

Configure Hiring Workflows in iSolved Hire (ATS/iHire)



This guide walks through how to set up Hiring Workflows. These help create a visual process to track applicants through the steps of the hiring process.

1

Navigate to

<https://admin.isolvedhire.com/dashboard/?id=1341&name=dashboard>

Dashboard



Applicants



Candidate Marketplace



Jobs



Reports



Inbox



Add

Thread HCM Demo Dashboard

Metrics

Activity Overview of Last Week

Opened Jobs	0
Closed Jobs	0
New Applicants	0
Interviewed	2
Total Hired	0
Hired - External	0
Hired - Internal	0

Coming up this Week

Jobs Closing	0
Reqs Pending Approval	0
Applicants w/No Status	1

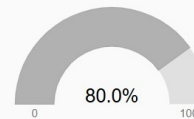
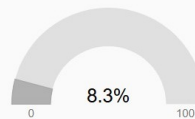
Conversion Effectiveness

01-May-2026

31-Jul-2026

Views vs. Starts

Starts vs. Completes



Source Performance

01-May-2026

31-Jul-2026

Most Applications

#	Source	Total Apps
1	LinkedIn	2

Qualified Applicants

#	Source	% Qualified	Qualified
1	LinkedIn	100%	2

Most Hires

#	Source	Total Hires

Best Applications per Hire Ratio

#	Source	Apps/Hires

2 Open the account menu.

The screenshot shows the Thread HCM Demo Dashboard. In the top right corner, there is a search bar labeled "Search Applicants" and a set of icons. The icon representing the account menu (three vertical dots) is circled in orange. The dashboard itself displays various metrics and charts, including "Activity Overview of Last Week", "Coming up this Week", and "Conversion Effectiveness".

Thread HCM Demo Dashboard

Metrics

Activity Overview of Last Week

Opened Jobs	0
Closed Jobs	0
New Applicants	0
Interviewed	2
Total Hired	0
Hired - External	0
Hired - Internal	0

Coming up this Week

Jobs Closing	0
Reqs Pending Approval	0
Applicants w/No Status	1

Conversion Effectiveness

01-May-2026 31-Jul-2026

Views vs. Starts 8.3%

Starts vs. Completes 80.0%

Source Performance

01-May-2026 31-Jul-2026

Most Applications **Qualified Applicants** **Most Hires** **Best Applications per**

3 Click "Settings"

This screenshot shows the same dashboard as the previous one, but with the account menu open. The menu is located in the top right corner and contains the following options: Home, Notifications, Users, Settings, My Account, Help Center, Contact Us, and Exit. The "Settings" option is circled in orange. The dashboard content remains the same.

Thread HCM Demo Dashboard

Metrics

Activity Overview of Last Week

Opened Jobs	0
Closed Jobs	0
New Applicants	0
Interviewed	2
Total Hired	0
Hired - External	0
Hired - Internal	0

Coming up this Week

Jobs Closing	0
Reqs Pending Approval	0
Applicants w/No Status	1

Conversion Effectiveness

01-May-2026 31-Jul-2026

Views vs. Starts 8.3%

Starts vs. Completes 80.0%

Source Performance

01-May-2026 31-Jul-2026

Most Applications **Qualified Applicants** **Most Hires** **Best Applications per**

Home
Notifications
Users
Settings
My Account
Help Center
Contact Us
Exit

4 Click "Hiring Workflows"

The screenshot shows the 'Thread HCM Demo Settings' page. The 'Hiring Workflows' tab is highlighted with an orange circle. The page includes a sidebar with navigation options like Dashboard, Applicants, Candidate Marketplace, Jobs, Reports, Inbox, and Add. The main content area has a top navigation bar with tabs: Account Controls, Career Site Pages, Jobs Settings, Business Units, Sources, Statuses, Hiring Workflows, and Inbox Template. Below the tabs, there is a section titled 'Create additional pages as menu options that will display on your career site for job seekers to view.' with a 'New Career Site Page' button. A table lists the current page:

Menu Title	Page Title	URL	Order	Type	Default
Action ▾	Jobs	https://threadcmdemo.isolvedhire.com/jobs/	1	Page	☒

Below the table, it says 'Date: 30-Jul-2026'.

5 Click "Create New Workflow"

The screenshot shows the 'Thread HCM Demo Settings' page with the 'Hiring Workflows' tab selected. The 'Create New Workflow' button is highlighted with an orange circle. The page includes a sidebar with navigation options like Dashboard, Applicants, Candidate Marketplace, Jobs, Reports, Inbox, and Add. The main content area has a top navigation bar with tabs: Jobs Settings, Business Units, Sources, Statuses, Hiring Workflows, Inbox Templates, Cronofy Templates, and Surveys. Below the tabs, there is a section titled 'Workflows allow you to organize and automate important steps in the recruitment and hiring process.' with a 'Create New Workflow' button. A table lists the existing workflows:

Name ↑	Connected Jobs	Last Modified	Modified By	Status
Actions ▾ Benefits Workflow	2	2025-10-17 06:58:16	Matt Bonds	Active
Actions ▾ HR Hiring Workflow HR hiring workflow	0	2025-10-20 11:25:57	Matt Bonds	Active
Actions ▾ Sales Job Workflow	1	2025-10-16 14:08:02	Holly Webb	Active

Below the table, there is a 'Show Archived' button. At the bottom, it says 'Date: 30-Jul-2026'.

6 Click the Workflow Name field.

The screenshot shows a web interface for creating a new hiring workflow. On the left is a sidebar with navigation links: 'Candidate Marketplace', 'Jobs', 'Reports', 'Inbox', and 'Add'. The main content area is titled 'New Hiring Workflow' and features an illustration of a person at a desk with a large document icon. Below the illustration is the text 'Let's make a great workflow!'. The form contains two input fields: 'Workflow Name' and 'Description'. The 'Workflow Name' field is highlighted with an orange circle and contains the text 'New Hiring Workflow'. Below the fields are 'Save' and 'Cancel' buttons. At the bottom of the form, the date 'Date: 30-Jul-2026' is displayed. A search bar at the bottom left of the page contains the text 'Need help? Search the Help Content'.

7 Add Details and click "Save"

This screenshot shows the same 'New Hiring Workflow' form, but with the 'Workflow Name' field updated to 'Manager Workflow'. The 'Description' field remains empty. The 'Save' button is now highlighted with an orange circle. The date 'Date: 30-Jul-2026' is still visible at the bottom of the form. The sidebar and search bar are identical to the previous screenshot.

Workflow Configuration

8

Once you go into the builder, you can set up the notifications and the details for each step.

The screenshot shows the 'Manager Workflow' builder interface. On the left is a sidebar with navigation options: Applicants, Candidate Marketplace, Jobs, Reports, Inbox, and Add. The main content area has a top navigation bar with links: Jobs Settings, Business Units, Sources, Statuses, Hiring Workflows (highlighted), Inbox Templates, Cronofy Templates, and Surveys. Below the navigation bar, the 'Manager Workflow' section is active, showing 'New Job Listing Settings' and 'Job Setting Notifications'. The 'Job Setting Notifications' section includes a description: 'All setting selections here will be automatically applied to new Job Listings if this Workflow is selected when a new job is created. You can also edit existing job templates to utilize this Workflow.' Below this are four notification settings: 'New Applicant Notification', 'Job Opening Notification', 'Job Closing Notification', and 'Paid Ad Closing Notification'. Each notification setting has a dropdown menu for selecting users. The 'New Applicant Notification' dropdown is highlighted with an orange circle. There is also a checkbox option: 'Only send email if the applicant has met BQ'.

9

Go through the steps on the left side to choose additional settings for this workflow.

The screenshot shows the 'Manager Workflow' builder interface, specifically the 'Auto Assign Status' section. The sidebar on the left is the same as in the previous screenshot. The main content area shows the 'Manager Workflow' section with 'New Job Listing Settings' and 'Auto Assign Status'. The 'Auto Assign Status' section has a title 'Automatically assign statuses for new applicants.' and a subtitle 'Auto-Assigned App Statuses are configured in Status settings.' Below this are two status assignment rules: 'Applicant meets basic qualifications' and 'Applicant fails basic qualifications'. The 'Applied' status is selected in the 'New Job Listing Settings' section, and the 'Interview' status is highlighted with an orange circle in the 'Auto Assign Status' section. A 'Go to Status Settings' button is visible at the bottom of the 'Auto Assign Status' section. The date 'Date: 30-Jul-2026' is displayed at the bottom of the page.

10

Click "Select Applicant Statuses" to add or remove steps to this workflow from the existing Statuses List.

The screenshot shows the 'Thread HCM Demo Settings' interface. The left sidebar contains navigation links: Dashboard, Applicants, Candidate marketplace, Jobs, Reports, Inbox, Add, and marketplace. The main content area is titled 'Thread HCM Demo Settings' and includes a top navigation bar with links: Account Controls, Career Site Pages, Jobs Settings, Business Units, Sources, Statuses, **Hiring Workflows**, Inbox Templates, Cronofy Templates, Surveys, and eFor. Below this, the 'Benefits Workflow' section is visible, with a 'Save' button and a 'Close Builder' button. The workflow steps are listed on the left: New Job Listing Settings, Applied (1 Step), Reviewing, Interview (3 Steps), Post-Interview (1 Step), Hired (1 Step), and Not Selected (1 Step). The 'Interview' step is expanded, showing sub-steps: In-Person Interview Scheduled - Hiring manager interview, Phone Interview Scheduled, and In-Person Interview Scheduled. On the right, the 'Hiring manager interview' step is selected, and the 'Select Applicant Statuses' button is highlighted with an orange circle.

© Date: 03-Aug-2026

Q Need help? Search the Help Content

11

Click here.

The screenshot shows the 'Thread HCM Demo Settings' interface, similar to the previous one. The 'Interview' step is expanded, and the 'Select Applicant Statuses' button is highlighted with an orange circle. On the right, a search for 'Phone Interview Completed' is shown, with the results list displaying the following items:

- Hiring manager interview
Parent Status: In-Person Interview Scheduled
- Phone Interview Scheduled
- + **Phone Interview Completed**
- In-Person Interview Scheduled
- + 1st Interview Completed
- + 2nd Interview Completed

The 'Phone Interview Completed' item is highlighted with an orange circle. A 'Close Search' button is visible at the bottom of the search results.

© Date: 03-Aug-2026

Q Need help? Search the Help Content

12

If you need to add or remove statuses, you can do that by clicking "Statuses" up top.

The screenshot shows the 'Thread HCM Demo Settings' page. The top navigation bar includes 'Account Controls', 'Career Site Pages', 'Jobs Settings', 'Business Units', 'Sources', 'Statuses' (highlighted with an orange circle), 'Hiring Workflows', 'Inbox Templates', 'Cronofy Templates', 'Surveys', and 'eFor'. The main content area is titled 'Benefits Workflow' and contains a 'New Job Listing Settings' section with a list of steps: 'Applied' (1 Step), 'Reviewing', 'Interview' (3 Steps), 'Post-Interview' (1 Step), 'Hired' (1 Step), and 'Not Selected' (1 Step). The 'Interview' step is expanded, showing 'In-Person Interview Scheduled - Hiring manager interview', 'Phone Interview Scheduled', and 'In-Person Interview Scheduled'. A 'Select Applicant Statuses' button is visible. On the right, a search bar is present with a list of items: 'Hiring manager interview', 'Phone Interview Scheduled', 'Phone Interview Completed', 'In-Person Interview Scheduled', '1st Interview Completed', and '2nd Interview Completed'.

13

Here you can edit any Statuses

The screenshot shows the 'Thread HCM Demo Settings' page with the 'Statuses' tab selected. The top navigation bar is the same as in the previous screenshot. The main content area contains a table of application statuses. The table has columns: 'Status Name', 'Type', 'Parent Status', 'Checklist', and 'Workflow'. The 'Statuses' tab is highlighted in the top navigation bar. Below the table, there are buttons for 'New Application Status', 'Common Statuses Questions', 'Create Application Statuses', and 'Send Email on Status Update'.

Status Name	Type	Parent Status	Checklist	Workflow
Action ▾ Hiring manager interview	Interview Phase	In-Person Interview Scheduled	X	2
Action ▾ Reviewed Interview Confirmation	Reviewing			1
Action ▾ Left Voicemail	Reviewing			1
Action ▾ Phone Interview Scheduled Interview Confirmation	Interview Phase			2
Action ▾ Phone Interview Completed	Interview Phase			1
Action ▾ In-Person Interview Scheduled	Interview Phase			2
Action ▾ 1st Interview Completed	Interview Phase			
Action ▾ 2nd Interview Completed	Interview Phase			
Action ▾ Position Offered	Post-Interview Phase			2
Action ▾ Hired	Hired			2
Action ▾ Not Qualified	Not Selected			1
Action ▾ Not Selected	Not Selected			2

14 Click "New Application Status" to add a new Status

The screenshot shows the 'Thread HCM Demo Settings' page with the 'Statuses' tab selected. A blue button labeled 'New Application Status' is circled in orange. Below the button is a table of existing statuses.

	Status Name	Type	Parent Status	Checklist	Workflow
Action	Hiring manager interview	Interview Phase	In-Person Interview Scheduled	X	2
Action	Reviewed <i>Interview Confirmation</i>	Reviewing			1
Action	Left Voicemail	Reviewing			1
Action	Phone Interview Scheduled <i>Interview Confirmation</i>	Interview Phase			2
Action	Phone Interview Completed	Interview Phase			1
Action	In-Person Interview Scheduled	Interview Phase			2
Action	1st Interview Completed	Interview Phase			
Action	2nd Interview Completed	Interview Phase			
Action	Position Offered	Post-Interview Phase			2
Action	Hired	Hired			2
Action	Not Qualified	Not Selected			1

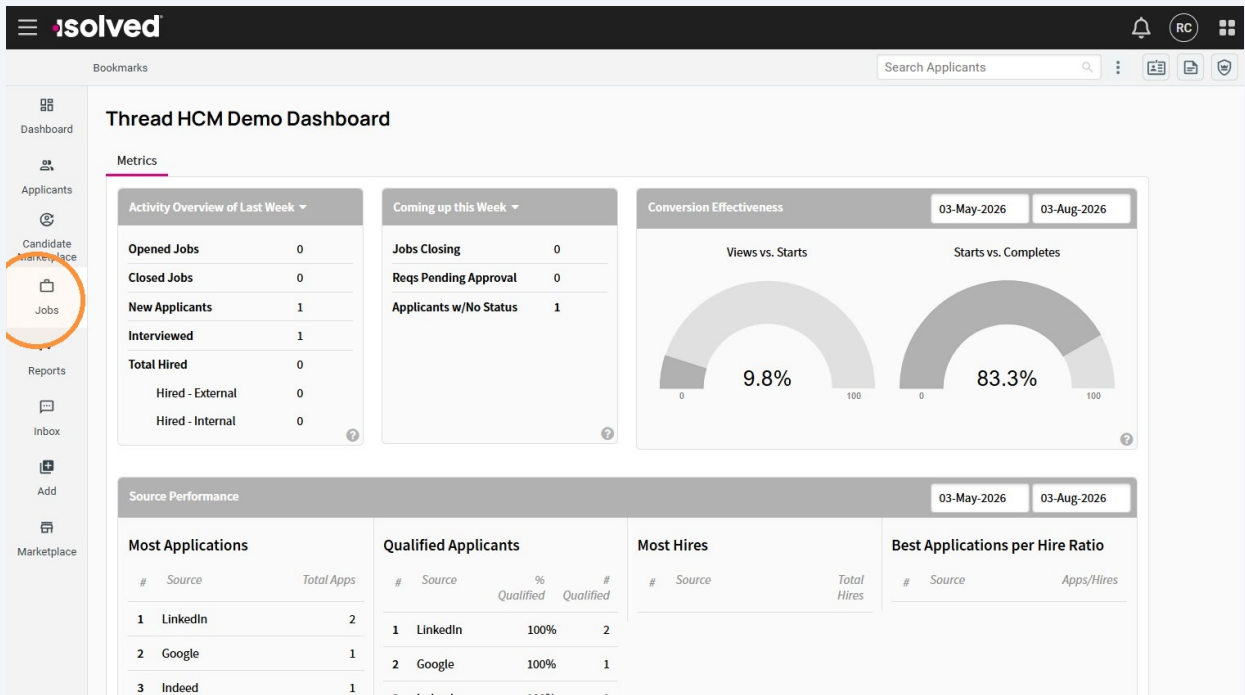
15 Then Click "Save"

The screenshot shows the 'Thread HCM Demo Settings' page with the 'Hiring Workflows' tab selected. A blue button labeled 'Save' is circled in orange. The page displays a 'Manager Workflow' section with a 'New Job Listing Settings' button and a list of stages: Applied (1 Step), Reviewing, Interview (selected), Post-Interview, and Hired. A message states 'No statuses exist for this stage.' Below the stages is a 'Select Applicant Statuses' button.

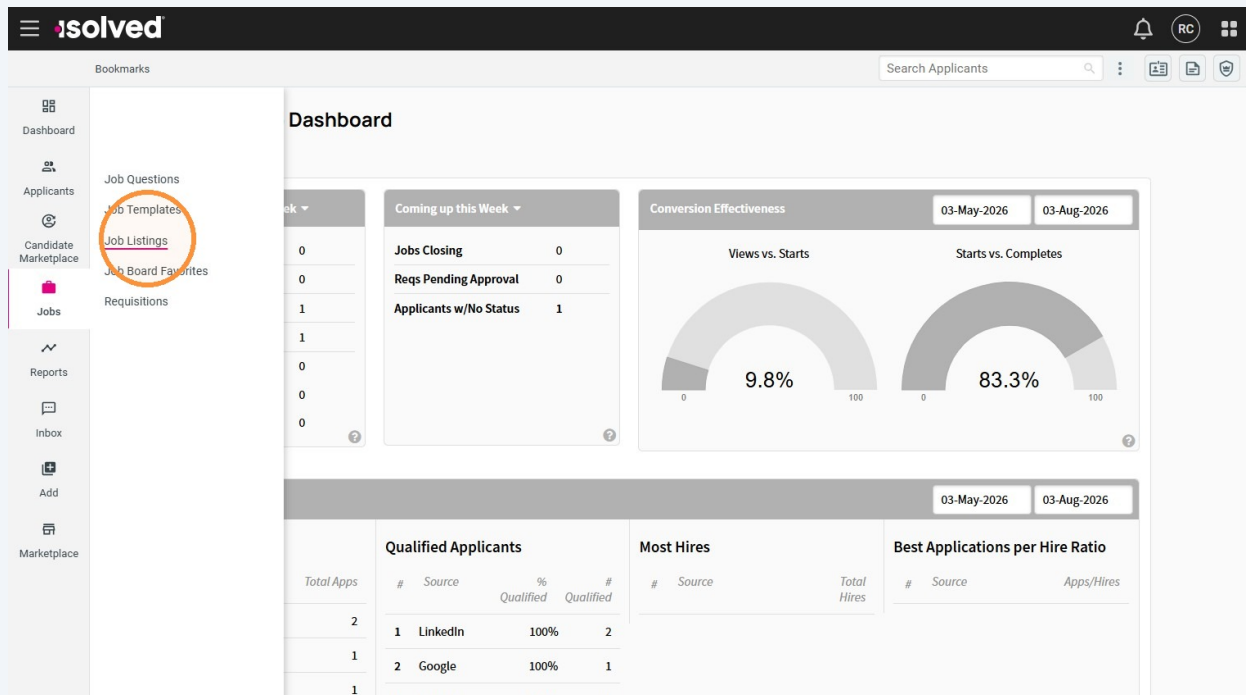
Job Assignment

16

Click "Jobs"



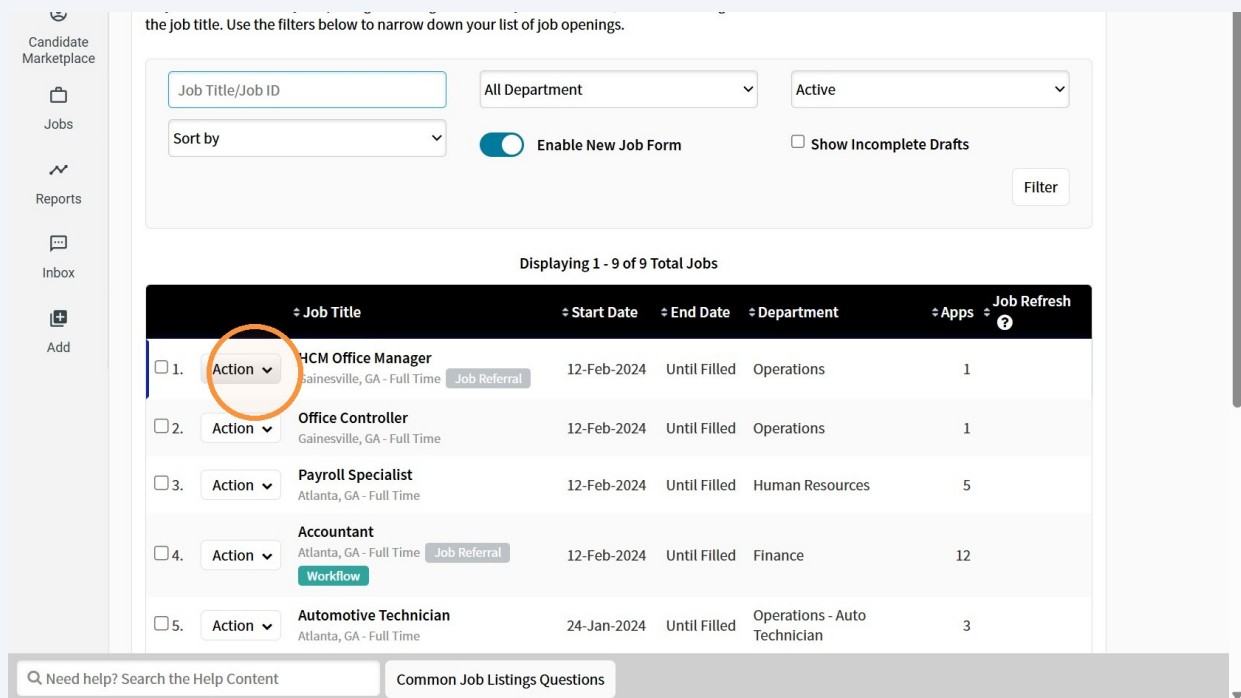
17 Click "Job Listings"



The screenshot shows the iSolved dashboard interface. On the left sidebar, the 'Job Listings' menu item is circled in orange. The main dashboard area displays various metrics and charts, including 'Coming up this Week', 'Conversion Effectiveness' (Views vs. Starts at 9.8% and Starts vs. Completes at 83.3%), and a table of 'Qualified Applicants'.

Total Apps	#	Source	% Qualified	# Qualified
2	1	LinkedIn	100%	2
1	2	Google	100%	1

18 Click "Action"



The screenshot shows the iSolved Job Listings page. The 'Action' button in the first row of the job list is circled in orange. The page includes a search bar, filters, and a table of job listings.

the job title. Use the filters below to narrow down your list of job openings.

Job Title/Job ID: All Department: Active:

Sort by: ☒ Enable New Job Form ☐ Show Incomplete Drafts

Displaying 1 - 9 of 9 Total Jobs

	Job Title	Start Date	End Date	Department	Apps	Job Refresh
☐ 1.	Action HCM Office Manager Gainesville, GA - Full Time Job Referral	12-Feb-2024	Until Filled	Operations	1	
☐ 2.	Action Office Controller Gainesville, GA - Full Time	12-Feb-2024	Until Filled	Operations	1	
☐ 3.	Action Payroll Specialist Atlanta, GA - Full Time	12-Feb-2024	Until Filled	Human Resources	5	
☐ 4.	Action Accountant Atlanta, GA - Full Time Job Referral Workflow	12-Feb-2024	Until Filled	Finance	12	
☐ 5.	Action Automotive Technician Atlanta, GA - Full Time	24-Jan-2024	Until Filled	Operations - Auto Technician	3	

Need help? Search the Help Content Common Job Listings Questions

19 Click "Edit"

Thread HCM Demo Jobs Dashboard

Job Questions Job Templates **Job Listings** Job Board Favorites Requisitions Job Ads Text To Apply

Job Listings represent your current job openings. The Start and End dates represent when the job is active on your career site. If a job opening is no longer active on your career site, the "Closed" tag will show next to the job title. Use the filters below to narrow down your list of job openings.

[New Job Listing](#)

Job Title/Job ID All Department Active

Sort by ☒ Enable New Job Form ☐ Show Incomplete Drafts [Filter](#)

Edit

Close Job
Close & Archive
Copy Job Listing
Job Advertising [SALE](#)
Job Push History
Copy Job Link
Print Application
View Applicants
Add Applicant
Upload Bulk Applicants
Source Report
Status Report

Displaying 1 - 9 of 9 Total Jobs

	Start Date	End Date	Department	Apps	Job Refresh
1. Job Referral	12-Feb-2024	Until Filled	Operations	1	
2. Job Referral	12-Feb-2024	Until Filled	Operations	1	
3. Job Referral	12-Feb-2024	Until Filled	Human Resources	5	

20 Open Settings & Notifications.

HCM Office Manager

Cancel & Exit Save Listing & Exit [Save Listing & Continue](#) ☒ Enable New Job Form

Job Status: Active Department: Operations Employment Type: Full Time Date Created: 2/12/2024 Job ID: 1105939

Sponsored: No Location: Gainesville, GA, USA Pay Rate: \$55000 - \$65000 per year Closing Date: Until Filled Created By: Matt Bonds Template Name/ID: HCM Office Manager (193712)

Job Ad Position Details **Settings & Notifications** Preview on Career Site

Job Ad

Job Title* HCM Office Manager [Open Job Ad AI Pro](#)

Job Board Ad Title* HCM Office Manager

Job Ad*

File Edit View Insert Format Tools Table

Formats Paragraph Verdana Font Sizes

Job Ad Insights

[Job Ad Tour](#)

Title

- Keep Job Titles short and simple.
 - If the target audience is on Desktop aim for 60 characters or less.
 - If the target audience is on Mobile aim for 35 characters or less.
- Avoid internal language and abbreviations in Job Title.

21 Choose the Hiring Workflow from the dropdown

Advertising Settings

Ad Duration Start Date* 2024-02-12 End Date* Until Filled ☒

Enable Job Refresh ☐

Job Listing Notes

Admin Settings

Hiring Workflow None

Interviewers Matt Bonds

Notifications

Job Opening Notification Matt Bonds

Job Closing Notification Matt Bonds

Ad Duration

- Most Job Ads see the best performance for 30 days.
- Changing the start date will not reflect on job boards as they track the Job ID rather than a start date.

Job Questions

- Ensure your job questions do not include links as job boards may flag jobs that redirect away from their job board.
- Do not ask questions that could be considered discriminatory.

Required Fields

Job Ad

- ☒ Job Title
- ☒ Job Board Ad Title

22 To view this Workflow Click "Applicants" and "Hiring Pipeline"

isolved

Bookmarks Search Applicants (193712)

Dashboard

Applicants

Job Posting

Check the boxes below and then click Submit Job Board Selections to post this job to the selected job boards. You will either have credits deducted from your available credits or asked to pay the total for the jobs selected.

To add additional job boards go to Jobs > Job Board Favorites.

*Note: It may take up to 1 business day for Job Postings to appear on job boards. Requests submitted on Friday may not post until Monday.

Indeed Sponsored

We have made updates to the Indeed Sponsorship which may require you to re-input your credentials.

Once you connect to your Indeed account, you will see an applicant prediction based on your budget amount.

[Connect Indeed Account](#)

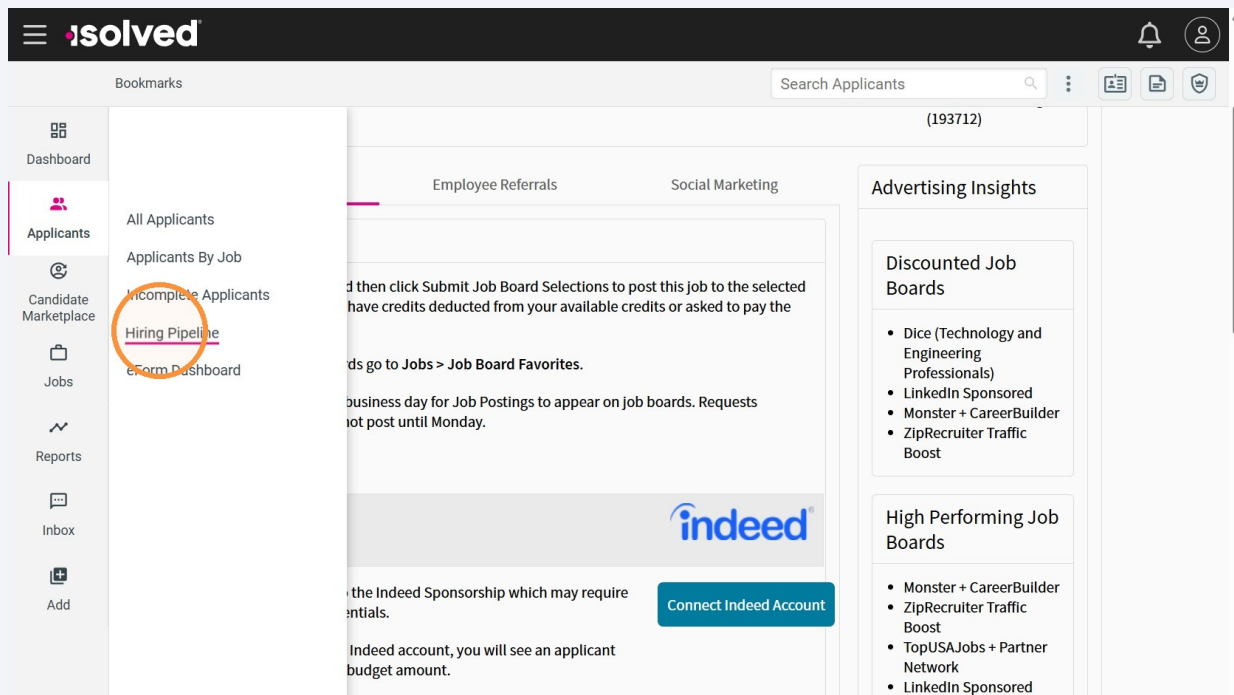
Advertising Insights

Discounted Job Boards

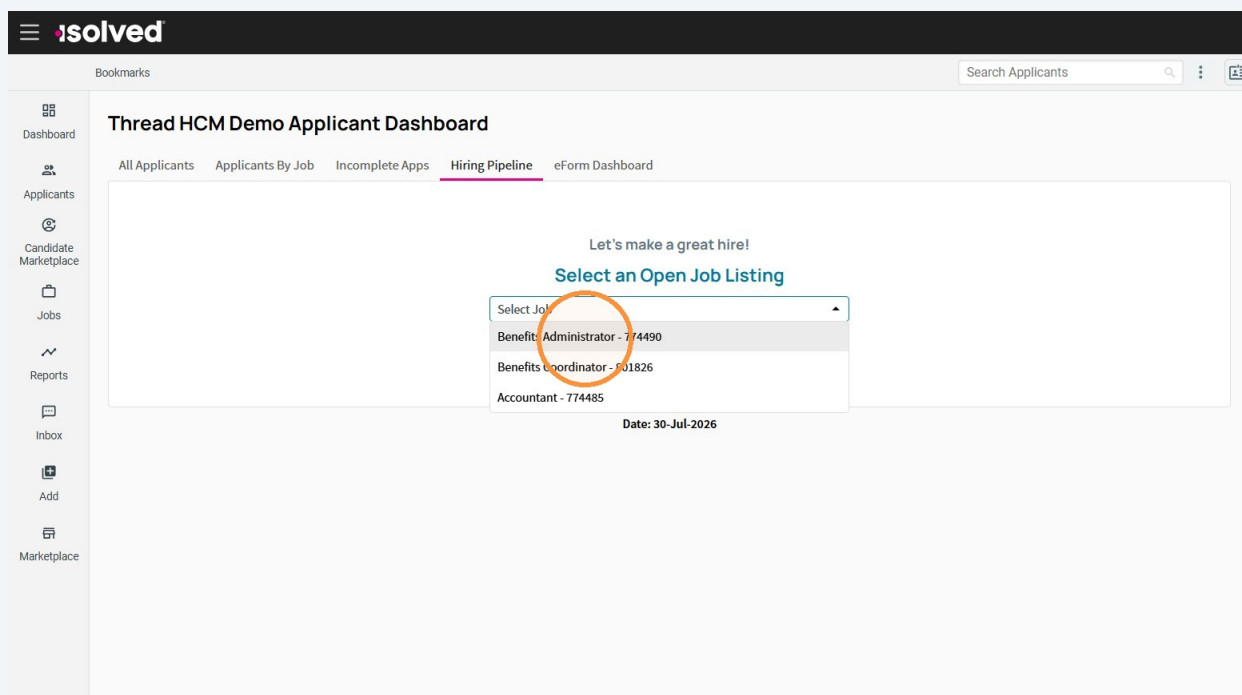
- Dice (Technology and Engineering Professionals)
- LinkedIn Sponsored
- Monster + CareerBuilder
- ZipRecruiter Traffic Boost

High Performing Job Boards

- Monster + CareerBuilder
- ZipRecruiter Traffic Boost
- TopUSAJobs + Partner Network
- LinkedIn Sponsored



23 Select the job from the dropdown.



24

From here you can see the workflow and as applicants are added to the job, you'll see them in each step. You can move them by clicking and dragging in this workflow, or

Department: Human Resources
Workflow: Benefits Workflow

Applicants

Add Applicant

Show Details

Show Filters

Search

Applied	Interview Phase	Post-Interview Phase	Hired	Not Selected
Applied	Hiring manager Interview Phone Interview Scheduled In-Person Interview Scheduled	Position Offered	Hired	Not Selected