workable

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Getting Started: Super Admin

Workflow Best Practices
For Super Admins

The Basics

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Workable is a hiring platform. From job description to offer letter, Workable provides the tools you need to discover and delight more candidates and decide who's best for your business, fast.

Go to workable.com/signin to login to your account.

Contents

1. Account Settings

Access account Settings by clicking your user icon in the upper right of Workable.

Pipelines

(WORKFLOW)
Every job in Workable has a 'recruiting pipeline' associated with it. Create pipeline stages based on candidate milestones in your process, always keeping "Hired" at the end. Adjust the pipeline as needed or create multiple pipelines for different types of job via the Workflow setting..

Compliance

Enable EEO/OFCCP settings if required for your jobs in the US. Enable GDPR settings if you recruit within EU, UK, Norway, Iceland, Switzerland & Liechtenstein. Enable CCPA settings if your job location is within California, USA.

Templates

Add email, texting, interview and offer letter templates for easier candidate communication and a more consistent hiring process.

Email & Calendar integrations

(INTEGRATIONS)
For Gmail or Microsoft 365 Outlook users, enable special integrations with those tools to unlock extra email syncing and scheduling features like self-scheduling and calendar comparison.

Automated Actions

Use automated actions to send email templates based on specific actions that users take in Workable i.e. moving/disqualifying a candidate.

Referrals portal

Roll out the referral portal across your company and adjust basic referrals settings i.e. default email notifications, referrals rewards, form questions etc.

Managing account members

Invite coworkers to Workable and assign them to specific jobs.

Super Administrators can access all account settings and candidate details. Other member types cannot access settings and must be assigned to jobs to see candidate details for those jobs.

Various user levels can be assigned to give users more or less access to Workable features and candidate details.
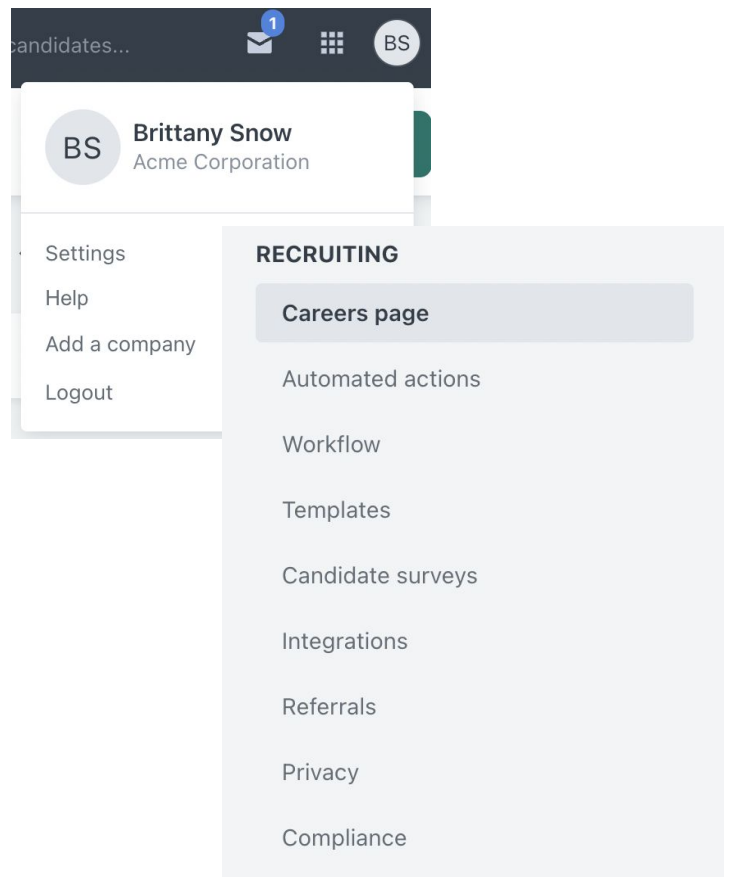
2. Create a requisition

For every employee that you plan to hire you'll need a requisition (req). The Hiring Plan tab on the Jobs page is where you can create and manage reqs. Or, create a req from the Homepage.

Reqs must be associated with a job. Link the req to an existing job or create a draft job. After defining the job, add the details of the req, including the headcount which quantifies the number of new hires you are seeking. Reqs will store details like the salary budget, planned start date, the hiring manager's name and any other internal notes or data that you wish to include.

Once a req is created it can be sent to relevant stakeholders for approval. Stakeholders will be able to approve or reject the req. Click your user icon and select Hiring Plan to update the settings for all req fields or to update/add approval workflows.

	JOBS	CANDIDATES	PEOPLE SEARCH

TestCorp Premier ⬏

JOBS **HIRING PLAN**

Define job	Add details	Review & send

* Code | **Headcount** ?
[ ] | [− 1 +]

Job title
Barista

Location
Boston, Massachusetts, United States

* Hiring manager
Select an option... ⌄
This is the person the new hire will report to (typically a hiring manager for the job).

* Requisition owner
Select an option... ⌄
This is the person that will be responsible for filling this requisition (typically a recruiting admin).

* Plan date
Select a date 📅

[All requisitions] [My requisitions] [Need approval]

Requisition	Hiring manager ⇕	Requisition Owner ⇕	Salary	Plan date ⌃	Status ⇕	
REQ2 Head of Finance	Eduardo Vallente	Natalie Sung	$60,000.00/year	January 2023 ❗	APPROVED	⋮
REQ11 Account executive London, England, United Kingdom	Natalie Sung	Natalie Sung	$60,000.00/year	January 2023 ❗	OPEN	⋮
⇄ **REQ7 Head of Finance**	Eduardo Vallente	Natalie Sung	$53,000.00/year	February 2023	FILLED	⋮
REQ5 Lead UI Designer Engineering	Eduardo Vallente	Natalie Sung	$60,000.00/year	February 2023 ❗	REJECTED	⋮

3. Create a job

From the Homepage or Jobs page, click [Create A New Job](#)

[Draft] Customer Service Manager ⌄   Preview job   Save draft   Publish ⌄

Job details   Application Form   Find Candidates   Team Members   Workflow

Job Details

In the job editor, navigate through the tabs at the top from left to right to complete the setup for your job. You can save drafts and even make changes after publication. Fill in the job details or generate your job description with AI.

Application Form

Customize the application form with questions relevant to the specific job. Click the Publish button when you're ready to advertise the job. Jobs can be set to "Internal" if you don't want to publish yet. You can unpublish and republish jobs any time.

Find Candidates

Under Find Candidates, choose the job boards you want to post on, and select paid/promoted post options. Nurture the job over time through this tab.

Team Members

Add the job's hiring team. Users who are added to this tab will be able to see candidates and help hire for this job.

Workflow

The Workflow tab is used to choose a pipeline and add assessments or video interviews.

Create a new job

nts ⌄   All locations ⌄   No group applied ⌄

Find Candidates   Published ⌄   ⋮
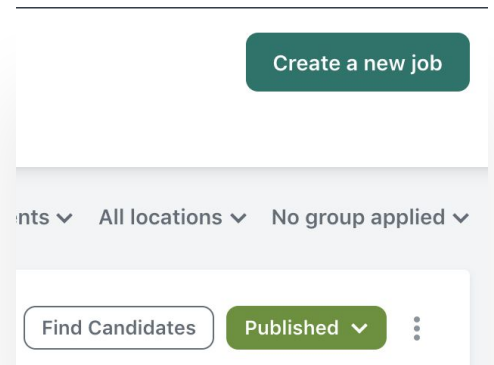
[Draft] Marketing Manager ⌄

The Job	Application Form	Find Car
Tell applicants why it's great to work at Stark Industries.	Design the application form for this role.	Post on j recruiters

Job title and Department details

* Job title

Marketing Manager

Department   Internal code

Marketing

Location

Country   Region, City or Zip code

United States   ⌄   Boston, MA 02127, United States

4. Interact with candidates

From the Jobs page, click on any stage in a job to view its candidates. Select a candidate to view the candidate profile and toolbar.

Mail

Send an email to the applicant. When a candidate replies you'll get a copy to your email as well as your Workable inbox. You can reply from your regular email inbox. Email threads will be logged in the candidate's Timeline in Workable automatically.

Schedule

When it's time to talk or meet with a candidate, you can send a calendar invite right from Workable. Add attendees, set the location, date, and time.

Comment

Leave an internal note on a candidate's profile. Use this option if something stood out on their resume or to have another team member check out the profile.

Evaluate

You can evaluate a candidate during each stage of the pipeline. Multiple people can provide evaluations. Leave ratings of: Definitely / Yes / No

Disqualify

If a candidate doesn't seem like a good fit for the role, you can Disqualify them. Disqualifying will help you manage your workload more easily. Candidates are not automatically notified when you disqualify them.

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).

More options

Click the three dots for extra candidate management options.
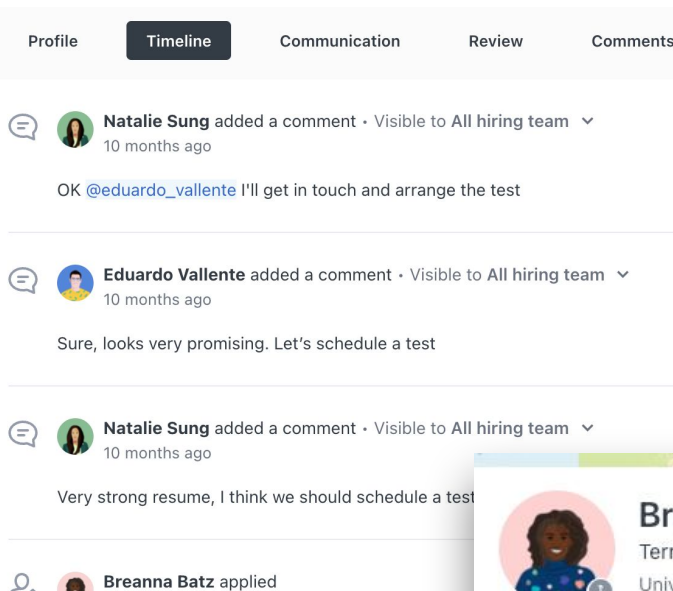
5. View a candidate profile

Under the toolbar, you'll see a panel with some basic candidate details. Every candidate in Workable has a candidate profile. The different tabs are where you can review a candidate's application details and track team interactions.

Profile

The section includes information provided by the candidate when they applied for the job. If they uploaded a resume it will be here. Any custom fields will also be included. Candidate answers to questions you added to the application will be found here as well. If the candidate was referred then referrals information will be listed.

Timeline (all items)

The Timeline provides a chronological view of all activities and interactions. This includes emails sent, interviews scheduled, notes left, and any other significant events. A descriptive icon that matches the toolbar will be visible next to each item for easier distinction.

Profile	Timeline	Communication	Review	Comments

Natalie Sung added a comment • Visible to **All hiring team** ⌄
10 months ago

OK @eduardo_vallente I'll get in touch and arrange the test

Eduardo Vallente added a comment • Visible to **All hiring team** ⌄
10 months ago

Sure, looks very promising. Let's schedule a test

Natalie Sung added a comment • Visible to **All hiring team** ⌄
10 months ago

Very strong resume, I think we should schedule a test

Breanna Batz applied

Communication

The **Messages** tab includes emails and text messages between the hiring team and the candidate, including messages sent using automated actions and esignature requests. All scheduled event information will be recorded in the **Events** tab.

Review

The Review tab this includes **Evaluations**, **Assessments**, **Video interviews**, **External feedback**, **Background checks**, and **Reference check**, each with their own respective subtabs, when applicable.
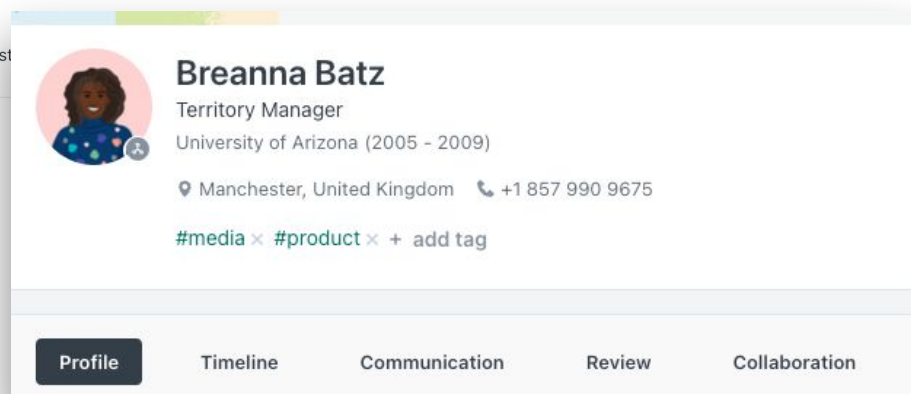
Comments

Comments left for the candidate will be listed here. Candidates will never see these comments. They are only for internal use.

Offer

This tab will appear if you have sent or completed an offer e-signature request to the candidate. Offer audit trails will also appear here.

Files

If a file was attached to a comment or email then a Files tab will be displayed. E-signature completion and offer acceptance files will also appear here.

Breanna Batz
Territory Manager
University of Arizona (2005 - 2009)

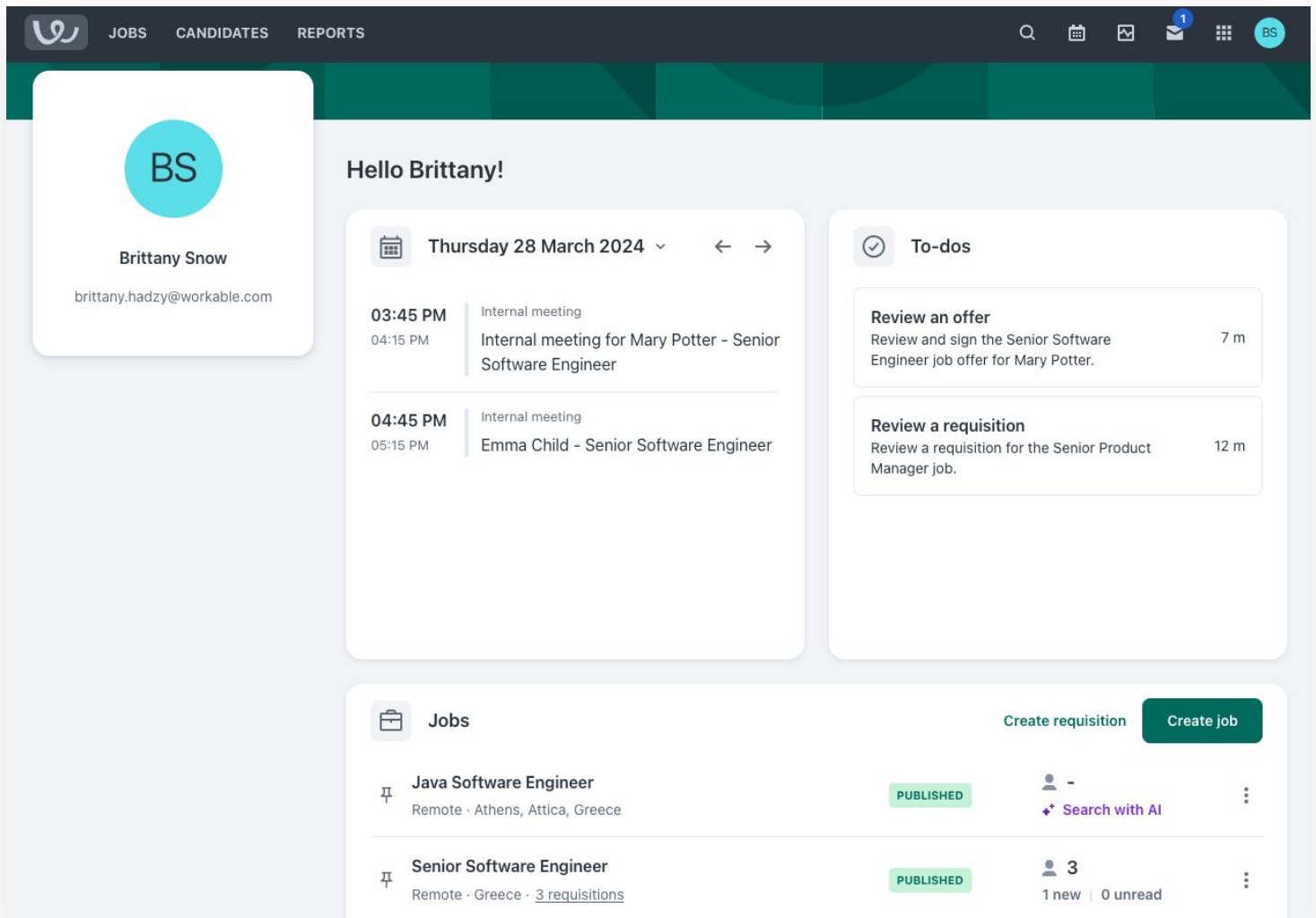📍 Manchester, United Kingdom 📞 +1 857 990 9675

#media ✕ #product ✕ + add tag

Profile	Timeline	Communication	Review	Collaboration

6. Viewing the Homepage

Upon login, you will land on the homepage. Also accessible from the "W" logo

The **Homepage** displays all the necessary information needed at a glance including a daily agenda, to-do items, and job information. You may have additional information on your homepage depending on your permissions. The common information to see are:

- **Calendar:** View Events for the current calendar day
- **To-dos:** Take action to approve jobs, requisitions or offers
- **Jobs**: View the jobs you have visibility for and create jobs or requisitions

7. AI Sourcing & Screening Tools

Utilize Workable's built-in AI features to source and screen candidates.

Sourcing with AI Recruiter

Workable's AI Recruiter recommends ideal passive candidates for your job based on its description. Easily review their fit summary and seamlessly add them to your candidate list.

Click **Add candidates** and then **View passive candidates** to see all profiles we have selected for the job in a new model. After reviewing the profiles, you can:

- Add them to your pipeline individually from the option at the upper right of the profile you are currently viewing.
- Add them to your pipeline in bulk; just tick the profiles from the list and a button will appear at the bottom to add the selected profiles to your pipeline.

Added profiles will be removed from the list and will be sent to the Sourced stage of your job. Candidates will be automatically tagged with "#suggested_by_workable" so you can easily differentiate those you've uploaded yourself from AI Recruiter results.
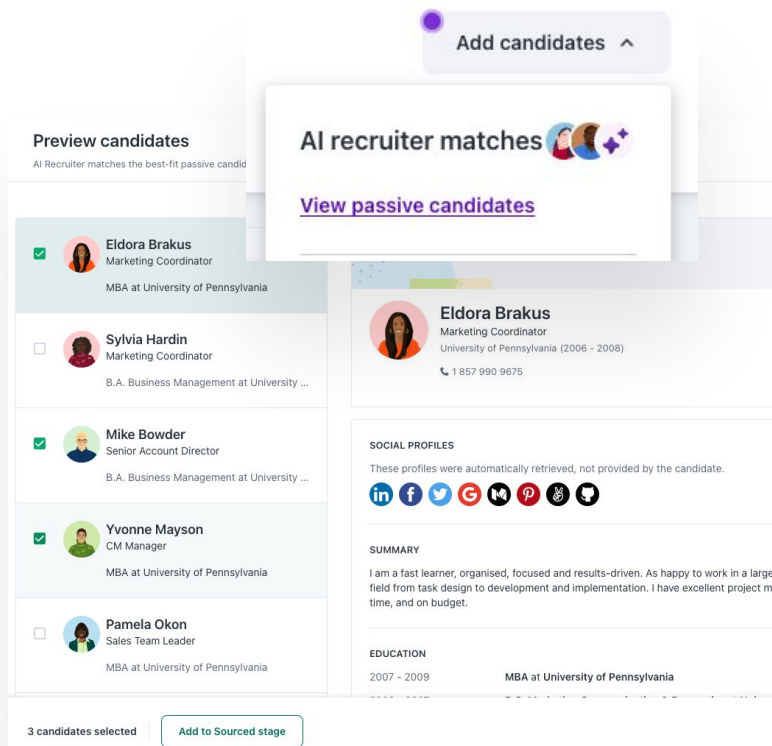
Screening Assistant

The Screening assistant uses AI technology to review and shortlist candidates at the Sourced and Applied stages of your recruiting pipeline.

AI analyzes job descriptions to extract and rephrase hard skills concisely. These matching criteria are displayed at the top of the candidate's profile and in the candidate avatar. You can sort candidates by Best match under the 'Sort & filter' menu to identify strong matches or those not meeting basic requirements.

Override AI decisions by using the **Edit this profile summary** functionality. Tick or untick the criteria you would like to show as matching for the specific candidate. Upon saving, the name of the last user that performed the edit/review will be displayed.
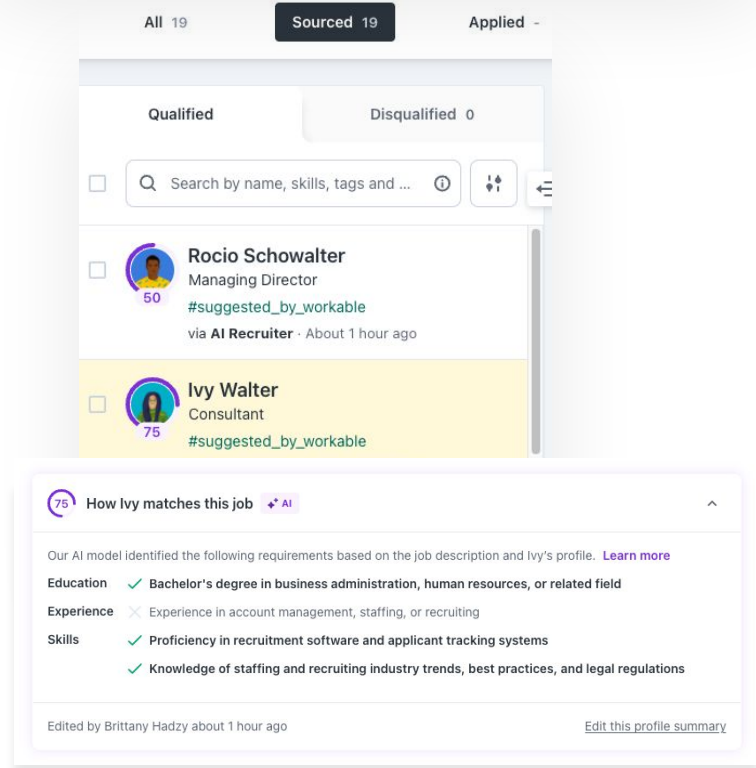
8. Reporting

Your Workable account has a wide range of reporting options. Click **Reports** to access the Report Center. Workable offers dozens of reports to view. Reports are filterable by jobs' department, location, and date. Start with the reports featured on this page if you haven't explored reporting in the past.

Candidate Sources

A complete breakdown of how candidates arrive in your Workable account: their 'source'. See which channels get the most views and candidates. From job boards to referrals to uploads, every source is tracked automatically with the Candidate Sources report.

Hiring Velocity

Learn which stages of your pipeline take the longest. Pinpoint inefficiencies and make adjustments to your recruiting process to ensure that you don't miss out on the best candidates with the Hiring Velocity report.

Time to Hire

See a big picture view of how long it takes you to hire. Time to Hire report is best used historically. If you hired for "Sales Representative" 6 months ago and now have to hire again, you can set expectations for how long the candidate search will take.

1,579
VIEWS

1,540
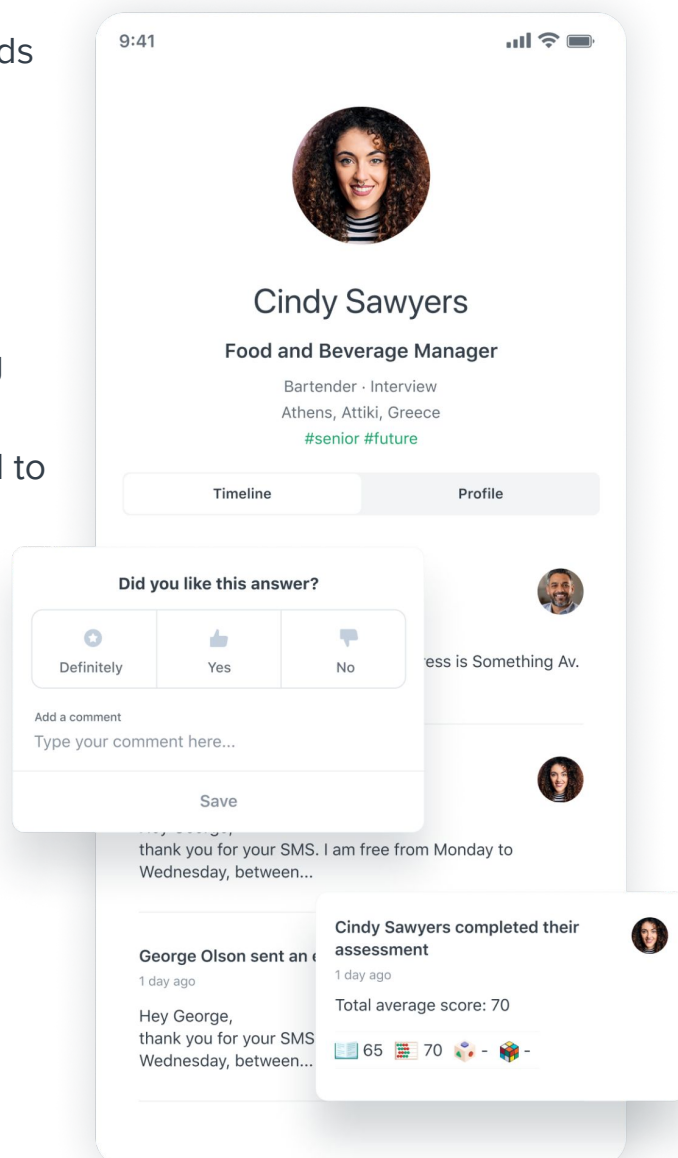CANDIDATES

562
MOVED

2
HIRED
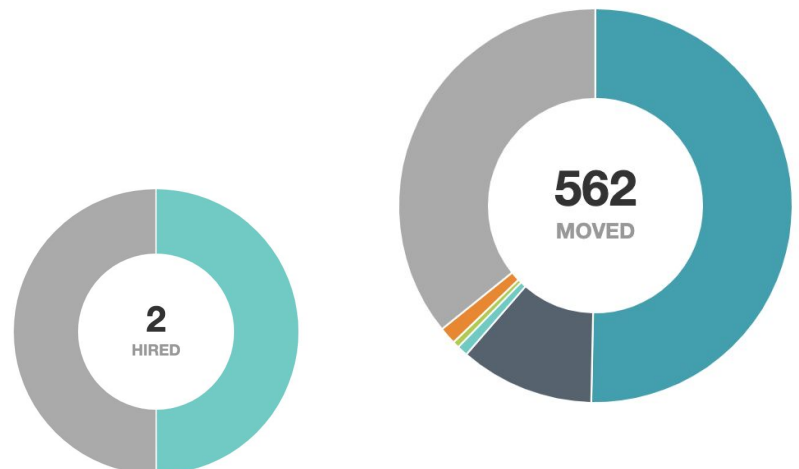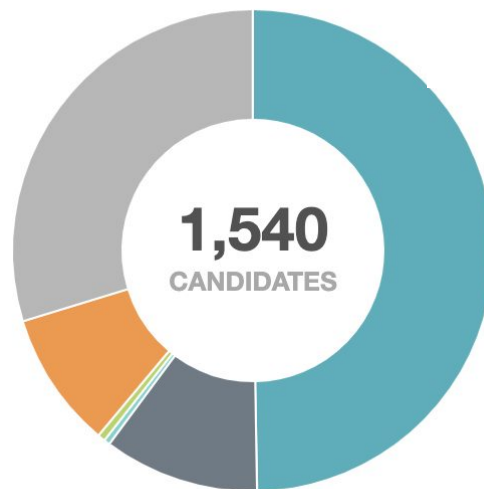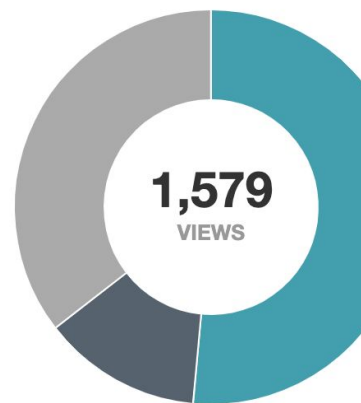
9. Workable Mobile

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

- Create, edit, and publish jobs
- Review resumes and profile info
- Fully interact with candidates
- See upcoming events
- Complete evaluations/interview scorecards
- Share candidate profiles
- Use People Search
- Send or approve offer letters
- And more...

The Workable app is especially useful for hiring managers. They'll receive notifications when something requires their attention or they need to take action with a candidate.

10. Extra Options

Bulk actions

Perform actions in bulk by selecting the checkbox next to candidates within a stage. This is an effective way to send email templates or disqualify candidates in a group. Bulk actions can also be completed in the Candidates page.

Candidate search

Search by name, or any term that can be matched to a candidate's profile. Refine your search results using filters. Use the search bar in the upper right or click Candidates in the toolbar.

Every candidate in your account is searchable, no matter their status (active, archived, disqualified, snoozed).

Natalie Sung sent an offer · less than a minute ago

OFFER DETAILS

Candidate	Therese Walter
Job	Head of Finance
Company	Folio
Start Date	Thursday 09 March 2023
Direct Manager	Flynn Hadzy
Salary	$120,000.00 per year
Paid Time Off	3
Offer Expiration Date	Wednesday 15 March 2023
Sender Name	Natalie Sung
Offer Document	📄 offer.pdf
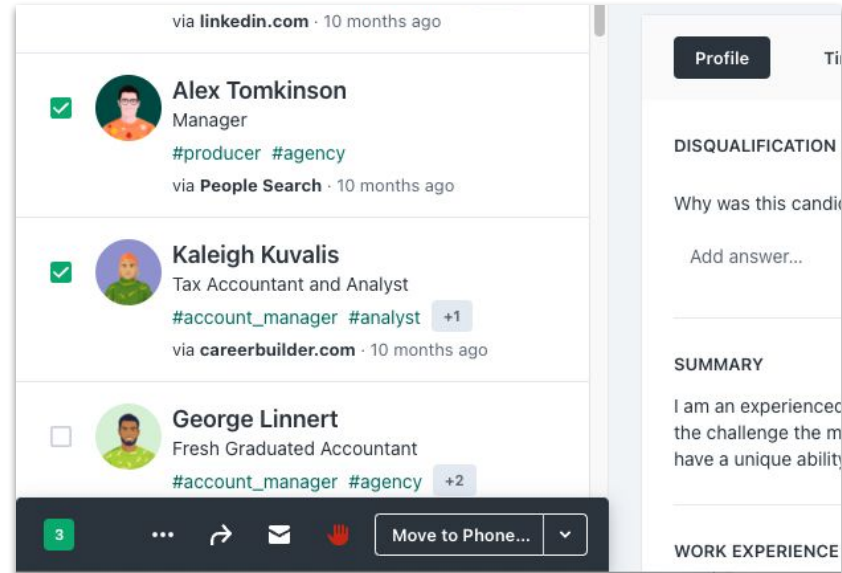
Offer letters

Add templates to send custom offer letters to candidates in your Offer stage. You'll fill in the key details of your custom offer templates (like salary, start date and other variables you select), then a link is sent to the candidate where they can view the letter and provide their e-signature.

As soon as the candidate signs, you're notified and the signed document is stored in Workable.

Interview kits

Add interview kits to stages of your recruiting pipeline via the Workflow tab of the job editor. Interview kits are custom sets of questions that will appear for an interviewer.

With Interview kits added, candidates will be judged on a level playing field, creating a consistent experience for both parties.

Support when you need it

help.workable.com

support@workable.com

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+44 (0) 800 086 8870

(3:00am - 5:00pm ET)

Live chat and access support resources by clicking your user icon and then "Help"