

Scheduler Basics



1

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

Ryan Cyn...

Client: CYN22 - CynTech Legal: Cynkar Technologies Status: Active

Client Search

Search the menu

Customer Service

Employee Admin Tools

Employee Administration

Compensation Management

Employee Scheduling

Default Schedule

Scheduler

Scheduler Import

Enrollment Management

I-9 Management

Pending Employees

Pending Terminations

Pending Workflow

Self-Service Management

Employee Analytics

Employee Utilities

Employee Management

Client Management

Payroll

Reports

Production Utilities

Security

Conversion Management

System Management

Scheduler History

Please use filters to set criteria or just click apply to load default results.

Filtered: Status (Active)

Policy Group: ANY Home Labor Field: ANY Status: Active Manager: ANY EE Group: ANY HR Category: ANY Search:

Pay Group: ANY Home Labor Value: ANY EE Type: ANY Supervisor: ANY Team: ANY HR Value: ANY Shift Status: (ANY)

Apply Reset

2 Click "Scheduler"

The screenshot shows the iSolved HR system interface. The top navigation bar includes the iSolved logo, "Delivered by thread", and a user profile icon labeled "RC". Below the navigation bar, the user's name "Ryan Cyn..." is displayed. The main content area is divided into a left sidebar and a right pane. The sidebar contains a search bar and a list of menu items under "Employee Admin Tools". The "Scheduler" item is highlighted with an orange circle. The right pane shows the "Scheduler" section with a "History" tab. Below the tab, there is a message: "Please use filters to set criteria or just click apply to load default results." A filter section titled "Filtered: Status (Active)" contains various dropdown menus for filtering: Policy Group (ANY), Home Labor Field (ANY), Status (Active), Manager (ANY), EE Group (ANY), HR Category (ANY), Pay Group (ANY), Home Labor Value (ANY), EE Type (ANY), Supervisor (ANY), Team (ANY), HR Value (ANY), and Shift Status (ANY). There is also a search bar and "Apply" and "Reset" buttons.

3 Choose any fields you'd like to filter by and Click "Apply" If you want to see all employees you have access to, just click "Apply"

This screenshot is identical to the one above, showing the iSolved HR system interface. The "Scheduler" menu item in the left sidebar is highlighted with an orange circle. In the right pane, the "Apply" button in the filter section is also circled with an orange circle, indicating the next step in the process.

4 Click on the time card where you are looking to add a shift.

The screenshot shows the 'isolved' system interface. The top bar includes the 'isolved' logo, 'Delivered by thread', and a user profile 'Ryan Cyn...'. The main header shows 'Client: CYN22 - CynTech', 'Legal: Cynkar Technologies', and 'Status: Active'. The left sidebar contains 'Employee Admin Tools' with sub-items like 'Employee Administration', 'Compensation Management', 'Employee Scheduling', and 'Default Schedule'. The main area is titled 'Schedulr' and shows a calendar grid for the week of Sun 6/15 to Sat 6/21. An orange circle highlights the cell for Monday, 6/16, for the employee 'Bailey, Christopher'.

5 Choose the shift from the dropdown

The screenshot shows the 'isolved' system interface with a modal window open for adding a shift. The modal is titled 'Schedule' and contains the following fields: 'Employee Name' (Bailey, Christopher), 'Shift Name' (First Shift), 'Override Shift' (checkbox), 'Open Shift' (checkbox), 'On Call Shift' (checkbox), '* Start Time' (6/16/2025 8:00 AM), '* End Time' (6/16/2025 4:00 PM), '* Duration' (8:00), 'Required' (checkbox), 'Maximum' (checkbox), '* Attendance Rule' (test), and 'Meal/Break Rule'. The 'Labor' section includes a 'Department' dropdown. The modal has buttons for 'Draft', 'Post', and 'Cancel'. An orange circle highlights the 'Shift Name' dropdown menu.

6 Click "Override Shift" if you need to change any details for the existing shift.

The screenshot shows the 'isolved' scheduler interface with a modal dialog titled 'Schedule' open. The dialog is for 'Bailey, Christopher' and shows a 'First Shift' selected. The 'Override Shift' button is highlighted with an orange circle. The dialog includes fields for Start Time (6/16/2025, 8:00 AM), End Time (6/16/2025, 4:00 PM), Duration (8.00), Required, Maximum, Attendance Rule (test), and Meal/Break Rule. The 'Labor' section shows a Department dropdown. At the bottom are buttons for 'Draft', 'Post', and 'Cancel'.

isolved
Delivered by thread

Client: CYN22 - CynTech Legal: Cynkar Technologies Status: Active

Search the menu

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Conversion Management

Scheduler History

Filtered: Status (Active)

Schedule By Employee

Show Re...

Showing r...

Scheduler

Bailey, Chris...

Button IV, Be...

Clooney, Ge...

Dooly IV, Dav...

Doore, Samu...

Employee, M...

Employee, P...

EMPLOYEE, TEST

Fieri, Guy R

Fowler, Rickie

Total

Grand Total

Hours

Sat 6/21

Days

Month

Total

Previous 1 2 Next

Schedule

Employee Name: Bailey, Christopher

Shift Name: First Shift

Override Shift

Open Shift

On Call Shift

* Start Time: 6/16/2025 8:00 AM

* End Time: 6/16/2025 4:00 PM

* Duration: 8.00

Required:

Maximum:

* Attendance Rule: test

Meal/Break Rule:

Labor

Department:

Draft Post Cancel

7 If all is correct, Click "Post"

This screenshot is identical to the previous one, but with an orange circle highlighting the 'Post' button at the bottom of the 'Schedule' dialog box.

isolved © 2025

8 If you click and drag on the time card, you can add multiple days of shifts.

isolved Delivered by thread

Client: CYN22 - CynTech Legal: Cynkar Technologies Status: Active

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- Employee Admin Tools
 - Employee Administration
 - Compensation Management
 - Employee Scheduling
 - Default Schedule
 - Scheduler**
 - Scheduler Import
 - Enrollment Management
 - I-9 Management
 - Pending Employees
 - Pending Terminations
 - Pending Workflow
 - Self-Service Management
 - Employee Analytics
 - Employee Utilities
 - Employee Management
 - Client Management
 - Payroll
 - Reports
 - Production Utilities
 - Security
 - Conversion Management

Scheduler History

Filtered: Status (Active)

Schedule By Employee

Show Results Clear Clipboard Copy Schedules Approvals Weekly Schedule Report

Showing results 1 - 50 of 62

Scheduler

Sun 6/15 Mon 6/16 Tue 6/17 Wed 6/18 Thu 6/19 Fri 6/20 Sat 6/21

Hours Days Month

Bailey, Christopher

First Shift

8:00 AM - 4:00 PM

Button IV, Ben

Clooney, George

Dooly IV, David

Doore, Samuel

Employee, Mel

Employee, Penn

EMPLOYEE, TEST

Fieri, Guy R

Total

8.00

9 Then Post.

isolved © 2025

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 - Conversion Management
 - System Management
 - Employee Self-Service

Scheduler History

Filtered: Status (Active)

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Scheduler

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Hours Days Month

Bailey, Christopher

First Shift

8:00 AM - 4:00 PM

Button IV, Ben

Clooney, George

Dooly IV, David

Doore, Samuel

Employee, Mel

Employee, Penn

EMPLOYEE, TEST

Fieri, Guy R

Total

8.00

Grand Total

8.00

Schedule

Employee Name: Bailey, Christopher

Shift Name: First Shift

Create a Schedule for Each Day

Create a Single Schedule

Selected Dates: 6/17/2025 - 6/20/2025

Override Shift

Open Shift

On Call Shift

* Start Time: 8:00 AM

* End Time: 4:00 PM

* Duration: 8:00

Required:

Maximum:

* Attendance Rule: test

Meal/Break Rule:

Labor

Department:

Draft Post Cancel

10 If you need to copy schedules to future weeks, Click "Copy Schedules"

The screenshot shows the iSolved Scheduler interface. At the top, a green banner indicates "Command executed successfully." The left sidebar contains a menu with "Employee Admin Tools" expanded, showing options like "Employee Administration", "Compensation Management", "Employee Scheduling", and "Default Schedule". The "Scheduler" option is selected. The main area displays a calendar view for the week of Sun 6/15 to Sat 6/21, 2025. The "Copy Schedules" button is highlighted with an orange circle. Below the calendar, a table shows the schedule for various employees, including Bailey, Christopher, Button IV, Ben, Clooney, George, Dooly IV, David, Doore, Samuel, Employee, Mel, Employee, Penn, EMPLOYEE, TEST, and Fieri, Guy R. The table columns represent days of the week, and the rows represent individual employees. The "Copy Schedules" button is located above the calendar grid.

11 You can choose the employees you want to copy, and the date range you'd like to copy to and from.

The screenshot shows the iSolved Scheduler interface with the "Copy Employee Schedules Forward" dialog box open. The dialog box has two main sections: "Copy Employees:" and "Source:". The "Copy Employees:" section has two columns: "Unselected" and "Selected". The "Unselected" column lists employees: Bailey, Christopher, Button IV, Ben, Clooney, George, Dooly IV, David, Doore, Samuel, Employee, Mel, Employee, Penn, EMPLOYEE, TEST, Fieri, Guy R, Fowler, Rickie, Grohl, Dave, and Hoffman, Duettin. The "Selected" column is empty. The "Source:" section has two radio buttons: "Use Current View Range" (selected) and "Use Specified Range". Below the radio buttons, the "Date Range:" is set to 6/15/2025 to 6/21/2025. The "Destination:" section has a "Date Range:" set to 6/22/2025 to 6/28/2025. The "Overlap Options" section has two radio buttons: "By Day" (selected) and "By Shift". The "Overlap Action:" section has two radio buttons: "Replace" (selected) and "Skip". At the bottom of the dialog box are "Save" and "Cancel" buttons.

12 Then click "Save"

Copy Employee Schedules Forward

Copy Employees:

Unselected: Bailey, Christopher, Button IV, Ben, Employee, Mel, Employee, Penn, EMPLOYEE, TEST, Fieri, Guy R, Fowler, Rickie, Grohl, Dave, Hoffman, Dustin, Jack, John, Jackson, Michael, Johnson, Nathan.

Selected: Clooney, George, Dooly IV, David, Doore, Samuel.

Source:

☒ Use Current View Range
☐ Use Specified Range
 Date Range: 6/15/2025 to 6/21/2025

Destination:

Date Range: 6/22/2025 to 6/28/2025

Overlap Options

Overlap Type:
☒ By Day
☐ By Shift

Overlap Action:
☒ Replace
☐ Skip

Save **Cancel**

13 There is also the option of Default Scheduler. If you create Schedule Rules, you can then apply those schedules to employees using Default Schedules and these can be set up indefinitely into the future so you don't have to manually assign shifts.

Click "Default Scheduler"

Employee List

Expand All Groups Collapse All Groups Clear Grouping/Filters

Drag a column header here to group by that column

Legal Name	Pay Group	Employee ID	First Name	Preferred Na...	Middle Name	Last Name	Status	Team	Department
Cynkar Technolo...	Bi-Weekly	0006	Christopher			Bailey	Active		
Cynkar Technolo...	Bi-Weekly	0025	Benjamin	Ben		Button IV	Active		
Cynkar Technolo...	Bi-Weekly	520	George			Clooney	Active		
Cynkar Technolo...	Bi-Weekly	0013	David			Dooly IV	Active		
Cynkar Technolo...	Bi-Weekly	0024	Samuel			Doore	Active		
Cynkar Technolo...	Bi-Weekly	516	Mel			Employee	Active		
Cynkar Technolo...	Bi-Weekly	2354	Penn			Employee	Active		
Cynkar Technolo...	Bi-Weekly	2384	TEST			EMPLOYEE	Active	01 - 01	
Cynkar Technolo...	Bi-Weekly	0003	Guy		R	Fieri	Active		
Cynkar Technolo...	Bi-Weekly	2365	Rickie			Fowler	Active		
Cynkar Technolo...	Bi-Weekly	2381	David	Dave		Grohl	Active		
Cynkar Technolo...	Bi-Weekly	2378	Dustin			Hoffman	Active		
Cynkar Technolo...	Bi-Weekly	0018	John			Jack	Active		
Cynkar Technolo...	Bi-Weekly	38	Michael			Jackson	Active		
Cynkar Technolo...	Bi-Weekly	0026	Nathan			Johnson	Active		

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Click "Add New" and add your Schedule Rule.
(Schedule Rules do need to be created first)

The screenshot displays the 'isolved' application interface. At the top, the header includes the 'isolved' logo, a 'Delivered by thread' badge, and a user profile for 'Ryan Cyn...'. Below the header, a navigation bar shows the user's name 'Christopher Bailey' and various details like 'Pay Group: Bi-Weekly', 'Hourly: 37.0000', 'Hire Date: 1/30/2023', 'Work Location: DECA...', 'Department: ...', and 'Client: CYN22 - CynTech'. The left sidebar is expanded to 'Employee Admin Tools', with 'Default Schedule' highlighted. The main content area is titled 'Default Schedule' and features a table with columns 'Effective Date' and 'Schedule Rule'. Below the table, a '+ Add New' button is circled in orange. A toolbar below the button contains 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel' icons. The 'Default Schedules' section below the toolbar shows a dropdown for 'Schedule Rule' set to 'No Schedule' and a date field for 'Effective Date' set to '6/19/2025'. A 'Preview' button is also visible.

15

If you navigate back to the time card, you will see blocks of time on each day that has a schedule. This will be in the background of any worked blocks of time.

If you want to edit the schedule for that specific employee quickly, you can click "View Scheduler"

The screenshot displays the iSolved Time Card interface for Christopher Bailey. The top navigation bar includes buttons for 'Verification: Unverified', 'Analyze Rules', 'Request Time Off', 'View Scheduler' (highlighted with a yellow box), 'Time Card Report', 'Schedule Report', 'Preview Check', and 'Alert Detail'. The main area shows a calendar view with time slots from 12:00 AM to 10:00 PM. A yellow box highlights the 'View Scheduler' button. The calendar shows scheduled shifts for Christopher Bailey, including a 7:00 AM shift on Thursday, June 15th, and a 7:00 AM shift on Friday, June 16th. The bottom of the calendar shows a summary of hours worked for each day and a total of 17.17 hours for the week.

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If you do want a full schedule for the week, you can navigate back to the Scheduler and Click "Weekly Schedule Report"

The screenshot displays the iSolved Scheduler interface. The top navigation bar includes buttons for 'Scheduler', 'History', 'Clear Clipboard', 'Approvals', and 'Weekly Schedule Report' (highlighted with a yellow box). The main area shows a table of scheduled shifts for the week of June 15th to June 21st, 2025. The table lists employees and their scheduled shifts, including Bailey, Christopher, Button IV, Ben, Clooney, George, Dooly IV, David, Doore, Samuel, Employee, Mel, Employee, Penn, EMPLOYEE, TEST, and Eleri, Guy R. The bottom of the table shows a total of 40.00 hours for the week.