Workable
HR Handbook

The perfect all-encompassing resource for HR teams

This handbook provides an overview of each Workable HR feature with **checklists, tips**, and **training material**.

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Employee management and onboarding

Manage employee information, organize company documents, review organizational structure, and more with employee management and onboarding features in Workable.

Company entities

Companies with multiple locations can create one or more legal entities, each with its own set of locations and sites to differentiate the employee information that needs to be captured.

Tip: It is recommended to create an entity even if you currently have one location. Backtracking in the future will create a more complex process, especially for time-off policies and custom employee profile templates.

Resources

Creating and using company entities

Example

At Workable, we have legal entities in the U.S., Greece, U.K., and APAC. The information needed for our HR team differs based on employee type and location, thus having entities created allows us at Workable to easily assign profile templates, company files, and time-off policies.

Employee profile templates

Configure and organize the sections of your default employee profile template to suit your company's needs.

Checklist

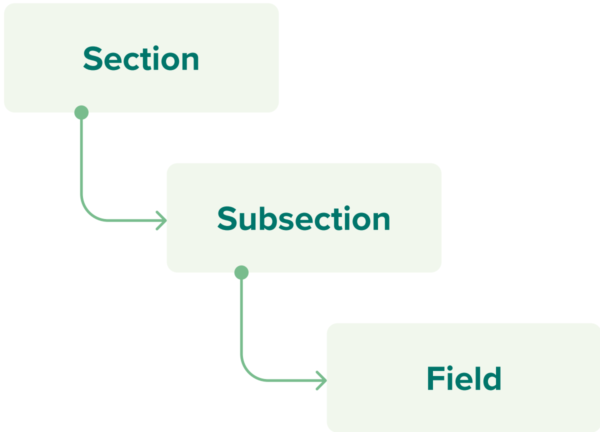
- Determine who is responsible for creating employee profile fields in the default profile template.
- Determine how many custom employee profile templates you may need. Think of the information you collect for different types of employees and at different levels or locations.
- Determine visibility, edit ability, and approval settings for each field.

Resources

Managing employee profile templates

Your default template should be the "master" template, including all sections and fields you want in any employee profile along with their default settings (visibility, historical entries, access and approvals). If some parts are only relevant to specific entities or levels, you can hide them in the default and only show them when you create a custom template.

Employee profile templates are broken into sections, sub-sections, and fields. Think of the field as the piece of information specific to that employee (e..g, Job title or start date).



Employee profile field types

The following field types are allowed in Workable:

Boolean (Yes/No)	Provide a yes or no response
Country	A dropdown field with a predefined list of countries
Currency	Select the currency and amount; best for one-off costs, bonuses
Date	Select a date from a calendar menu
Dropdown	Select an answer from a dropdown menu
Email	Provide an email address
File	Provide a file attachment. The maximum file size is 10MB. Supported file types for upload are: .doc, .docx, .gif, .html,.jpeg, .jpg, .odt, .pdf, .png, .ppt, .pptx, .rtf, .tiff, .txt, .xls, .xlsx, .zip
Image	Upload an image up to 10MB
Location	Locations will be auto-suggested as you type
Multi-field	Best when you need to track multiple fields at once; e.g. a field capturing "Bank details" will include fields like Bank name, IBAN, etc.
Multiple dropdown	Select one or more dropdown answers
Numeric	Input only numbers
Paragraph	These fields are designed to be answered in the form of a sentence or paragraph. Common uses include: CV summary, requesting links to work samples
Pay rate	Provide the currency, amount and frequency
Percentage	Input a positive or negative percentage
Phone	Provide a phone number and select the country code

Short text	Limited to 128 characters, short answer fields are best suited for cases where multiple-choice options might be too lengthy or where you would like a concise, free response
Timetable	Select days and hours from a dropdown list; ideal for capturing working hours
Multi-field	This field type will allow you to include any of the above field types as an inner field. Common uses include: Marital status which may include a file field and a dropdown field

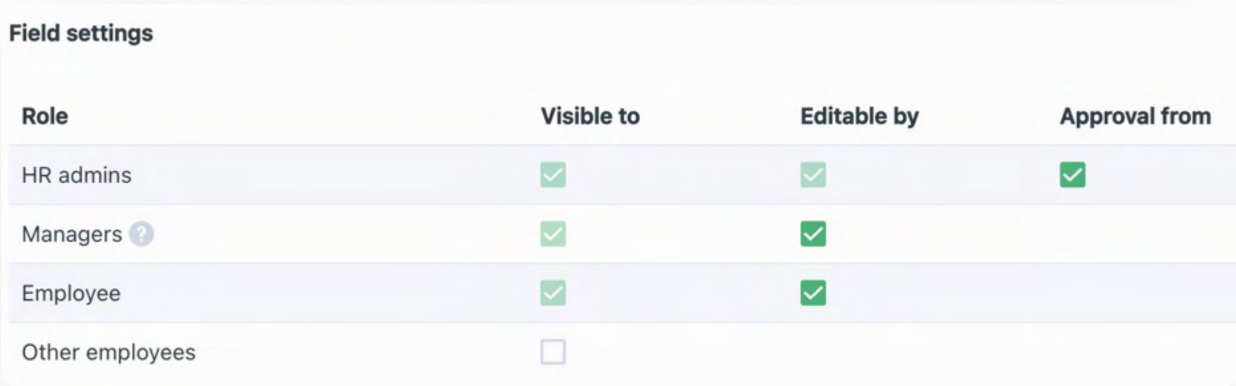
Visibility, edit ability, and approval settings

HR Admins have control of choosing which fields are visible to all employees, the employee themselves, or just the HR team. There may be pieces of information that you can allow employees to edit themselves, but want to be alerted to approve the change in the profile, like an employee's home address.

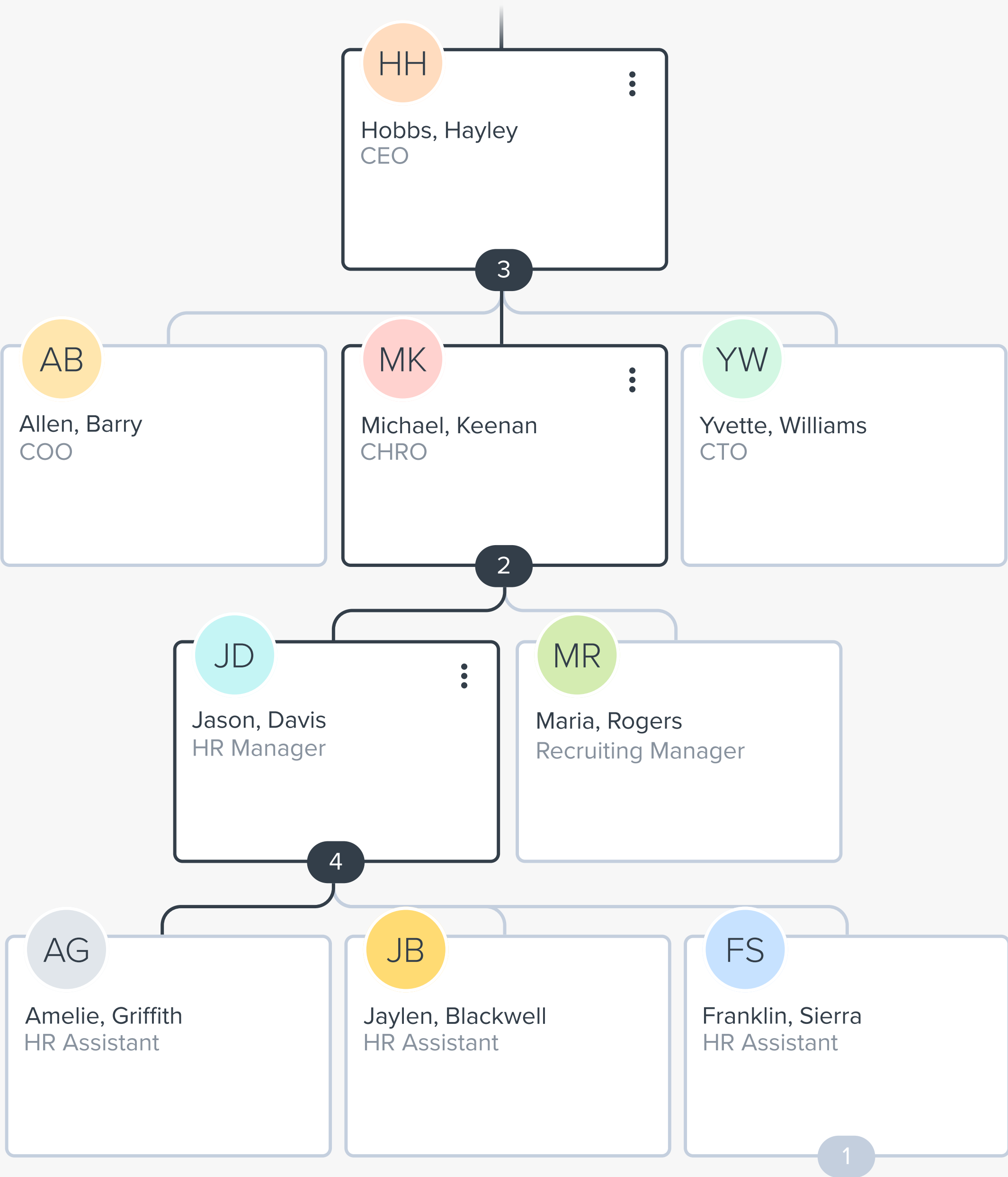
By default, a newly created field will have the below field settings

- **Visible to:** HR admins, Managers and Employee
- **Editable by:** HR admins
- **Approved by:** HR Admins

If Managers are ticked, all direct managers and any managers in the same vertical line above the employee will be able to view (and edit if selected) the specific field. As a company, you will need to determine which profile fields should be visible to all employees and which fields need approval.



Important: To prompt employees to complete specific profile fields during onboarding, you should adjust their Field settings and make them editable by the Employee; otherwise, the fields won't appear in the onboarding flow.

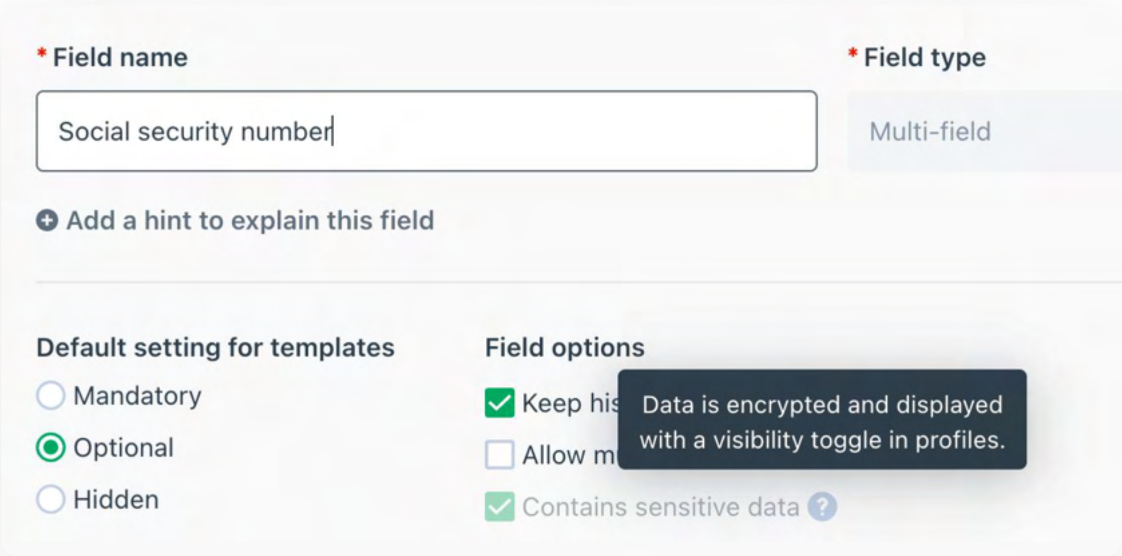


The dark black line visualizes of what is meant by managers in the same vertical line as the employee.

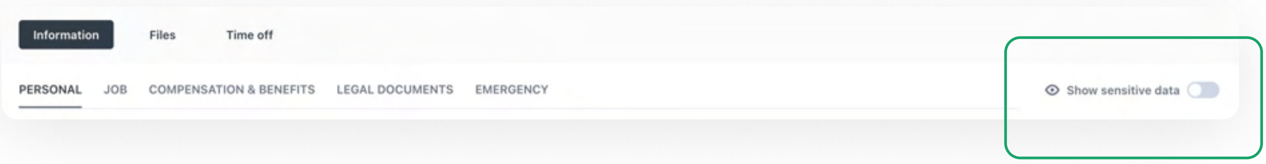
Sensitive data

By default, our system encrypts the following fields and therefore this field option cannot be edited.

- Allergies
- Salary details
- Bonus details
- Stock options
- Bank details
- Social security number
- National identification number
- Social insurance number
- Tax identification number
- Passport details
- Visa details
- License details



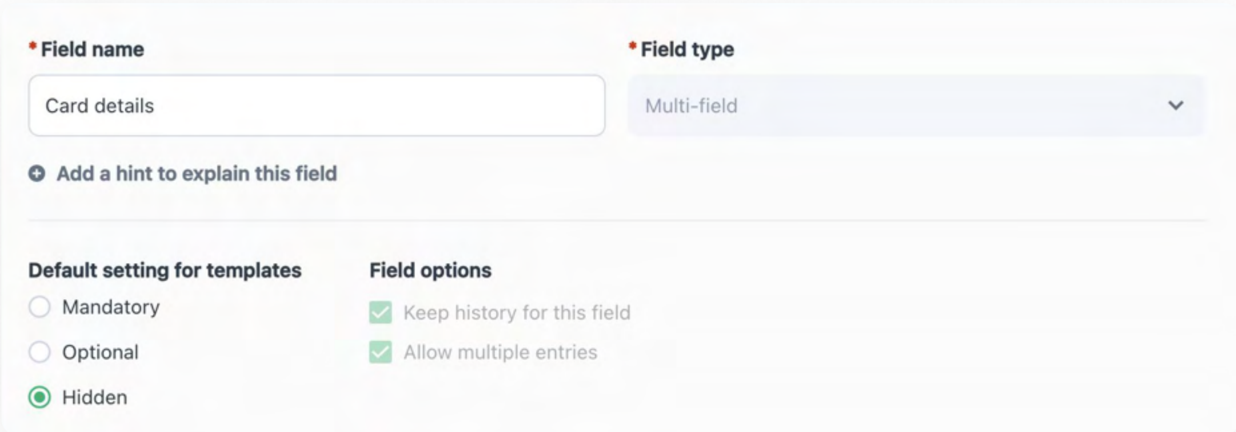
You can choose to hide these fields if they are not of use to you. If you do have them visible in employee profiles, you will notice a toggle to display this information when needed.



Custom employee profile templates

Custom templates can be created to accommodate specific profile needs such as different levels or employment types and different employees in different locations, therefore different fields may be needed for local employment laws.

Let's say you hired a new employee who will act as an SVP of Retail Sales. Your executives have different needs for their profile. For example, you offer a bonus scheme, stock options, a credit card, and so on to employees at this level but not for all employees. In this case, you will configure all these fields in the default template but hide them there by default. Then you can create a custom template only relevant to SVPs and individually toggle the fields on as mandatory or optional.



Important: In order for fields to be added to custom templates, they must first be added to your default template, but can be set to be hidden in the default template.

Managing historical entries

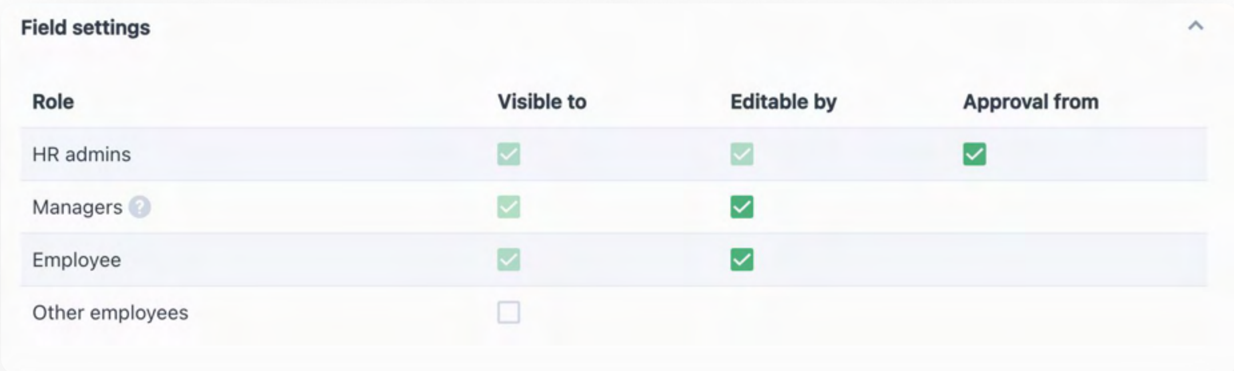
HR Admins can add, edit or delete historic entries for employee fields to make sure Workable accurately reflects when certain changes occur. Managing historic entries is beneficial if a title or salary change was entered in on the wrong date and you want Workable to reflect the exact date the change occurred.

Note: Deleting a field's current value entry is not possible. If you wish to clear the field’s current value, you need to edit the employee profile and remove the value set for the employee field.

Approving profile field updates from employees

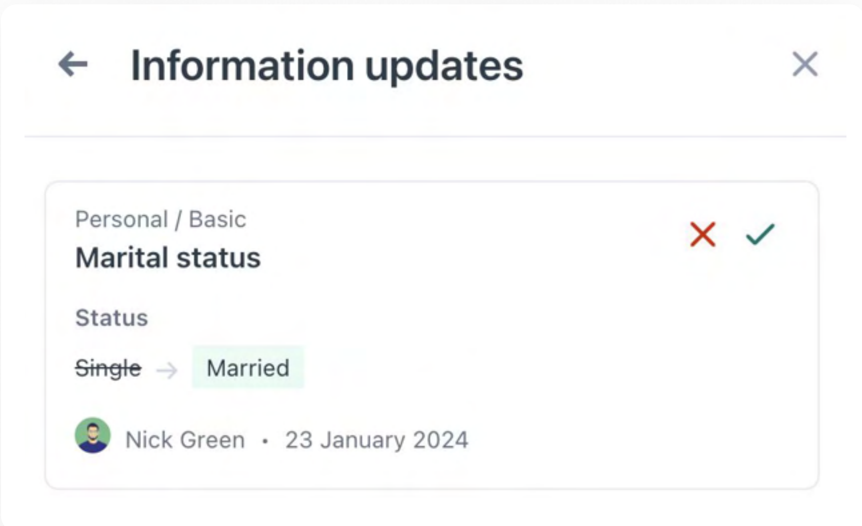
There may be some profile fields that can be updated by employees but an HR Admin needs to approve the edit. Common examples include the employee's address or marital status.

For this to occur, the profile field must be set to be editable by the employee and approval from HR Admin, as shown below.


Field settings

Role	Visible to	Editable by	Approval from
HR admins	☑	☑	☑
Managers	☑	☑	
Employee	☑	☑	
Other employees	☐		

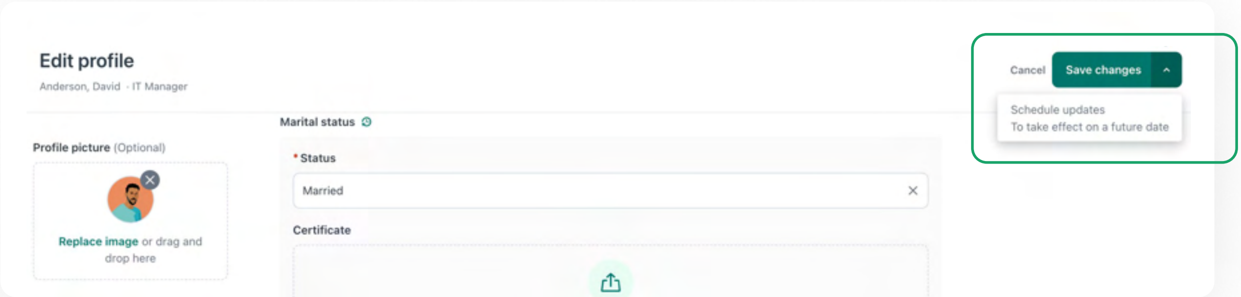
HR Admins will receive a Workable inbox item notifying them of the edit, for them to approve or reject. The request can also be seen within the Updates section of the employee's profile.



Scheduling profile field updates

You can make changes to one or more profile fields and schedule the updates to take effect on a future date rather than immediately. This is particularly useful when you need to make updates to Grades, Managers, or Salaries and want them to be effective on a specific date.

When editing an employee profile, click the dropdown to “schedule updates.” Scheduled updates will be displayed by clicking **Updates → Scheduled updates** on the employee profile.



Note: HR Admins can view scheduled updates for all employee profile fields. Managers and employees can only see scheduled updates for fields that are editable by them.

Resources

Scheduling employee field updates

Document templates

Document templates will assist you in getting your employees to complete and/or sign your legal-binding documents in a timely manner. Document templates can be added to onboarding workflows, or sent to employees after they are published, as needed.

The maximum file template size is 10MB and can be one of the following types: .pdf, .ppt, .pptx, .doc, .docx

Note: Document templates are designed to collect information or provide personalized information to an employee. If you want employees to view a file that contains specific policies or information applicable to all employees, those can be uploaded as **Files** (see page 24).

Resources

- Document templates for signature requests
- Requesting e-signatures from employees
- Document templates overview
- Placing profile fields in document templates

Checklist

- Determine the types of documents employees have access to and locate where they are currently stored.
- Determine which documents need to be signed/completed digitally; or if they are not currently, determine if you would like them to be.

Example

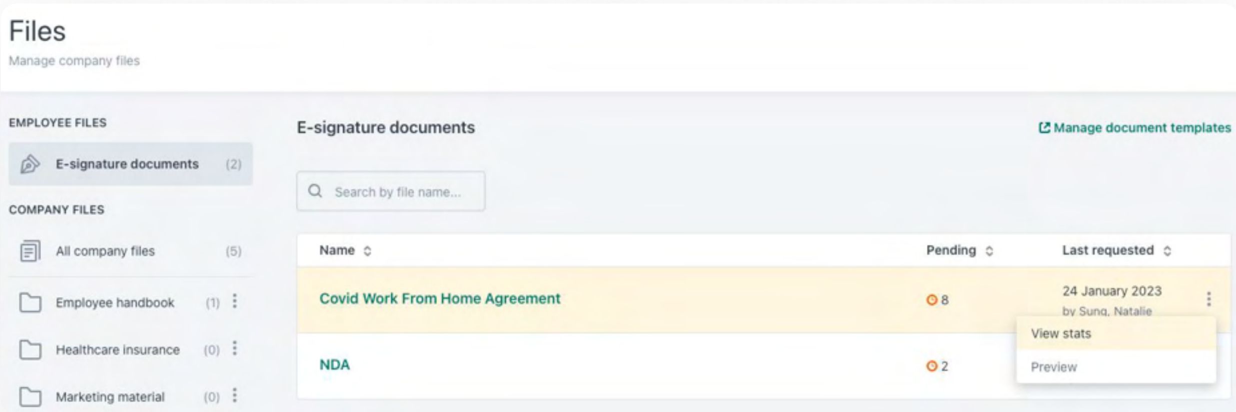
During onboarding

After the offer letter, an employee will likely need to sign and initial some type of Employment Agreement. Adding an Employment Agreement or similar document to sign during onboarding helps you collect the information you need before the employee starts, and helps prevent any delays on day one for the new employee.

One-off e-signature document

If your company is going on a retreat or doing a team builder activity, you may need to have your employees understand a new set of expectations or sign a waiver. Create a Document Template and assign to employees of specific entities of where it applies. Once it's added, the employee(s) will receive a notification to sign a new document assigned to them.

HR Admins can view stats of e-signature documents such as who has signed and how many still need to be signed, under the Files tab.



Important: For an employee to sign an e-signature document after onboarding, they need to be a published employee.

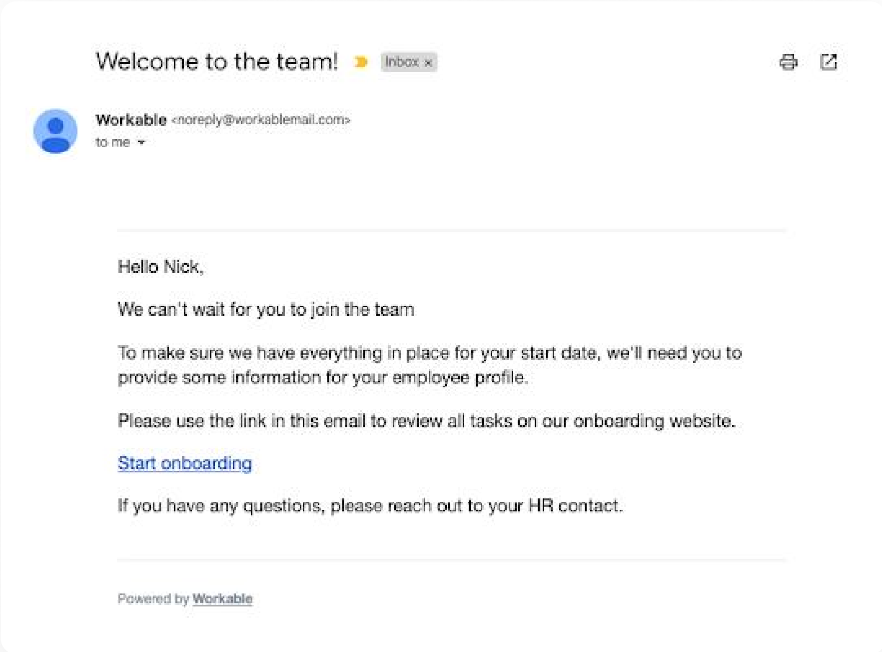
Onboarding workflows

Customize workflows for new hires and collect their information or signatures before their first day for a seamless onboarding experience.

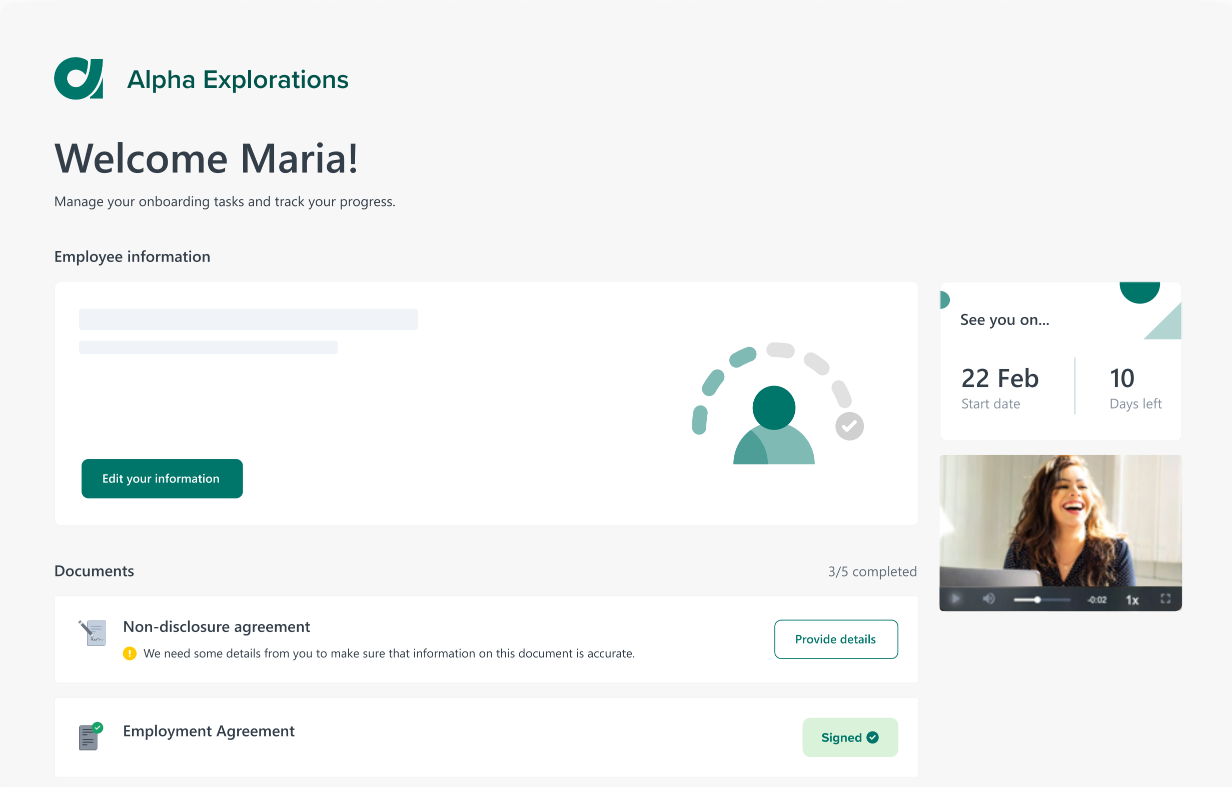
Important: Finalize your employee profile field settings and profile templates before creating onboarding workflows.

In onboarding, there are four main tasks and automations:

- **Welcome email** - includes a link to a personalized onboarding website where employees are prompted to complete their profile.
- **Welcome page** - personalize the messaging a new employee receives after clicking into their onboarding website.
- **Complete profile** - employee is prompted to fill out all employee profile fields that are selected as "edited by" employee, allowing you to collect all necessary information before their first day.
- **Sign documents** - add one or more documents for employees to sign e.g. contract, waiver, or disclaimer. These documents must already be created as document templates.



Example of the welcome email with their magic onboarding website link.



Example of a welcome page.

Resources

- Employee onboarding workflows
- Onboarding dashboard overview
- Employee onboarding workflows

Checklist

- Determine all information and documents an employee needs to complete before their start date.
- Ensure that all documents you want signed are created as Document templates.
- Ensure that all profile fields that you want the employee to complete in onboarding are set to be edited by the employee.
- Decide if you want to include a welcome video to your company to be included on the onboarding website.

Onboarding dashboard

Maintain a record of the progress of your company's onboarding workflows and take action as required. The onboarding dashboard is broken into five sections:

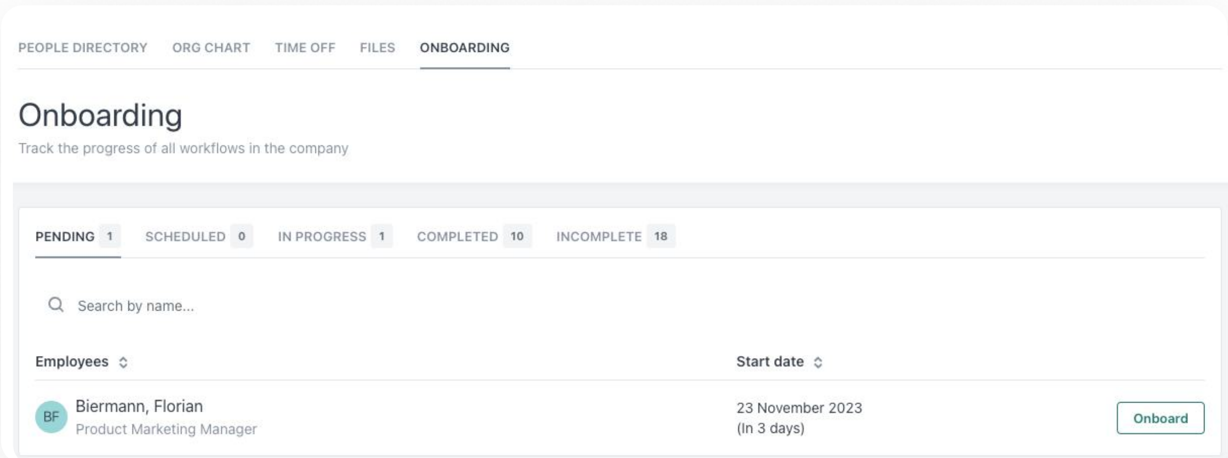
- **Pending:** Newly hired draft employees will be displayed here in order to assign them to start their onboarding sometime in the future.

- **Scheduled:** All employees displayed here were assigned an onboarding workflow but will start at a future date.

- **In progress:** All employees with an onboarding workflow in progress; workflow has started but not all tasks have been completed. A progress bar will show the percentage of tasks completed and a warning sign will appear when the start date is in the past or is approaching.

- **Completed:** All active employees that have completed all tasks of their onboarding. Inactive (offboarded) employees won't be included here.

- **Incomplete:** All employees that haven't completed all their onboarding tasks before their start date. Any completed tasks will be logged normally in their profile.



Important: The Onboarding page is only visible to HR Admins and Standard members with direct reports; standard access members not managing anyone won't be able to view this page.

Adding and inviting employees to Workable

Resources

- [Adding and managing employees]
- [Inviting new employees to Workable]

New employees can be created multiple ways:

- They can be added and created manually
- If using Workable Recruiting, a draft employee profile will automatically be created for a candidate who is moved to the Hired stage
- They can be uploaded in bulk via csv

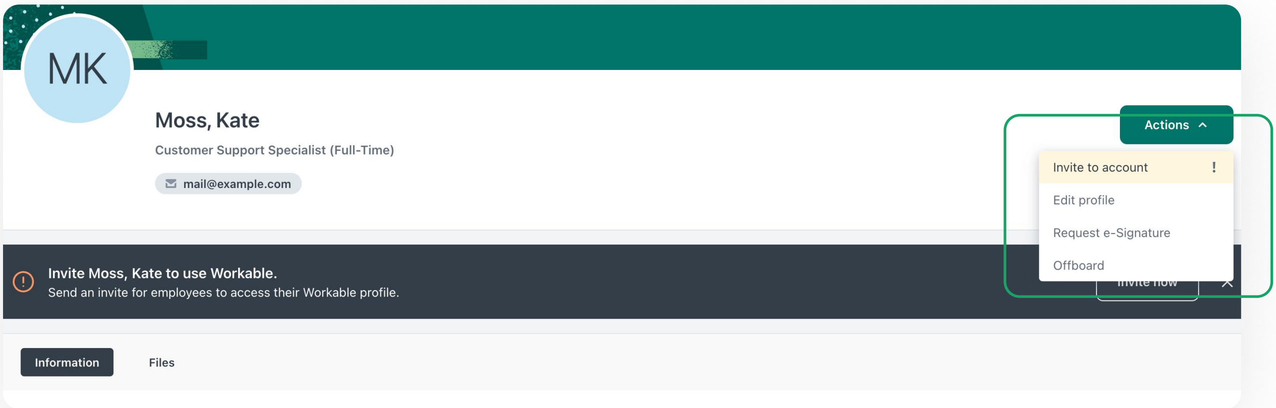
Checklist

- ✓ Onboarding is complete
- ✓ All mandatory profile fields are complete
- ✓ Confirm the employee’s work email address is correct
- ✓ The employee’s time-off policies are added

Important: Published employees cannot undergo onboarding with Workable. If you want the employee to go through **Onboarding with Workable**, save them as a draft employee.

Employee profiles can be published manually by an HR Admin or can be automatically published and have an invite sent after completing onboarding, as determined by the onboarding workflow settings assigned to the employee. If an HR manually publishes employees, they will need to be invited to Workable so they can view the company org chart, edit their profile information, request time off, and sign documents.

There will be an **Invite to account** option under the Actions menu as shown below.



Note: The Actions menu items will change based on the profile status of the employee. For example, there will be an Onboard action for draft employees, but it won't be visible on Published employees.

Important: Once an employee logs in with the email listed as their work email, the work email cannot be changed in the employee profile.

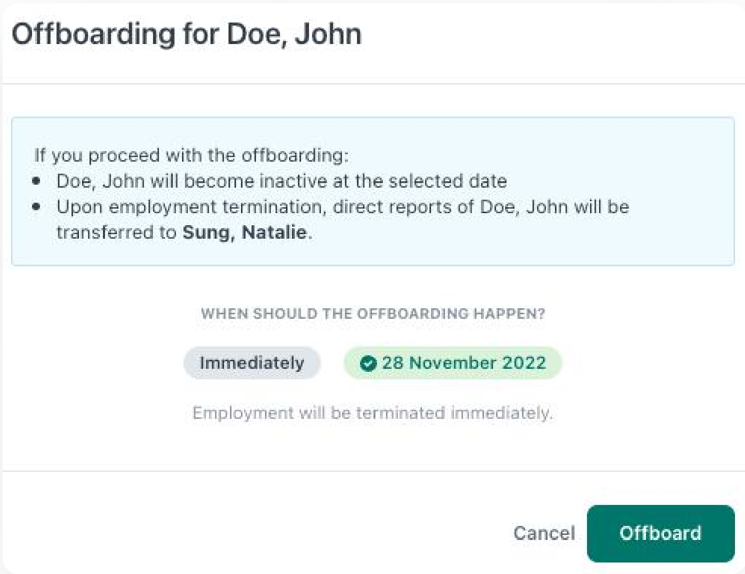
Offboarding

The offboarding process can be initiated by HR admins in order to formally separate an employee from your organization. Offboarding sets the employee's profile status to "Inactive" and further action cannot be taken to reverse it.

Inactive employee profiles will only be accessible to view by HR Admins.

Important: When an employee is offboarded, their access to Workable will be terminated completely. A new profile with a new email address should be created in case the employee needs to join the company again.

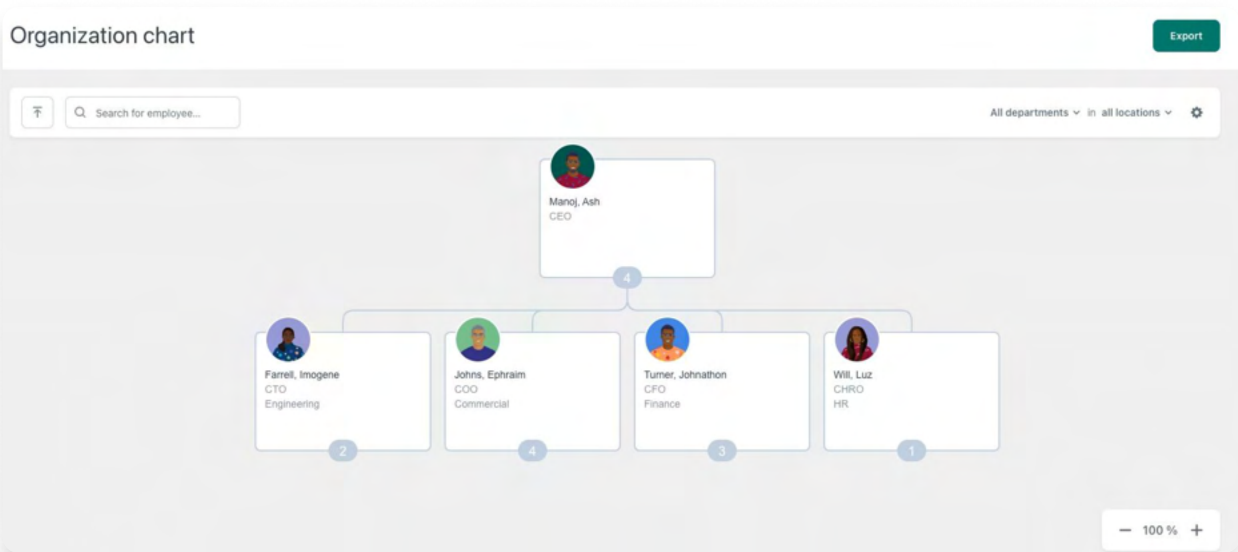
To initiate the offboarding process, go to the employee's profile actions and select **Offboard**. Choose to offboard immediately, or choose a specific date.



Upon employment termination, direct reports of the offboarded employee (if any) will be transferred to their line manager. In the example above, John's direct reports will be transferred to Natalie.

Organization chart

All employees have access to the company organization chart. Search by employee name, filter by department or entity, and export as needed.



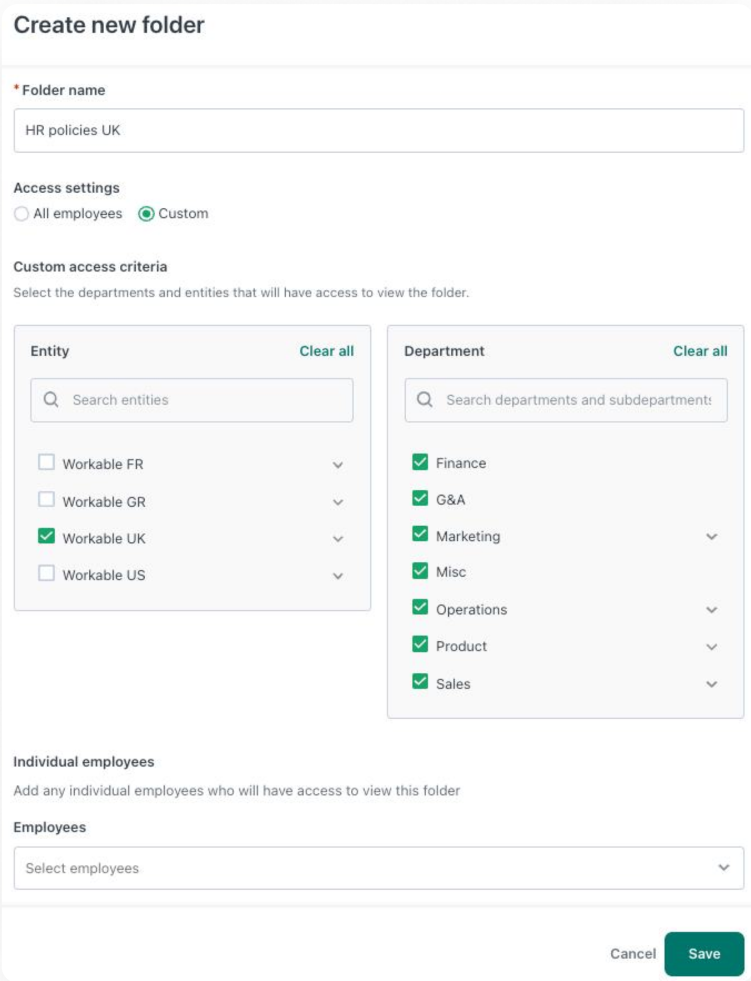
Resources

Viewing the Employee Directory and Org Chart

Files

Resources

[Accessing and managing company files]



Company files work as a centralized repository for all your company-related documents and other file types that you need to share with your employees.

Individual files can be a maximum of 10MB in the following file type:.pdf, .ppt, .pptx, .doc, .docx, .xls, .xlsx, .png, .jpg, .jpeg. The file title can be a maximum of 70 characters.

File folders can be visible to all employees or those chosen by HR Admins, indicating that certain files are only visible to employees of specific entities, departments, or individual employees.

Examples:

- Guides
- Company policies
- Branding guidelines
- Office floor plans
- Vendor lists

Additional employee management resources

Resources

- Implementation guide: Employee onboarding and management
- HR Admin FAQs
- Comparing employee management user permissions

Time-off management

Create time-off types and policies that apply to different groups of employees based on their entity, location, or site so you never have to manually track again.

Checklist

- Gather your current time-off policy information including policy balances, renewal information, accrual levels, carry over, and proration.
- Determine if any time-off requests require attachments.
- Outline your approval process for time-off requests (these can be different based on policy).
- For bulk imports of time off balances and policies, ensure the data export meets the requirements for our bulk import via csv option.

Important: You must have already created both work schedules and holiday calendars before starting creating time-off policies.

Work schedules

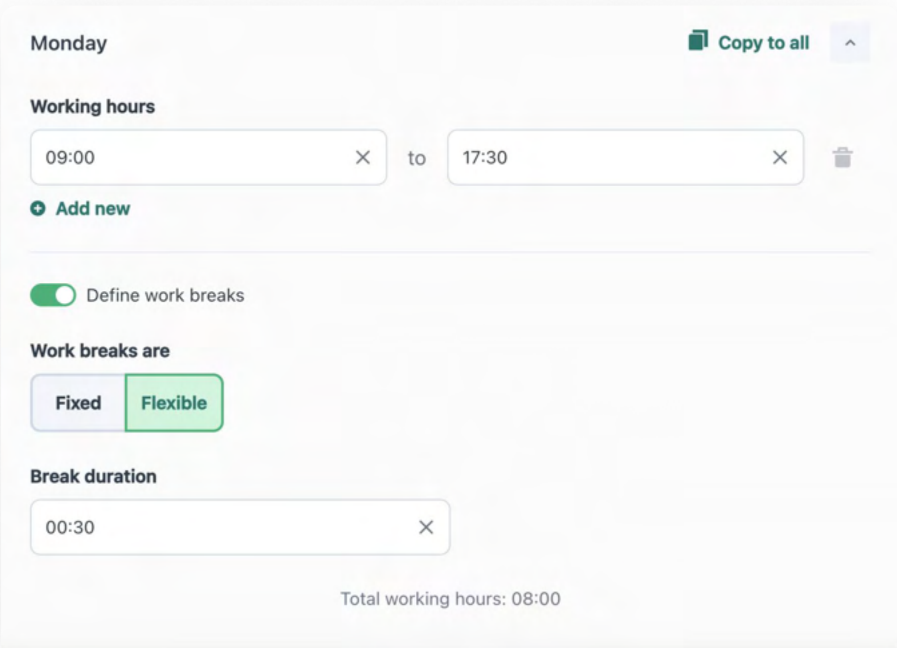
Work schedules facilitate your employees' time off management and it is beneficial to set them up during your implementation so your time off management process is seamless.

Resources

[Adding and managing work schedules]

Checklist

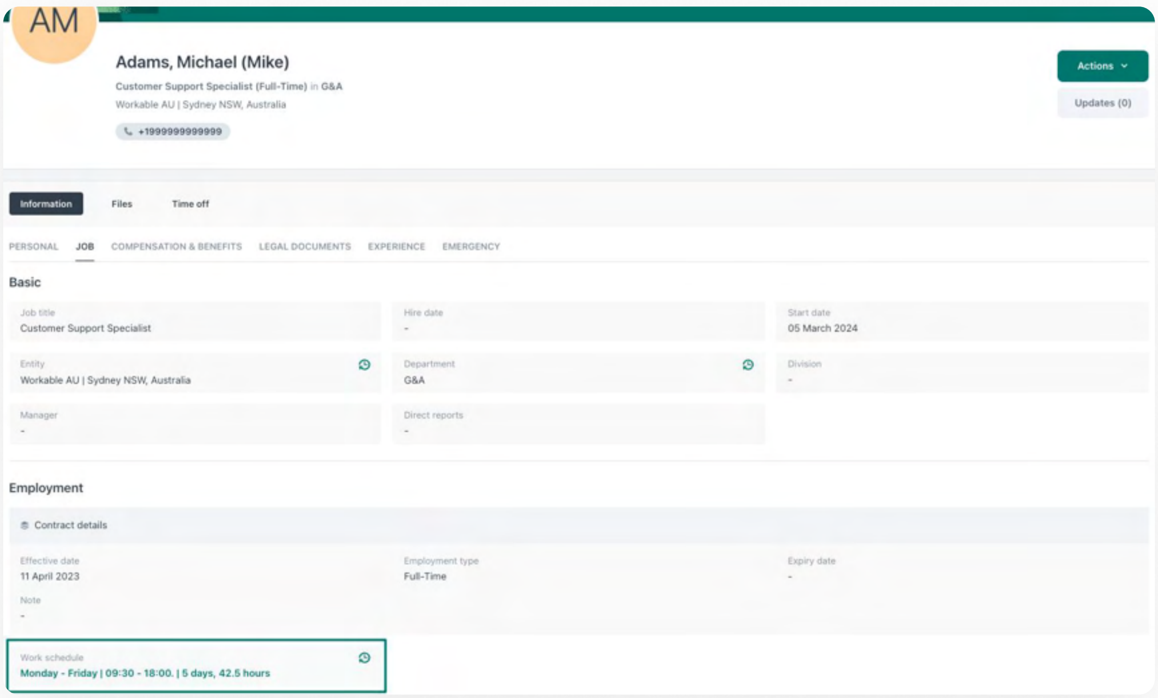
- Gather the work schedules of employees, including their breaks. There may be more than one work schedule for your company depending on the employee's department or entity.



Head to your Work Schedule settings and fill out the appropriate information, including if this schedule is tied to a specific entity or department. Define working days and breaks. Breaks can be fixed, meaning they begin and end at a specific time, or flexible, meaning that there is a set duration of a break but the actual time does not need to be identified.

Assigning work schedules to employees

When creating or editing an employee profile, select the correct Work schedule for the employee within the **Job → Employment section**.



Holiday calendars

Holiday calendars enable you to set up public and company-specific holidays for employees. These calendars can be applied to entities or locations, and when employees request time off, the designated holidays won't be deducted from their balance, depending on the time-off type settings.

Resources

Adding and managing holiday calendars

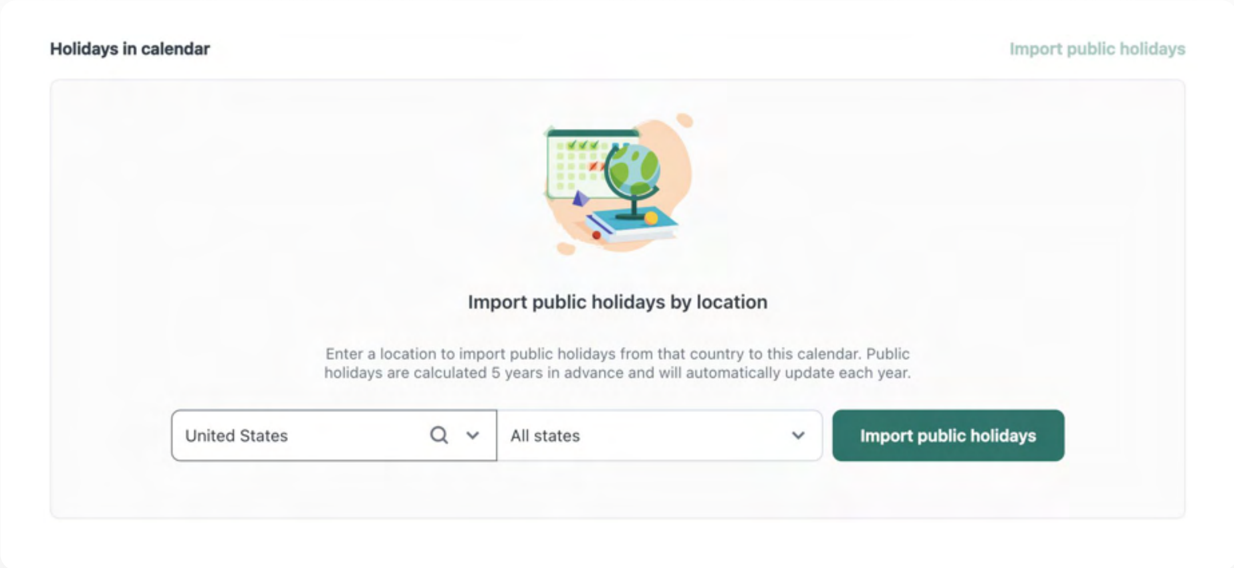
Checklist

- Gather a list of observed public holidays at your organization, by location
- Gather a list of observed company holidays at your organization, by location

Import holidays via API

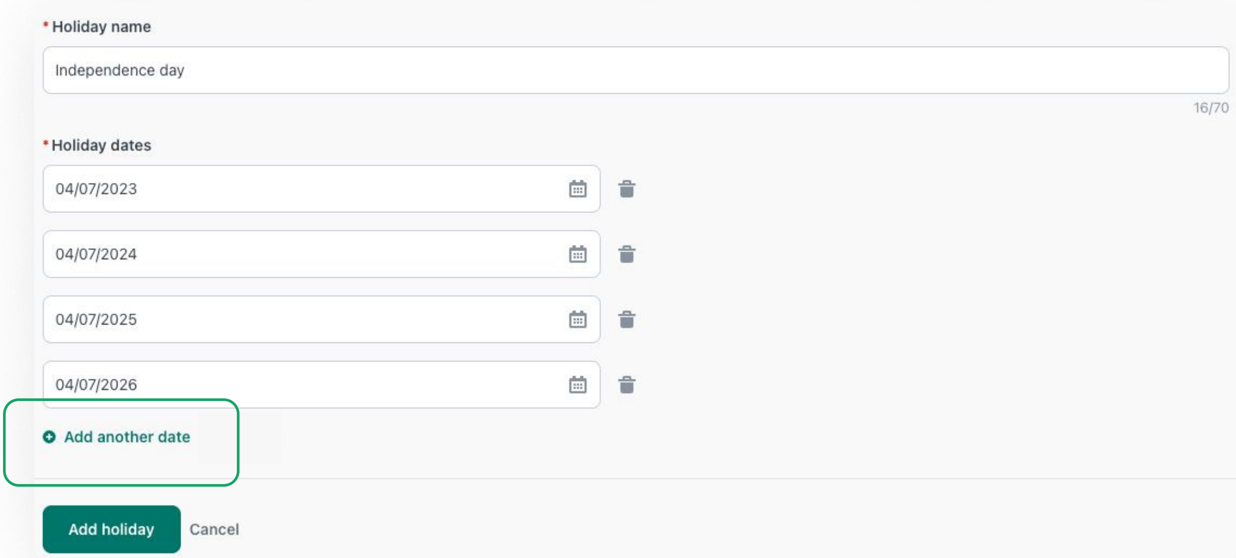
Head to your Holiday Calendar settings and add a calendar, defining the name and determine the entity it will be assigned. Using the modal, select the country, and choose an optional state or region to import the holidays. Workable will automatically create a list with the applicable public holidays and the dates they will occur for the next 5 years. Because you are importing via API, there will always be 5 years of holiday calendars, meaning that by generating a list in 2024, you will see holidays from 2024-2028, and once 2025 begins, the list will show holidays from 2025-2029, etc.

You can edit the imported holiday dates manually, if needed.



Adding holiday calendars manually

Manually add holidays, defining their name and at least one date. You can add multiple dates as needed. Because these are manually added by you, the system will not automatically update every year to include 5 years of holidays.

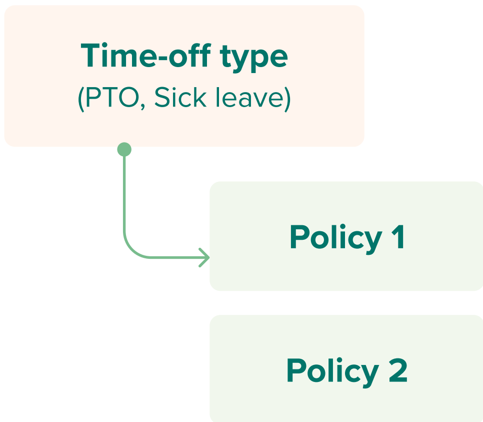


Type-off types

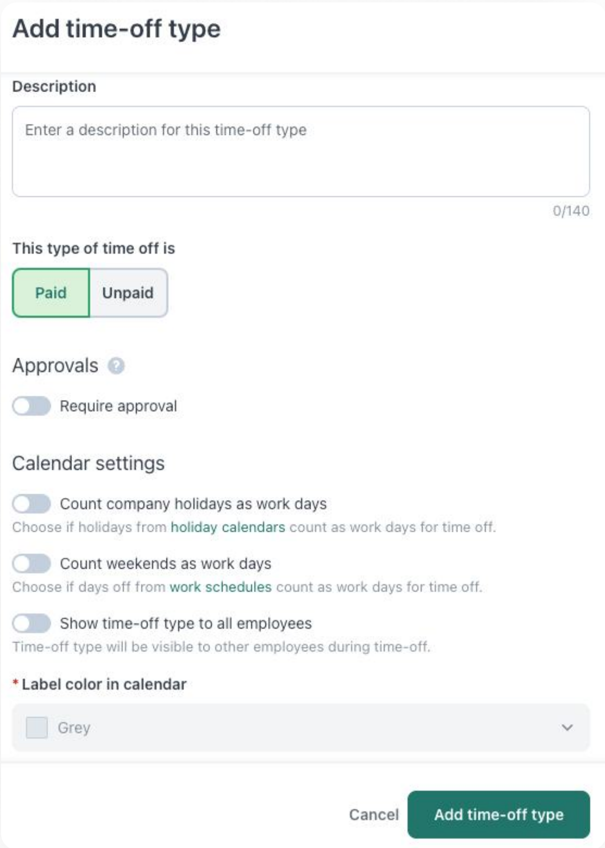
Resources

[Adding and managing time-off types and policies]

By default, there will be three time-off types added to your account to act as guides: paid time-off, sick leave, unpaid leave. Specific policies fall under the time-off types.



To add or manage time-off types, head to your Time-Off settings and fill out the appropriate information. You'll notice settings for approvers and calendar settings. Changing these settings provides a default setting for all policies created under this type. However, you can still manually edit the specific policy approver and calendar settings, if needed.



Above: example of enabling the "show" time-off type to all employees. If disabled, the banner would just read "On leave".

Calendar settings

- **Count company holidays as work days:** When this setting is enabled, the calculation of the requested amount in this time-off type will ignore any company holidays that are set up for the employee's entity or location.

- **Count weekends as work days:** When this setting is enabled, the calculation of the requested amount in this time-off type will include non-working days of the employees' work schedules as if they were working days.

- **Show time-off type to all employees:** When this setting is enabled, the time-off type of employees' absence will be shown in the employee profile header and the Time-off company calendar. HR Admins can also choose the color that they want this time-off type to use in the calendar. When this setting is disabled, employees' time-off type won't be shown anywhere. In the employee profile header, we will show just "On leave" while in the Time-off calendar the request will be shown in gray color.

Time-off policies

Resources

Creating and managing time-off policies

For each time-off type, there may be different rules & balances applicable to employees, which can be covered by creating different time-off policies in each time-off type. Common factors for establishing these policies include:

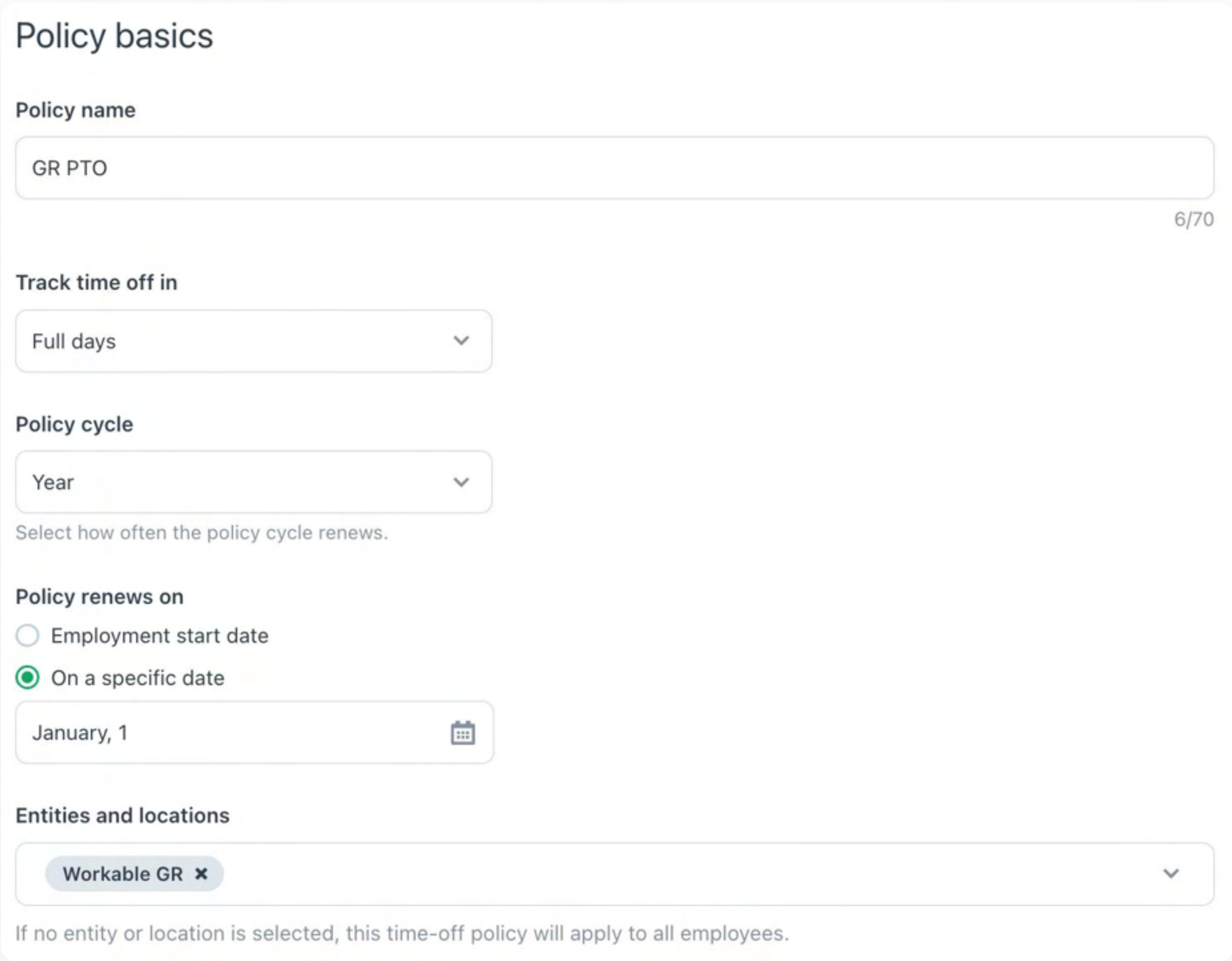
- **Employee entity** (different time-off legislation by country/state)
- **Cycle renewal date** (fixed or based on employee's start date)
- **Employee past experience**
- **Employee work schedule** (different allocation for part-time/full time employees)

Policy basics

Define the policy name, measurement unit, cycle, renewal date, and assign it to specific entities, if applicable.

Time-off policies can be measured in: full days, half days, hours. The policy cycle refers to how often the policy days will be renewed, which can be in: a year, quarter, month, or occurs once, indicating that this policy does not renew.

The policy can either be renewed on the employment start date, or on a specific date. Check your local laws or internal processes to determine which renewal option is best for you.

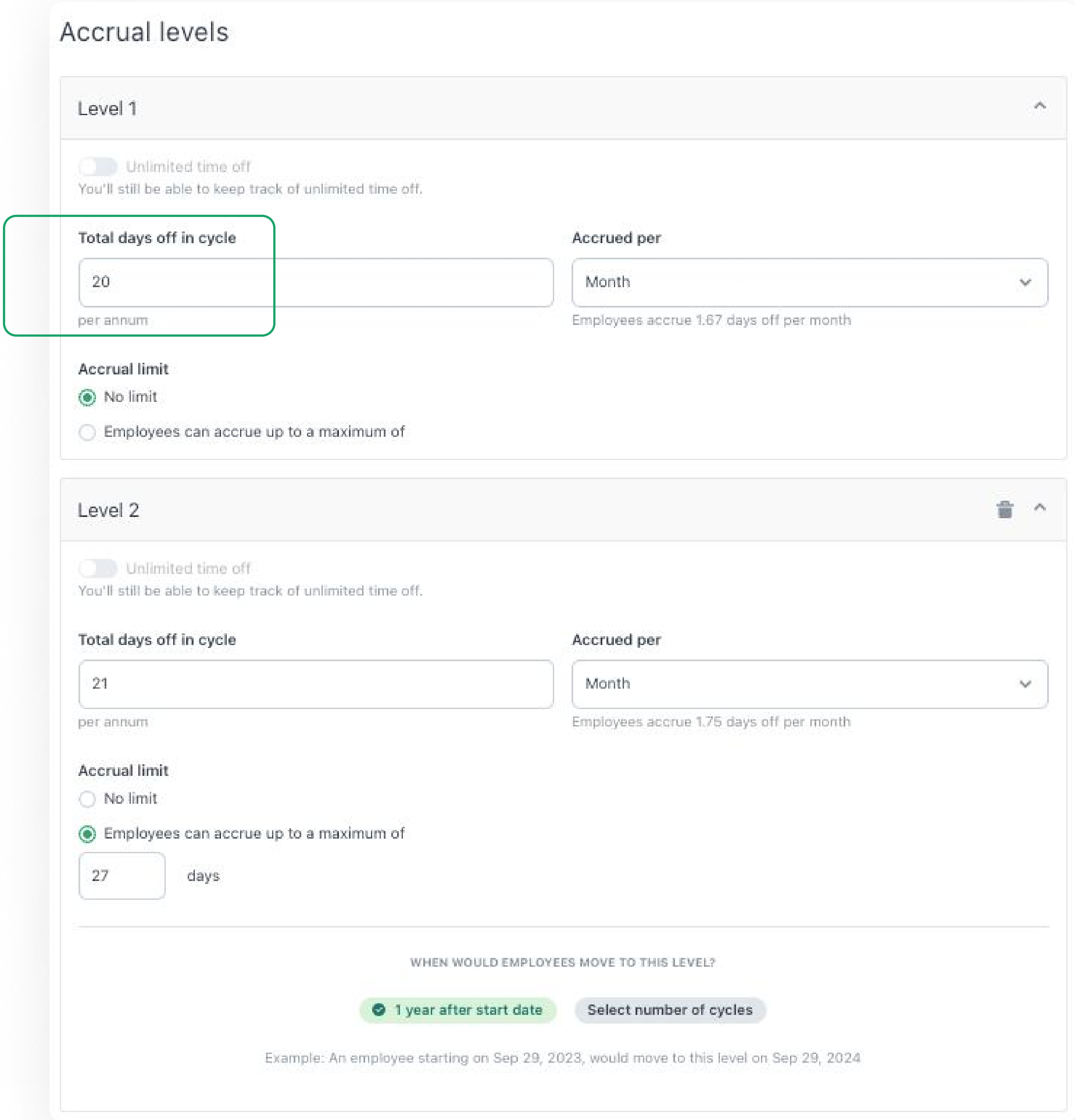


Example of a policy set-up where employees can only request full days with the full policy renewing every year on January 1.

Accrual levels

Each time-off policy can have multiple accrual levels, which might have different amounts of days/hours allocated to employees based on their years of service within a company or the number of policy cycles completed during employment.

When a time-off policy has multiple levels created, for each one of the 2nd level and onwards, the HR Admin needs to define when the employee should move to each level, based on years of service in the company or number of cycles elapsed in the policy.



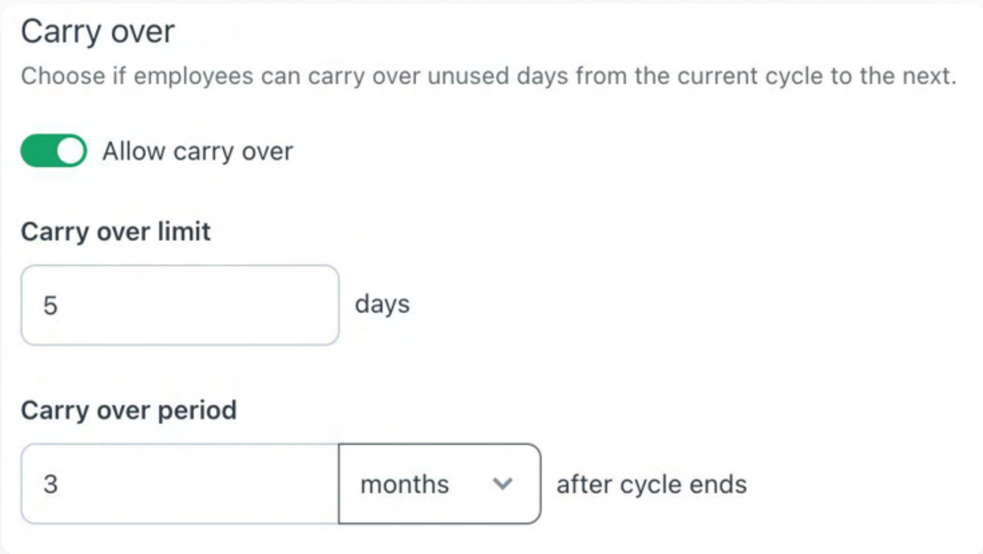
Example of a policy that has two levels. The first level has 20 days in the cycle where 1.67 days are accrued each month. After one year of employment of their start date, the employee will move to level 2 where they will accumulate 1.75 days per month, for a cycle of 21 days.

Here, the accrual maximum is 27 days, meaning that if the employee carried over any days from level 1, the maximum they'll ever accrue is 27 days.

Additional settings

Carry over

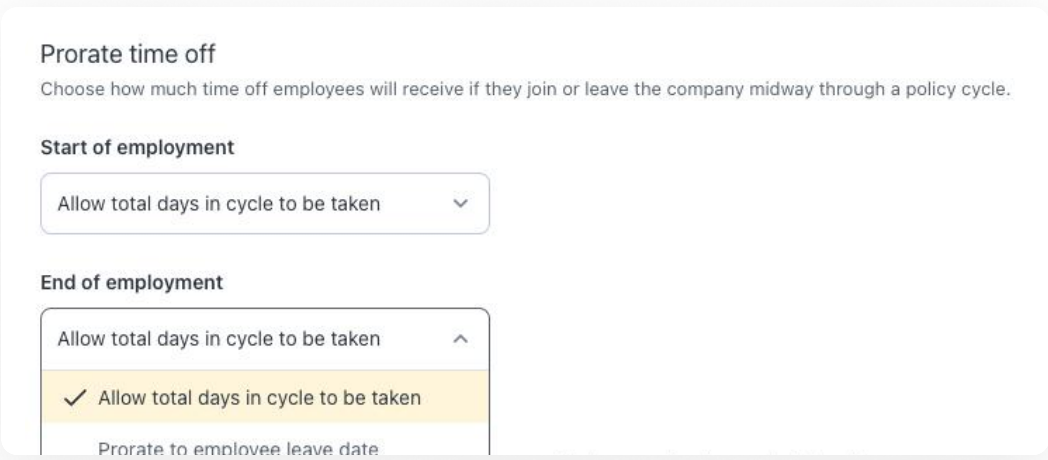
For each policy, you can define if the employees are allowed to carry over any unused days/hours in the next cycle and when these days/hours should expire.



Example of a policy where employees are allowed to carry over up to 5 days and utilize them within a 3-month period.

Proration

You can choose how much time off employees will receive if they join or leave the company midway through a policy cycle.



Start of employment:

- **Allow total days in the cycle to be taken:** When an employee joins the company, the entire accrual cycle's amount will be allocated and made available for utilization.
- **Prorate to employee start date:** When an employee joins the company, their allocated time off is proportional to the number of days between their start date and the end of the cycle.

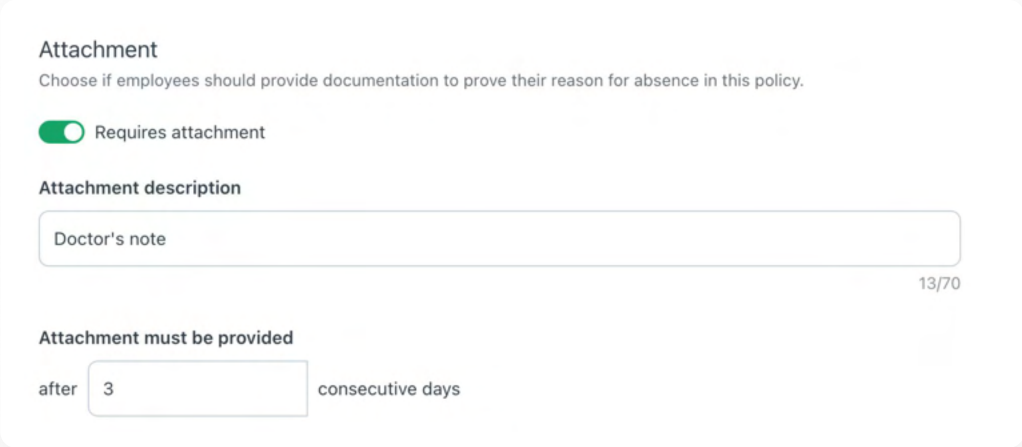
Example: An employee joining the company on July 1st will be allocated half the amount of PTO policy if the policy cycle is set to renew every January 1st, as the employee will be actually working half of the cycle for the company.

End of employment:

- **Allow total days in cycle to be taken:** All allocated days will be available to an employee with a scheduled offboarding, without any proration on the employment end date.
- **Prorate to leave date:** The employee can take time off based on their active accrual days, and the balance will be recalculated when offboarding is scheduled.

Including attachments

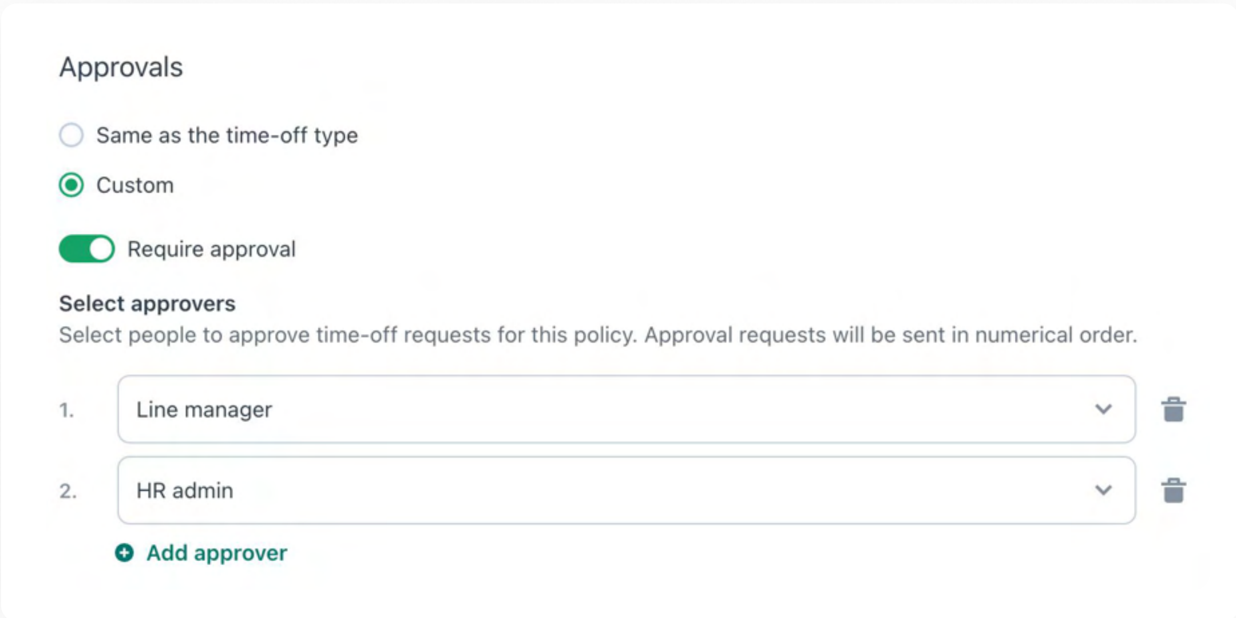
There may be times when you want the employee to include an attachment, such as a doctors note, to a time off request extending a certain number of days. By default, attachments are toggled off for time off policies.



Example where an employee would have to include an attached doctors note if requesting off for 3 consecutive days under this time-off policy

Approvals

By default, a time-off policy follows the approval flow assigned to the time-off type it belongs to. You can define custom approval flows for specific policies, overriding the default approval flow that the time-off type is using. You will be prompted to select the approvers from a list. Approvers can be specific employees or roles.

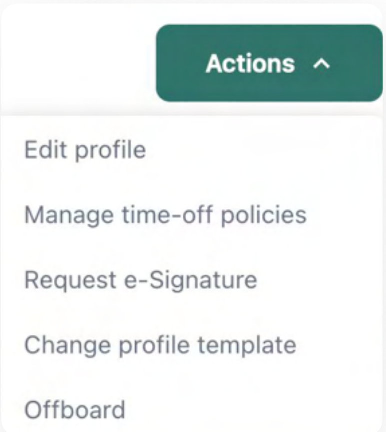


Assigning time-off policies to employees

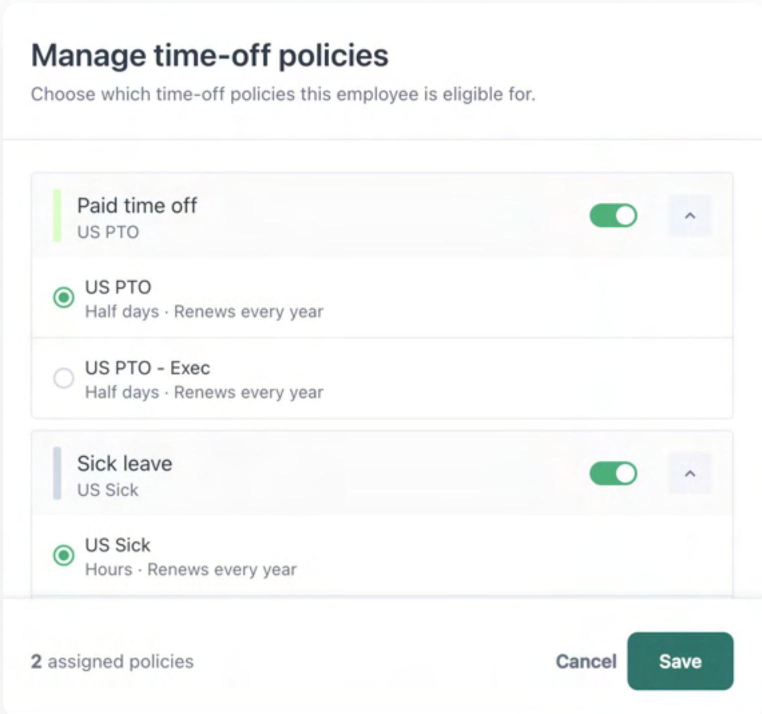
Resources

[Assigning time-off policies to employees]

Within the employee's profile, select **Actions → Manage time-off policies**. All policies created will be visible but only the policies that are available to be assigned to the employee based on their entity are able to be selected.



Actions dropdown from an employee profile.



Toggle time-off types and select specific policies.

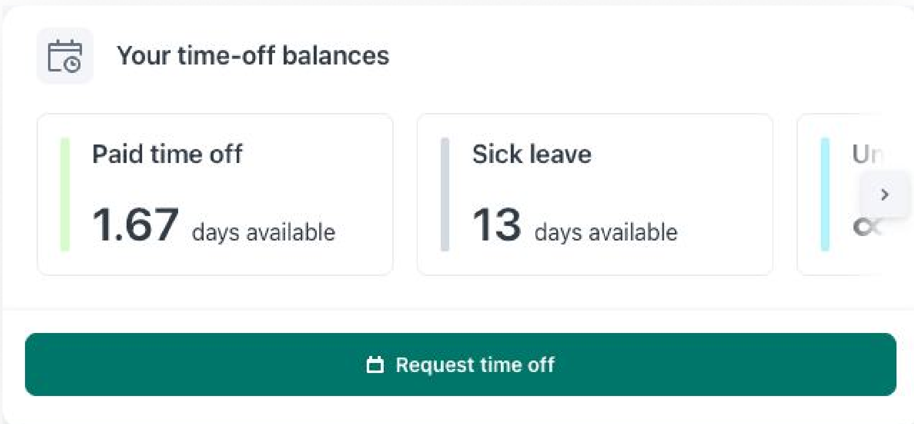
Tip: To assign time-off policies and balances in bulk, you can import via csv. Read instructions in this [article].

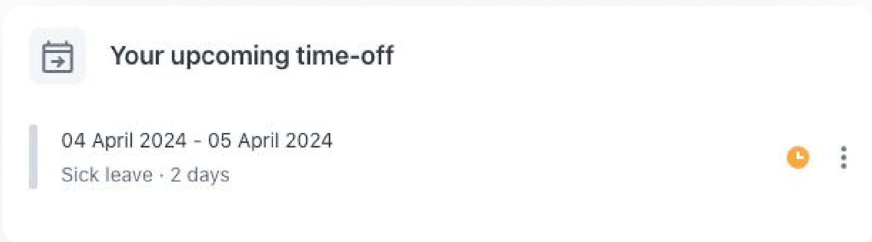
Requesting time-off

Resources

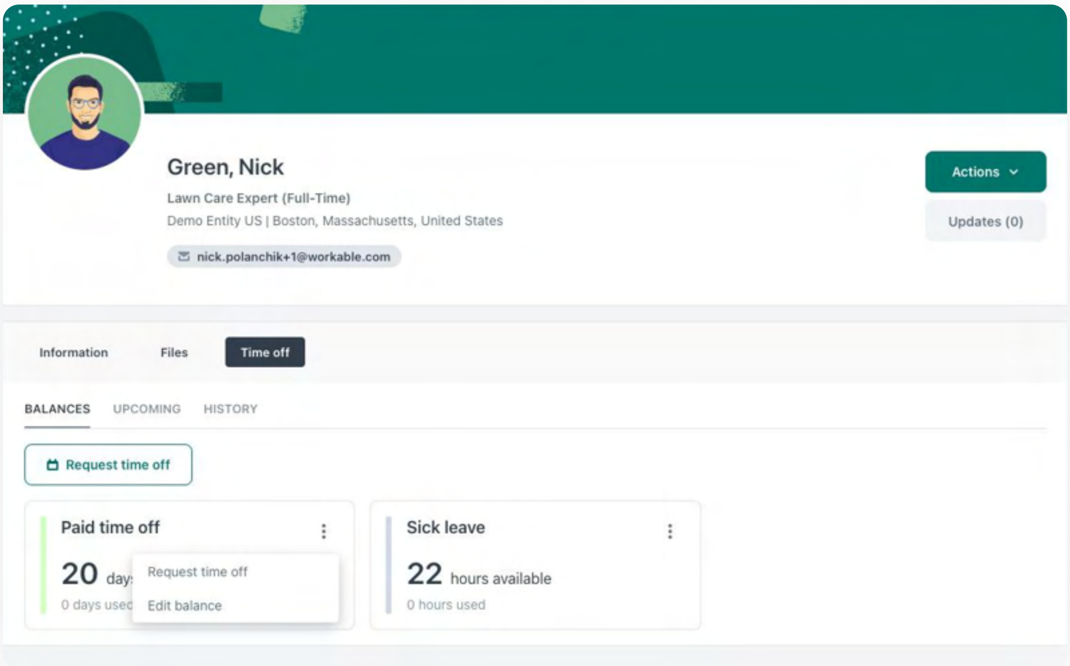
[Requesting time-off](#)

Time-off requests can be completed by the employee themselves via their homepage. Scroll to the time off widget and click Request time-off.

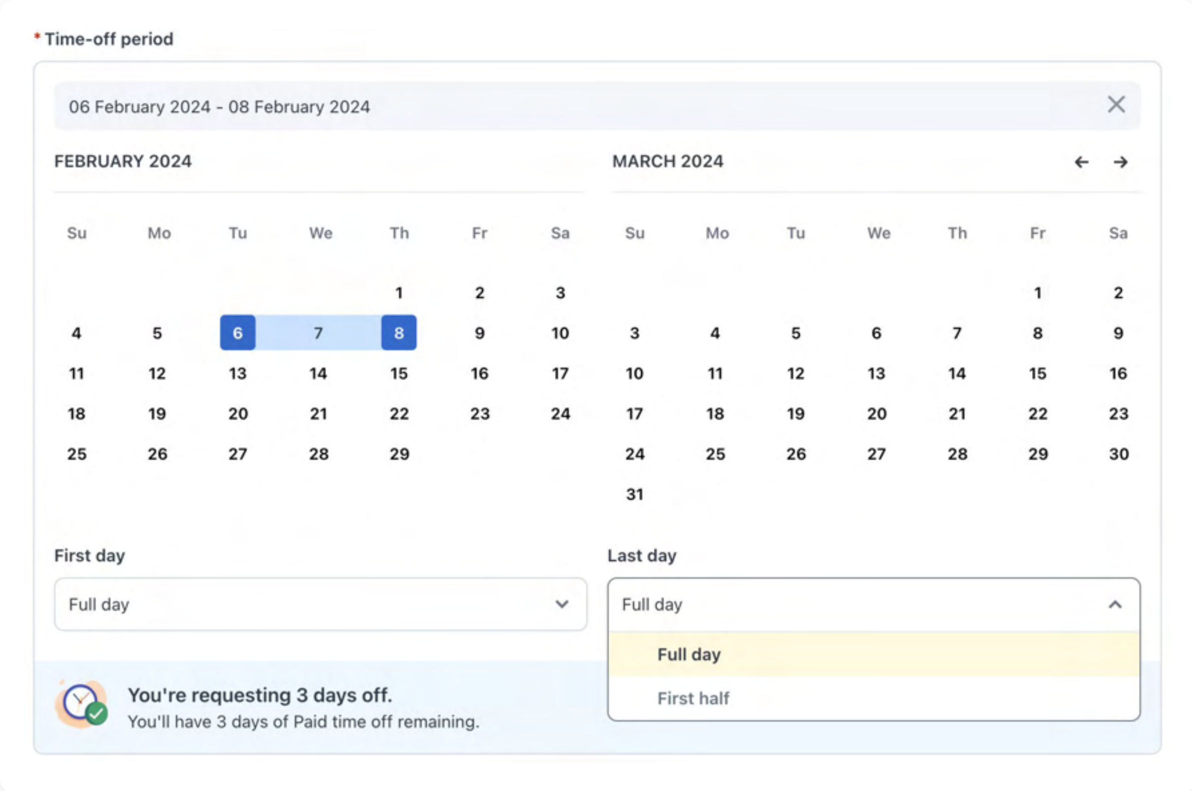




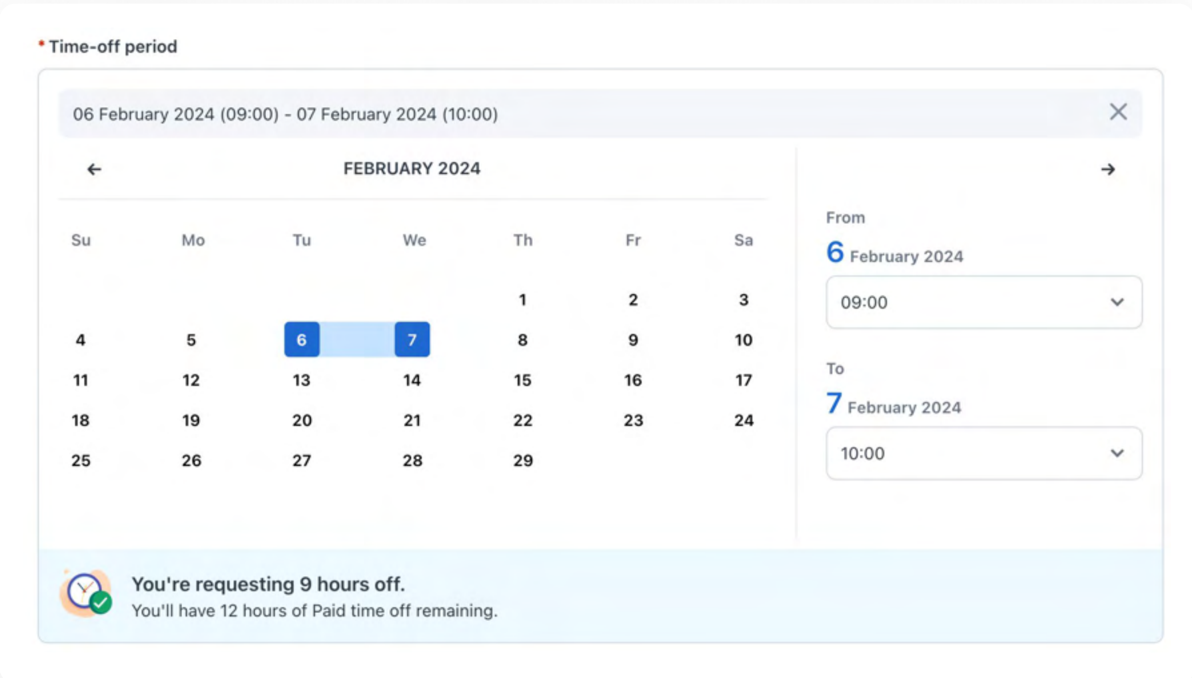
Alternatively, request time off via the Time-Off section of the employee profile. Employees can request time-off via the “Request time off” button or from the action menu on the actual policy balance card. This action can also be completed by an employee’s line manager and managers above on behalf of the employee, or HR Admins for all employees.



Set the dates, or hours, and submit the request.

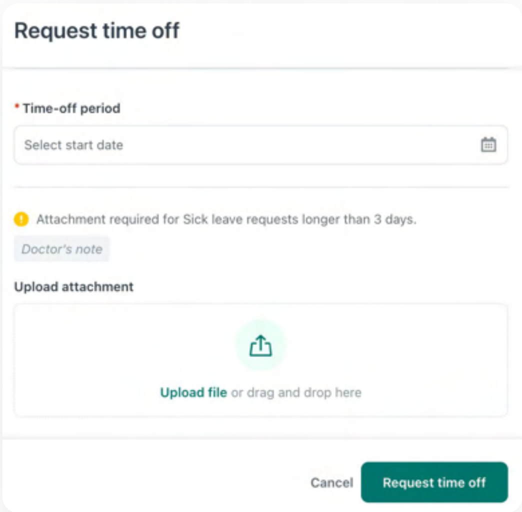


Example of a request where the time-off policy is measured in half days.

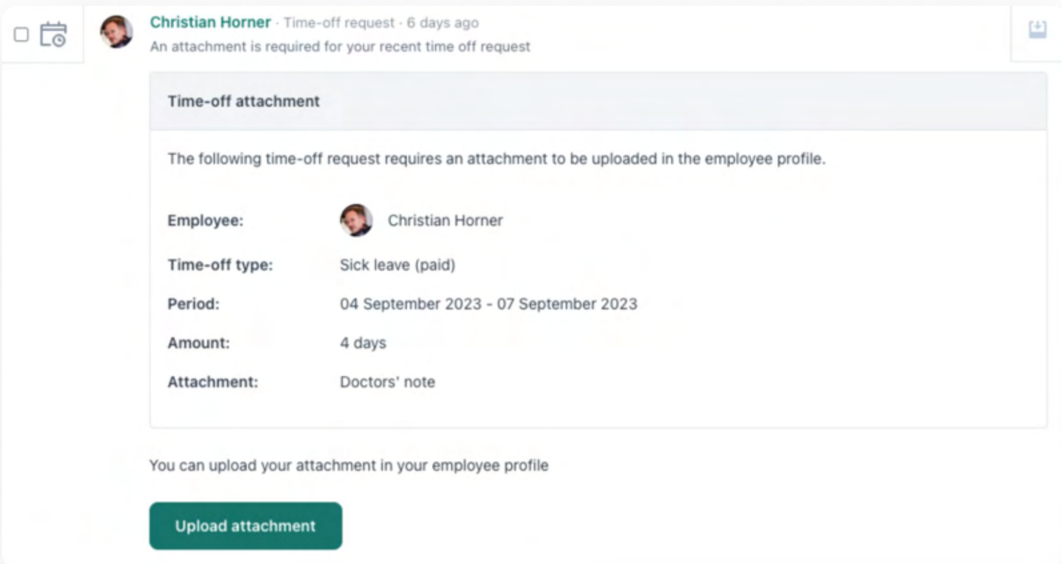


Example of a request where the time-off policy is measured in hours.

If a time-off request requires an attachment, there will be an additional field in the time-off request modal. If a document is available at request creation, the employee can upload it and submit with their request. If the document is not available upon request creation, the request can proceed as normal and the employee will receive an inbox item on their first day back after their time-off, requesting for the document to be uploaded.



Example of what the employee will see if there is an attachment requirement. If the employee has the document available at creation, they can upload with the request itself.



Example of the inbox message an employee will receive if an attachment is required for their time-off request but they did not upload one at request creation.

If an employee already uploaded a document, they will not receive this message.

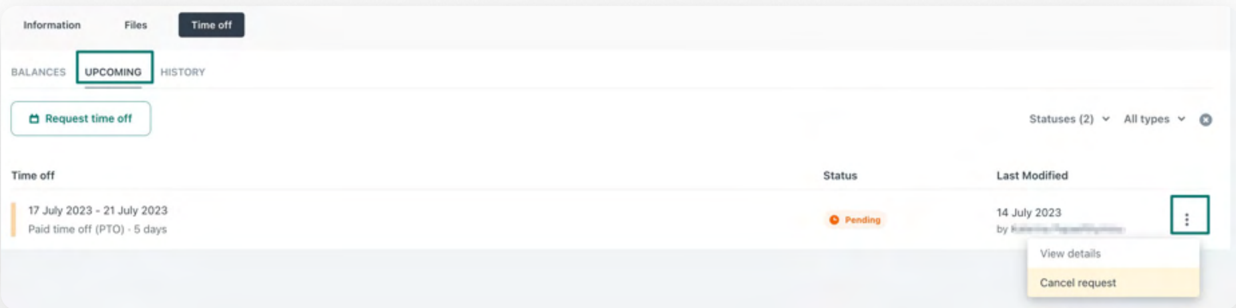
Canceling time-off requests

Resources

- [Canceling time-off requests]
- [How can I correct time-off request mistakes?]

Employees have the ability to cancel an upcoming time-off request if it is no longer needed. For requests with a past or present date, the request can only be canceled by an HR Admin.

Employees can cancel requests in their **Upcoming** tab, whereas HR Admins can cancel requests under the employee's **History** tab.



Approving / rejecting time-off requests

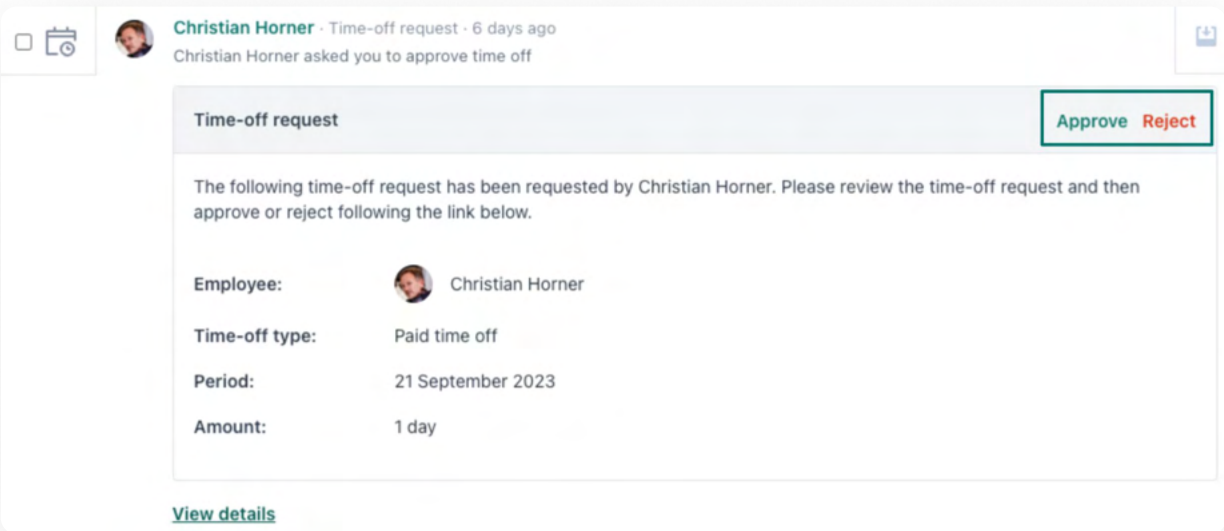
Resources

Approving/rejecting time-off requests

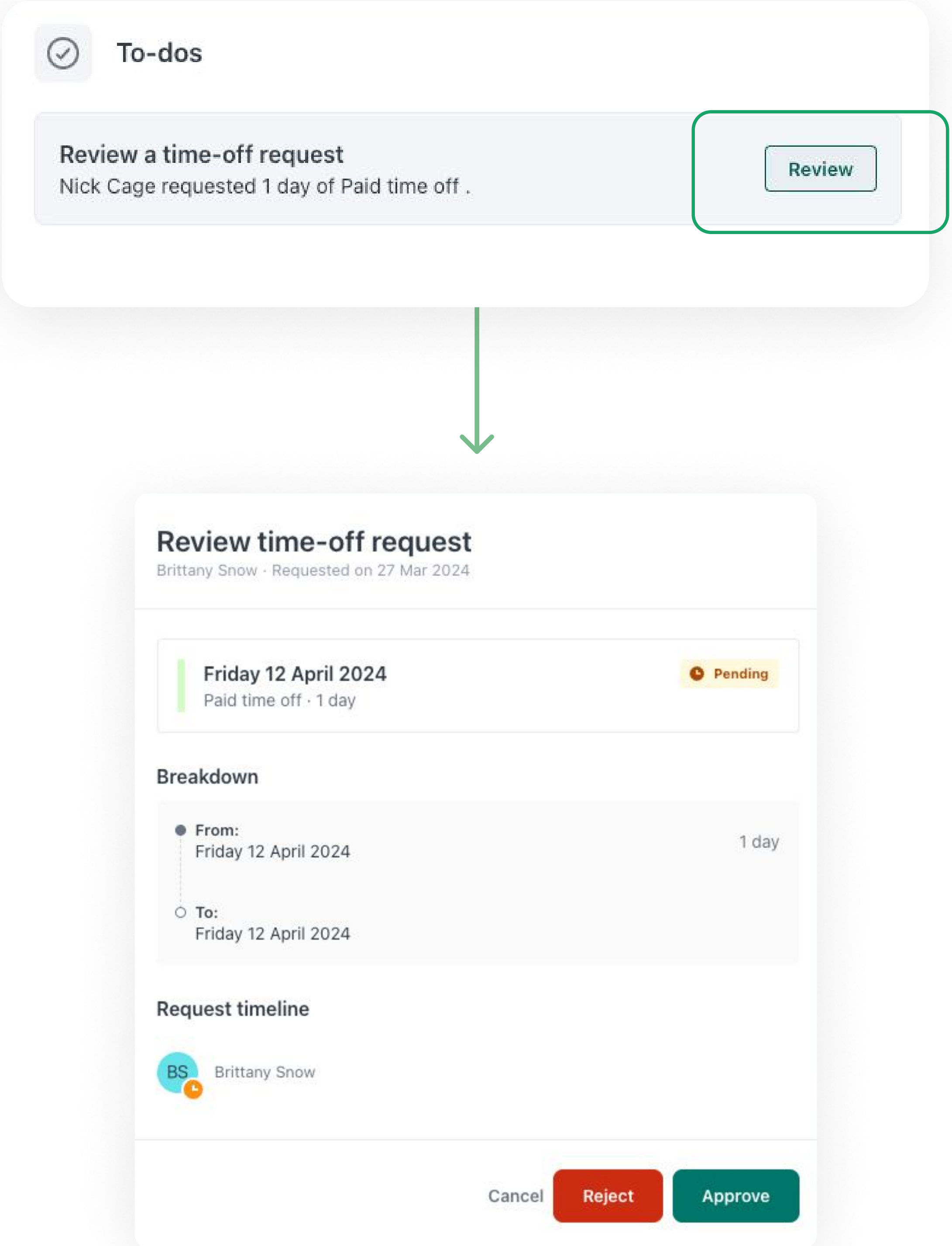
Once an employee has submitted a time-off request, it may need to be approved by one or more employees/roles (Line manager, HR Admin). Approvals in time-off are sequential, which means that the first approver needs to approve a request before the second one is notified that there is an approval pending. When any of the approvers rejects a time-off request, then this rejection is considered final and the next approvers do not get notified at all.

In case no approval is required for a time-off type or policy, then all the requests of this type are automatically marked as "Approved" in the employee profile.

The approver can take action directly via their homepage or Workable inbox.

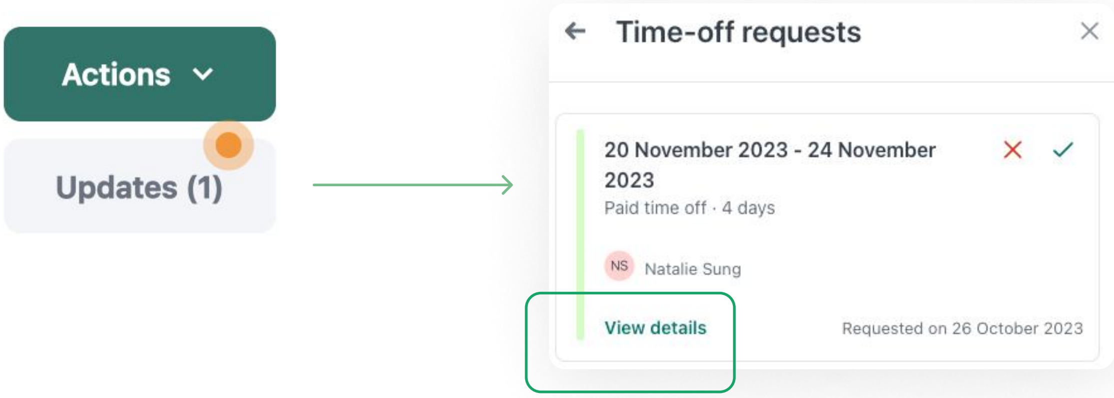


Example of taking action via the Workable inbox.

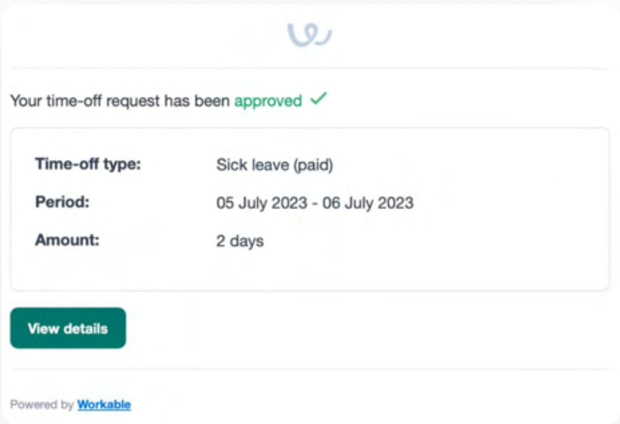


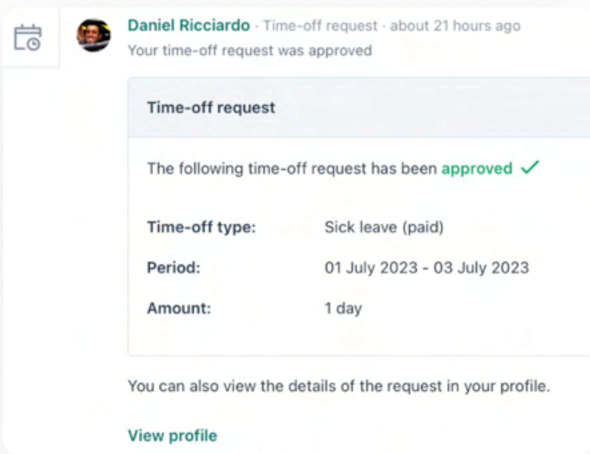
Example of reviewing request via the homepage widget.

Approvers can take action within the employee's profile via the **Updates** menu. By clicking **View details**, more information about the request becomes available.



The employee will receive a Workable inbox item and email with the status of the request once approved or rejected.





Example of email notification to employee.

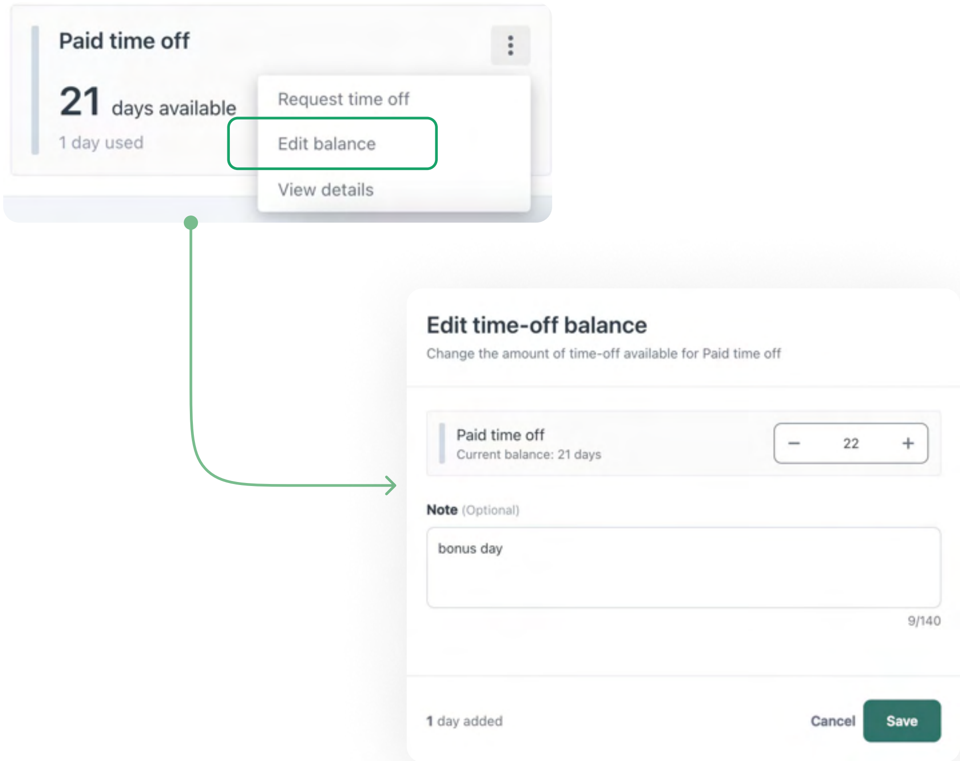
Example of Workable inbox notification to employee.

Editing employee time-off balances

Resources

- How can I edit a time-off balance of an employee?
- Viewing employee's time off (balances, history)

Navigate to the employee's Time-off tab and click Edit balance in the contextual menu.

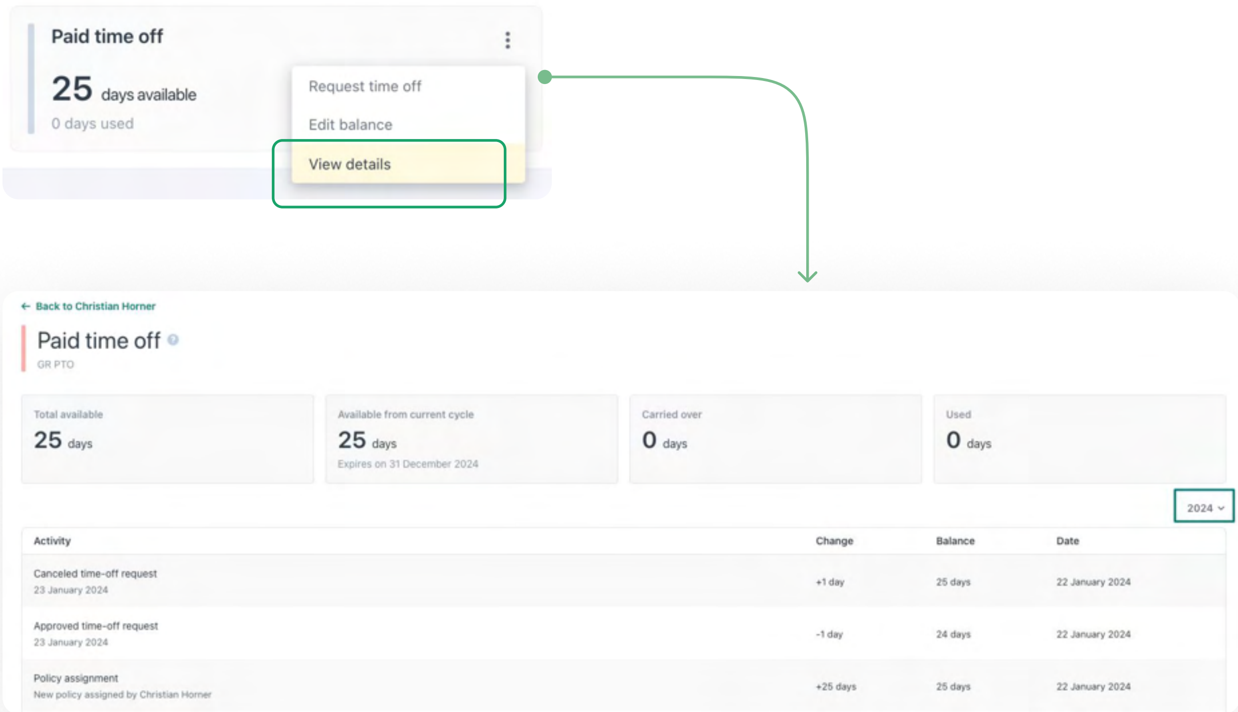


Note: The edit balance option will only be available to non-unlimited policies.

Viewing balance details

To view the details of an employee's time-off balances, click the three dot menu on the balance card and select **View details**. You'll be able to see each credit or debit balance and a breakdown of the current balance and when it expires.

If an HR Admin manually edited a balance with a note, the note will be visible under the corresponding activity line.

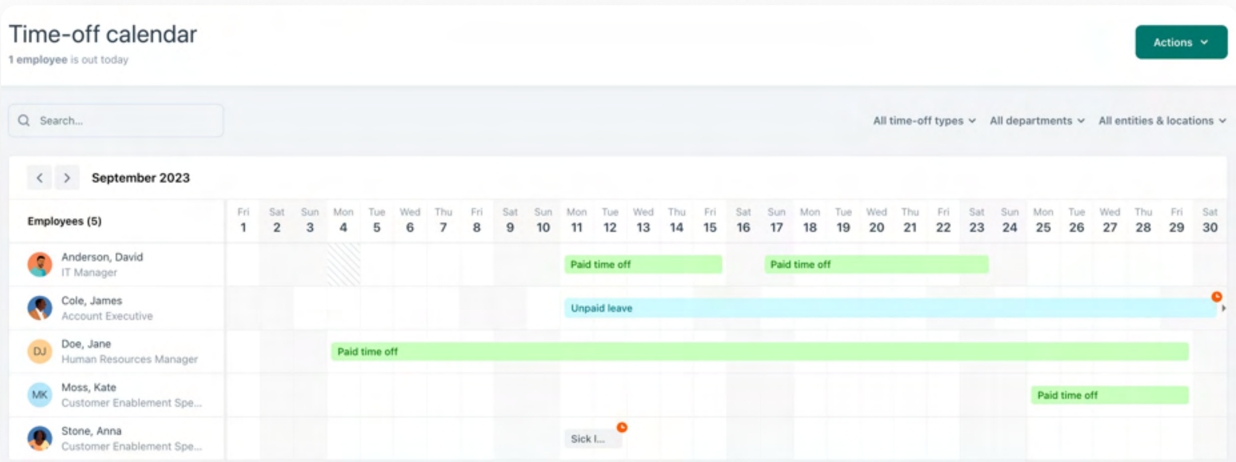


Time-off calendar

Resources

[‘Time-off’ company calendar]

The Time-off calendar provides a visual representation of which employees are currently out. Employees can search by first or last name and filter by departments and entities.



Note: HR Admins can also filter based on the time-off types in the Time-off company calendar, however this option is not available to employees.

The **Actions** dropdown is dynamic to the user permissions of the user.
All employees could request time off here; approvers of time-off requests can approve or reject requests, and HR Admins can import time-off balances for employees.

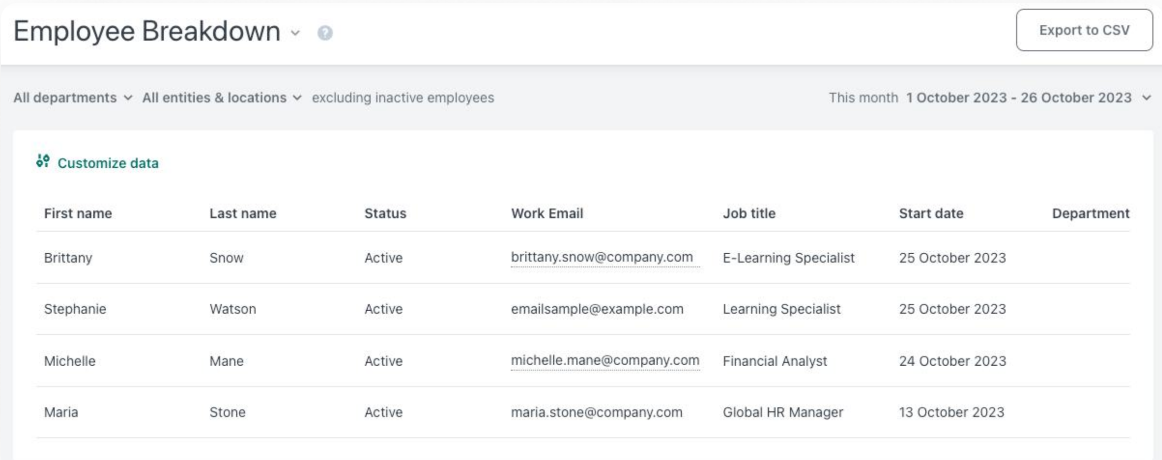
Tip: If you do not want employees to see the time-off type displayed in the calendar, you can disable this visibility setting within the time-off type settings. If this is disabled, employees will still see days team members are out, but won't know the type of time off being used.

Reports

Use built-in reports to view when employee profiles were updated, time-off balances, and more.

Employee breakdown

View detailed information about all your employees and their field values. All account members can access this report, but each member will only see employees that they can view listed in the Employee Directory and the fields they can view. For example, a draft employee is only visible to HR admins and employees in their management line.

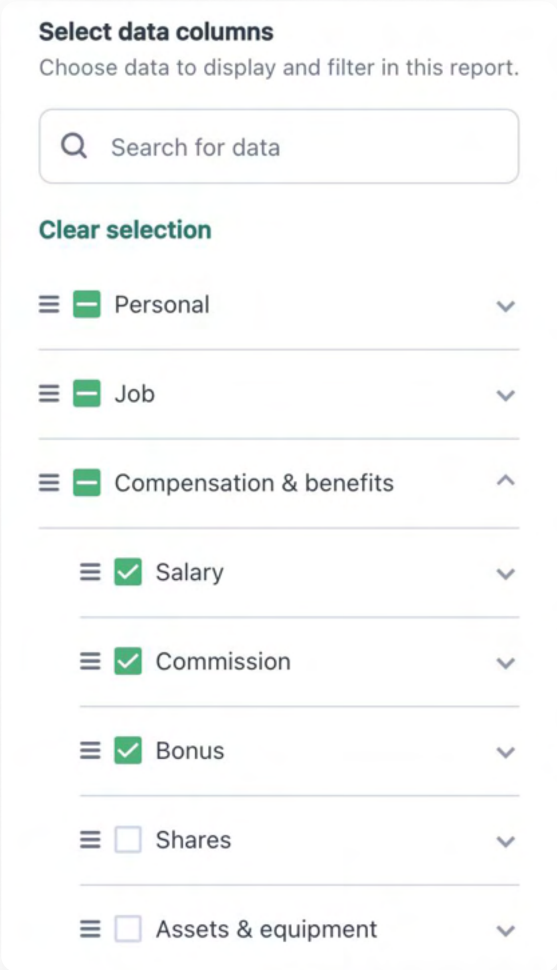


Resources

Using the Employee Breakdown report

Customize the data you need in the report. Available options to add as data are all fields in the default employee profile template.

Check as many you want and re-order as desired.

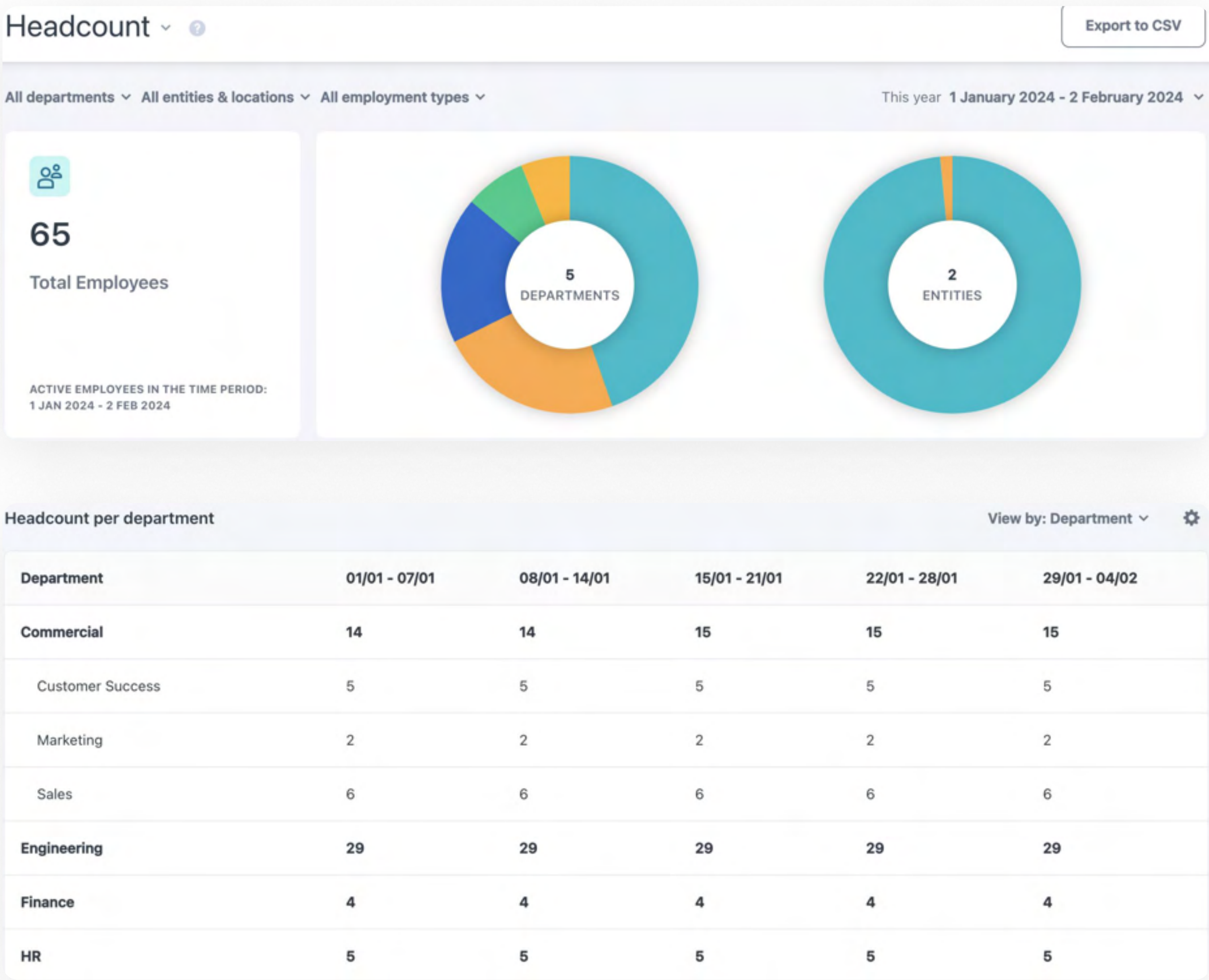


Important: The available fields for selection under Customize data for each member viewing the report depend on the visibility settings of the field. For example, if a field is set to be visible to HR admins only, then an employee viewing the report won't have access to that field. In contrast, another field visible to HR admins and Managers will be available for selection; a manager can view field values for employees they oversee, while for others, the field values might be unavailable or empty.

Headcount

Get a visual or tabular representation of your active employees.
This report is visible to all employees.

Filter by department, entity, employment type, and timeframe.



Department	01/01 - 07/01	08/01 - 14/01	15/01 - 21/01	22/01 - 28/01	29/01 - 04/02
Commercial	**14**	**14**	**15**	**15**	**15**
Customer Success	5	5	5	5	5
Marketing	2	2	2	2	2
Sales	6	6	6	6	6
Engineering	**29**	**29**	**29**	**29**	**29**
Finance	**4**	**4**	**4**	**4**	**4**
HR	**5**	**5**	**5**	**5**	**5**

Resources

Using the Time-off balances report

Time-off balances

This report provides an overview of each employee's time-off balance, including the days they've carried over, used or still have available. This report is only available to HR Admins.

The time-off type and policy information is provided with the following details:

- **Current balance:** shows the total balance that the employee has (had) for the specific time-off type, policy, and time selected, including carried-over amounts from the previous cycle.

- **From cycle:** shows the balance that the employee has (had) for the specific time-off type, policy, and time selected that came from the accrual/renewal of the cycle.

- **Carried over:** shows any balance carried over from the previous policy cycle; these days are consumed with priority.

- **Used:** shows the total usage for the current cycle, including all approved requests (historical and upcoming).

Time-off Balances

Export to CSV

All time-off types · Departments (3) · All entities & locations · excluding inactive employees · As of Today

Employee name	Employee ID	Status	Time-off type	Time-off policy	Current balance	From cycle	Carried over	Used
Horner, Christian	3	Active	Paid time off	GR PTO	22 days	22 days	0 days	2 days
Horner, Christian	3	Active	Sabbatical	20 year sabbatical	179 days	179 days	0 days	1 day
Lambiase, Gianpiero	62	Active	Paid time off	UK PTO (after Oct 1st 1998)	30 days	27 days	3 days	3 days
Lambiase, Gianpiero	62	Active	Pawternity	Pawternity UK	∞ days	∞ days	-	1 day
Marshall, Rob	55	Active	Bonus day	Bonus days	0 days	0 days	0 days	2 days
Marshall, Rob	55	Active	Learning and development	2 hours per month	4 hours	4 hours	0 hours	0 hours
Marshall, Rob	55	Active	Paid time off	PTO (Unlimited)	∞ days	∞ days	-	3 days
Marshall, Rob	55	Active	Pawternity	US pawternity	1 day	1 day	0 days	1 day
Marshall, Rob	55	Active	Sabbatical	20 year sabbatical	151 days	151 days	0 days	29 days
Marshall, Rob	55	Active	Sick leave (unpaid)	Sick half days unl	∞ days	∞ days	-	14.5 days

1 2 3 4 5

Resources

[Using the Time-off balances report]

Time-off requests

This report shows a detailed breakdown of all the time-off requested by employees. Only HR Admins can access this report.

Time-off Requests

Export to CSV

All time-off types · All departments · All entities & locations · All statuses

This month 1 November 2023 - 30 November 2023

Employee name	Employee id	Time-off type	Time-off policy	Start date	End date	Time requested	Request status	Department
Anderson, David	8	Sick leave	Sick leave	01 November 2023	01 November 2023	1 day	Canceled	IT
Doe, Jane	75	Paid time off	PTO	01 November 2023	06 December 2023	26 days	Approved	-
Anderson, David	8	Paid time off	US PTO	03 November 2023	07 November 2023	3 days	Canceled	IT
Anderson, David	8	Sick leave	Sick leave	07 November 2023	07 November 2023	1 day	Approved	IT
Doe, Jane	75	Sick leave	Sick leave	16 November 2023	20 November 2023	3 days	Canceled	-
Anderson, David	8	Paid time off	US PTO	20 November 2023	24 November 2023	4 days	Pending	IT
Anderson, David	8	Paid time off	US PTO	22 November 2023	24 November 2023	2 days	Canceled	IT
Snow, Brittany	93	Paid time off	PTO	23 November 2023	27 November 2023	3 days	Approved	-

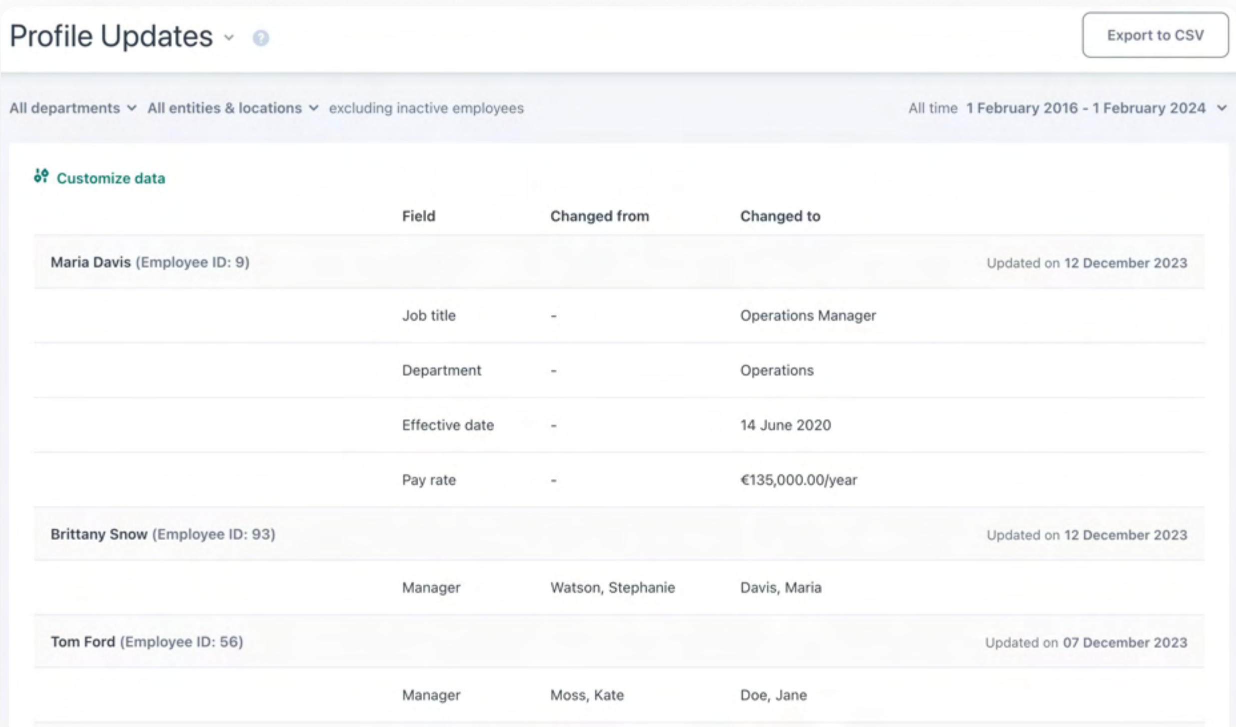
Resources

Using the Time-off requests report

Profile updates

This report shows changes to employee profiles by date, location, department, etc. All employee statuses, except for draft, will be shown in this report.

The data of the report can be customized as long as the profile fields have the setting to "keep history" within the default profile template.



Profile Updates

Export to CSV

All departments · All entities & locations · excluding inactive employees · All time 1 February 2016 - 1 February 2024

Customize data

	Field	Changed from	Changed to	
Maria Davis (Employee ID: 9)				Updated on 12 December 2023
	Job title	-	Operations Manager	
	Department	-	Operations	
	Effective date	-	14 June 2020	
	Pay rate	-	€135,000.00/year	
Brittany Snow (Employee ID: 93)				Updated on 12 December 2023
	Manager	Watson, Stephanie	Davis, Maria	
Tom Ford (Employee ID: 56)				Updated on 07 December 2023
	Manager	Moss, Kate	Doe, Jane	

Resources

[Using the Profile updates report]

Resources

- Employee onboarding workflows
- Onboarding dashboard overview
- Employee onboarding workflows

Checklist

- Determine all information and documents an employee needs to complete before their start date.
- Ensure that all documents you want signed are created as Document templates.
- Ensure that all profile fields that you want the employee to complete in onboarding are set to be edited by the employee.
- Decide if you want to include a welcome video to your company to be included on the onboarding website.

Onboarding dashboard

Maintain a record of the progress of your company's onboarding workflows and take action as required. The onboarding dashboard is broken into five sections:

- **Pending:** Newly hired draft employees will be displayed here in order to assign them to start their onboarding sometime in the future.

- **Scheduled:** All employees displayed here were assigned an onboarding workflow but will start at a future date.

Adding and inviting employees to Workable

Resources

- Adding and managing employees
- Inviting new employees to Workable

New employees can be created multiple ways:

- They can be added and created manually
- If using Workable Recruiting, a draft employee profile will automatically be created for a candidate who is moved to the Hired stage
- They can be uploaded in bulk via csv

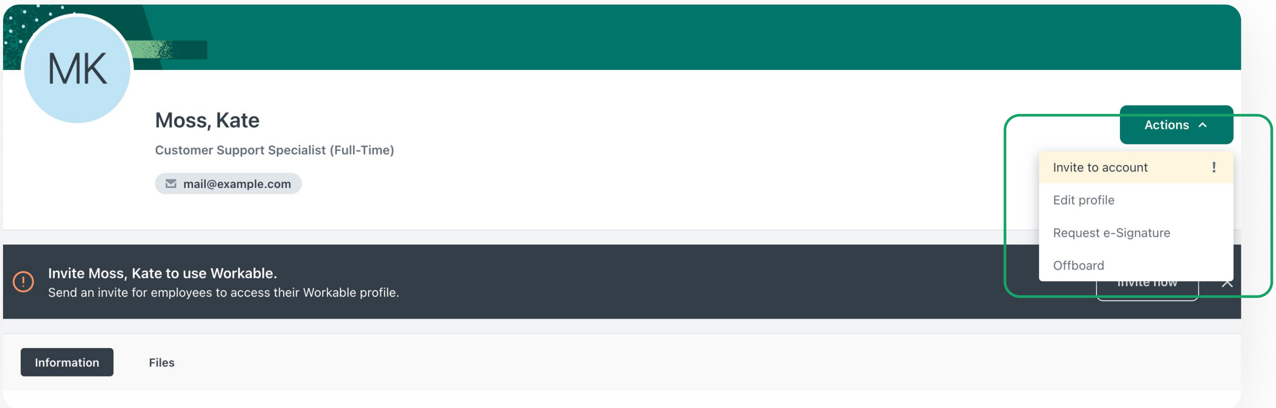
Checklist

- ✓ Onboarding is complete
- ✓ All mandatory profile fields are complete
- ✓ Confirm the employee’s work email address is correct
- ✓ The employee’s time-off policies are added

Important: Published employees cannot undergo onboarding with Workable. If you want the employee to go through **Onboarding with Workable**, save them as a draft employee.

Employee profiles can be published manually by an HR Admin or can be automatically published and have an invite sent after completing onboarding, as determined by the onboarding workflow settings assigned to the employee. If an HR manually publishes employees, they will need to be invited to Workable so they can view the company org chart, edit their profile information, request time off, and sign documents.

There will be an **Invite to account** option under the Actions menu as shown below.



Note: The Actions menu items will change based on the profile status of the employee. For example, there will be an Onboard action for draft employees, but it won't be visible on Published employees.

Important: Once an employee logs in with the email listed as their work email, the work email cannot be changed in the employee profile.