Hiring Manager User Guide

Workflow Best Practices For Hiring Managers
Basic usage

Learn how to access your account, setup your profile & notifications, use the dashboard and interact with candidates.

Sign up by accepting the invitation you received or go to workable.com/signin to login to your account (if you have one already).

➡️ Getting Started video
Setting up your account

Once you log in to your account start with setting up your profile, notifications preferences and authenticating your email/calendar (if your company is using a Gmail/Microsoft 365 integration).

Profile setup

Click your user icon on the upper right and then ‘Your Profile’. Here you can edit your full name, job title, time zone (this will be used when you attend Workable scheduled events) and upload a profile picture. At the bottom of the page under Credentials you can connect additional apps (Zoom, LinkedIn etc).

Notifications & availability

Next, navigate to Settings > Your preferences. Here you can add a personal signature that will be included to all emails sent via Workable. You can also manage your own email notification preferences for email and/or mobile.

Make sure you add your interview availability by selecting the days and timeframes you are available. This (together with your timezone) will be used as your default availability while using self-scheduling for events.

Authenticate your email/calendar

If a Workable administrator has enabled the Google or Microsoft 365 Outlook integration for your company’s account, you’ll still need to authorize your own Google/Outlook account in order to use it for emails/events.

This will enable other users to more easily schedule interviews on your behalf or provide the option to have candidates self-schedule events based on your availability in your calendar.

To authenticate your account, click on the email and calendar icons and follow the instructions in the pop-up window. This is a one time authentication process so you will be requested to do this only once (when you try to send an email/event through Workable).
Using the dashboard

The dashboard is where you’ll see jobs that your organization is hiring for. If you see a job’s ‘pipeline’ then you’re on the hiring team for that job and can review candidates.

Jobs

Your Workable admins have created recruiting ‘pipelines’: workflows that your company uses to hire. They always begin with Sourced and Applied stages, where candidates will start their journey.

If you see a job’s pipeline then you’re on the hiring team for that job. You’ll be able to see and interact with those candidates.

If not, then it’s likely you aren’t involved with the hiring for that job. However, you can request access to the candidates by hovering on the job and clicking the ‘ask to join’ button.

Click on a pipeline stage to see the candidates in that step of the process.

Inbox & Agenda

The inbox works like a ‘to do’ list. You’ll see notifications about candidates that need your attention. These include items like: candidate feedback where your name is mentioned, offer letter approval requests, RSVP options for interviews and more.

Access the agenda through the calendar icon at the top of Workable. The agenda has upcoming and recent interviews you’re involved with. This is the easiest way to access candidate information before an interview, or to leave an evaluation after.

Search

Use the search in the upper right to look up candidates. Search by name, headline or any information in their resume.
Interacting with candidates

From the main dashboard, click on any job stage to view those candidates. Then, select a candidate to view their Timeline, resume and application details.

**Evaluate**

Use the thumbs up/down button to evaluate a candidate during each stage of the pipeline. Leave ratings of: Definitely / Yes / No to share your opinion to other members of the hiring team. *(Note: To limit bias, if you are invited to an event, you will not be able to see your colleagues’ evaluations until you submit your own.)*

**Comment**

Add an internal note on a candidate’s profile. Use this option if something stood out on their resume. Type '@' and a coworker’s name to notify a team member about your note.

**Emails and events**

You can send email and setup events via the Timeline. However, if your recruiting team manages these communications you won’t need to worry about it.

You’ll get notified via email about interviews you’re invited to or action you need to take in Workable. *(Note: If a Workable administrator has enabled the Google or Microsoft 365 Outlook integration for the company account, you'll still need to authorize your own Google/Outlook calendar.)*

**Change stages**

Move a candidate to the next stage in the hiring pipeline (you can also use the dropdown arrow to move them to any stage, backwards or forwards).
Workable Mobile

Mobile minded? Use the Workable app for all your candidate review and tracking.

Download the Workable mobile app for free on iOS and Android phones:

- Review resumes and profile info
- See upcoming events
- Complete evaluations/interview scorecards
- Send or approve offer letters
- And more...

You’ll receive notifications when something requires your attention or you need to take action with a candidate.

Download for iOS  Download for Android
Looking for more advanced guidance? Learn how to create jobs, raise and approve requisitions and pull important reports
Creating jobs and requisitions

If you have a more active role in the hiring process you may be required to create jobs and raise requisitions (if your company’s account uses the Hiring Plan feature).

**Job creation**

Hiring Managers cannot publish jobs directly, but can request publication from a Super or Recruiting Admin. Create your job by following the job board guidelines and make sure you add a full location (even for fully remote jobs).

Once you click ‘Publish’ you will be prompted to send a publish request to an admin. The job will be stored as draft until an admin reviews it.

**Create and approve requisitions**

If your company’s account uses Hiring Plan, you or your HR team will need to create a requisition before you start recruiting for a position.

To view or create requisitions go to the Hiring Plan dashboard. When creating a req, link it to a new or existing job and fill out the required fields.

The req is sent through your company’s approval process to be reviewed by the stakeholders. If you are the one who created the req you will be notified via email if it’s approved/rejected; if rejected there will be a note, explaining what should be updated.

If you are involved in the approval process you will receive an approval request email and an Inbox notification with a call to action. You can find your requisitions and any that need your approval under the respective tabs on your Hiring Plan dashboard (My requisitions, Need approval tabs).
Pulling reports

Showcase results and check the progress of your recruiting with Workable reports. Click on the pie chart icon to get started.

View a recruiting snapshot

The Current Pipeline report is your recruiting snapshot. Similar to the Dashboard that you see right when you log in to Workable, this report shows you what’s going on with each job. How long has it been open for? Is the pipeline full? You can even break down each position by stage to gather more specific information: Where are the bottlenecks and what are the holdups at each stage? What areas do you need to focus on?

Monitor Time to Hire

The Time to Hire report shows how long it takes you to hire for a position, while the Historic Pipeline shows you why it takes that long.

Review the recruiting pipeline for time sinks and implement process changes if needed.

Explore your recruiting mix

The Candidate Sources report explores your recruiting mix. It’ll tell you where your candidates are coming from as a whole. Which avenues are working and which are not?

Filtering reports

Reports can be filtered by department (including sub-departments), location, job, and date. Keep in mind that for each report the date filter may operate differently. Data shown between different reports may not be comparable.

Check more here.
Support when you need it

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Live Chat or access other support resources by clicking the (?) button in your account.