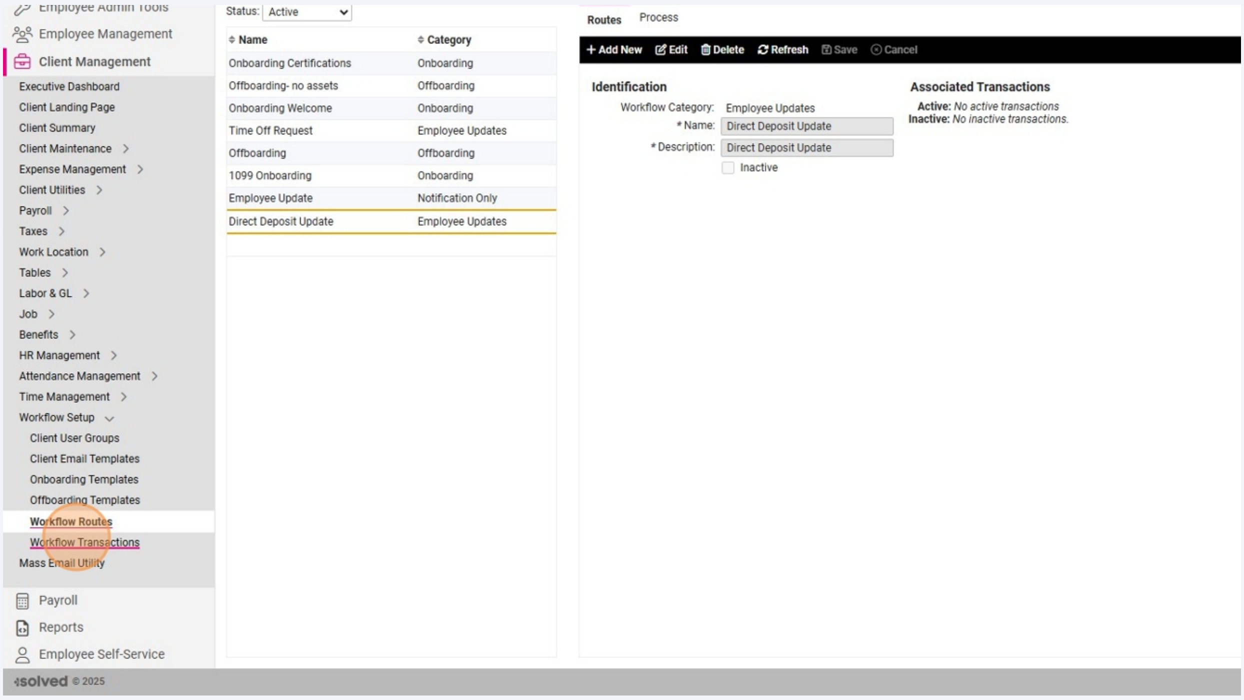
Click "Save"



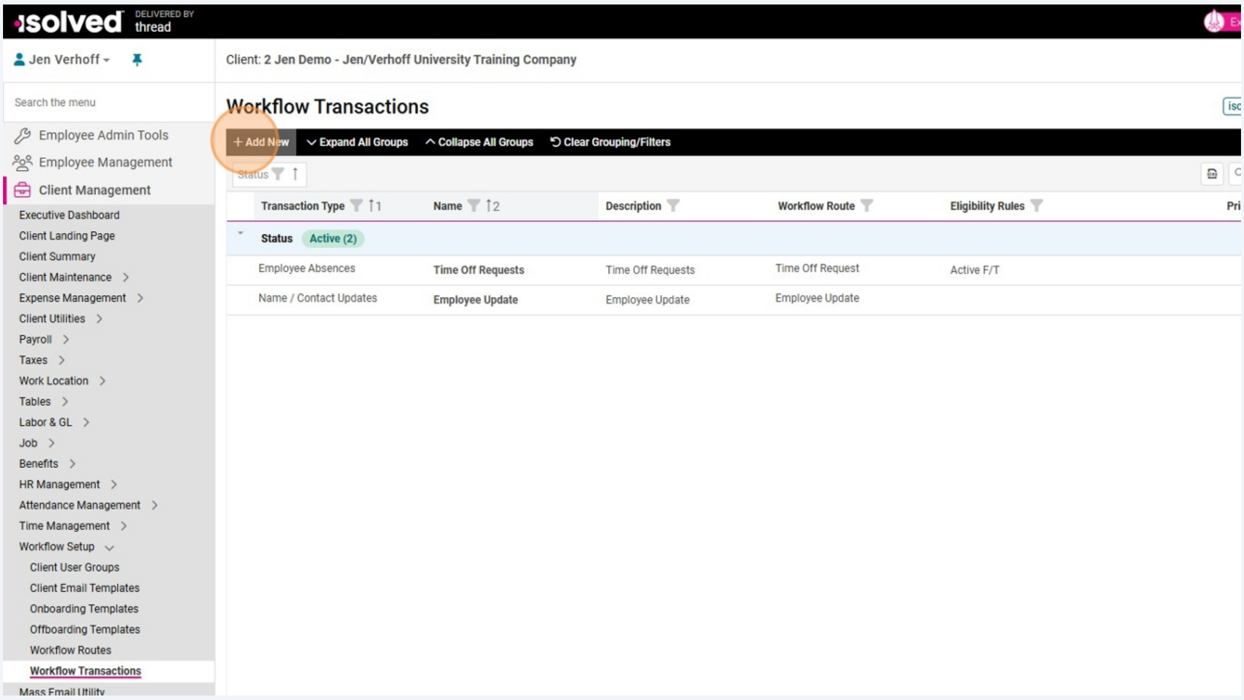
24 Click "Save" again to save the new Workflow Route.



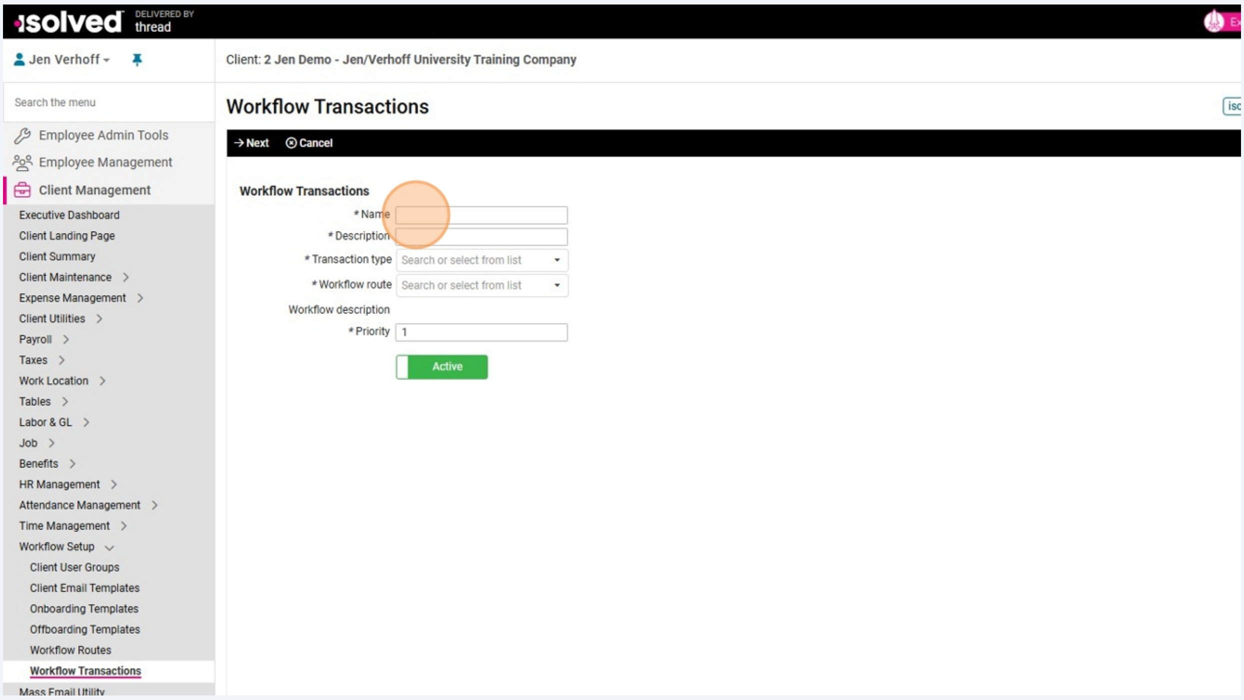
25 Every Workflow Route must have a Workflow Transaction to function correctly. Click on "Workflow Transaction"



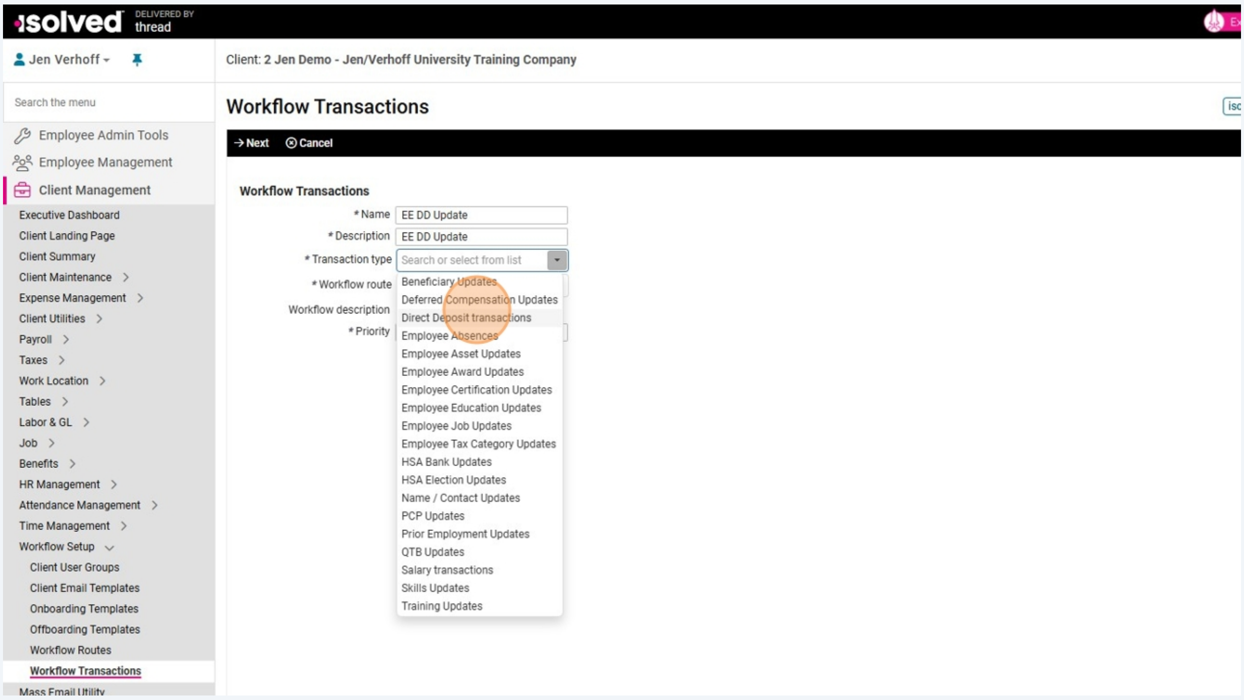
26 Click "Add New"



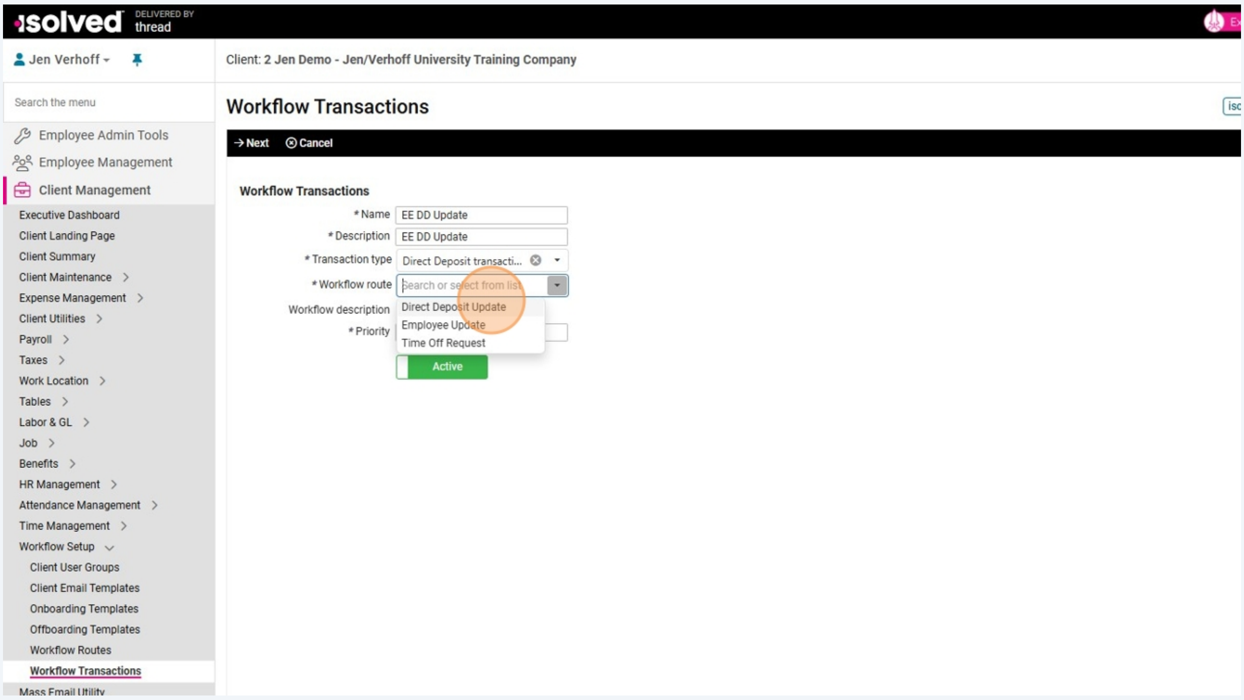
27 Complete the Name and Description fields.



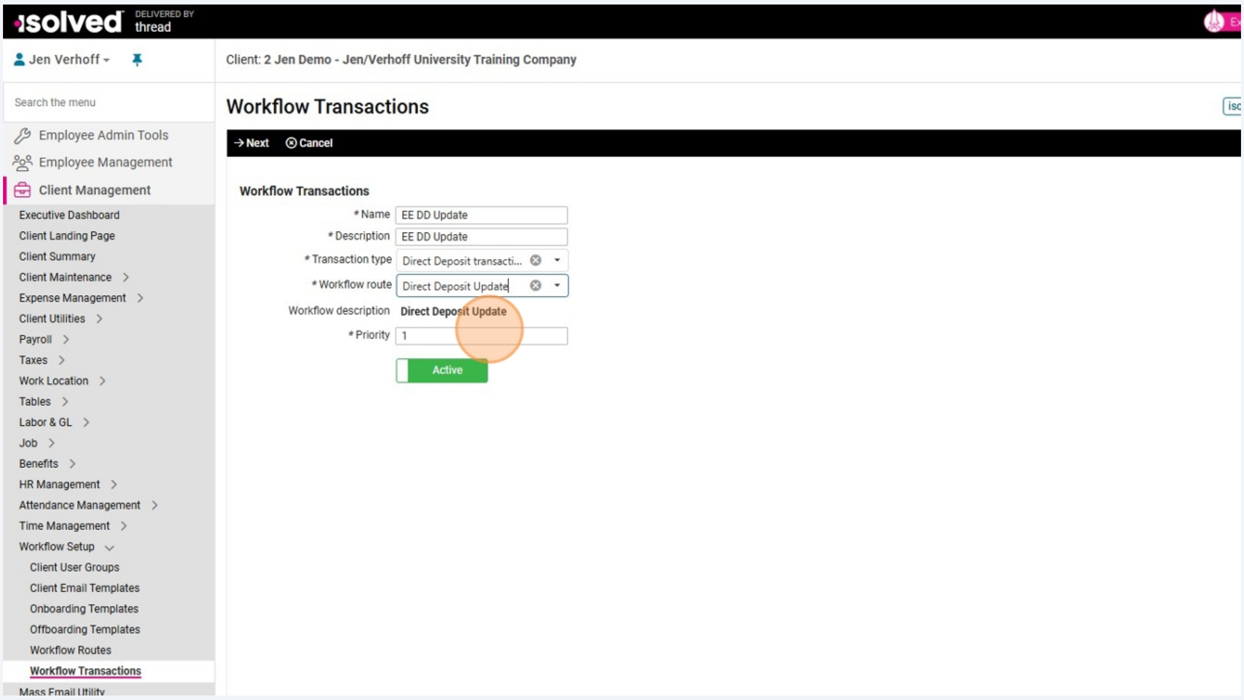
28 Choose the appropriate transaction type from the drop down, in this example we would need "Direct Deposit transactions".



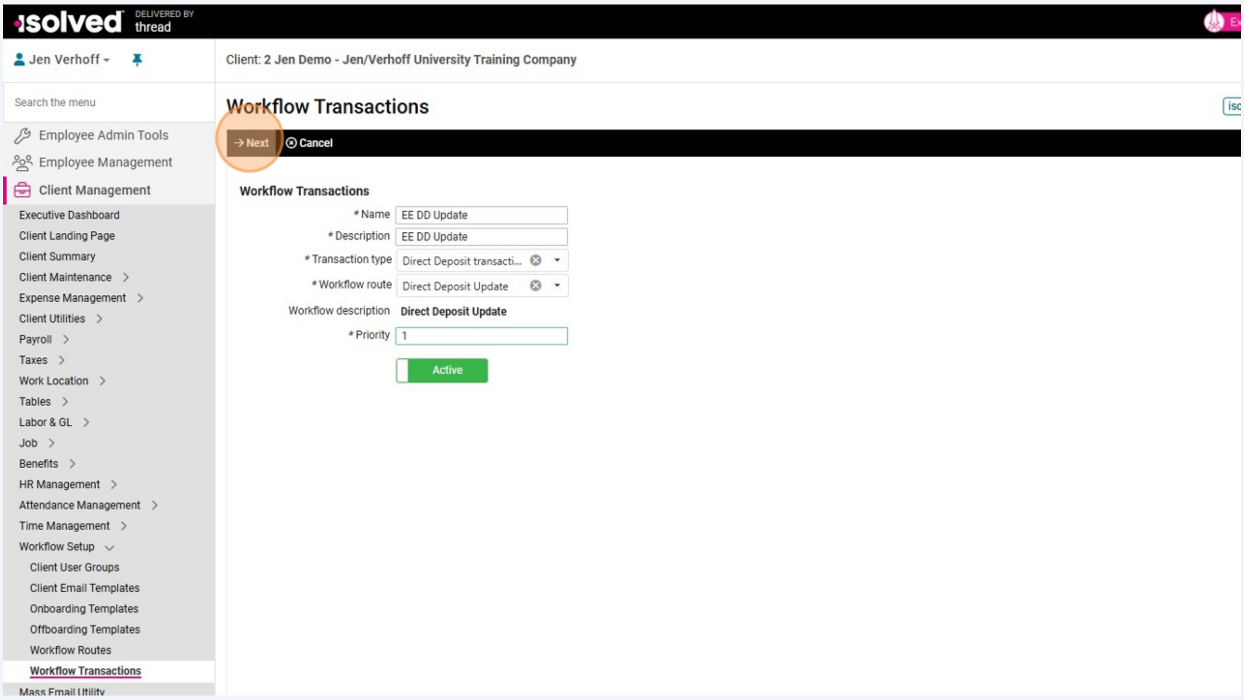
29 Choose the Workflow Route you just created, in this example it is "Direct Deposit Update"



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



31 Click "Next"



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.