



Line Manager User Guide

Learn to take action as a line manager
with employee management features
in Workable

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1. Actions overview

As a **line manager**, you are able to do everything that an [employee](#) can, plus:

- [Edit your employee profile](#) and those in your reporting line.
- View draft and inactive employee profiles of your reporting line within the **People Directory**.
- Track onboarding for employees on your reporting line (including all direct reports of your direct reports).

Note: Fields not visible while editing can only be edited by HR administrators.

Adams, Okey
Senior Account Executive (Full-Time) in Account Executive

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Actions ▾
Updates (0)

Information Files

PERSONAL JOB COMPENSATION & BENEFITS LEGAL DOCUMENTS EXPERIENCE EMERGENCY

Basic

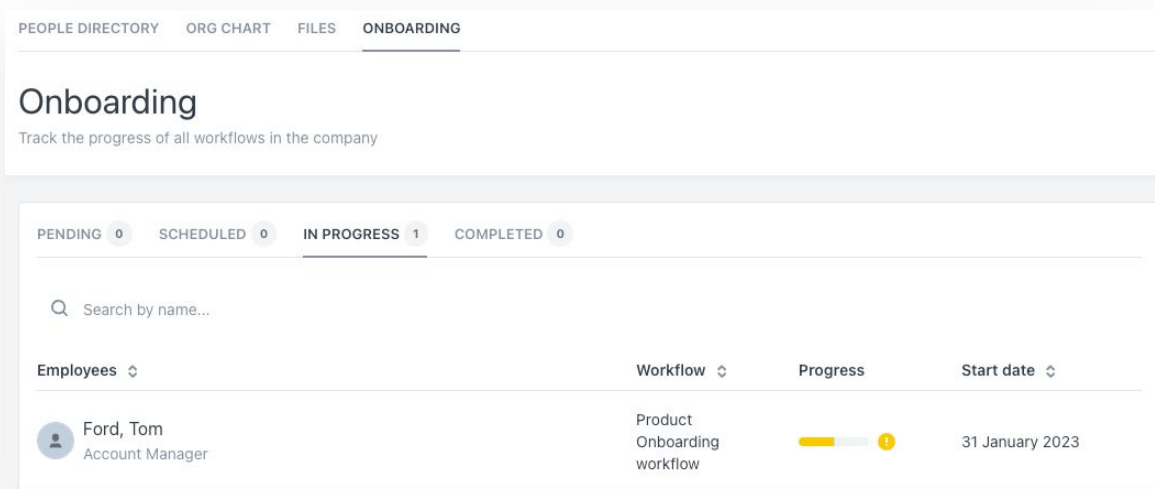
First name Okey	Middle name -	Last name Adams
Preferred name -	Employee ID 41	Status Active

2. Track onboarding

As a **line manager**, you can track onboarding for employees on your reporting line (including all direct reports of your direct reports).

- Navigate to the [onboarding dashboard](#) and click the **In progress** tab.
- A **progress bar** will show the % of tasks completed. There will be an alert displayed if the Start date is in less than 5 days and employee tasks have not yet been completed.

Note: To stop or edit an employee's onboarding, contact your HR Administrator.





PEOPLE DIRECTORY ORG CHART FILES **ONBOARDING**

Onboarding

Track the progress of all workflows in the company

PENDING 0 SCHEDULED 0 **IN PROGRESS 1** COMPLETED 0


Search by name...

Employees	Workflow	Progress	Start date
 Ford, Tom Account Manager	Product Onboarding workflow	<div style="width: 50%;"><div style="width: 50%;"></div></div> 	31 January 2023

Onboarding dashboard tabs

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

- **Pending:** Draft employees pending to be onboarded (i.e. no onboarding workflow assigned)
- **Scheduled:** Employees that an HR Admin has 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.
- **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 employees displayed on the onboarding dashboard will consist solely of those who are in your reporting line, including their direct reports.

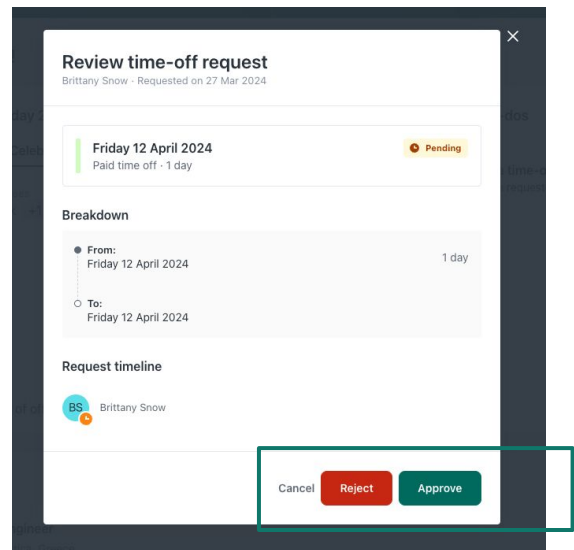
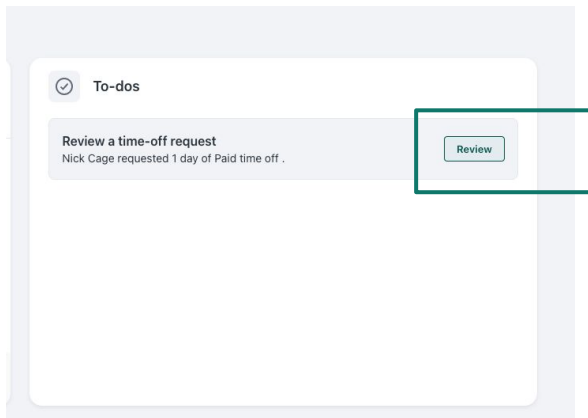


3. Approve/reject time-off requests

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.



You can also view the details of the request in the employee profile.

[View profile](#)



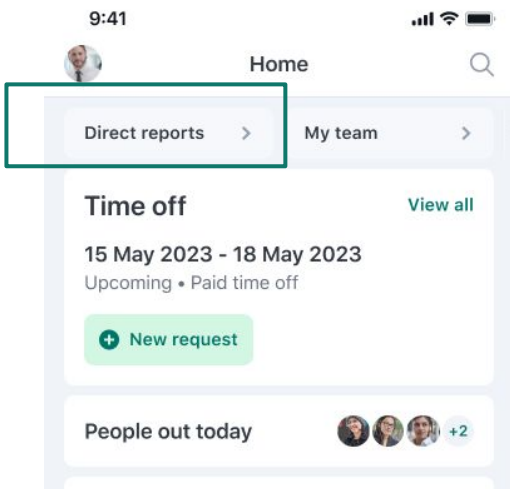
4. Mobile app

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



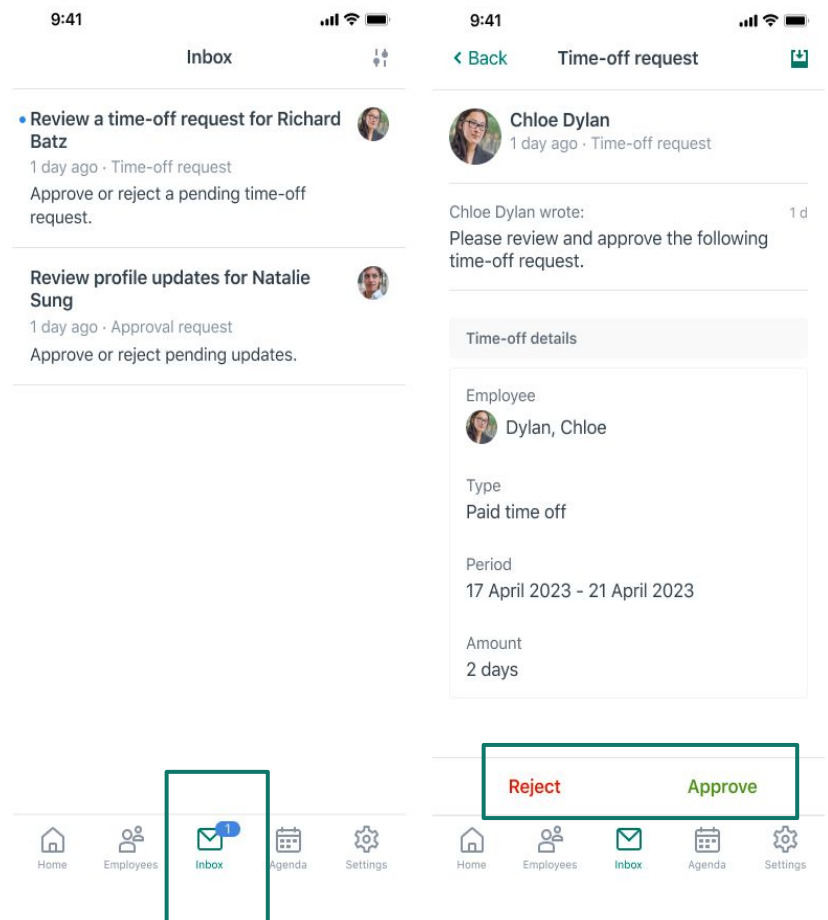
View Direct reports

View all employees reporting directly to you by selecting **Direct reports** on the home page. Tap on any employee to view their employee profile.



Approve or Reject Time off

Review a Time-off request and take action directly on mobile from your inbox.





5. FAQs

If I don't have a direct report, will I see the onboarding tab?

No.

What is a draft employee?

A newly created profile starts as a **Draft** until all mandatory fields are completed and the profile is published. Only draft employee profiles can be onboarded.

What is an inactive employee?

When an active employee is offboarded the profile status will become Inactive. Inactive profiles are read-only with no ability to edit information.

Who can I view in my onboarding dashboard?

The employees displayed on the onboarding dashboard will consist solely of those who are in your reporting line, including their direct reports. **Important note:** An employee will be displayed under the pending tab, only if their start date is after two days or later from today's date.

Can I request time off for my direct report?

Yes. A time off request can be created within the employee profile from line managers and managers above on behalf of their direct reports. In mobile apps, you can request time off only for yourself and not for another employee.



Support when you need it

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

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resources by clicking your
user icon and then “Help”**
