workable

—

Employee User Guide

Learn how to access your company's employee management features in Workable

Contents

1. Complete onboarding

Congratulations on your new role! Before your start date, your employer will send you onboarding information to ensure you are set up for a productive start.

Access the onboarding website

Your employer will send you a warm welcome and inform you about necessary tasks to complete for a successful first day.

Click **Start onboarding** to access your personalized onboarding website and view your tasks. The link will expire on your start date so make sure you complete all tasks before that date.
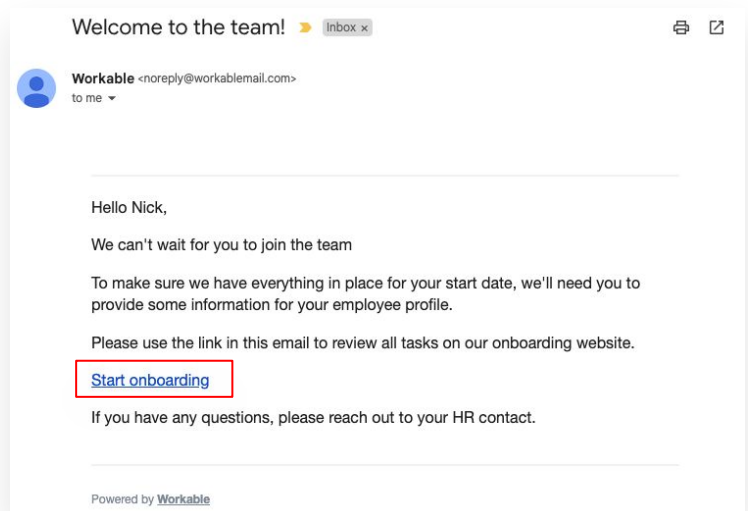
Complete your onboarding tasks

Here you will be prompted to:

- **Edit your information** by filling in as much information as possible in your employee profile. Make sure you fill out all the mandatory fields.
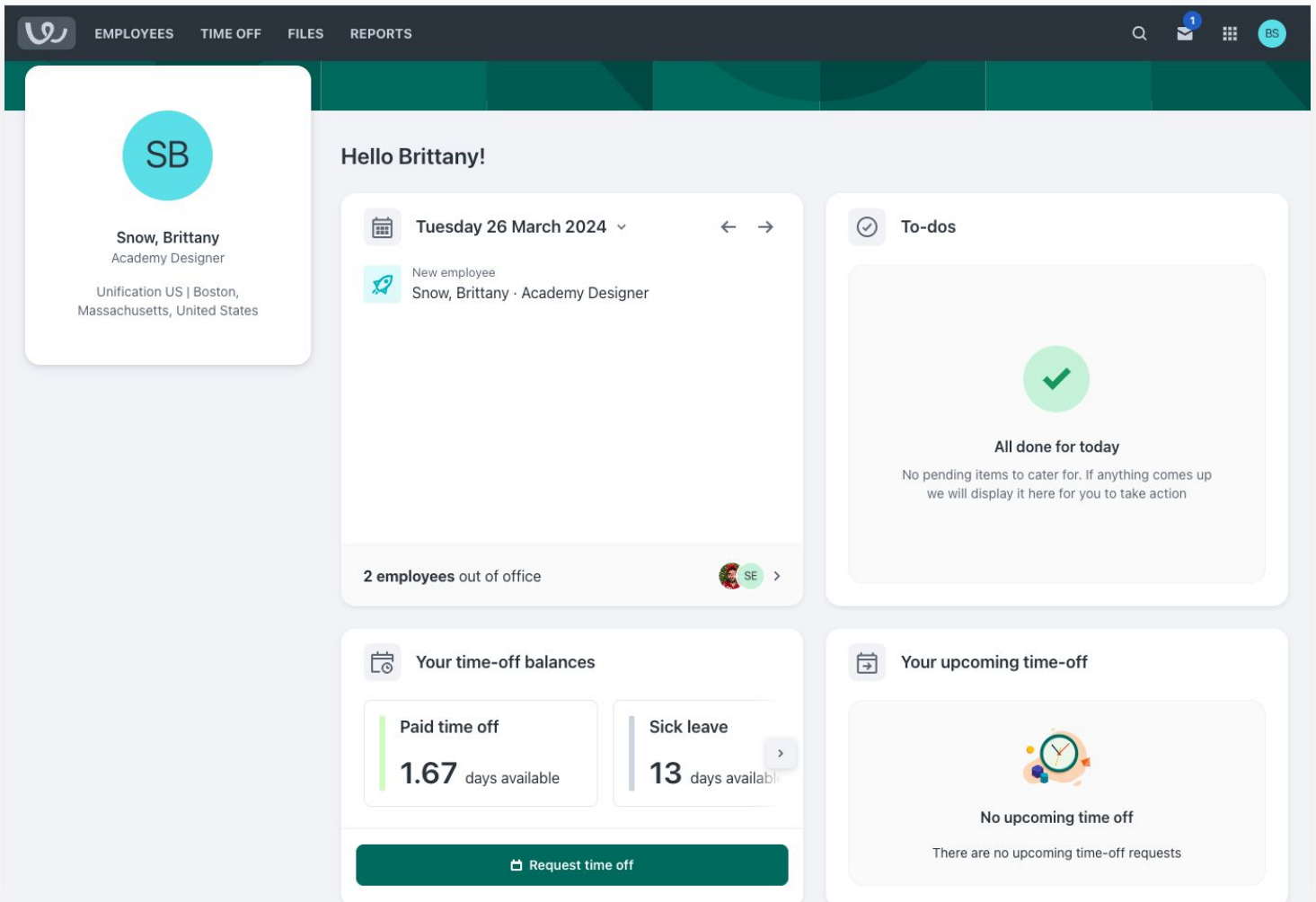- Sign necessary documents
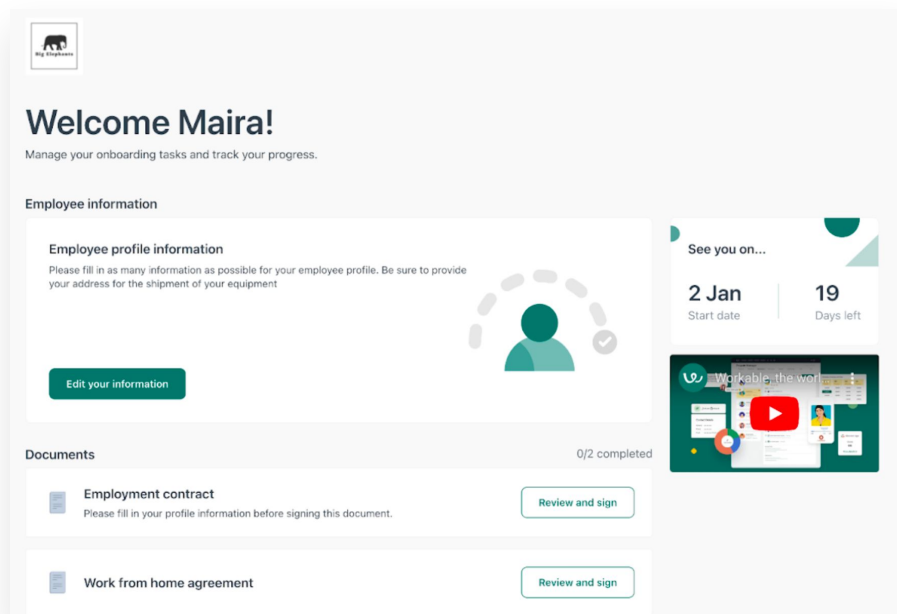
2. View the Homepage

You will be notified by your employer when and how you can access Workable. Upon login, you will land on the homepage. Also accessible from the "W" logo

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

- **Personal Information:** View your employee profile by clicking the large user icon
- **Calendar:** View Events and Celebrations for your company for the current calendar day
- **To-dos:** View and take action for items regarding your employee profile or time off
- **Time off:** View your time-off balances and upcoming time-off

2. Access Employee information

Click the **Employees** tab in the top toolbar to access your company's people directory, org chart, and files.
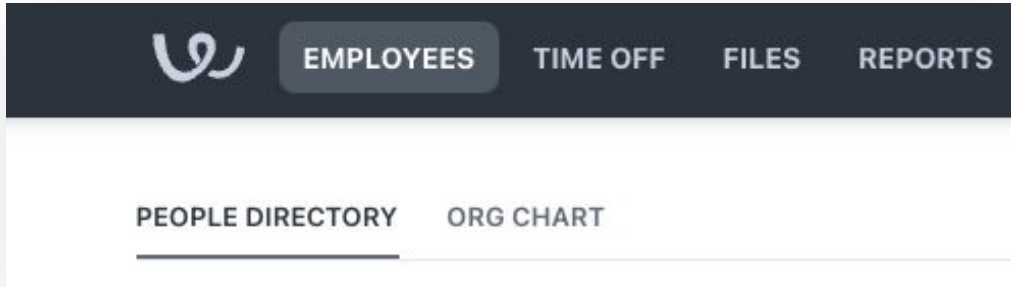
People Directory and Org Chart

People Directory displays all company employees alphabetically according to their last names.
- **View information** like contact details, who they report to, and number of direct reports.
- **Search** for employees by name/email or **filter** by department or location.
- **Click** an employee name to view further details of their employee profile.

Click **org chart** to visualize your company's structure.

Files

Review and download company-related documents in the **Files** page.
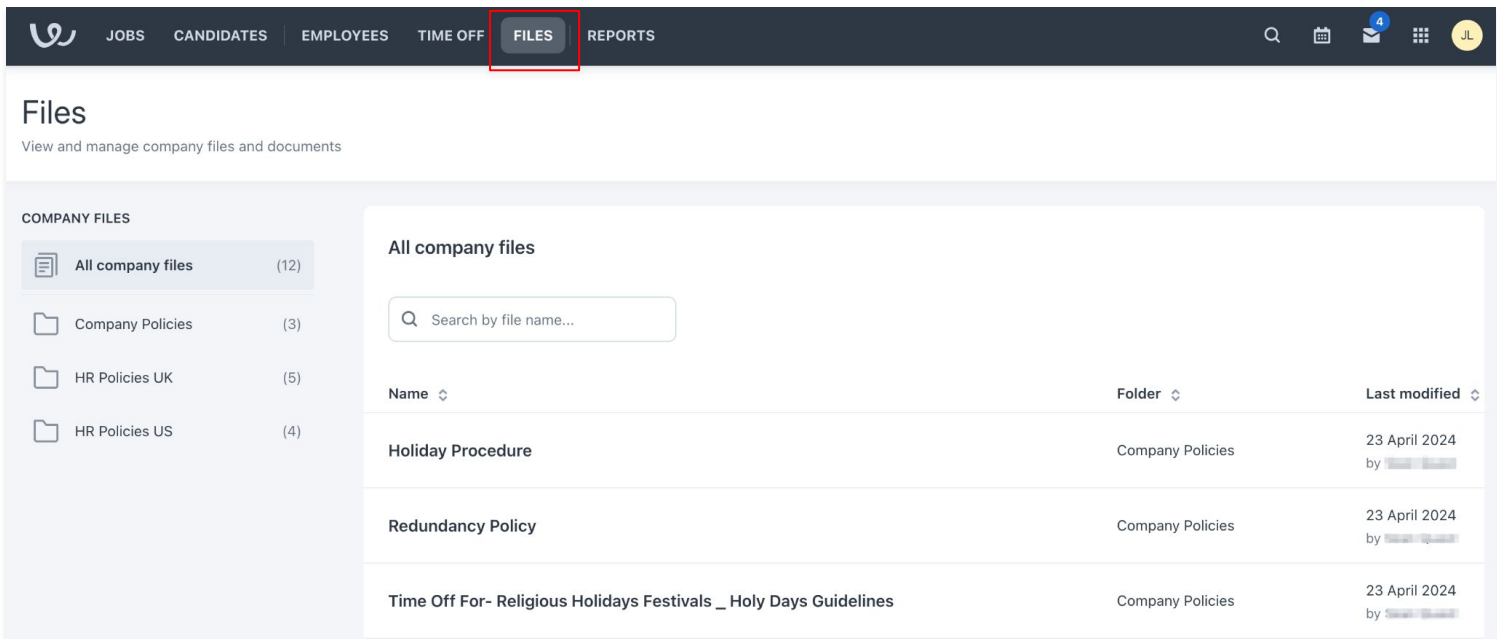
3. Edit your profile information

Life happens and personal details change. Easily edit your employee profile information anytime. Some field changes may need HR approval to be reflected in your profile.

Go to your profile

- Click your user icon on the homepage or search for your employee profile from the **People Directory**
- Select **"Edit profile"**
- Once you are done click **Save**
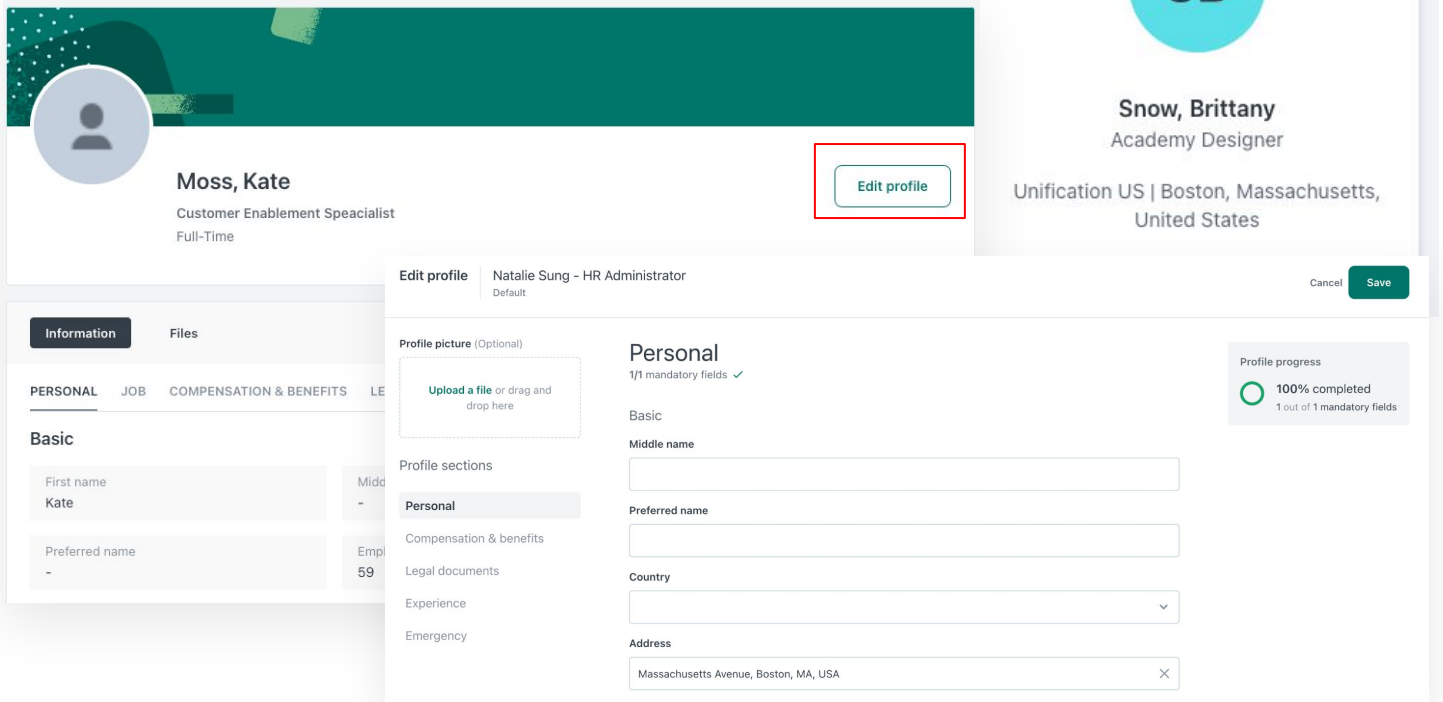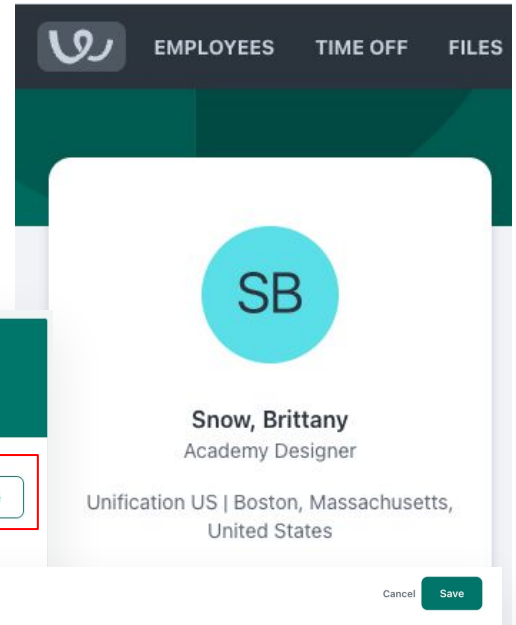
Fields that are not visible can only be edited by HR administrators or your manager.
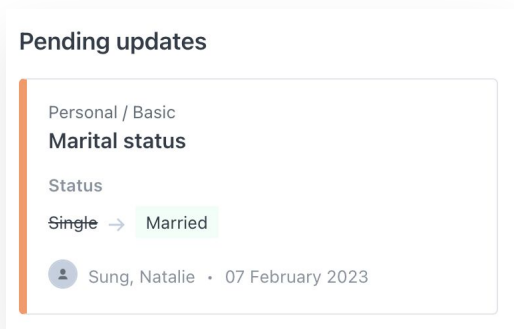
Pending updates

Some field updates may require HR approval. When you save your profile you'll see which fields are sent to HR to be approved. Once approved, they will be reflected in your employee profile.

4. Review and sign documents

As an employee, you may be requested to review and sign documents at any point during your employment.

Access the document

- You will be notified by email that there is a new document pending your signature.
- After clicking the **Sign document** button, you will be taken to your Workable Inbox, where you can access the document that needs to be signed.

New document signature request

Hi Kate,

Natalie Sung requests that you review and sign the following document:

NDA

Sign document

Thanks,
The Workable Team

Powered by **Workable**

Inbox	1		Natalie Sung · Signature request · 5 days ago	Sign document	
Important			Natalie Sung has asked you to review and sign the following document		
Jobs					

Showing all items ˅

Example: Contract of Employment

CONTRACT OF EMPLOYMENT

between

Corporate entity: Big elephant Ltd.

Employer

and

First and last name: Maira .... Filippou

Postal address: ██████ ███ Greece

Date-of-birth: 29 November 2000   Civil status: Married

Social Security ('AHV') No.: 1234561

Employee

1. **Position**

The Employee is hereby employed as Product Manager .... on the following terms and conditions.

2. **Commencement of the Employment**

The employment commences on 02 January 2023

Sign document

Once the document opens click **Get Started** to review and sign it. You may be requested to fill in some information.

5. Request time off

You can request time off via multiple methods. Choose what's easiest for you!

Request time off

- From the Homepage click **"Request time off"** under your balances widget
- Navigate to the **Time off** page and use the "**Request time off**" button
- Time off can also be requested within the Time off section in your employee profile

These steps will open a modal for you to set you days and times for your request. Before submitting a time off request, you will be able to preview the amount of time that will be charged and the remaining amount in the selected time off type.

Time-off company calendar

To view who is out at your company, check the Time-off calendar by clicking the **Time off** page of the main menu

6. Mobile app

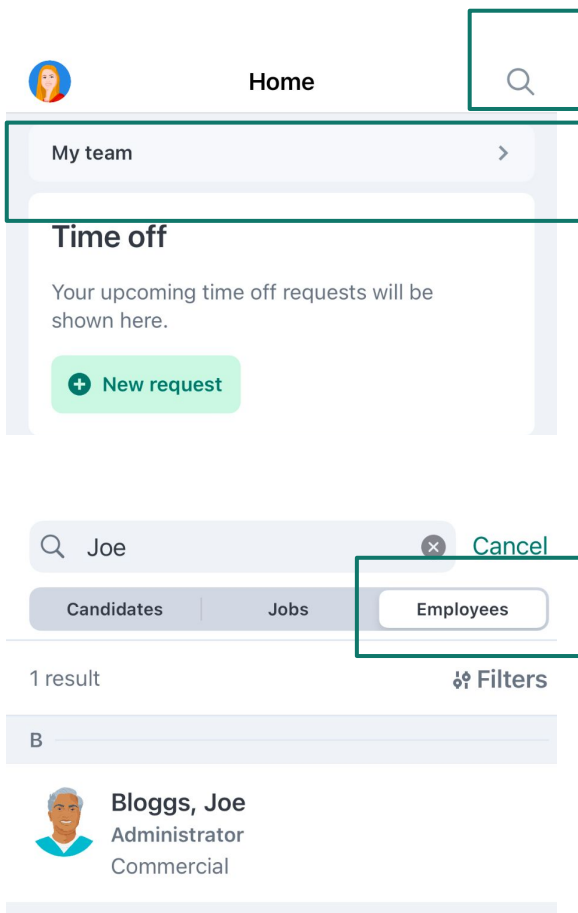Mobile minded? Download the Workable mobile app for free on iOS and Android phones.

View Employees

View your manager and all employees reporting directly to the same manager under **My team**.

View employees not on your team by using the search feature and switching to employees.

Tap on any employee to view their employee profile.

Request Time off

Any upcoming time off will be shown under the time off section on your app home page. Click View all to see a list of all your approved and pending upcoming time off requests.

Click New request next to the time off section on your app home page to begin a request.
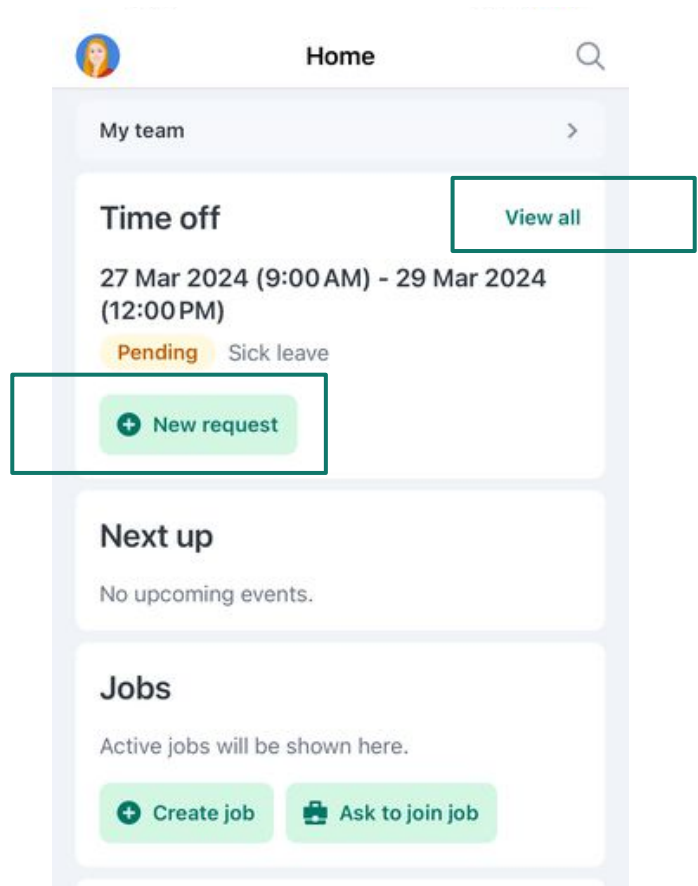
7. FAQs

—

How will I know if I need to sign a new document after I onboard?

You will see a notification in your Workable inbox as well as receive an email to the email address associated with your Workable account.

How can I see any pending approvals in my profile once they are updated?

If a field has an approval pending you can see this with an orange dot next to its name and the pending value will be available in your profile widget sidebar.

How can I see the history of a field's changes in my profile?

If a field keeps history of any updates that are done, you will see a clock icon, which you can click to view all the past values of the field. (i.e your previous salary).

Which profile fields need an approval?

It depends on the configuration that your HR Administrators have set up for each profile field. Contact your HR Administrators for more information.

Support when you need it

help.workable.com

support@workable.com

+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"