



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

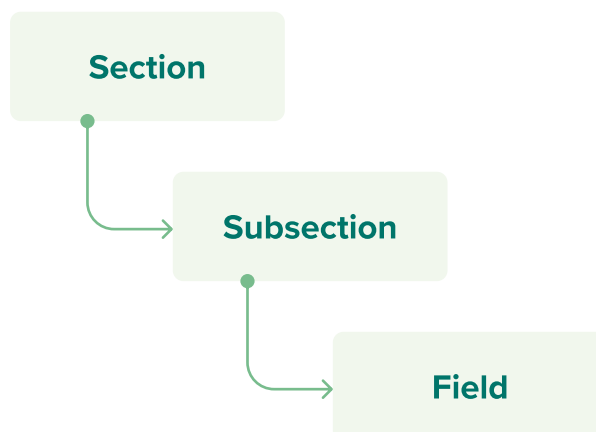
- ✓ Determine who is responsible for creating employee profile fields in the default profile template.
- ✓ Determine how many custom employee profile templates you may need. Think of the information you collect for different types of employees and at different levels or locations.
- ✓ Determine visibility,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

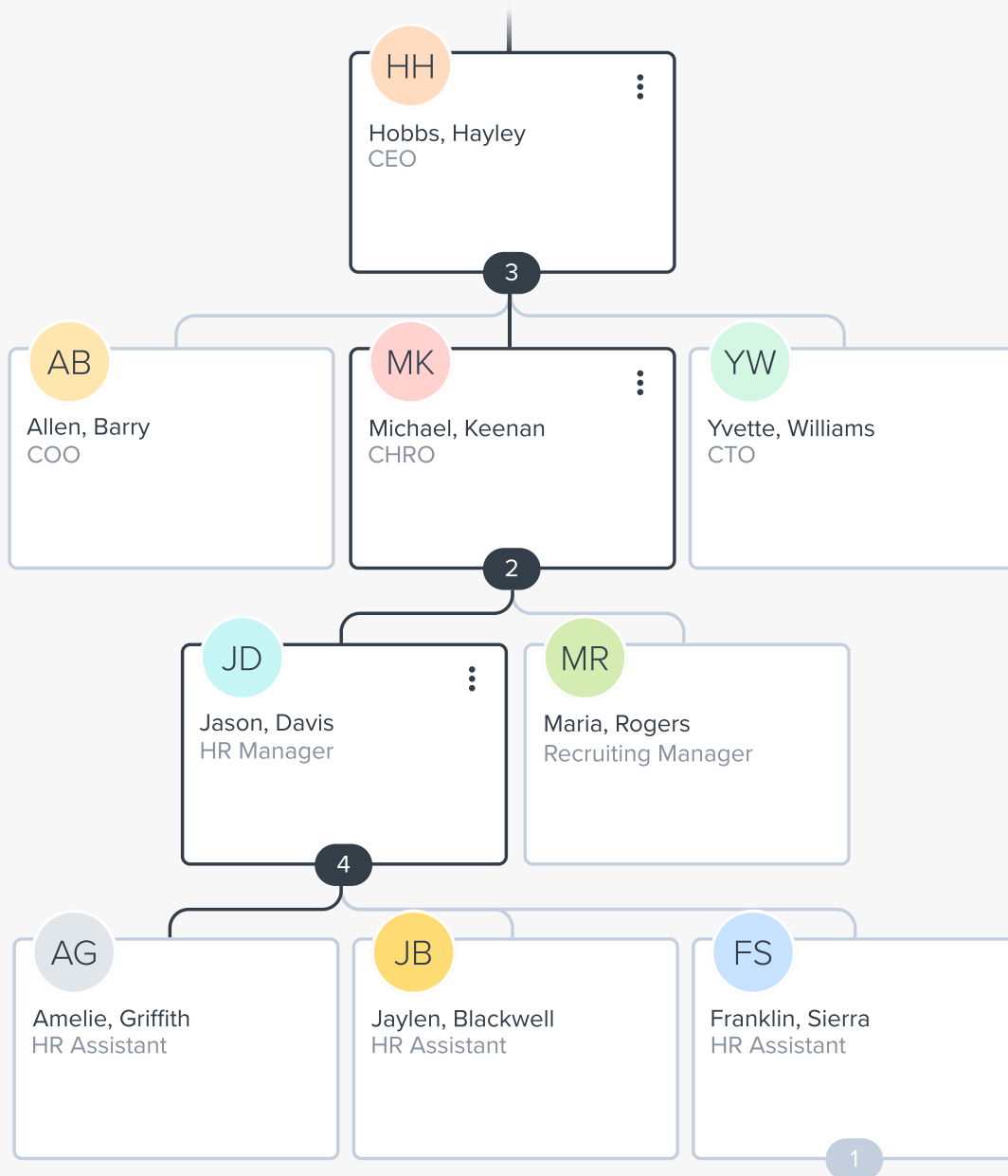
By default, a newly created field will have the below field settings

- **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.

Field settings			
Role	Visible to	Editable by	Approval from
HR admins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Managers 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Employee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Other employees	<input type="checkbox"/>		

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.

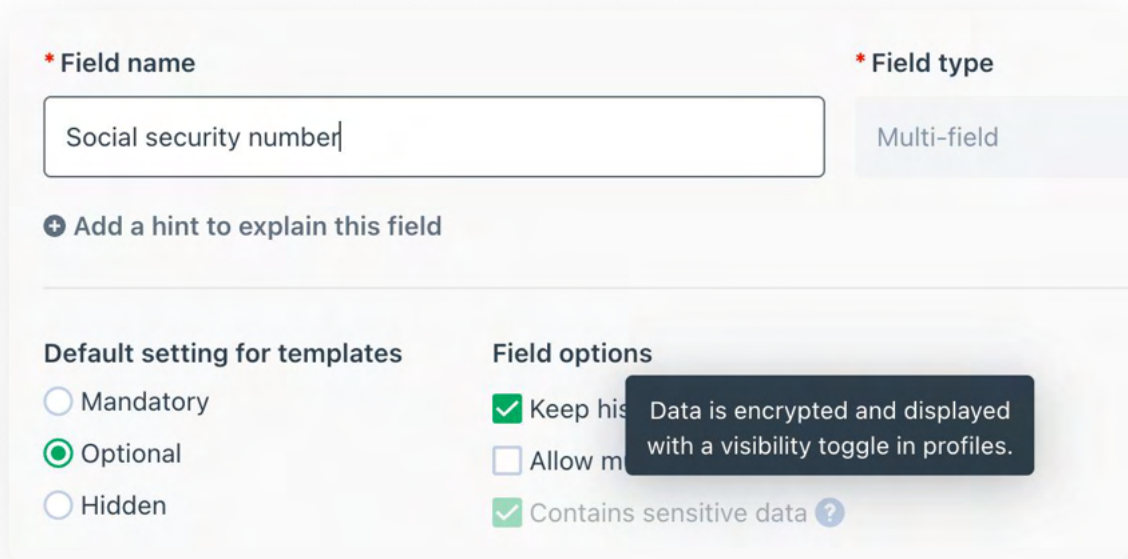


The dark black line visualizes of what is meant by managers in the same vertical line as the employee.

Sensitive data

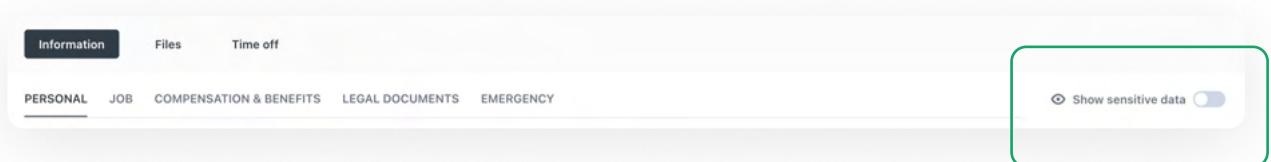
By default, our system encrypts the following fields and therefore this field option cannot be edited.

- 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



The screenshot shows a configuration panel for a field named "Social security number". The field type is set to "Multi-field". Under "Default setting for templates", "Optional" is selected. Under "Field options", "Keep hidden" and "Contains sensitive data" are checked. A tooltip points to the "Contains sensitive data" option, stating: "Data is encrypted and displayed with a visibility toggle in profiles."

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.

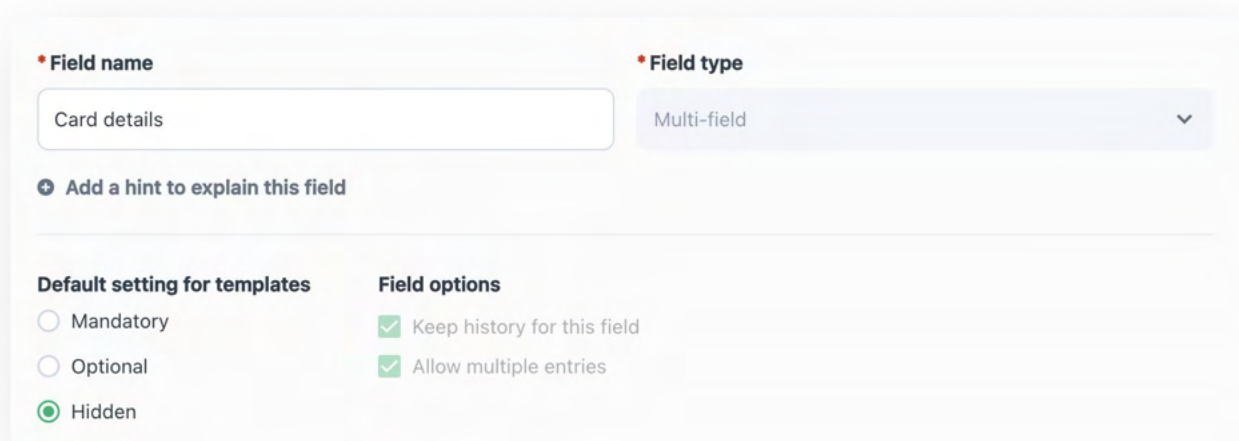


The screenshot shows a profile card with tabs for "Information", "Files", and "Time off". Below the tabs are sections for "PERSONAL", "JOB", "COMPENSATION & BENEFITS", "LEGAL DOCUMENTS", and "EMERGENCY". A "Show sensitive data" toggle is visible in the bottom right corner, currently turned off.

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.



The screenshot shows a configuration interface for a new field. At the top, there are two sections: '* Field name' and '* Field type'. The 'Field name' section contains a text input field with the value 'Card details'. The 'Field type' section contains a dropdown menu with 'Multi-field' selected. Below these sections is a link that says 'Add a hint to explain this field'. At the bottom, there are two columns of settings. The first column, 'Default setting for templates', has three radio buttons: 'Mandatory', 'Optional', and 'Hidden', with 'Hidden' selected. The second column, 'Field options', has two checkboxes: 'Keep history for this field' and 'Allow multiple entries', both of which are checked.

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.

Job title

2 changes

[+ Add historic entry](#)

12 January 2024 **CURRENT VALUE** 

Account Manager

10 May 2023  

Account Executive

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.

Role	Visible to	Editable by	Approval from
HR admins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Managers ?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Employee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Other employees	<input type="checkbox"/>		

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.


← Information updates ×

Personal / Basic ✗ ✓

Marital status

Status

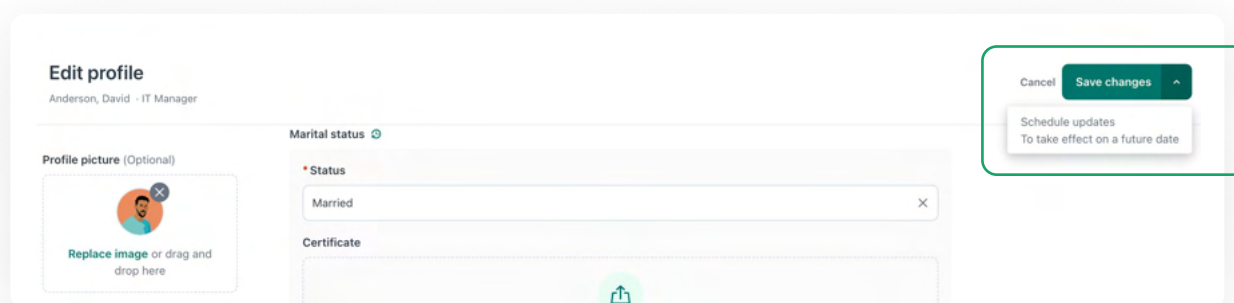
Single → Married

 Nick Green • 23 January 2024

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

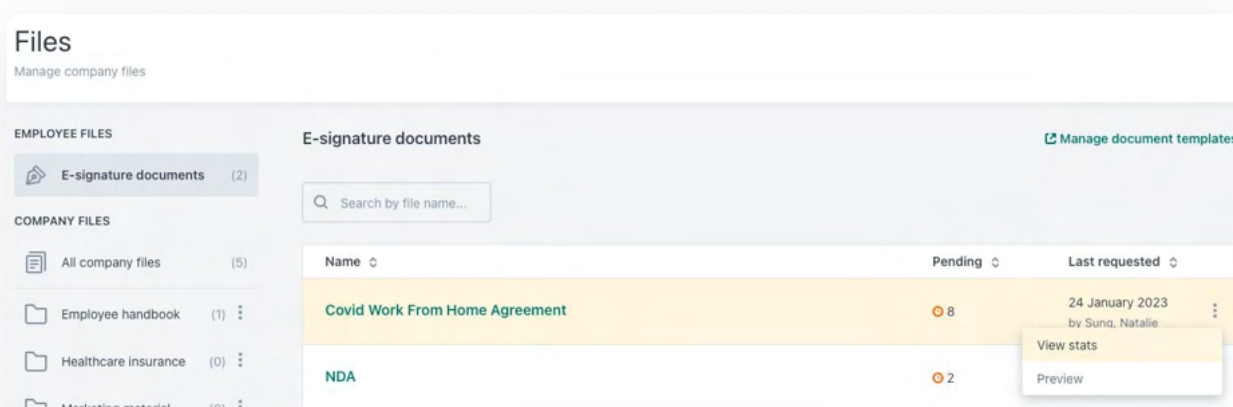
During onboarding

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.



The screenshot shows the 'Files' section of the Workable HR system. On the left, there are navigation menus for 'EMPLOYEE FILES' (with 'E-signature documents' selected) and 'COMPANY FILES'. The main area is titled 'E-signature documents' and includes a search bar. Below the search bar is a table with columns for 'Name', 'Pending', and 'Last requested'. Two documents are listed: 'Covid Work From Home Agreement' with 8 pending signatures and 'NDA' with 2 pending signatures. A dropdown menu is open for the 'Covid Work From Home Agreement' row, showing 'View stats' and 'Preview' options.

Name	Pending	Last requested
Covid Work From Home Agreement	8	24 January 2023 by Suno, Natalie
NDA	2	

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

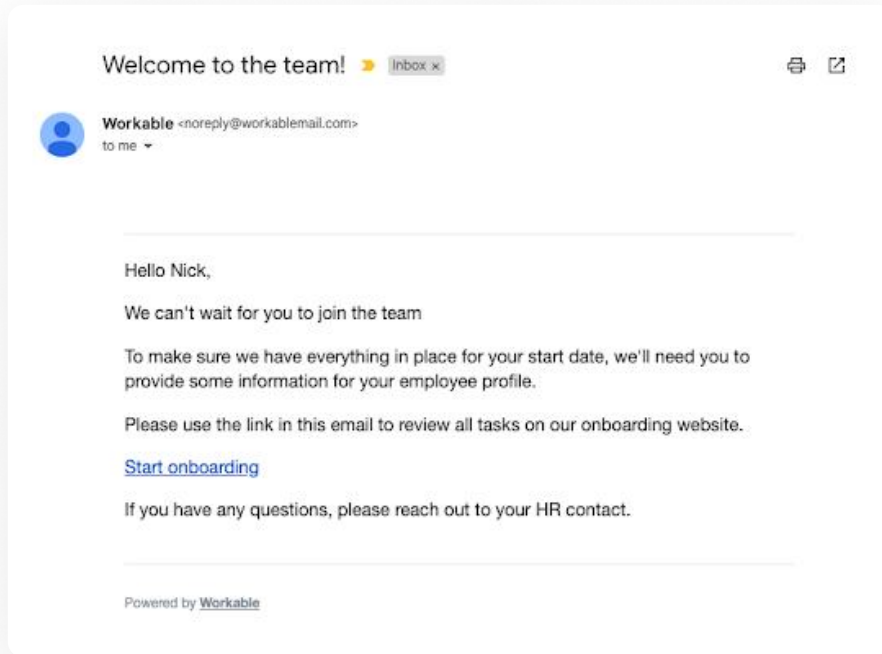
Onboarding workflows

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

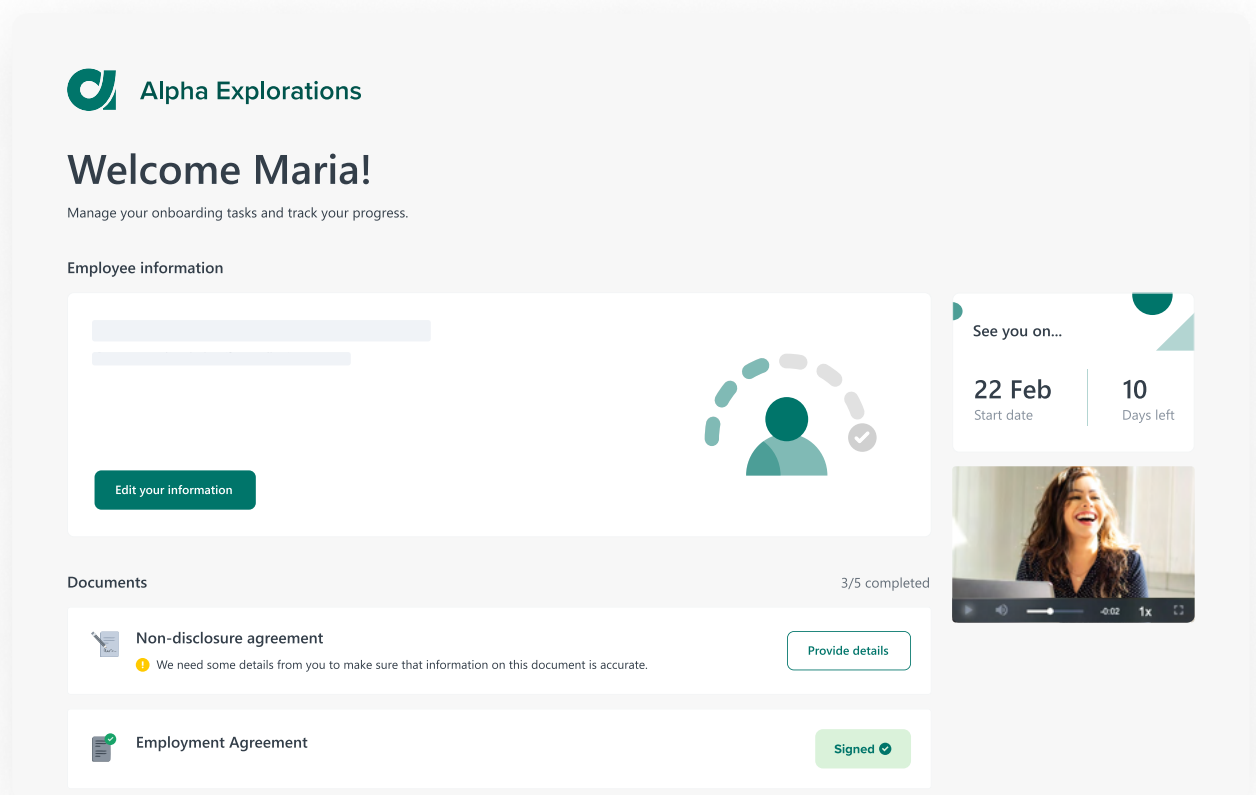
Important: Finalize your employee profile field settings and profile templates before creating onboarding workflows.

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

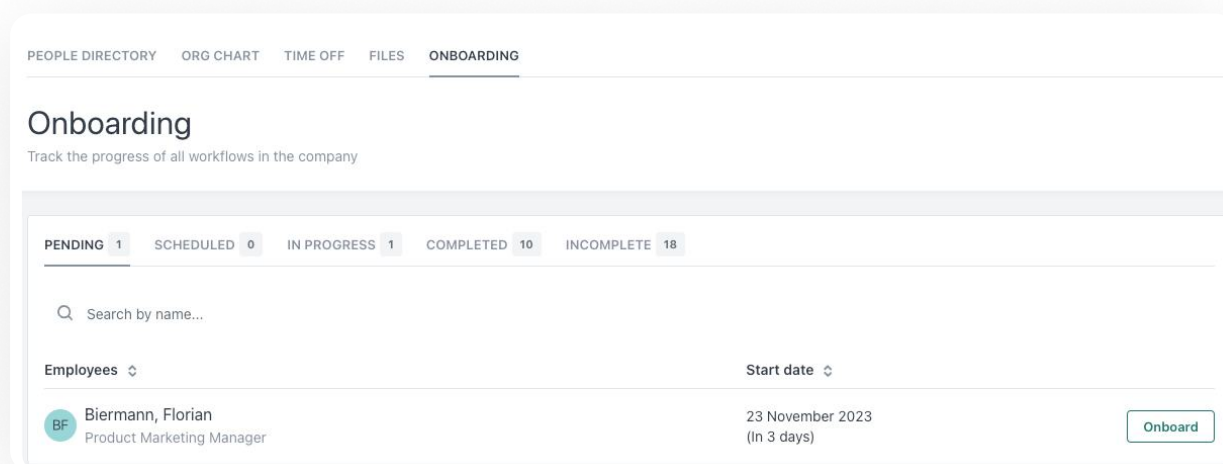
-  Determine all information and documents an employee needs to complete before their start date.
-  Ensure that all documents you want signed are created as Document templates.
-  Ensure that all profile fields that you want the employee to complete in onboarding are set to be edited by the employee.
-  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.



The screenshot shows the 'Onboarding' page in the Workable HR system. At the top, there are navigation tabs: PEOPLE DIRECTORY, ORG CHART, TIME OFF, FILES, and ONBOARDING (which is selected). Below the tabs, the page title 'Onboarding' is displayed, followed by the subtitle 'Track the progress of all workflows in the company'. A summary bar shows the following counts: PENDING 1, SCHEDULED 0, IN PROGRESS 1, COMPLETED 10, and INCOMPLETE 18. Below this is a search bar with the placeholder text 'Search by name...'. There are two dropdown menus: 'Employees' and 'Start date'. The main content area displays a table with one row for Florian Biermann, Product Marketing Manager. His start date is 23 November 2023, which is 3 days away. An 'Onboard' button is visible next to his name.

Employees	Start date
 Biermann, Florian Product Marketing Manager	23 November 2023 (In 3 days)

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

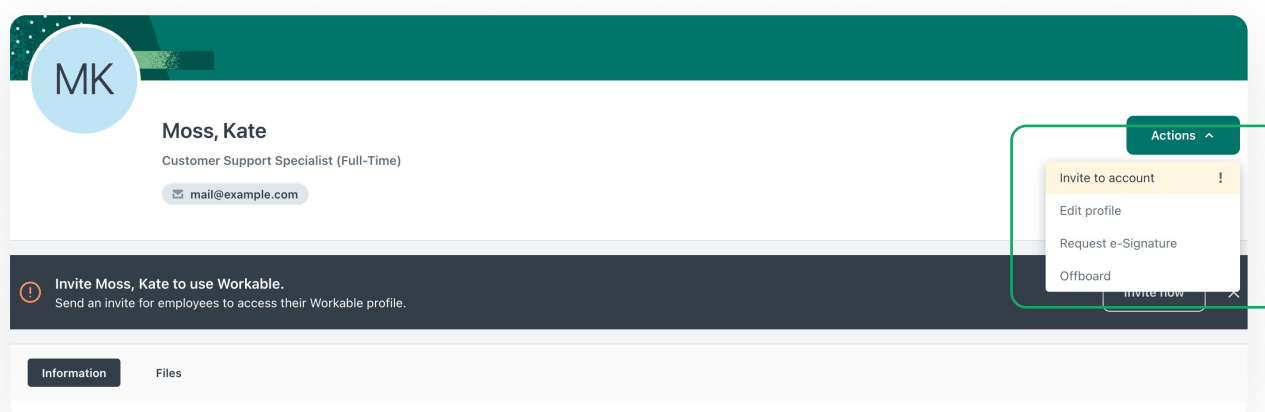
Checklist

-  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.

Offboarding for Doe, John

If you proceed with the offboarding:

- Doe, John will become inactive at the selected date
- Upon employment termination, direct reports of Doe, John will be transferred to **Sung, Natalie**.

WHEN SHOULD THE OFFBOARDING HAPPEN?

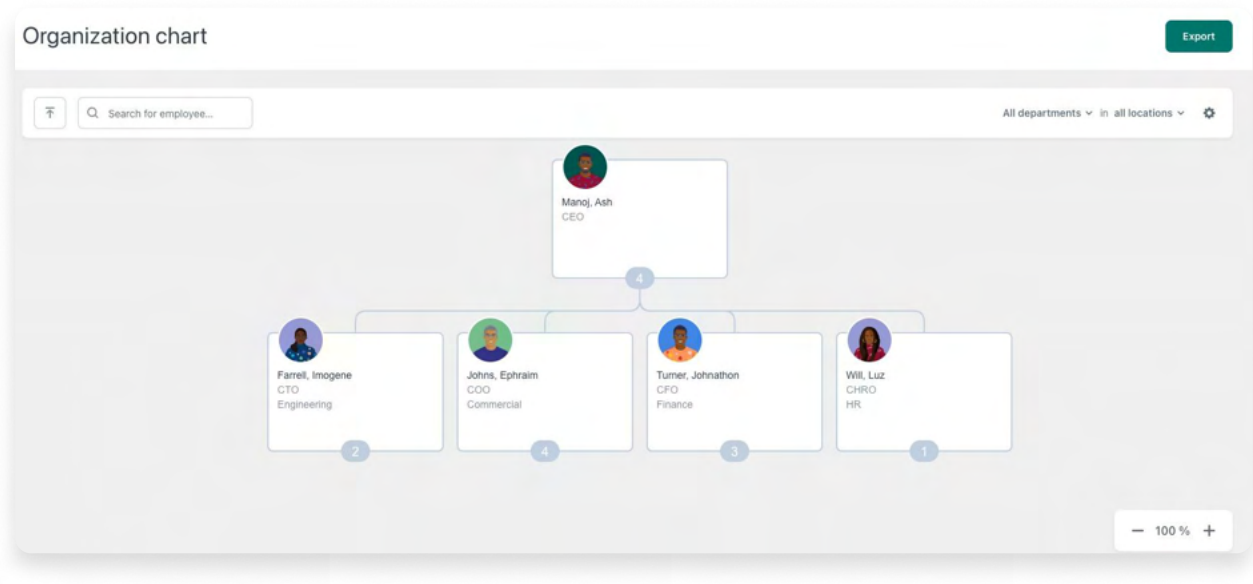
Immediately 28 November 2022

Employment will be terminated immediately.

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](#)

Create new folder

*** Folder name**

Access settings

All employees Custom

Custom access criteria

Select the departments and entities that will have access to view the folder.

Entity	Clear all	Department	Clear all
<input type="text" value="Search entities"/>		<input type="text" value="Search departments and subdepartment"/>	
<input type="checkbox"/> Workable FR	▼	<input checked="" type="checkbox"/> Finance	
<input type="checkbox"/> Workable GR	▼	<input checked="" type="checkbox"/> G&A	
<input checked="" type="checkbox"/> Workable UK	▼	<input checked="" type="checkbox"/> Marketing	▼
<input type="checkbox"/> Workable US	▼	<input checked="" type="checkbox"/> Misc	
		<input checked="" type="checkbox"/> Operations	▼
		<input checked="" type="checkbox"/> Product	▼
		<input checked="" type="checkbox"/> Sales	▼

Individual employees

Add any individual employees who will have access to view this folder

Employees

Cancel Save

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

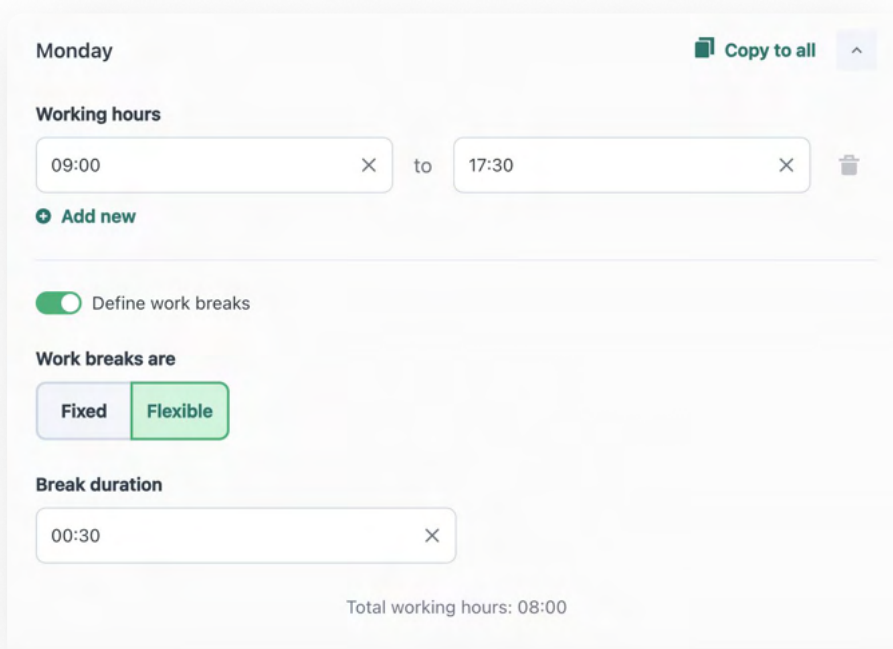
Work schedules facilitate your employees' time off management and it is beneficial to set them up during your implementation so your time off management process is seamless.

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.



Monday Copy to all

Working hours

09:00 to 17:30

Add new

Define work breaks

Work breaks are

Fixed Flexible

Break duration

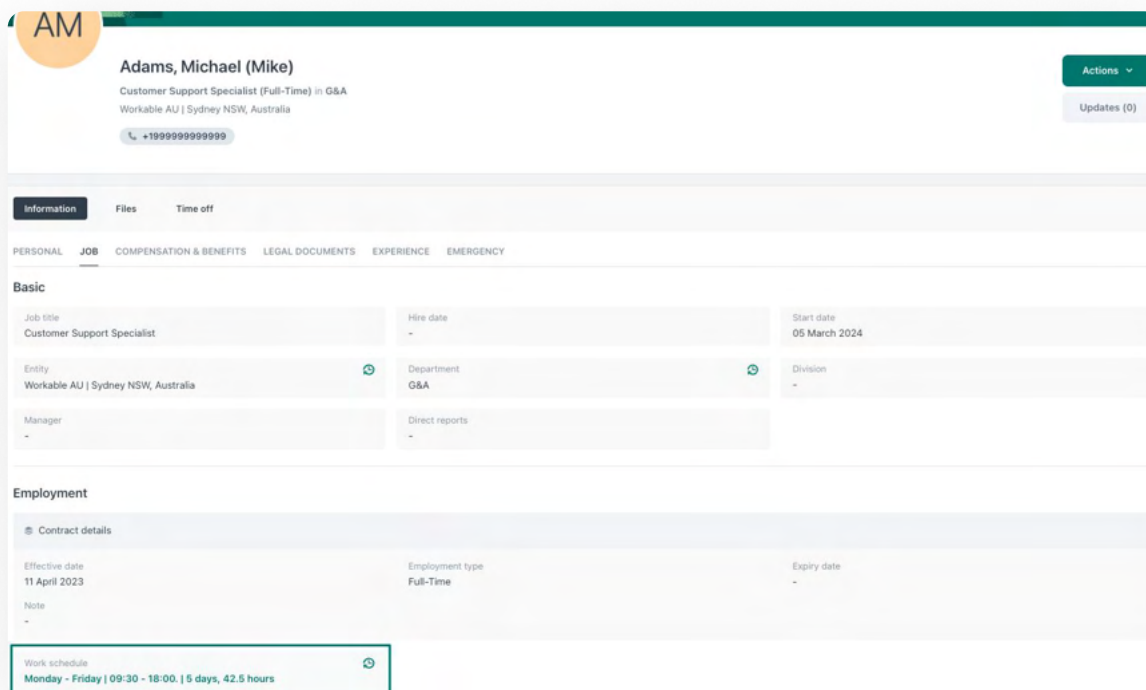
00:30

Total working hours: 08:00

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.



The screenshot shows the employee profile for Michael Adams. The 'Employment' section is expanded, and the 'Work schedule' field is highlighted with a red box. The work schedule is set to 'Monday - Friday | 09:30 - 18:00 | 5 days, 42.5 hours'.

Basic		
Job title Customer Support Specialist	Hire date -	Start date 05 March 2024
Entity Workable AU Sydney NSW, Australia	Department G&A	Division -
Manager -	Direct reports -	

Employment		
Contract details		
Effective date 11 April 2023	Employment type Full-Time	Expiry date -
Note -		

Work schedule Monday - Friday 09:30 - 18:00 5 days, 42.5 hours

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.

Holidays in calendar Import public holidays



Import public holidays by location

Enter a location to import public holidays from that country to this calendar. Public holidays are calculated 5 years in advance and will automatically update each year.

United States Q v

All states v

Import public holidays

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.

*** Holiday name**

Independence day 16/70

*** Holiday dates**

04/07/2023 📅 🗑️

04/07/2024 📅 🗑️

04/07/2025 📅 🗑️

04/07/2026 📅 🗑️

➕ Add another date

Add holiday

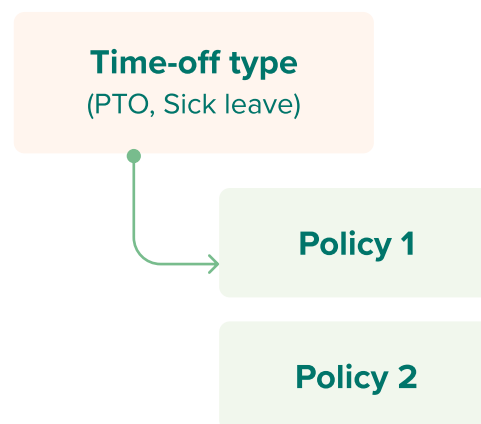
Cancel

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.

Add time-off type

Description

Enter a description for this time-off type

0/140

This type of time off is

Paid Unpaid

Approvals ?

Require approval

Calendar settings

Count company holidays as work days
Choose if holidays from holiday calendars count as work days for time off.

Count weekends as work days
Choose if days off from work schedules count as work days for time off.

Show time-off type to all employees
Time-off type will be visible to other employees during time-off.

* Label color in calendar

Grey

Cancel



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.

Policy basics

Policy name

6/70

Track time off in

Policy cycle

Select how often the policy cycle renews.

Policy renews on

 Employment start date On a specific date

Entities and locations



If no entity or location is selected, this time-off policy will apply to all employees.

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.

Accrual levels

Level 1 ^

Unlimited time off
You'll still be able to keep track of unlimited time off.

Total days off in cycle

20

per annum

Accrued per

Month v

Employees accrue 1.67 days off per month

Accrual limit

No limit

Employees can accrue up to a maximum of

Level 2 🗑️ ^

Unlimited time off
You'll still be able to keep track of unlimited time off.

Total days off in cycle

21

per annum

Accrued per

Month v

Employees accrue 1.75 days off per month

Accrual limit

No limit

Employees can accrue up to a maximum of

27

 days

WHEN WOULD EMPLOYEES MOVE TO THIS LEVEL?

1 year after start date
Select number of cycles

Example: An employee starting on Sep 29, 2023, would move to this level on Sep 29, 2024

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.

Carry over

Choose if employees can carry over unused days from the current cycle to the next.

Allow carry over

Carry over limit

days

Carry over period

after cycle ends

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.

Prorate time off

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

Start of employment

End of employment

Allow total days in cycle to be taken

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 doctor's note, to a time off request extending a certain number of days. By default, attachments are toggled off for time off policies.

Attachment
 Choose if employees should provide documentation to prove their reason for absence in this policy.

Requires attachment

Attachment description

Doctor's note 13/70

Attachment must be provided

after consecutive days

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.

Approvals

Same as the time-off type

Custom

Require approval

Select approvers
 Select people to approve time-off requests for this policy. Approval requests will be sent in numerical order.

1. ▼

2. ▼

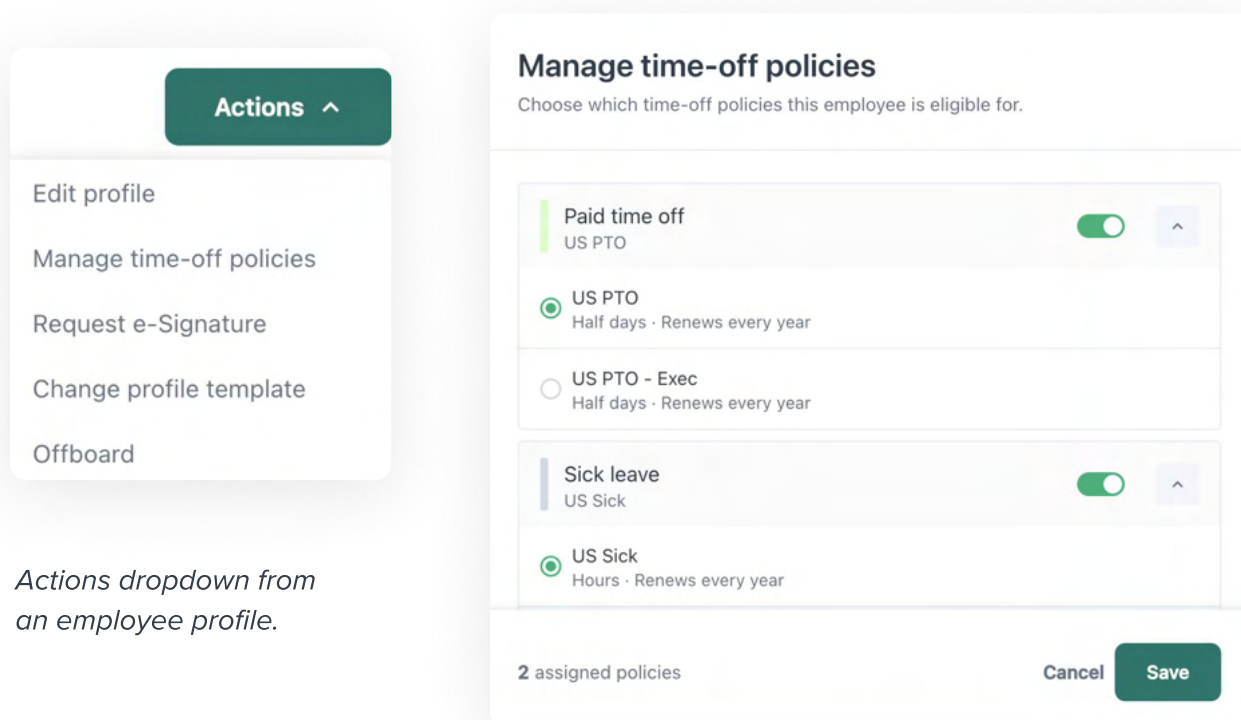
[+ Add approver](#)

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.

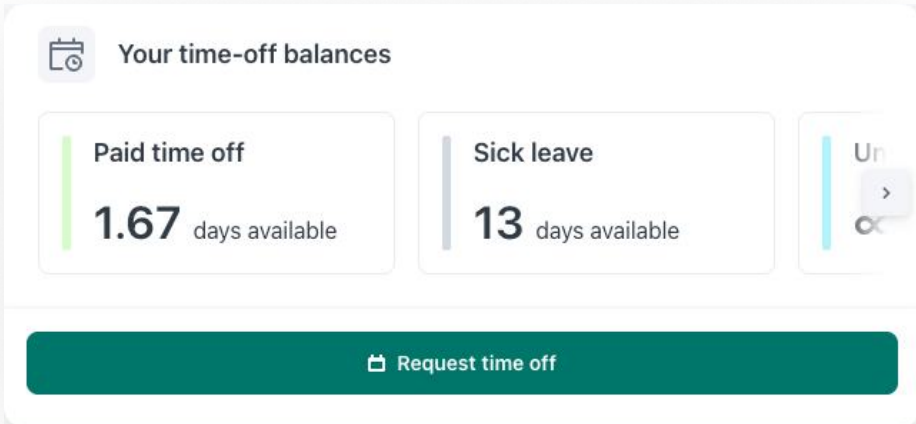
Tip: To assign time-off policies and balances in bulk, you can import via csv. Read instructions in this [article](#).

Requesting time-off

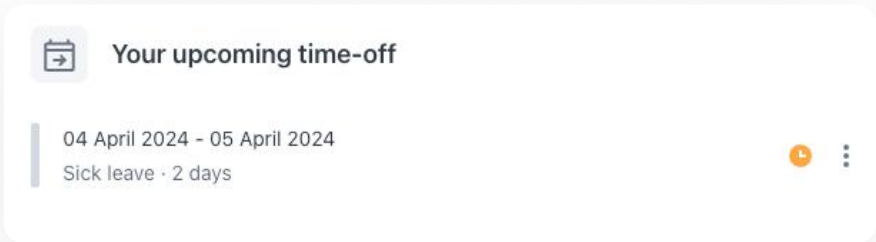
Resources

[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.

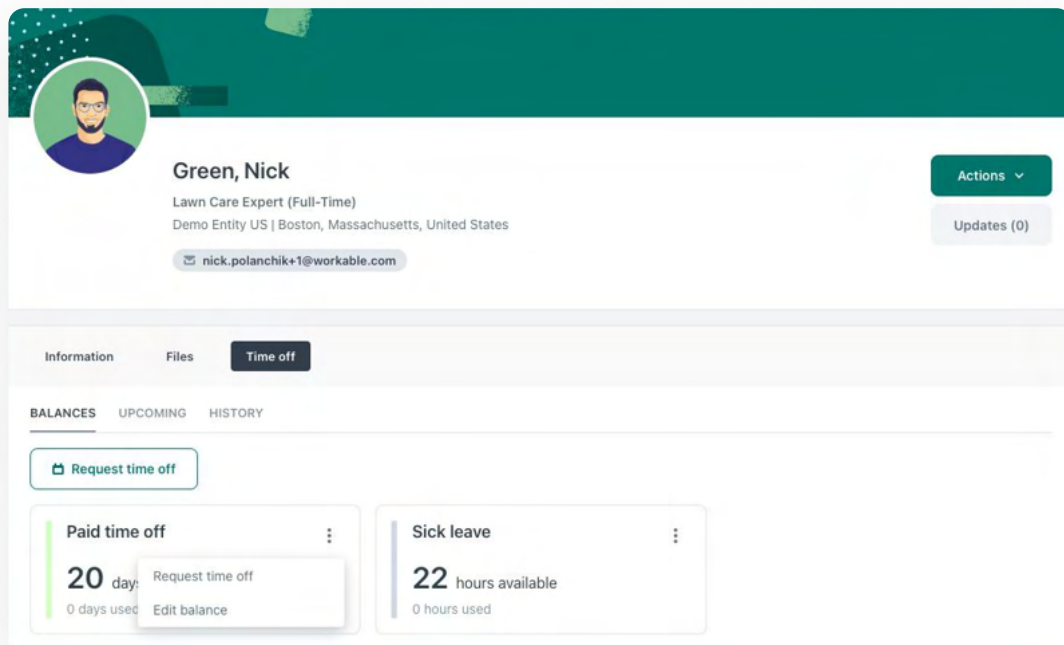


The screenshot shows a widget titled "Your time-off balances" with a calendar icon. It contains three cards: "Paid time off" with a green bar and "1.67 days available", "Sick leave" with a grey bar and "13 days available", and "Unpaid time off" with a blue bar and "Unpaid time off" text. Below the cards is a dark green button with a calendar icon and the text "Request time off".



The screenshot shows a widget titled "Your upcoming time-off" with a calendar icon. It displays a date range "04 April 2024 - 05 April 2024" and "Sick leave · 2 days" with a vertical bar on the left. To the right of the text are a small orange circle and a three-dot menu icon.

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.

*** Time-off period**

06 February 2024 - 08 February 2024 ✕

FEBRUARY 2024							MARCH 2024						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3						1	2
4	5	6	7	8	9	10	3	4	5	6	7	8	9
11	12	13	14	15	16	17	10	11	12	13	14	15	16
18	19	20	21	22	23	24	17	18	19	20	21	22	23
25	26	27	28	29			24	25	26	27	28	29	30
													31

First day: ▼

Last day: ▲

You're requesting 3 days off.
You'll have 3 days of Paid time off remaining.

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

*** Time-off period**

06 February 2024 (09:00) - 07 February 2024 (10:00) ✕

FEBRUARY 2024						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

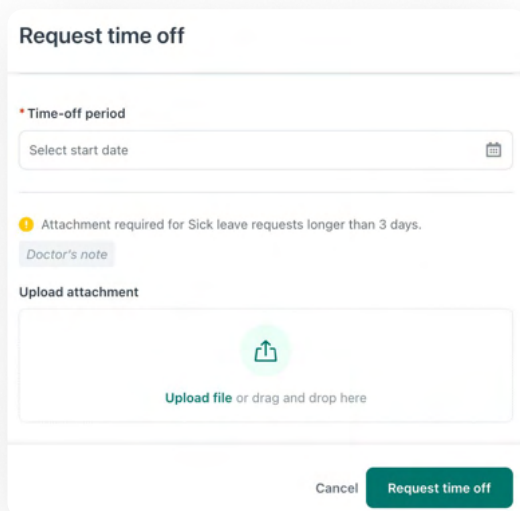
From: 6 February 2024
 ▼

To: 7 February 2024
 ▼

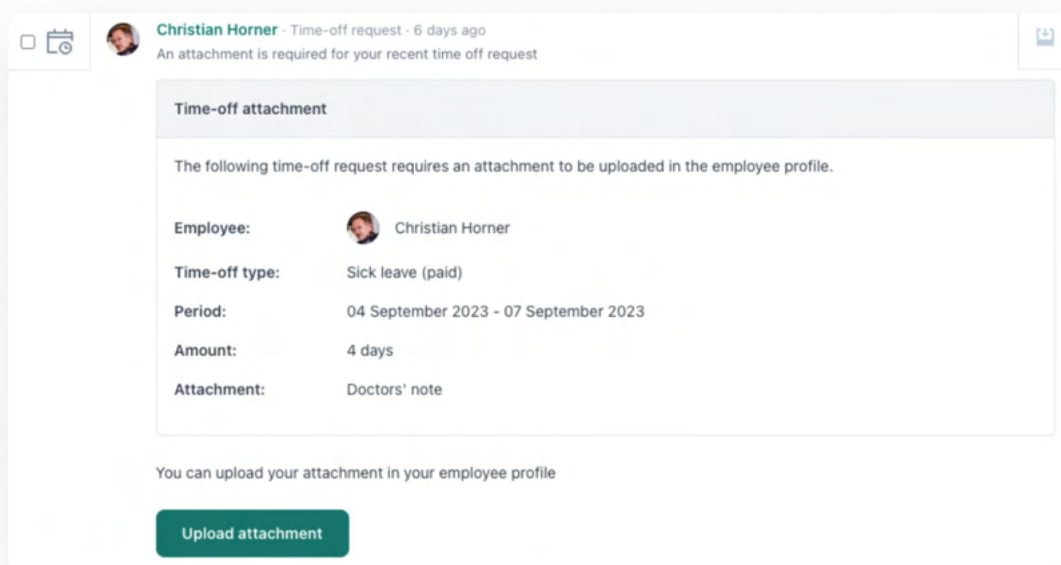
You're requesting 9 hours off.
You'll have 12 hours of Paid time off remaining.

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.

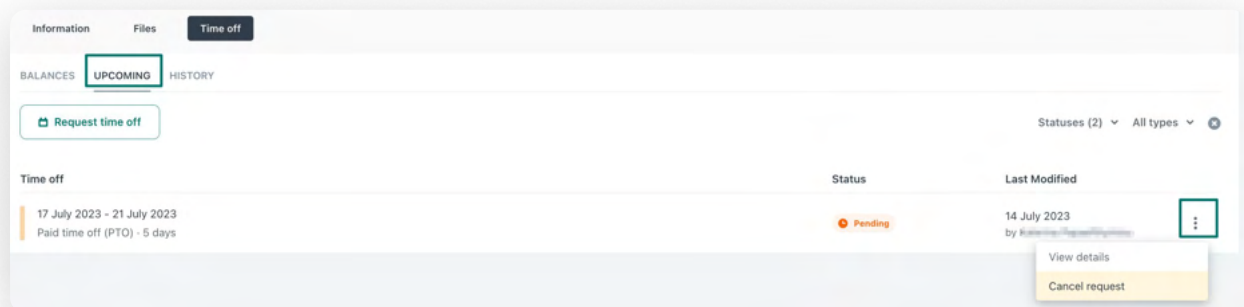
Canceling time-off requests

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

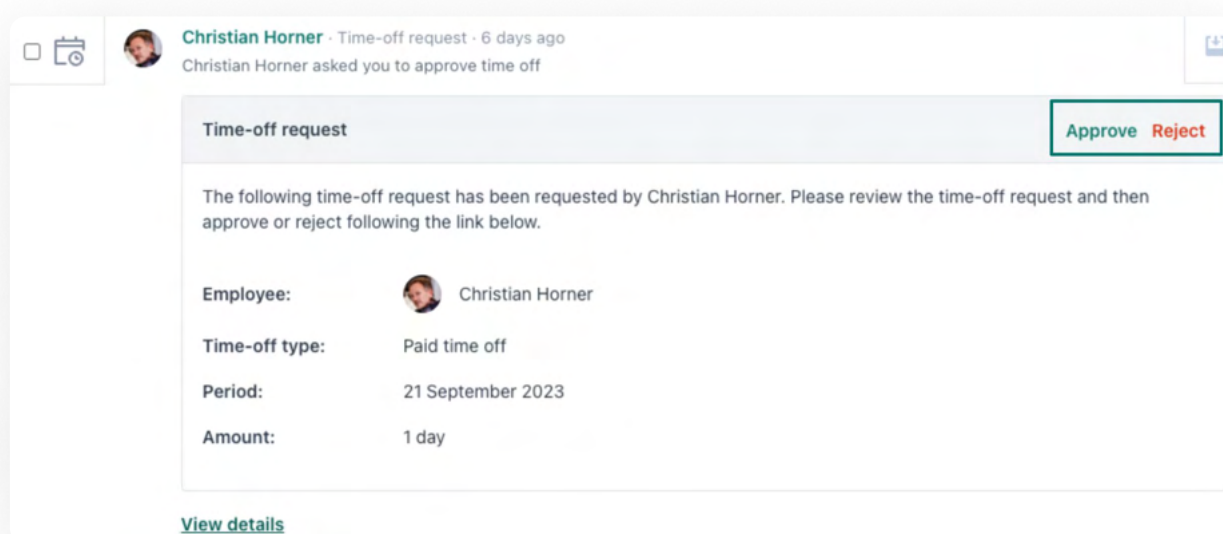
Resources

[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.

 **To-dos**

Review a time-off request
Nick Cage requested 1 day of Paid time off .

[Review](#)



Review time-off request

Brittany Snow · Requested on 27 Mar 2024


Friday 12 April 2024 Pending
Paid time off · 1 day

Breakdown

From: Friday 12 April 2024 1 day

To: Friday 12 April 2024

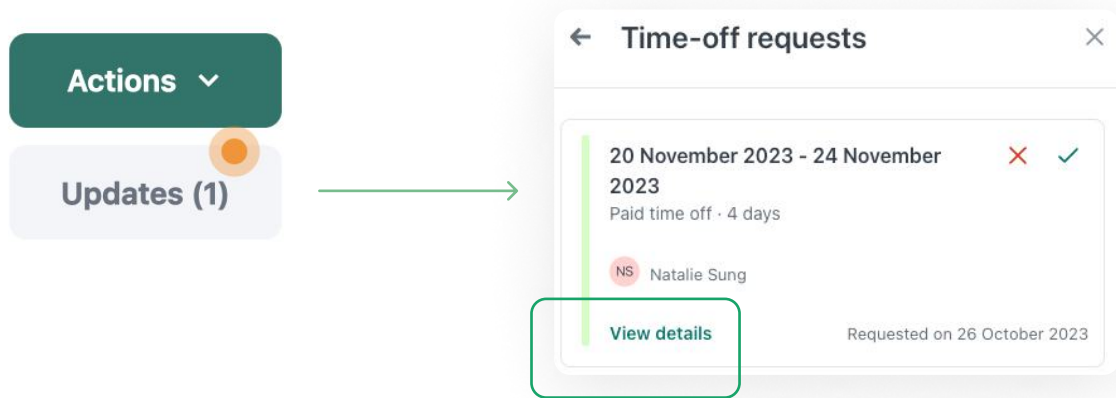
Request timeline

 **BS** Brittany Snow

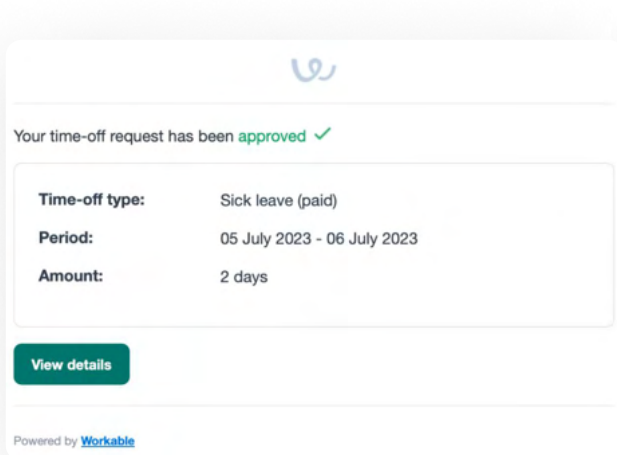
[Cancel](#) [Reject](#) [Approve](#)

Example of reviewing request via the homepage widget.

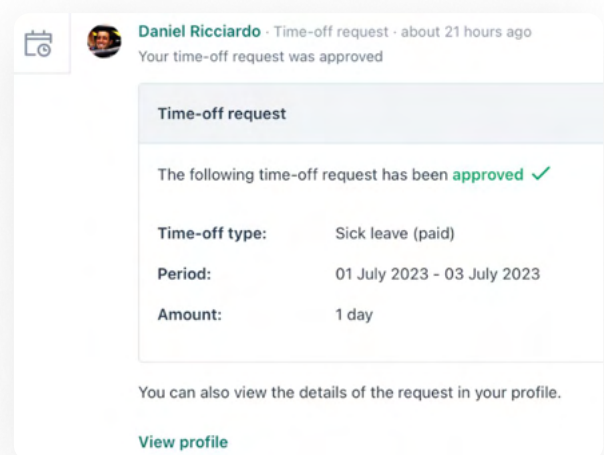
Approvers can take action within the employee’s profile via the **Updates** menu. By clicking **View details**, more information about the request becomes available.



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.



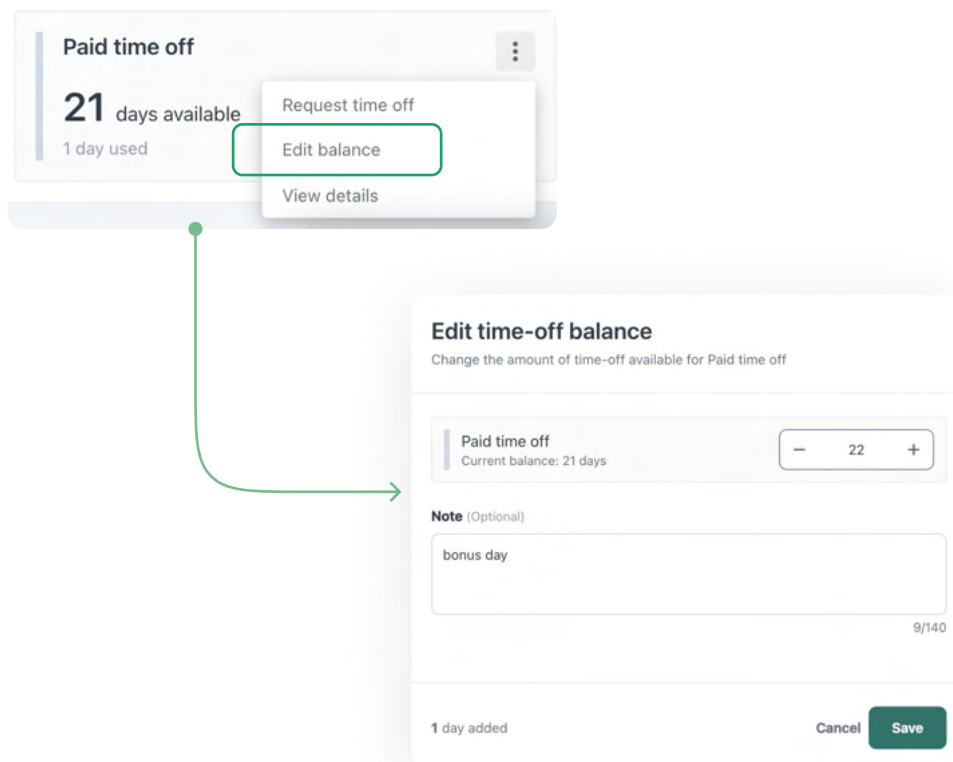
Example of Workable inbox notification to employee.

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.

The screenshot illustrates the process of viewing time-off balance details. It starts with a 'Paid time off' card showing 25 days available and 0 days used. A three-dot menu is open, with 'View details' highlighted. An arrow points to the detailed view page.

Paid time off
 25 days available
 0 days used

- Request time off
- Edit balance
- View details**

← Back to Christian Horner

Paid time off ⓘ
 GR PTO

Total available	Available from current cycle	Carried over	Used
25 days	25 days Expires on 31 December 2024	0 days	0 days

2024 ▾

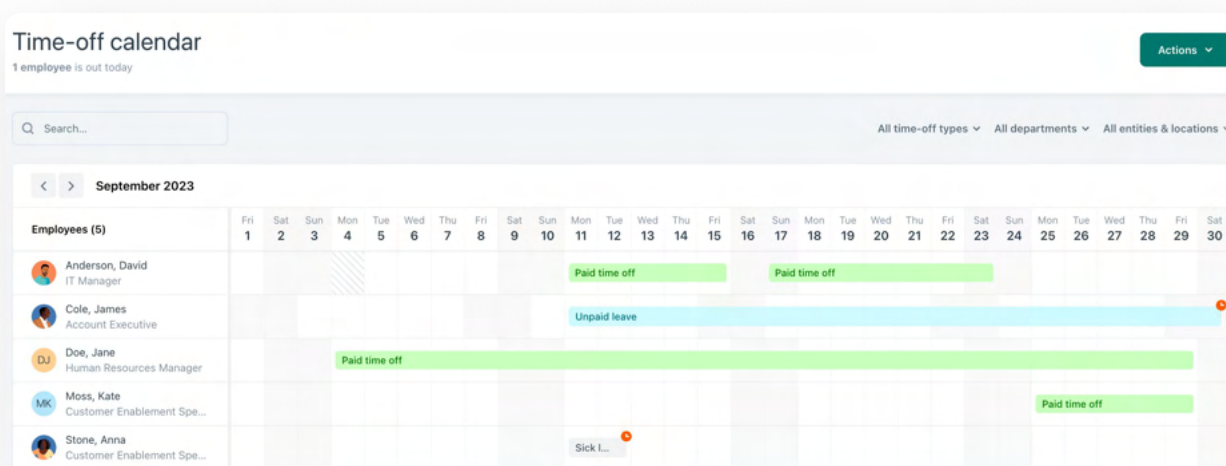
Activity	Change	Balance	Date
Canceled time-off request 23 January 2024	+1 day	25 days	22 January 2024
Approved time-off request 23 January 2024	-1 day	24 days	22 January 2024
Policy assignment New policy assigned by Christian Horner	+25 days	25 days	22 January 2024

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.

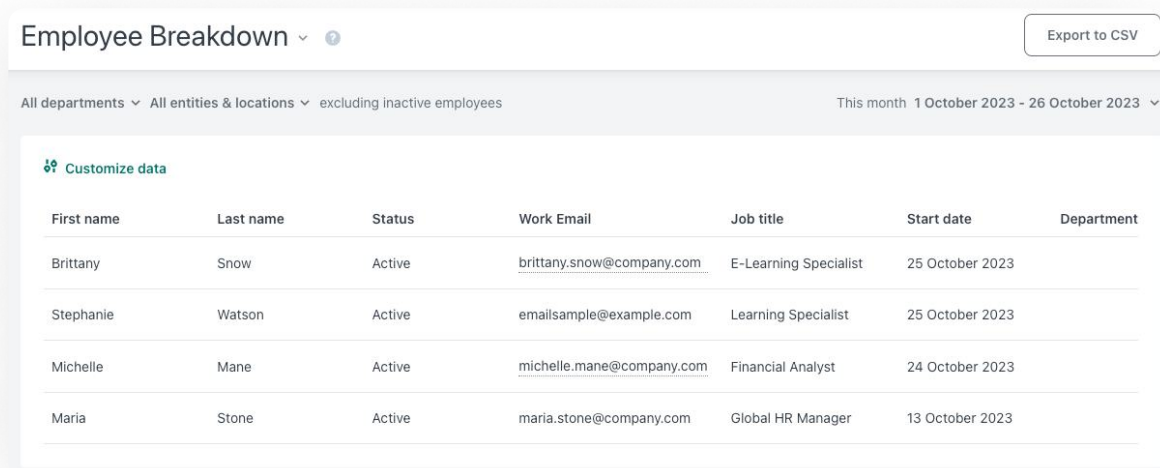


Reports

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.



The screenshot shows the 'Employee Breakdown' report interface. At the top, there is a title 'Employee Breakdown' with a dropdown arrow and a help icon, and an 'Export to CSV' button. Below the title, there are filters for 'All departments', 'All entities & locations', and 'excluding inactive employees', along with a date range 'This month 1 October 2023 - 26 October 2023'. A 'Customize data' section is visible, followed by a table with the following columns: First name, Last name, Status, Work Email, Job title, Start date, and Department. The table contains five rows of employee data.

First name	Last name	Status	Work Email	Job title	Start date	Department
Brittany	Snow	Active	brittany.snow@company.com	E-Learning Specialist	25 October 2023	
Stephanie	Watson	Active	emailsample@example.com	Learning Specialist	25 October 2023	
Michelle	Mane	Active	michelle.mane@company.com	Financial Analyst	24 October 2023	
Maria	Stone	Active	maria.stone@company.com	Global HR Manager	13 October 2023	

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.

Select data columns

Choose data to display and filter in this report.

Clear selection

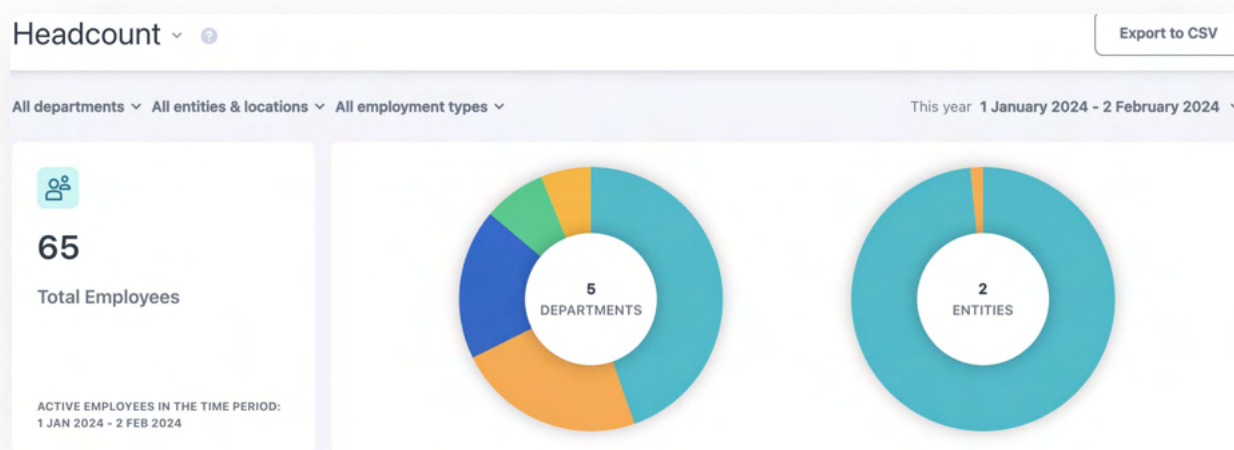
- Personal
- Job
- Compensation & benefits
- Salary
- Commission
- Bonus
- Shares
- Assets & equipment

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.



Headcount per department View by: Department ⚙️

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

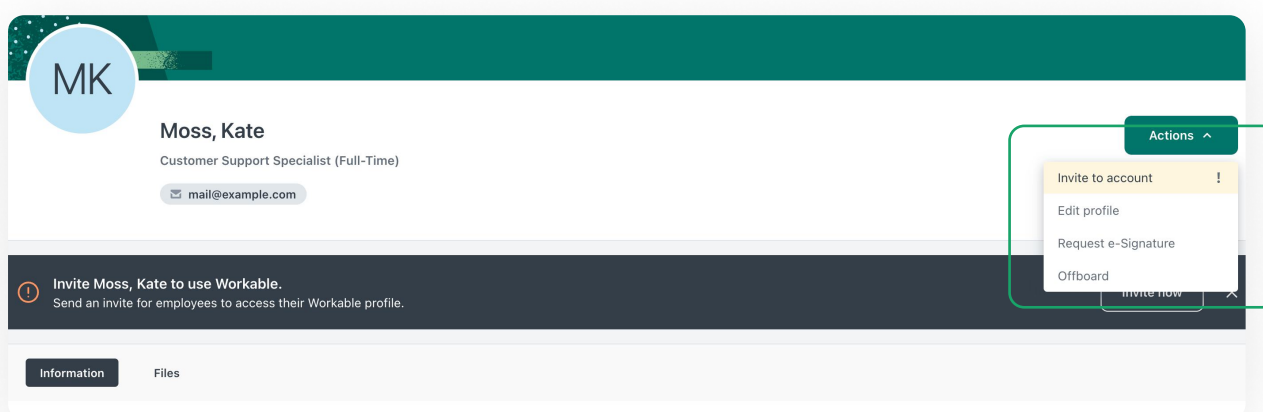
Checklist

-  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.