



Guide to Sample Data

Get the most out of your trial by interacting with Workable Recruiting and HR features before using them on your own jobs, candidates and employees

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1. Sample data overview

2 jobs 109 candidates

Edit job descriptions, **customize** the application form, **evaluate** candidates, and **move candidates** through the hiring pipeline. **Send emails and text messages** without anyone ever receiving the messages.

Assessments and video interviews

Review **17 assessment** results and evaluate and rate **4 video interview recordings**.

Candidate timelines

View the **candidate profile** and **timeline** with sample comments, events, and emails.

73 employee profiles and org chart

Review the available sample employee profiles, the people directory and org chart. **Onboard** sample employees and explore **time-off** features.

Employee Management sample settings

Review already generated settings for departments, Entities, locations, and sites, Onboarding workflows, Document templates, Work schedules, Time off policies, Holiday calendars

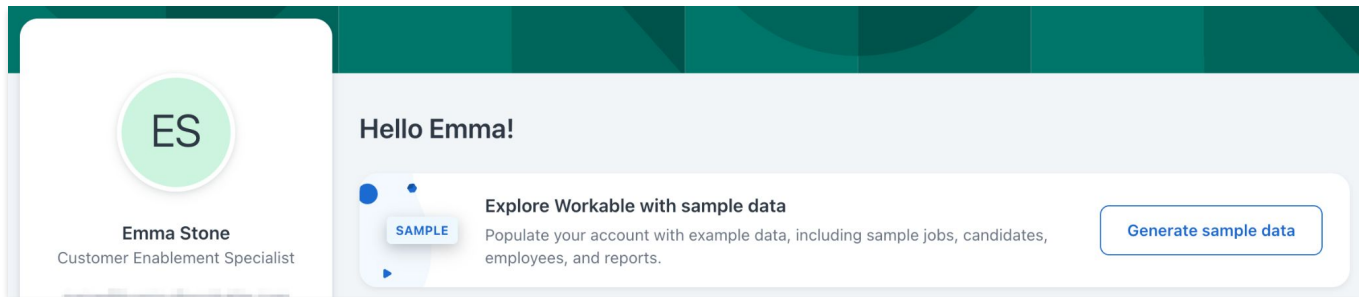
Recommended steps to optimize sample data experience

Although not required, we recommend completing these five steps before enabling sample data to fully immerse yourself in your Workable trial.

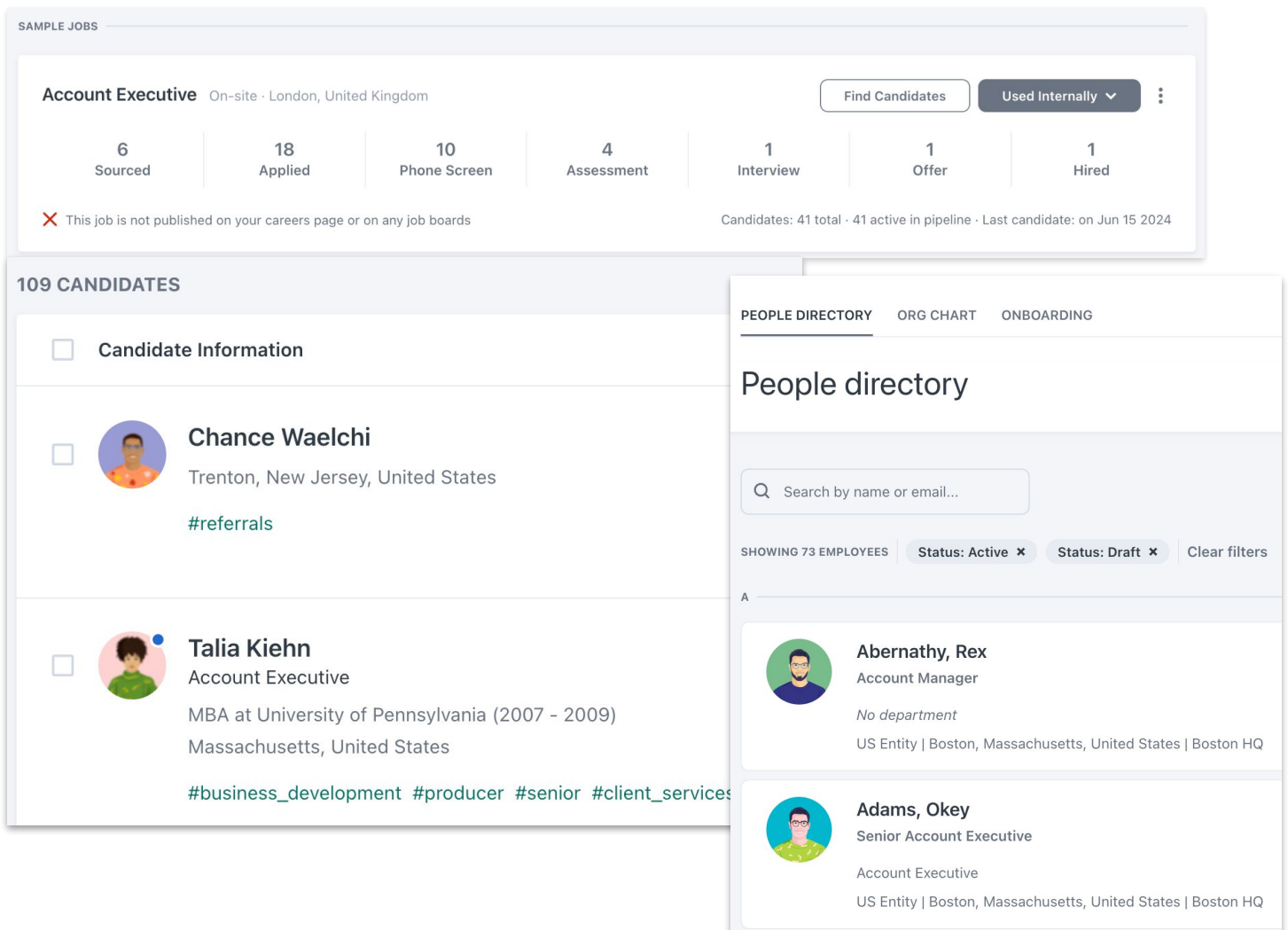
1. [Integrate](#) your Google or Microsoft 365 account to experiment with self-scheduling
2. To have coworkers experience your trial, [add](#) your team members to your account
3. For easy communication and to build automations, [create and review](#) email templates
4. [Customize](#) candidate profiles with [custom fields](#) to track the data that's key to your hiring
5. Download the Workable app for [iOS](#) or [Android](#) to interact with sample data on your phone

2. Set-up your sample data

Navigate to your home page as a Super Admin and click **Generate Sample Data**.



If you're unable to load sample data, check all account requirements in our [Help Center article](#). Explore sample data with sample jobs, candidates and employees.



 Super admins are also able to enable and delete sample data via our mobile apps ([iOS](#) and [Android](#)).


3. Home page widgets

Review your home page widgets

When the sample data are imported into your account, your home page as a Super Admin will have information in all widgets, including:

- Sample events
- Employees on leave
- Sample to-dos (add evaluations, review time-off requests, sign a document etc)
- Two sample jobs
- Sample employees to be onboarded
- Time-off balances

Hello Emma!


 Friday 20 September 2024 ▾

← →

Events 0


Celebrations 0


Holidays 0



No events

4 employees out of office

 >

 To-dos

Add an evaluation [SAMPLE](#)

Add Mia Rodriguez's evaluation for the Director of Finance job.

1 d

Review a time-off request [SAMPLE](#)

Emma Stone requested 3 days of Paid time off.

2 d

Add an evaluation [SAMPLE](#)

Add Andrea Manigo's evaluation for the Director of Finance job.

2 d

Add an evaluation [SAMPLE](#)

Pro tip

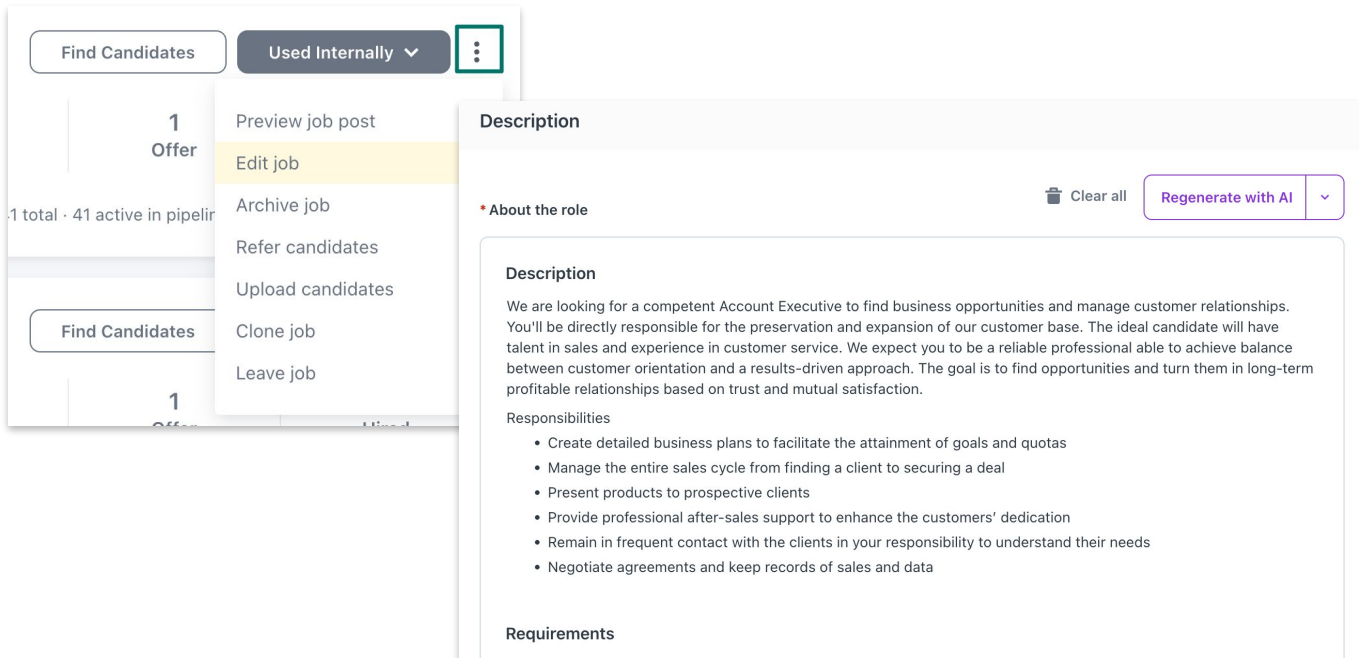
Try to complete some to-dos from the list and request time off.

4a. Recruiting sample data

Edit the job & application form

How to edit

Click the three dots to the right of the job title or click the job title and then **Edit job** on the right.



Editing the job description and application form

Account Executive ▾

Job details Application Form Find Candidates

CUSTOMIZE YOUR APPLICATION FORM

Personal information

Name	Mandatory
Email	Mandatory
Headline	Mandatory Optional Off
Phone	Mandatory Optional Off
Address	Mandatory Optional Off
Photo	Mandatory Optional Off

- **Generate with AI** job descriptions based on tone
- **Toggle** fields to be mandatory, optional, or not visible to candidates
- Create [knock out questions](#)
- Add your own questions under **Details**, re-order them to your liking
- **Preview** the application form on both mobile and desktop formats

Pro tip

Try editing the job and application form to imitate a position that you frequently hire for.

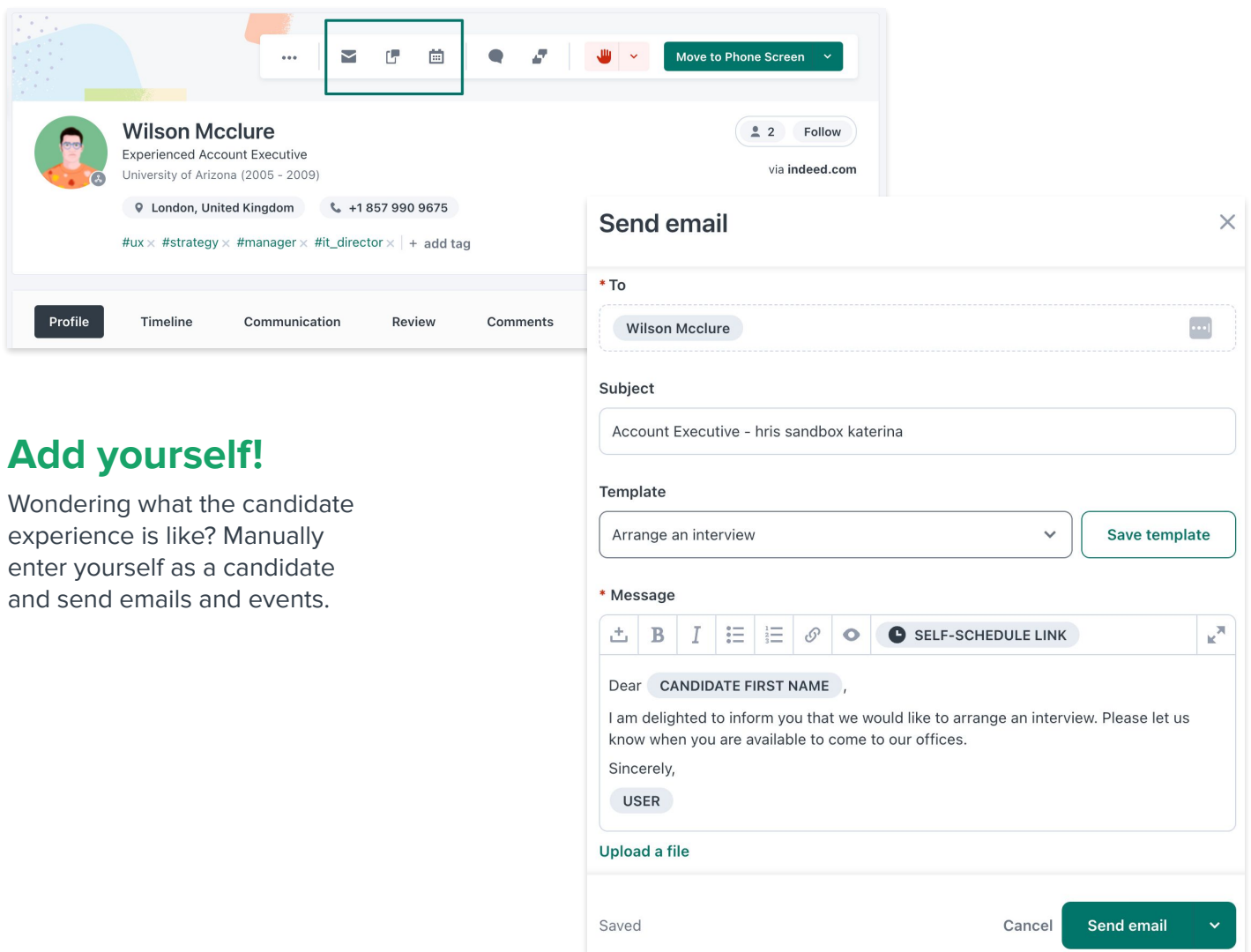
4b. Recruiting sample data

Communicate with candidates

Send emails, text messages, and events to sample candidates with our prescribed templates. Don't worry, none of the messages or events actually get sent to the sample candidates!

Sending emails, texts, and events

Click on a candidate in any stage of the hiring pipeline to email or text a candidate, and create events, such as scheduling an interview or phone call.



The screenshot displays the Workable interface. On the left, a candidate profile for Wilson McClure is shown. The profile includes a profile picture, name, title 'Experienced Account Executive', company 'University of Arizona (2005 - 2009)', location 'London, United Kingdom', and phone number '+1 857 990 9675'. Below the profile are tabs for 'Profile', 'Timeline', 'Communication', 'Review', and 'Comments'. A toolbar above the profile contains icons for email, text, events, and a 'Move to Phone Screen' button. A 'Send email' modal is open on the right. The modal has a 'To' field with 'Wilson McClure', a 'Subject' field with 'Account Executive - hris sandbox katerina', a 'Template' dropdown set to 'Arrange an interview', and a 'Message' field with a pre-filled email template. The template starts with 'Dear [CANDIDATE FIRST NAME],', followed by a paragraph: 'I am delighted to inform you that we would like to arrange an interview. Please let us know when you are available to come to our offices.', and ends with 'Sincerely, [USER]'. There is a 'SELF-SCHEDULE LINK' button in the message field. At the bottom of the modal are 'Upload a file', 'Saved', 'Cancel', and 'Send email' buttons.

Add yourself!

Wondering what the candidate experience is like? Manually enter yourself as a candidate and send emails and events.

Have you integrated your email and calendar yet?

Make sure to [integrate your email and calendar](#) to set-up [self-scheduling](#). Self-scheduling allows you to send links to candidates to schedule time on your calendar.

4c. Recruiting sample data

Evaluate candidates

Video interviews

Video interviews are available in the phone screen stage of the **Director of Finance** job. Locate the video icon in the candidate profile.

Qualified

Disqualified 0

☐ Search by name, skills, tags and ...

Ash Manoj

Senior Account Manager

#digital #business_development

+2

via [careerbuilder.com](#) · 4 months ago

- Review video interviews
- Add feedback
- Review scorecard

Overall scorecard for Phone Screen stage

How would you rate this candidate?

Eduardo Vallente

Pleased we spoke to Ash. Skills were a good match for the role and could be a star. Really liked his communication style on the phone which will be important for this role. I think we should progress to the next stage and set up an interview with me and Eric.

Natalie Sung

Experience is great and could be an excellent fit for the role. We should dig a bit deeper into his industry knowledge in later interviews though, we only touched on this at a high level @eduardo_vallente what did you think?

Critical Thinking

Analytical Skills

Please give me an example of how your analytical abilities enabled you to sort out a difficult situation

Tell me about a tricky situation for which you found a simple solution

Assessments

Assessments measure abstract reasoning, numerical comprehension, verbal comprehension, attention & focus, and workplace personality.

- Review candidate's assessments in the **Assessment** stage of the hiring pipeline
- Click **Detailed breakdown** under each assessment to learn more about how the candidate scored. Check out how to interpret [cognitive](#) and [personality](#) assessment results.

Profile

Timeline

Communication 1

Review 1

Comments

EVALUATIONS

ASSESSMENTS 1

Assessment

Jeanne Wilkinson completed their assessment

3 months ago

COGNITIVE

Attention & focus

Detailed breakdown

70

Verbal Comprehension

Detailed breakdown

54

Numerical Comprehension

Detailed breakdown

68

Abstract Reasoning

Detailed breakdown

63

How these numbers are generated

Total average score

64

Profile

Timeline

Communication

Review

Comments

EVALUATIONS

VIDEO INTERVIEWS

Phone Screen

2

View overall scorecard



5a. HR sample data

Employee Management settings

Under the Employee Management settings, you will be able to see already generated:

- Entities, locations, and sites
 - Onboarding workflows
 - Document templates
 - Work schedules
 - Time off policies
 - Holiday calendars
- + Departments (under the Company settings)

The screenshot displays the Workable HR settings interface. On the left, a sidebar menu is visible with sections for 'RECRUITING' and 'EMPLOYEE MANAGEMENT'. The 'EMPLOYEE MANAGEMENT' section is expanded, showing options like 'Company entities', 'Profile templates', 'Document templates' (which is highlighted), 'Onboarding', 'Work schedules', 'Time off', 'Holiday calendars', and 'Feature summary'. The main content area is divided into two panels. The top panel, titled 'DOCUMENT TEMPLATES', shows a list of templates: 'AI Tool Policy', 'I-9', and 'Nondisclosure Agreement'. Each template has a 'SAMPLE' tag and a dropdown menu. The bottom panel, titled 'TIME OFF', shows a list of time-off policies: 'Paid time off', 'UK PTO', 'US PTO', 'Sick leave', 'UK Sick leave', and 'US Sickness'. Each policy also has a 'SAMPLE' tag and a dropdown menu. The interface includes search bars and 'Add' buttons for each section.

Review all sample settings to understand how you can configure your onboarding, employee management and time- off procedures.

All example settings will have a 'Sample' tag for easy identification. If you modify any of the sample settings, the 'Sample' label will be removed, and these settings won't be deleted when you delete the sample data from your account. However, you can still delete them manually if you wish.




5b. HR sample data

Employee directory and org chart

Under the [Employees](#) tab, you will see 73 employees, with 65 already published and the others in various onboarding stages.

- Click on employee profiles in the directory to review their profile and time off information. Check the available actions and try to edit an employee profile.



On Paid time off: 14 September 2024 - 19 September 2024

Adams, Okey SAMPLE

Senior Account Executive (Full-Time) in Account Executive

US Entity | Boston, Massachusetts, United States | Boston HQ

[okey_adams@sampleemployee.com](#) [+18579909703](#)

Actions

Updates (0)

InformationFilesTime off

PERSONALJOBCOMPENSATION & BENEFITSLEGAL DOCUMENTSEXPERIENCEEMERGENCY

Basic

First name

Okey

Middle name

-

Last name

Adams

Preferred name

-

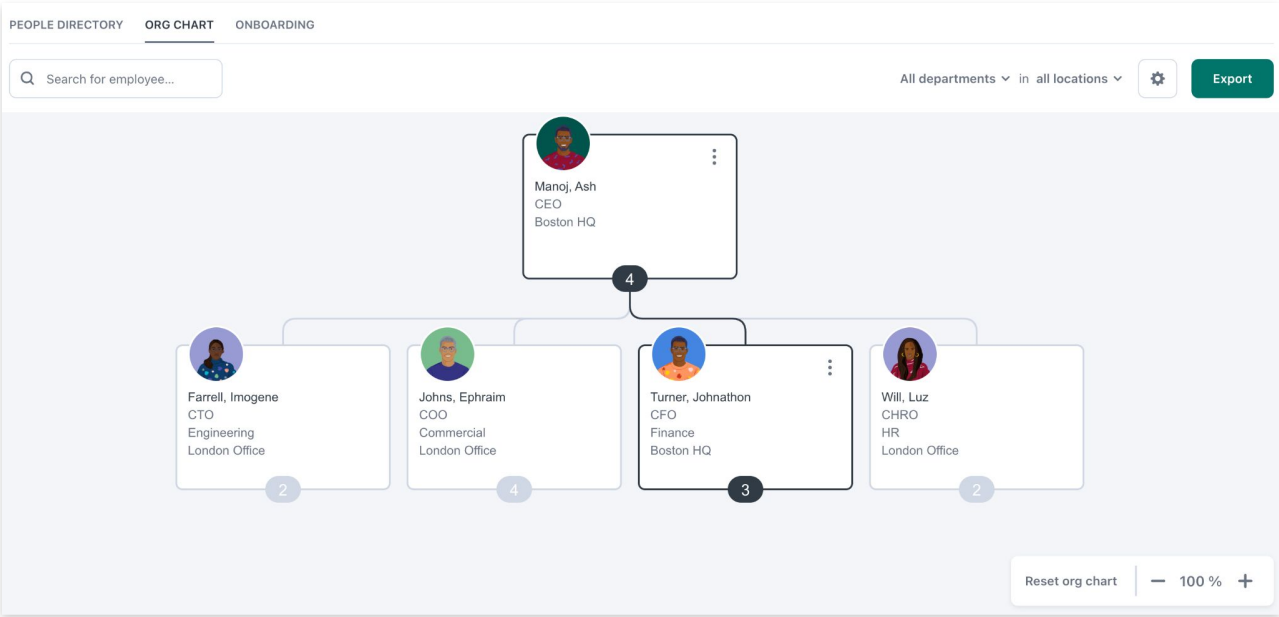
Employee ID

41

Status

Active

- Review and expand the org chart to understand how your company structure will appear. You can also try to export the org chart.





5c. HR sample data

Employee Onboarding

Under the [onboarding dashboard](#) (or the onboarding widget on your home page) you can:

- Check the employees under each of the onboarding statuses.
- Start onboarding for sample employees under the **Pending** tab.

Onboarding

Track the progress of all workflows in the company

PENDING 2

SCHEDULED 2

IN PROGRESS 2

COMPLETED 2

INCOMPLETE 0

Q Search by name...

Employees

Ortiz, Emmanuel

SAMPLE

Sales Development Representative

07 November 2024
(In 50 days)

Onboard

Lynch, Krystel

SAMPLE

Sales Development Representative

07 November 2024
(In 50 days)

Onboard

If you'd like to preview the onboarding portal as onboardees will see it, preview the onboarding website for your selected onboarding workflow under the [Onboarding workflows](#) settings.

ONBOARDING WORKFLOWS

▶ Watch tutorial

+ Add a new workflow

Q Search...

All entities & locations

Default

This is the default onboarding workflow for all employees

Modified on 13 September 2024

Preview onboarding website [↗](#)

General Onboarding [AU]

Onboarding flow for new hires

Modified on 13 September 2024 · Applied in 1 location

Preview onboarding website [↗](#)



5d. HR sample data

Request time off

Once you enable sample data, an employee profile is created for you with assigned time-off policies, allowing you to test time-off features without additional configuration.

Via the time off tab under your employee profile OR Home page time-off balances widget you can:

- Check your sample balances.
- Utilize the balance calculator to preview your time-off balance for a specific future date.
- Request time off.
- See your upcoming time-off requests.

ES

Stone, Emma

SAMPLE

HR Generalist (Full-Time) in HR

US Entity | Boston, Massachusetts, United States | Boston HQ

Employee profile

Actions

Updates (1)

InformationFilesTime off

BALANCESUPCOMINGHISTORY

Request time off

Balance calculator

Paid time off

14 days available

0 days used

Sick leave

32 hours available

0 hours used

Unpaid leave

∞ days available

0 days used

Your time-off balances

Paid time off

14 days available

Sick leave

32 hours available

Request time off

Your upcoming time-off

25 September 2024 - 27 September 2024

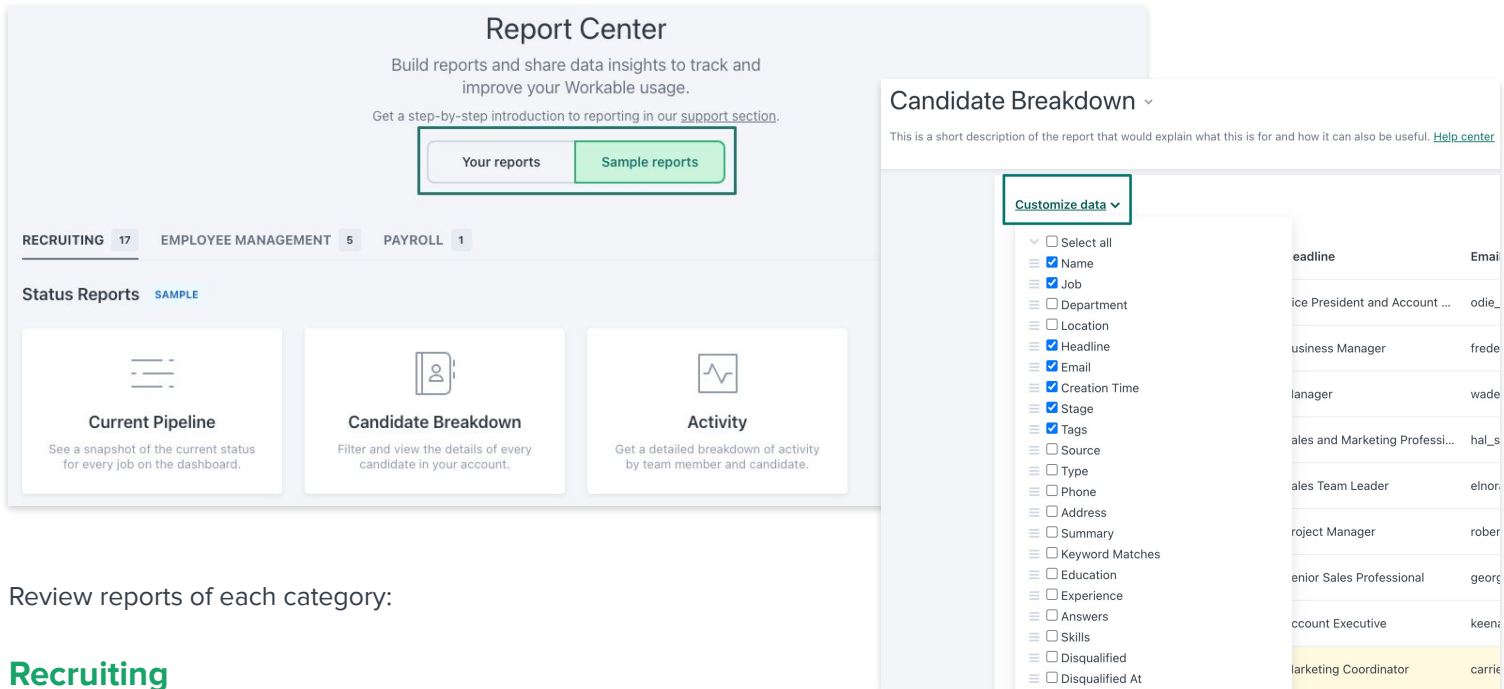
Paid time off · 3 days

Home page

6. Interact with reports

Sample data reports are static, meaning that if you change any sample data the sample data reports will always remain the same.

If you are using sample data together with 'actual' data, then when you navigate to your [Report Center](#), you will see a toggle to select if you wish to view 'Your reports' or 'Sample reports'.



Review reports of each category:

Recruiting

- **Hiring velocity:** spot which stages take the longest in and identify bottlenecks to reduce your time to hire
- **Time to hire:** quickly view how long it takes from opening the job to hiring someone for it, and how long it takes to hire that person after they applied
- **Productivity:** easily view what your team has been doing in Workable

Employee Management

- **Employee Breakdown:** view detailed information about all employees and their field values with the option to customize the data displayed.
- **Time-off Balances:** view each employee's time-off balance, including the days they've carried over, used or still have available

Payroll

Review the default payroll report and create custom reports based on specific legal entities, departments, etc.

Filter & export reports

Filter reports by available filters depending on the category (e.g. location, job, department, entity/location etc). Some reports like the **Candidate & Employee Breakdown** reports enable you to customize data even further. Export sample data reports to share with your team in either a pdf or CSV.



7. Explore some more

Check out all you can do with sample data and how to make the most of your trial.

Edit workflow

Add your own **video interviews, assessments or interview kits/scorecards** to sample jobs.

Referrals

See how [Workable Referrals](#) works by **referring yourself** to one of the sample jobs. Your candidate profile now has the referrals tag within the [Candidates page](#).

Career page

Create and customize your branded [careers page](#).

Reduce bias

[Enable anonymized screening](#) in your Workflow settings. Refer to our help center [article](#) for more details.

Disqualification reasons

Explore the build-in [disqualification reasons](#) by clicking the arrow next to the disqualification icon.

Find candidates

Auto source **sample passive candidates** by navigating to the Find Candidates tab for each sample job.



8. FAQs

What are the requirements to enable sample data?

An account Super Admin will be able to generate sample data for as long as:

- There are no published jobs with "actual" candidates applied
- There are no changes to the account's default pipeline settings
- There are no employees created
- There are no departments created
- There are no entities/locations/sites created
- There are no Onboarding workflows created
- There are no e-signature templates created
- There are no work schedules created
- There are no time-off types and policies created
- There are no holiday calendars created

Additionally, sample data **must be enabled before you convert to a paid plan**. You will still have access to sample data if you enable it before converting to a paid account.

Can I post a sample data job?

Sample data jobs cannot be posted. However, if you edit a sample job and hiring pipeline to your liking, **you can clone** it to add to as a job for your company.

Can I move a sample candidate to an actual job?

Sample candidates **cannot be moved or copied to actual job postings**. You are able to edit sample candidate information, with the exception of contact details: email, phone number, address.

Will sample data reports impact my reports for actual jobs?

No. If you have both sample data and non-sample data in your account, you can select the related toggle to view 'Your reports' or 'Sample reports'.

How do I delete sample data?

The sample data will not be deleted automatically; it will remain in your account for as long as you need it. When you are sure that you don't need the sample data anymore an admin user can permanently delete it. Deleting your sample data is a permanent and non-reversible action.

To do so, locate the sample data banner at the top of your home page and click **Delete sample data**. This action will open a confirmation modal for you to verify the action. Upon deletion, all sample data including related candidates, employees, settings, reports, and sample team members will be removed.

Deleting sample data **will not impact** your non-sample job, candidate and employee data.

Support when you need it

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+1 (844) 657 7637

+44 (0) 800 086 8870

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

**Live chat and access support
resources by clicking your
user icon and then “Help”**
