workable

HR Admin User Guide

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

Collection of resources

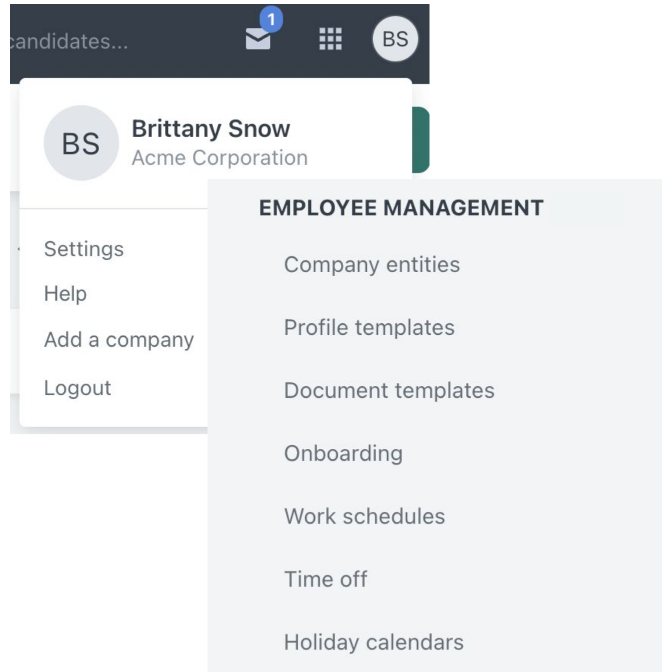
In addition to this user guide, check out all of our resources for employee onboard and management:

- Setting up employee onboarding and management features for the first time? Check our Implementation Guide
- Setting up Time-off features for the first time? Check our Time-off Implementation Guide
- View videos for onboarding workflows, document templates, and how to place profile fields to document templates
- Share pdf user guides to employees and line managers

Contents

1. Configuration

Access account Settings by clicking your user icon in the upper right of Workable and navigate to the Employee Management section.



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. This is particularly useful for companies that operate in different regions with varying tax regulations or for those with a single legal entity but multiple locations and sites.

Profile templates

Utilizing profile templates ensures that your employee records meet your unique needs.

Your default template should be used as the "master" template including all sections and fields you want in any employee profile along with their default settings.

Custom profile templates can be created on top of the default template to accommodate specific profile needs such as different employment levels or types, or different locations that may have special needs.

To prompt employees to complete specific fields of the profile during onboarding, adjust the Field settings to be Editable by the Employee.

Document templates

Document templates will assist you in getting your employees to complete or sign your legal-binding documents in a timely manner. Document templates can be made for both existing and new employees.

Onboarding workflows

Gather new employee information before their first day ensuring proper and smooth onboarding for your new hires. Create and edit onboarding workflows to design the exact new hire experience you want. A default onboarding workflow will be ready for use in your account but you can add more workflows as needed.

Work schedules

Work schedules facilitate your employees' time off management. Create work schedules for your organization and define working days and hours for your employees. This is mandatory for configuring time off.

Holiday calendars

Holiday calendars enable HR admins to set up public and company-specific holidays for employees. Create and configure holiday calendars to include the public holidays or any specific company holidays. Which can be applied to entities or locations.

Time off

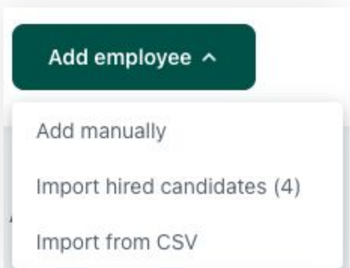
Time-off management enables you to manage your employees’ time off within Workable. Create time-off types and policies that may apply to different groups of employees based on their entity, location, or site. Set up approval flows for time-off types and policies during the creation process.

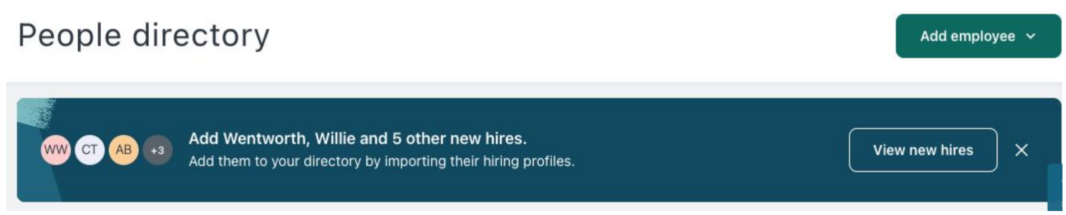
2. Manage employee profiles

The employee profile is the source of truth for an employee's information – from their personal details to their job and compensation information.

Prerequisite: Configure your default or create a custom profile template.

Create an employee profile





Add manually:
Fill in the record info you possess and select the Profile template you wish to use. Complete all mandatory fields to publish this profile.

Import hired candidates:
Select a hired candidate to import and select the **profile template**. The system will retrieve all the related information from the hired candidate to reduce manual data entry. Once ready, click **Save as draft** and exit.

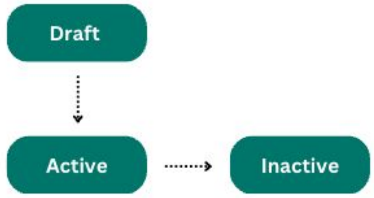
Note: Importing candidates from the hired stage will transfer the signed offer letter and any other documents signed through Workable from when the candidate was part of the recruitment process. The files will be in the **Files** tab.

Import from CSV:
A full-page modal will open from where you can import employee data through a four-step wizard.
The profiles will be imported as draft. You can see a detailed guide for each step here.

Tip: The easiest way to set up your existing users as employees is to upload them via a csv import. In order to map employees to their correct manager, the manager profile should already be published or included in the csv import.

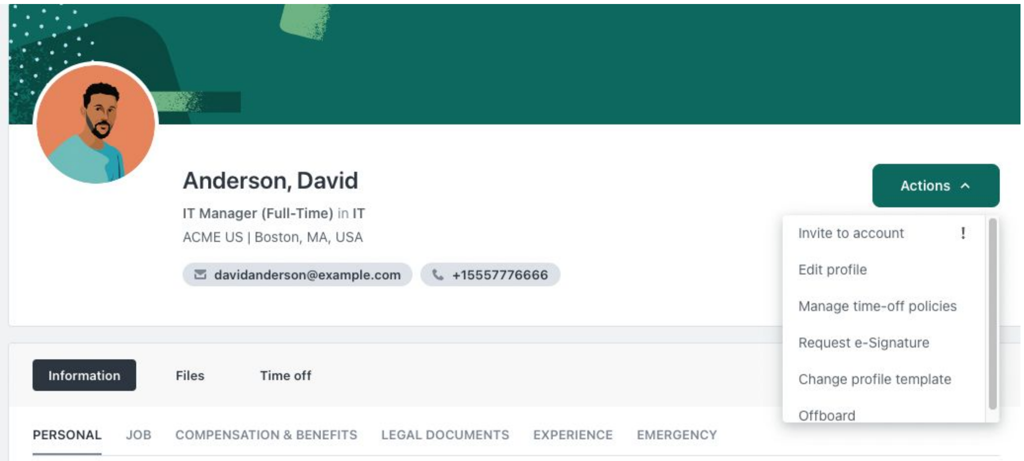
Employee profile statuses

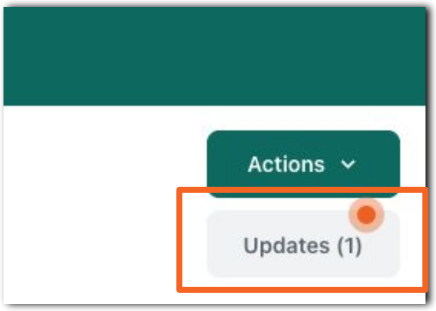
The three default statuses of an employee profile in a company are Draft, Active, and Inactive. Only draft employees can be onboarded. Active employee profiles can be assigned with a custom status (e.g. "In sabbatical", "Furloughed") that is created by HR admins under the Profile templates tab.



Manage an employee profile

Edit an employee profile: While viewing an employee profile click **Edit profile** under the **Actions** menu on the right. Each profile section contains some predefined fields that can work as a default template for your basic needs.





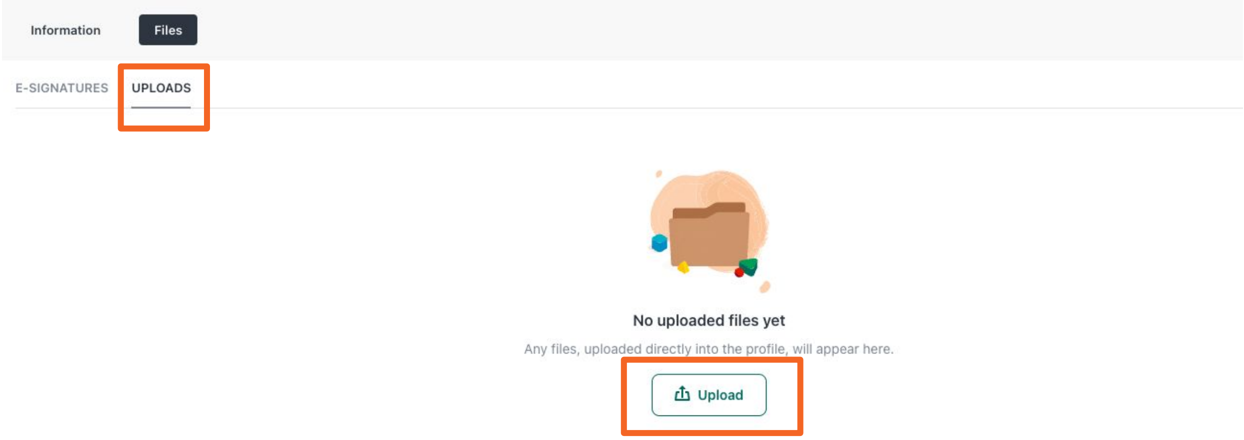
Change profile template: You can change the profile template that is assigned to an employee profile anytime by clicking **'Change profile template'** under the Actions menu. You can edit the default template or create custom templates by navigating to the Profile templates section of your account.

Profile fields history: The employee profile may include fields that need to have a "change log" for audit reasons. These fields are configured in the default template to keep history for every change that happens.

 The clock icon next to a field indicates that is has more than one history entry. Click the icon to view all history.

Profile change requests/pending updates: You will be notified with an Inbox item and an email notification for anything pending approval for an employee. Or, you can click the **Updates** button on the employee profile to see a side drawer.

Upload files: Upload any additional files for the employee under the **Files** tab.



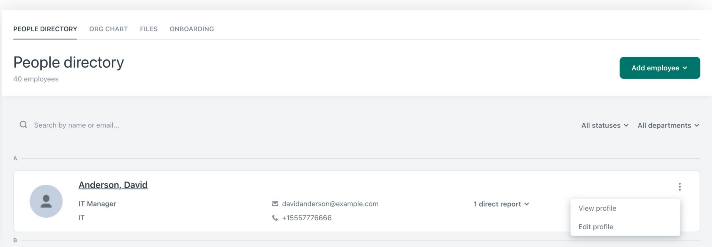
3. People directory & org chart

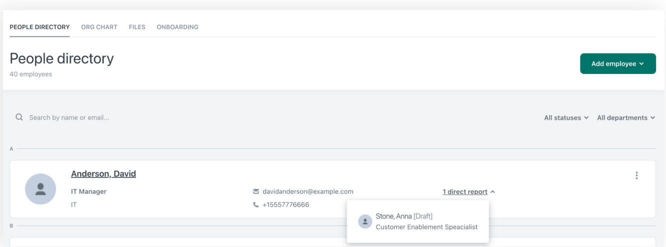
Once employees are added, view the company's employees and org chart by clicking on the Employee tab of the main menu.

Employees

All employees will be visible under the **People Directory** list in alphabetical order based on their last names. Search for employees by name or email address. Filter the directory by employee status, department, division, legal entity, location and site.

Click an employee's name to view or edit their profile. Click an employee's direct reports to see a list-of employees who report to them.





View per member access

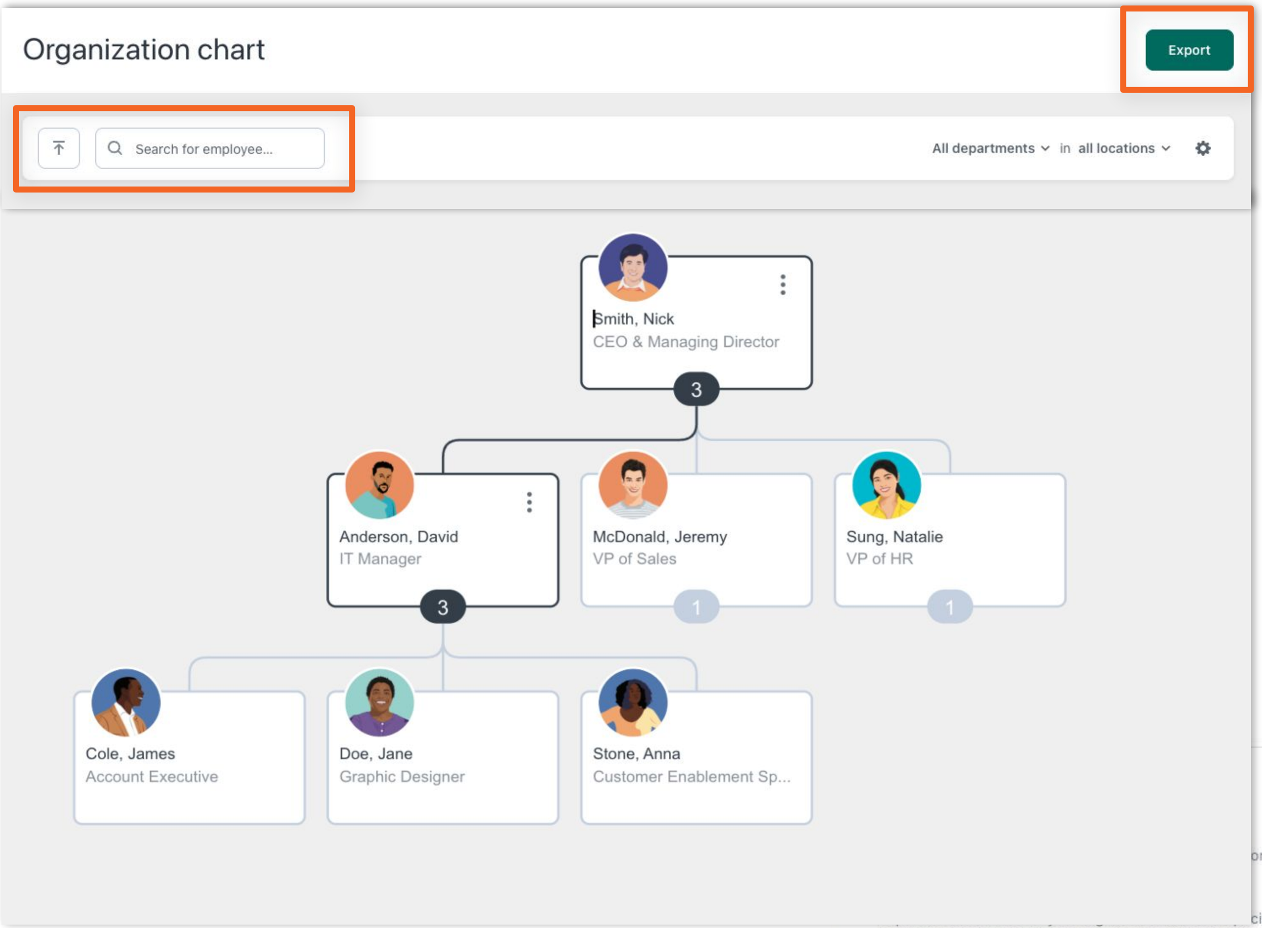
The employee view in the company's employee directory and org chart depend on the member's role. Specify each employees access level in your Account Members settings to adjust their view.

- An Employee with an **All-access** level can view all employee profiles including draft, inactive and custom-status employee profiles
- An Employee who has **direct reports** and a **Standard Access** level, can view published employee profiles. As well as, draft and inactive employees in their direct reporting line.
- An employee **without direct reports** with **Standard Access** can view published employee profiles.

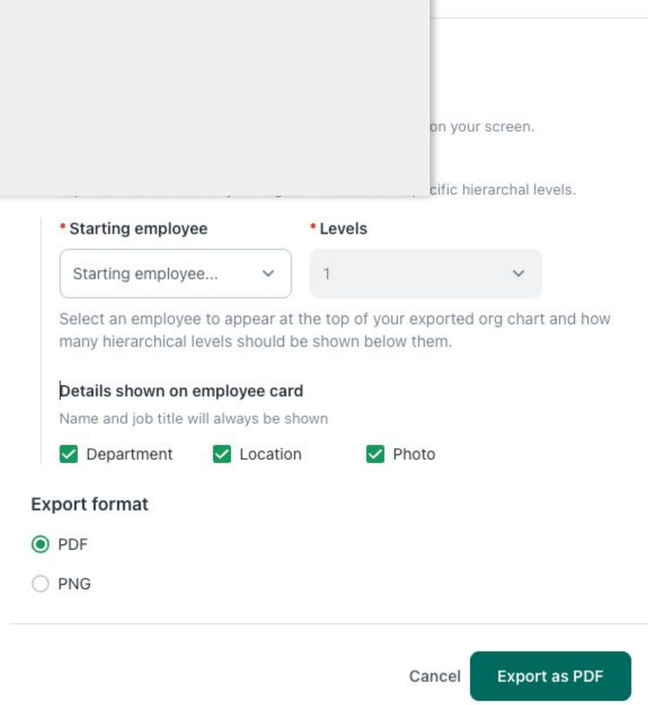
Org chart

The Org Chart will default to the top-level company officials and their direct reports. Zoom in or out to get the best view of the Org Chart. Adjust the centered view of the org chart, by clicking anywhere on the page and dragging it in the desired direction.

View the direct reports for each employee by clicking on the number under the employee name. This will reveal the employees who report to a specific person. Org chart will not display draft profiles without an assigned manager or inactive profiles.

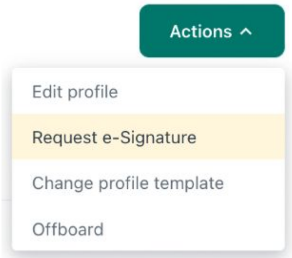


- **Search** for an employee in the Org Chart by name to view the selected employee, employee's manager and the employee's direct reports.
- **Filter** by department and/or location.
- **Export** the current view or a custom view by defining the starting employee, number of levels expanded and information to be displayed on employee card. Choose the export format as a PDF or PNG.



4. Request employee e-signatures

E-signature requests can be made for both new employees that are being onboarded and existing employees. **Prerequisite:** Configure document templates.



Request e-signatures from existing employees

There are three requirements to be able to request a signature from an existing employee.

1. The employee needs to be published meaning the status is active.
2. All requested signers, if multiple, must have a user account and should have logged in at least once.
3. At least one compatible document template should be created under the Document templates.

Assign an e-signature document and request that the signers involved in the document template sign it as well.

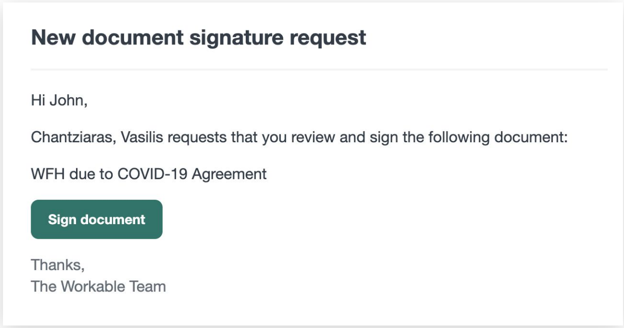
- Initiate the request by opening the **employee profile**.
- **Request e-Signature** using the Actions menu.
- Select a document template from the list of compatible templates.

Each successful signature request sends notifications to all signers sequentially, based on each document template configuration. These notifications include both inbox items and emails.

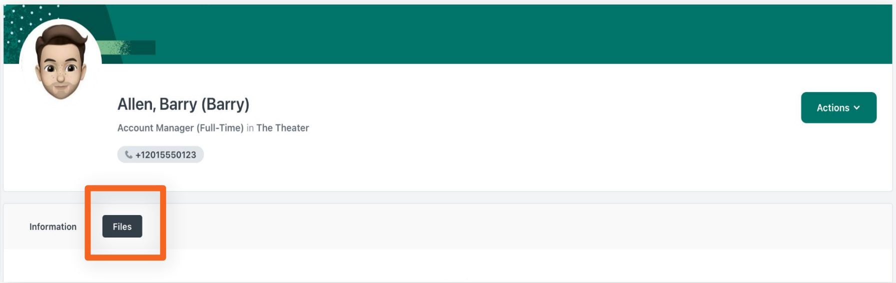
Request e-signatures from new employees

You can request e-signatures from new employees as part of their onboarding:

- Navigate to Onboarding
- Add the 'sign a document' task while creating an onboarding workflow.



Signed documents for existing and new employees will be complied in the **Files** tab of the employee profile.



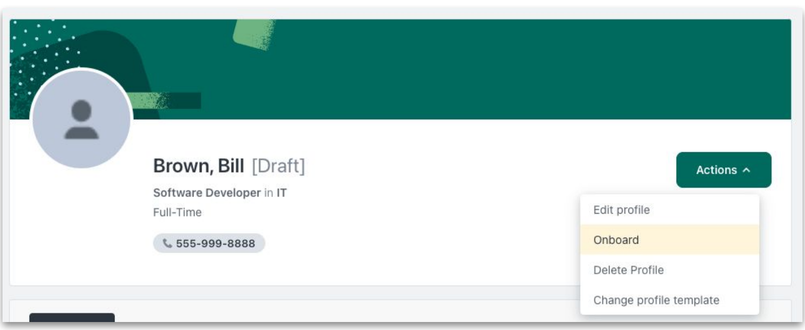
5. Onboarding dashboard

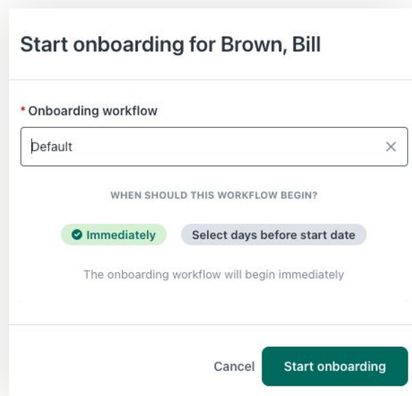
The Onboarding page allows you to view and manage the status of an employee's onboarding. **Prerequisite:** Create onboarding workflows.

Start onboarding

Onboarding can only occur for employees whose profile is in the draft status.

- Select the **Onboard** action in the employee profile.
- Choose when this onboarding workflow should begin and click **Start onboarding**.





Edit or stop onboarding

You can perform specific actions for each employee under the three dots menu.

Edit onboarding is available for **Scheduled** employees. Select a different onboarding workflow and/or change when is the onboarding workflow to begin.

Stop Onboarding for employees in the **Scheduled** and **In Process** tabs. When their onboarding is stopped, they will be moved to the **Pending** tab.

Tip: If your employee receives a message that the onboarding link expired (before their start date) they will be prompted to provide their email in order to access onboarding again and continue from where they left off. You can share with them these instructions. If you need to resend the onboarding email for any other reason you will need to stop the onboarding the start it again.

Onboarding dashboard tabs

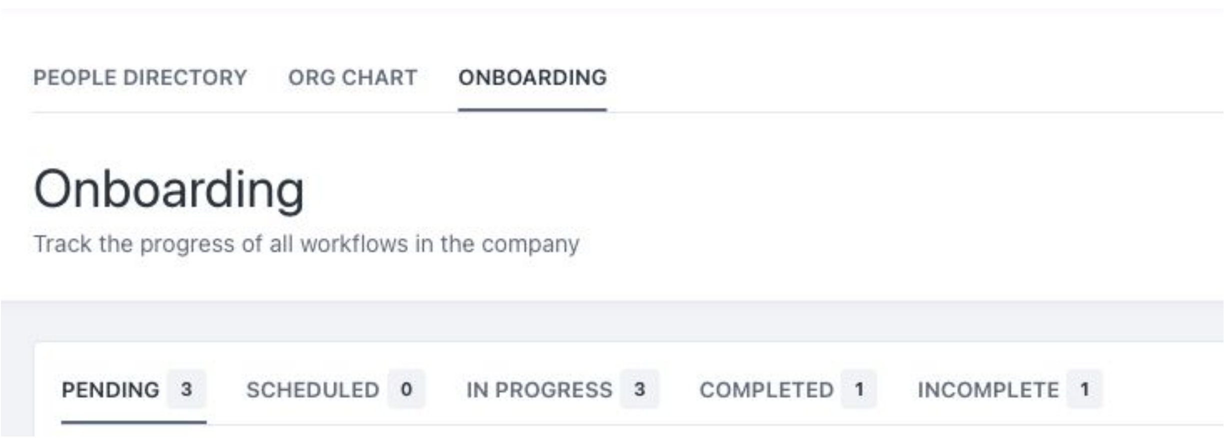
According to the status of the onboarding process, each tab corresponds to one of the following:

Pending: Newly hired draft employees (❗whose start date is after two days or later) will be displayed here in order to assign them to start their onboarding sometime in the future.

Scheduled: Employees that have been assigned an onboarding workflow but onboarding will start in the future. Employees are sorted by their onboarding scheduled date, closest scheduled date first.

In Progress: Employees that have started their onboarding workflow but have not completed all tasks. Employees are sorted by their start date, closest start date first.

Completed: Employees who have completed all tasks in their onboarding workflow. Employees are sorted by date onboarding was completed, most recent date first.



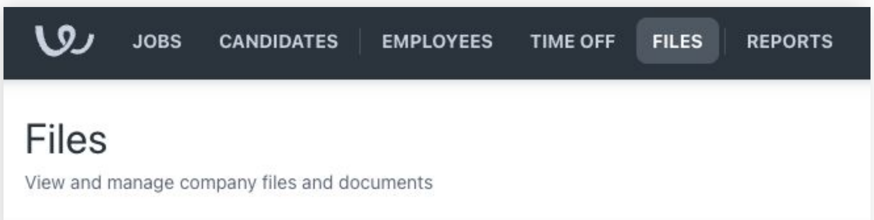
Tip: The Onboarding page is only visible to HR Admins and Standard members with direct reports; standard access members without direct reports will not be able to view this page.

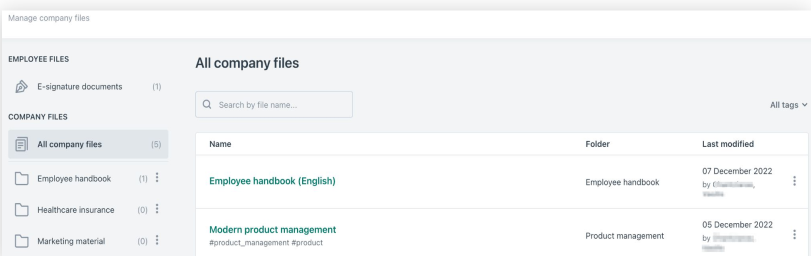
6. View company files & folders

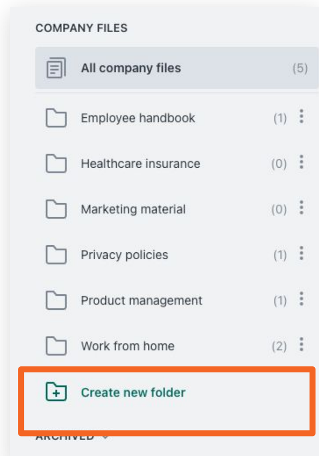
Company files work as a centralized repository for all your company-related documents and file types you need to share with your employees.

Access company files

Files are accessed under the main navigation menu. You have full access to all company folders and files, while standard access members can only view folders and files according to the permissions you set.







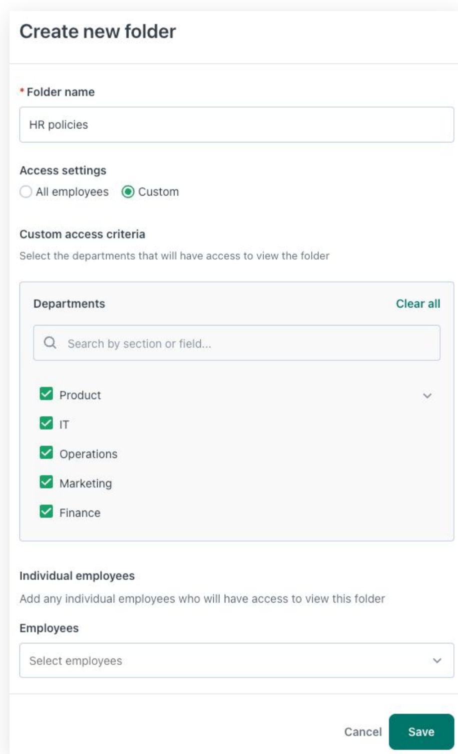
File folders

Organize files in folders to restrict or provide access to specific departments, entities, or individual employees.

Create a new folder and fill in fields such as name and access settings.

All employees: All users with access to the Employee Management features will be able to access this folder and the files uploaded in it.

Custom: Choose which departments, entities, or specific employees will be able to access this folder and the files uploaded in it.



7. Publish profiles & add members

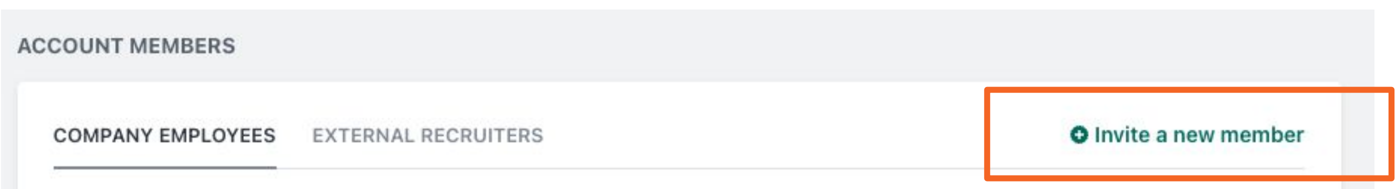
Once an employee is hired and onboarding is complete it's time to invite them to be a member on Workable.

Publish employee profiles

When all the mandatory fields are completed for a draft employee you can publish the employee profile. This action will make it "Active" and available to all employees in the company directory and org chart.

- Click **Publish** under the Actions menu
- Add the business email that the employee will use to sign up in Workable under the **Work email** field
- Once you're done click **Publish** on the upper right

Add new members



❗New members can be added only by **Super Admins** - users who have "All access" user permissions for both Employee Management and Recruitment.

- **Manually Add New Members:**
  Access the [Account Members](#) page. Click the link to **Invite a new member**. Enter the employee's business email address and decide on the membership type you'd like them to have for each of the access categories.

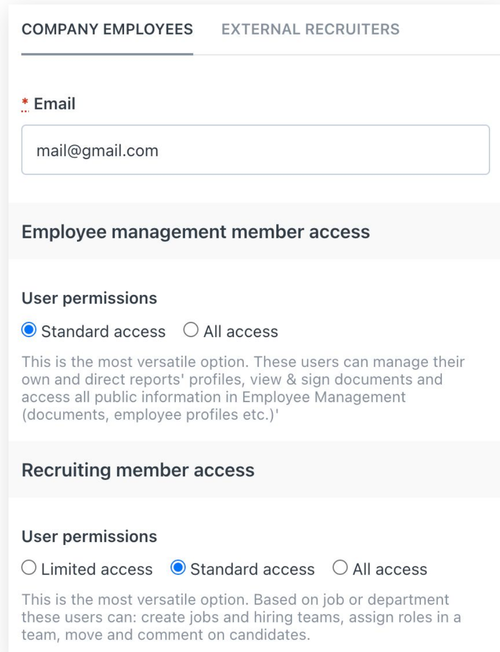
- **Enable Auto-join:**
  Allow anyone with an email address that matches your company's web address to join your Workable account as a **Standard member** without an invitation. Visit the [Account Members](#) page to enable or disable auto-join. Once auto-join is enabled you will see an option to invite your coworkers to join your account.

Manage employee access

Specify each employees access level in your Account Members settings.

Employee management member access permission defines what the user will be able to see or perform in Employee Management. Review our employee management user permissions comparison chart for more details.

- **Standard access** users can manage their own and direct reports' profiles, view & sign documents, and access all public information in Employee Management.
- **All access users** can access everything in Employee Management and manage employee profiles, onboarding workflows, profile & document templates, and approvals.
- **No access users** will not be able to access information in Employee Management.



Recruiting member access defines what the user will be able to see or perform in the recruiting part of the platform.

For more information see a full breakdown of recruiting user permissions or read our guide on how user access combinations will determine the parts of Workable that a user can see.

Tip: Employees must become a Workable member and have at least Standard Access in Employee Management to view files, employee directory, or org chart.

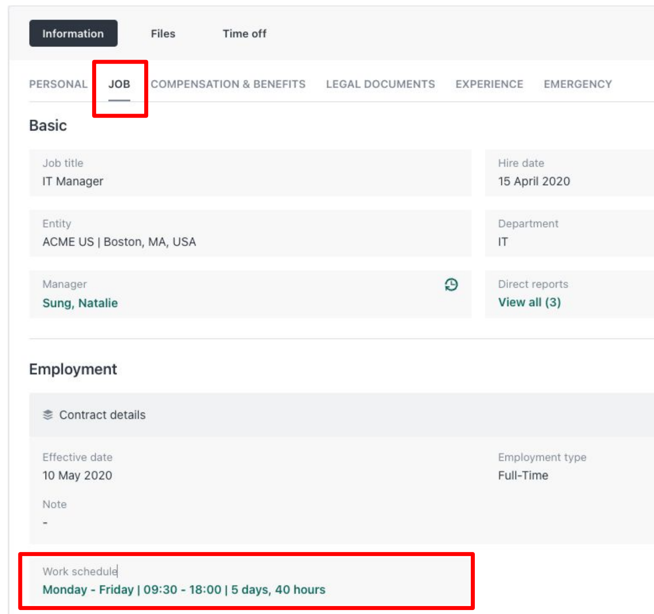
8. Manage work schedules

Work schedules facilitate your employees' time off management.
Prerequisite: Create work schedules for your organization.

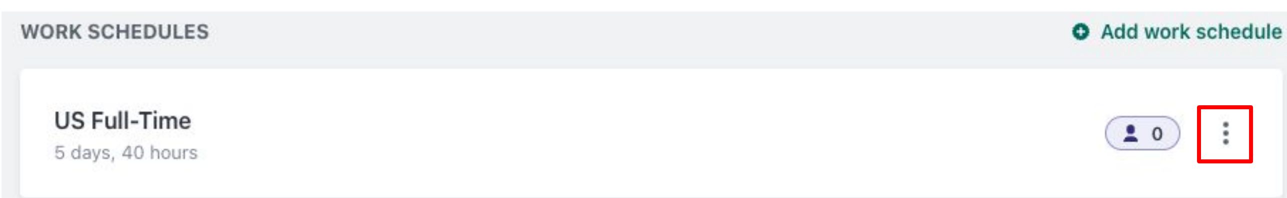
Assign work schedules

- **New Employees**: There is a dedicated profile field in the default profile template for work schedules under **Job** > **Employment.** When you create a new employee simply select the the correct Work schedule from the dropdown.

- **Existing Employees**: If you already have existing employees, **Edit** their employee profile via the **Actions** button and add their work schedule under **Job** > **Employment.** Similarly, to edit an employee's Work schedule, edit from their employee profile.



Manage work schedules



Click the three dots next to the work schedule you want to edit. You may see different options depending on if the schedule is currently assigned to employees.

- **Edit** - Editing a work schedule immediately updates the work schedule for all assigned employees, reflecting the changes in their profiles.

- **Disable** - Disabling a work schedule that is already assigned to an employee prevents new assignments for other employees. Any employees that already have been assigned to this work schedule will keep it.

- **Enable** - Enabling a disabled work schedule will make it available for assignments to employees.

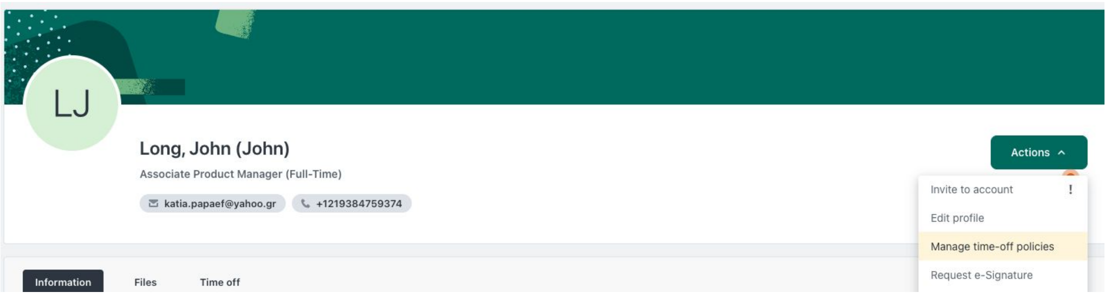
- **Delete** - Deleting a work schedule that is not assigned to any employees will completely remove it from the account. Any past assignments to employees won't be affected.

9. Assign time-off policies

Time-off types should be available for each employee and the policy that needs to be applied for each type.

Prerequisites: Create your time-off types and policies under the Time off settings page. Assign the employee's work schedule.

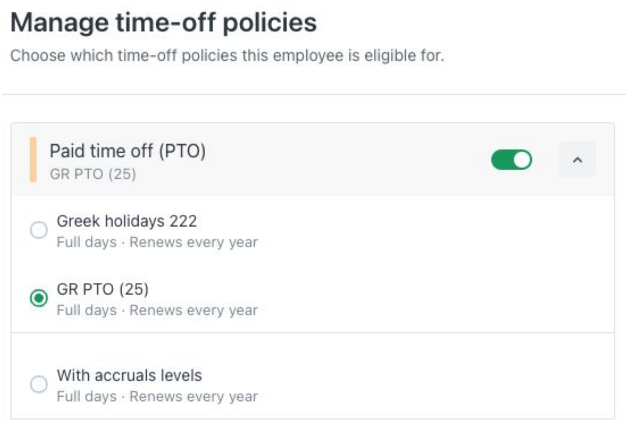
Add time-off policies to an employee



Find the employee profile you wish to assign the time-off policy to. Click **Actions** > **Manage time-off policies**. Then, select the time-off types you wish to assign to the employee.

If multiple policies exist within a time-off type, only the ones applicable to the employee's entities and departments will be visible. Select the appropriate option for the employee. Click **Save** to complete the process

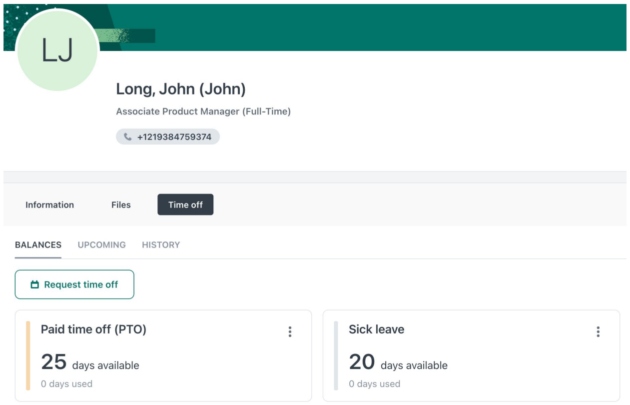
When time-off types are assigned to an employee, Workable will allocate the accrual balance for the current cycle based on the employee's start date. The balance will become available shortly after under **Time off tab** > **Balances** within the employee profile



Update time-off policies and balances

Within the employee profile, click **Actions** > **Manage time-off policies** and toggle on/off the policies you wish to change.

For more information on understanding how an employee's time-off balances are affected by updating time-off policies, click here.

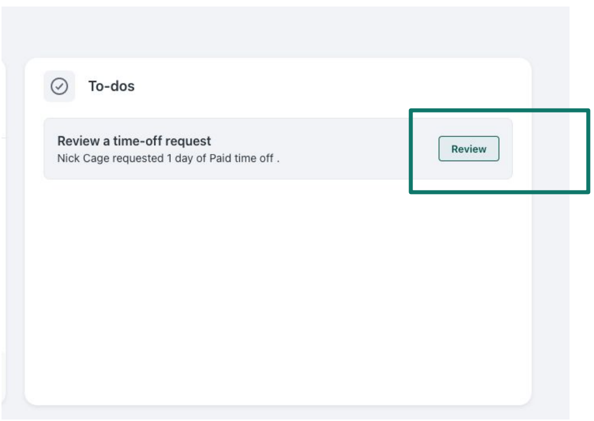


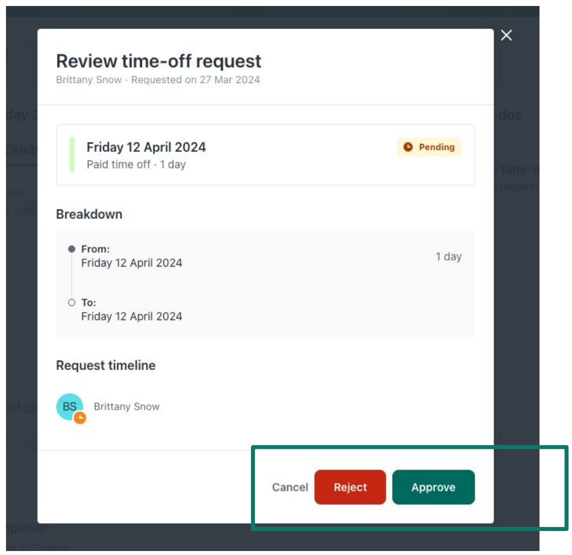
10. Approve/reject time-off requests

You will be able to approve or reject time-off requests submitted by your direct reports. Take action on desktop or our mobile app.

Via the Homepage

The To-dos widget will display time off requests in need of review. Click **Review** to open a modal to approve or reject the request.





Via Workable inbox

Review the request and take action directly in your Workable inbox on desktop or mobile.

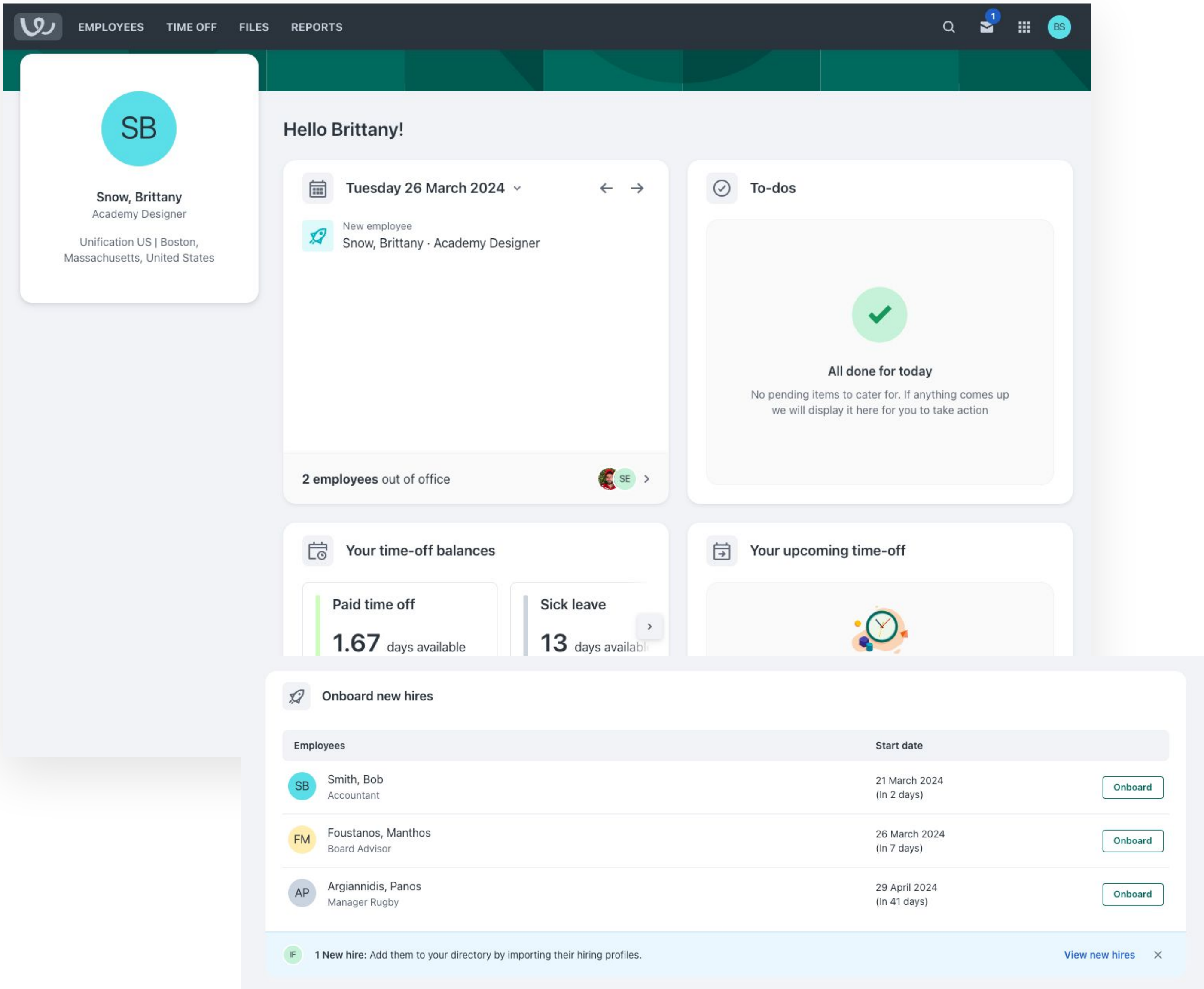
Note: you will also receive an email about the new request, but cannot take action on the request within your email client.

11. View the Homepage

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

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

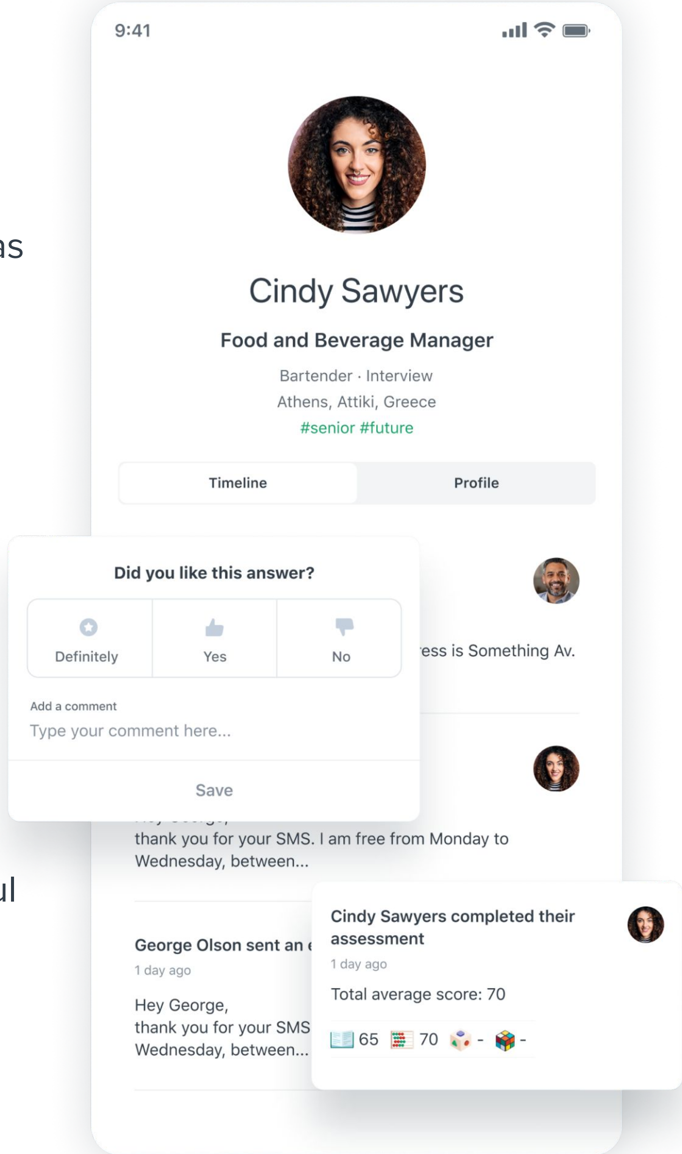
- **Personal Information:** View your employee profile by clicking the large user icon
- **Calendar:** View Events and Celebrations for your company for the current calendar day
- **To-dos:** Take action for employee profile updates, time-off requests or signatures
- **Time off:** View your time-off balances and upcoming time-off
- **Onboarding**: Start onboarding or view new hires



12. Mobile app

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

- View employee profiles
- Search/filter employees
- Contact employees via phone, message, or email
- Approve/reject profile change requests
- Sign documents
- Approve/Reject time-off requests
- Get notified when a time-off request has been approved
- Get notified when your employee profile has been published
- Request time-off
- Cancel an upcoming request
- Approve/ Reject time-off requests
- Get a response to a time-off request (in Inbox)
- See your upcoming time off in the dashboard



Available for HR Admins, Line Managers, and Employees! The Workable app is especially useful for Time-off requests and management!

13. FAQs

How do I implement employee onboarding and management features?

Check out our implementation guide for suggested steps.

How can I add a section to a custom template?

The section needs to first be added to your default template. Once the section is added to the default template, use the "Edit" button to adjust the section to be "Hidden" in the default template. You can now configure your custom template for the section to be "Mandatory" or "Optional."

Which employees will be visible under the Pending tab?

Employees ready to be onboarded will be visible under the Pending tab only if the below are true:

1. The employee profile is **Draft**.
2. The employee's start date is after two days or later from today's date.

Who can view the onboarding page?

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.

Do I have to separately invite each employee on the Account Members page?

Enable the auto-join feature to allow anyone with an email address that matches your company's web address to join your Workable account as a Standard member without an invitation. Read more about inviting new employees to Workable.

Is it possible to give access to employee management without recruiting member access?

Yes, you can set your employees' recruiting access to "No access" if they aren't involved in recruiting.

Can employees view files, employee directory, or org chart without Employee Management Access?

No. Employees must become a Workable member and have at least Standard Access in Employee Management to view files, employee directory, or org chart.

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"