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# Recruiting Admin User Guide

Workflow Best Practices  
For Recruiting Admins



# Basic usage



Learn how to access your account, setup your profile & notifications, use the Jobs page and interact with candidates.

Sign up by accepting the invitation you received or go to [workable.com/signin](https://workable.com/signin) to login to your account (if you have one already).



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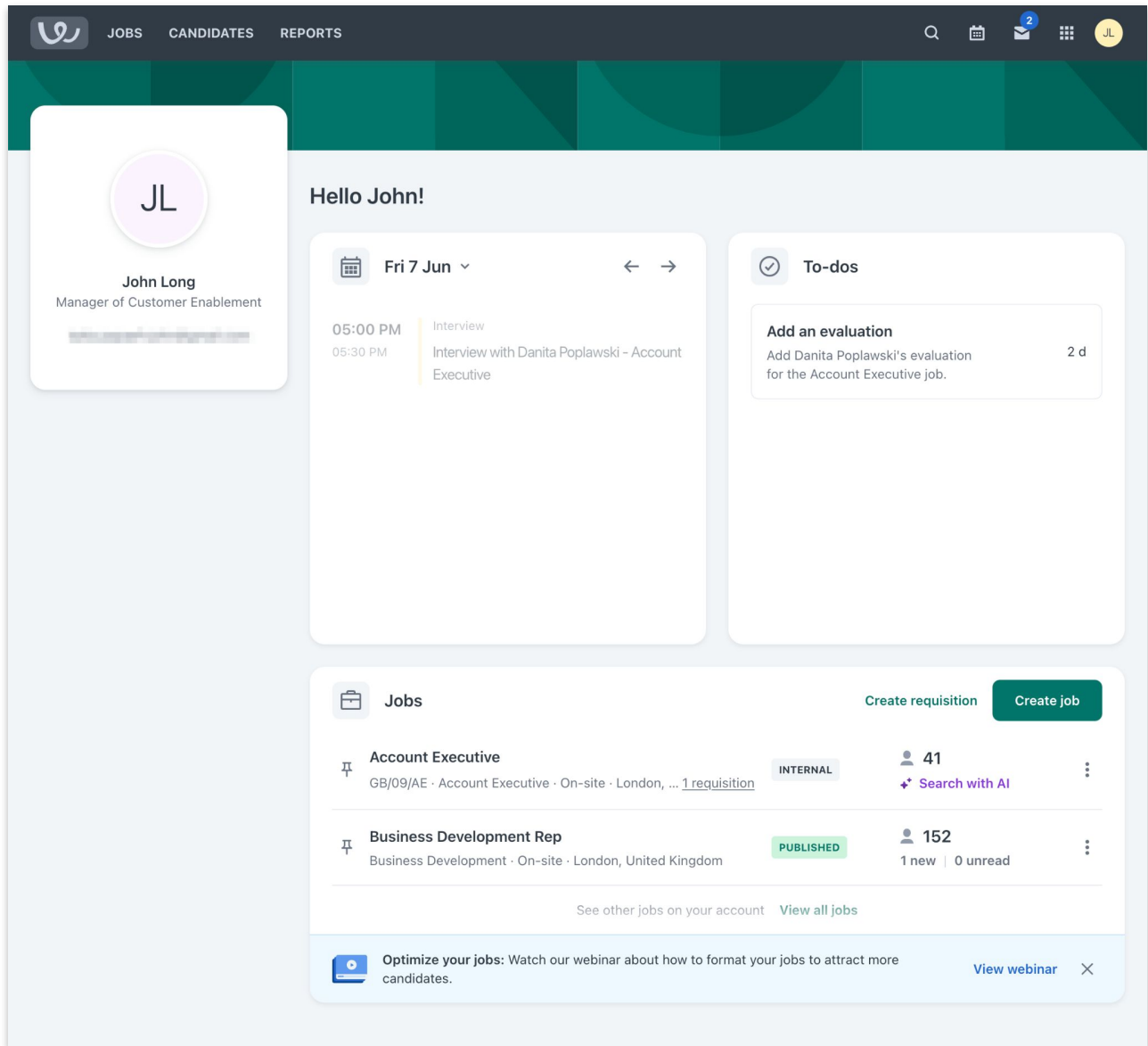


# 1. Viewing the Homepage

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, and job information. You may have additional information on your homepage depending on your permissions. The common information to see are:

- **Calendar:** View Events for the current calendar day
- **To-dos:** Take action to approve jobs, requisitions or offers
- **Jobs:** View the jobs you have visibility for and create jobs or requisitions





# 2. Setting up your account

Once you log in to your account start with setting up your profile, notifications preferences and authenticating your email/calendar (if your company is using a Gmail/Microsoft 365 integration).

## Profile setup

Click your user icon on the upper right, navigate to **Settings** and then **'Your Profile'**. Here you can edit your full name, job title, time zone (this will be used when you attend Workable scheduled events) and upload a profile picture. At the bottom of the page under Credentials you can connect additional apps (Zoom, LinkedIn etc).

## Notifications & availability

Next, navigate to Settings > **Your preferences**. Here you can add a personal signature that will be included to all emails sent via Workable. You can also manage your own email notification preferences for email and/or mobile.

Make sure you add your interview availability by selecting the days and timeframes you are available. This (together with your timezone) will be used as your default availability while using self-scheduling for events.

## Authenticate your email/calendar

If a Workable administrator has enabled the **Google or Microsoft 365 Outlook integration** for your company's account, you'll still need to authorize your own Google/Outlook account in order to use it for emails/events.

This will enable other users to more easily schedule interviews on your behalf or provide the option to have candidates self-schedule events based on your availability in your calendar.

To authenticate your account, click on the email and calendar icons and follow the instructions in the pop-up window. This is a one time authentication process so you will be requested to do this only once (when you try to send an email/event through Workable).

The screenshot displays the 'NOTIFICATIONS' settings panel on the left and an authentication pop-up on the right. The notification panel lists categories like 'Comments', 'Evaluations', and 'Candidates' with their respective notification preferences for Email and Mobile. The authentication pop-up is titled 'Authenticate your Google account' and includes a 'Move to Hired' button and an 'Authenticate your account' button.

Category	Notification Description	Email	Mobile
Comments	There are new comments on candidates you're following	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Your name is mentioned in a comment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Evaluations	Candidates you're following are evaluated	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Your name is mentioned in an evaluation	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Candidates	A new candidate applies		



# 3. Using the Jobs page

The Jobs page is where you'll see jobs that your organization is hiring for. If you see a job's 'pipeline' then you're on the hiring team for that job and can review candidates.

## Jobs

Your Workable admins have created recruiting 'pipelines': workflows that your company uses to hire. They always begin with Sourced and Applied stages, where candidates will start their journey.

If you see a job's pipeline then you're on the hiring team for that job. You'll be able to see and interact with those candidates.

If not, then it's likely you aren't involved with the hiring for that job. However, you can request access to the candidates by hovering on the job and clicking the 'ask to join' button.

Click on a pipeline stage to see the candidates in that step of the process.

## Inbox & Agenda

The inbox works like a 'to do' list. You'll see notifications about candidates that need your attention. These include items like: candidate feedback where your name is mentioned, offer letter approval requests, RSVP options for interviews and more.

Access the agenda through the calendar icon at the top of Workable. The agenda has upcoming and recent interviews you're involved with. This is the easiest way to access candidate information before an interview, or to leave an evaluation after.

## Search

Use the search in the upper right to look up candidates. Search by name, headline or any information in their resume.

## Workable Academy [↗](#)

Create a new job

JOB'S HIRING PLAN

🔍 Start typing to search jobs...

All departments ▾ All locations ▾ No group applied ▾ [Include draft job](#)

★ **Account Executive** Account Executive · London, United Kingdom · 2 requisitions

Find Candidates

Published ▾



4 Sourced

18 Applied

3 Phone Screen

3 Assessment

3 Hiring Manag...

- VP Interview

3 Offer

3 Hired

✓ Published on your [careers page](#) and 11 free job boards

Candidates: 41 total · 37 active in pipeline · Last candidate: on May 3 2023



# 4. Creating a job

As a Recruiting Admin you can publish jobs **only** for your assigned department(s)/location(s). From the Homepage or Jobs page, click [Create A New Job](#).

[Draft] Customer Service Manager ▾

Preview job Save draft Publish ▾

Job details Application Form Find Candidates Team Members Workflow

## Job Details

In the job editor, navigate through the tabs at the top from left to right to complete the setup for your job. You can save drafts and even make changes after publication. Fill in the job details or generate your job description with AI.

## Application Form

Customize the application form with questions relevant to the specific job. Click the Publish button when you're ready to advertise the job. Jobs can be set to "Internal" if you don't want to publish yet. You can unpublish and republish jobs any time.

## Find Candidates

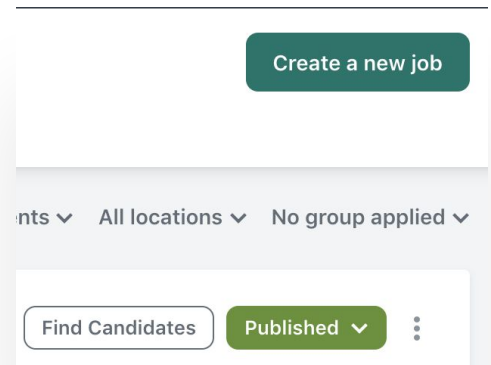
Under Find Candidates, choose the job boards you want to post on, and select paid/promoted post options. Nurture the job over time through this tab.

## Team Members

Add the job's hiring team. Users who are added to this tab will be able to see candidates and help hire for this job.

## Workflow

The Workflow tab is used to choose a pipeline and add assessments or video interviews.



[Draft] Marketing Manager ▾

The Job Tell applicants why it's great to work at Stark Industries. Application Form Design the application form for this role. Find Candidates Post on job recruiters

### Job title and Department details

\* Job title Marketing Manager

Department Marketing Internal code

### Location

Country United States ▾ Region, City or Zip code Boston, MA 02127, United States



# 5. Requisitions

If your company’s account uses the Hiring Plan feature you may be required to create or manage requisitions. As a Recruiting Admin you can view requisitions of jobs you are on the hiring team, as well as any requisitions you have created.

## Create and approve requisitions

If your company’s account uses Hiring Plan, you or your HR team will need to create a requisition before you start recruiting for a position.

To view or create requisitions go to the Hiring Plan page. When creating a req, link it to a new or existing job and fill out the required fields.

The req is sent through your company’s approval process to be reviewed by the stakeholders. If you are the one who created the req you will be notified via email if it’s approved/rejected; if rejected there will be a note, explaining what should be updated.

If you are involved in the approval process you will receive an approval request email and an Inbox notification with a call to action. You can find your requisitions and any that need your approval under the respective tabs on your Hiring Plan page (My requisitions, Need approval tabs).

## Manage requisitions

When you start the recruitment process, the requisition needs to be opened. This is so that 'time to fill' can be accurately tracked.

The Requisition Owner should go to the Hiring Plan page and open the requisition by clicking the settings cog. This indicates that recruitment has begun. If you plan to advertise publicly for the job, this is the best time to publish the job as well.

The hiring team should follow the recruiting process as normal, interviewing and assessing candidates.

A requisition is filled when a candidate moves from the ‘Offer’ pipeline stage to ‘Hired’. When updating this status, the user who moves the candidate will be prompted to enter the agreed salary and start date. This data feeds back into your reporting page.

August 2019	FILLED	⋮
September 2019	APPROVED	⋮
October		<ul style="list-style-type: none"> <li>View requisition</li> <li>Open requisition</li> <li>View associated job</li> <li>Edit requisition</li> <li>Clone requisition</li> </ul>
October		





# 6. AI Sourcing & Screening Tools

Utilize Workable’s built-in AI features to source and screen candidates.

## Sourcing with AI Recruiter

Workable's AI Recruiter recommends ideal passive candidates for your job based on its description. Easily review their fit summary and seamlessly add them to your candidate list.

Click **Add candidates** and then **View passive candidates** to see all profiles we have selected for the job in a new modal. After reviewing the profiles, you can:

- Add them to your pipeline individually from the option at the upper right of the profile you are currently viewing.
- Add them to your pipeline in bulk; just tick the profiles from the list and a button will appear at the bottom to add the selected profiles to your pipeline.

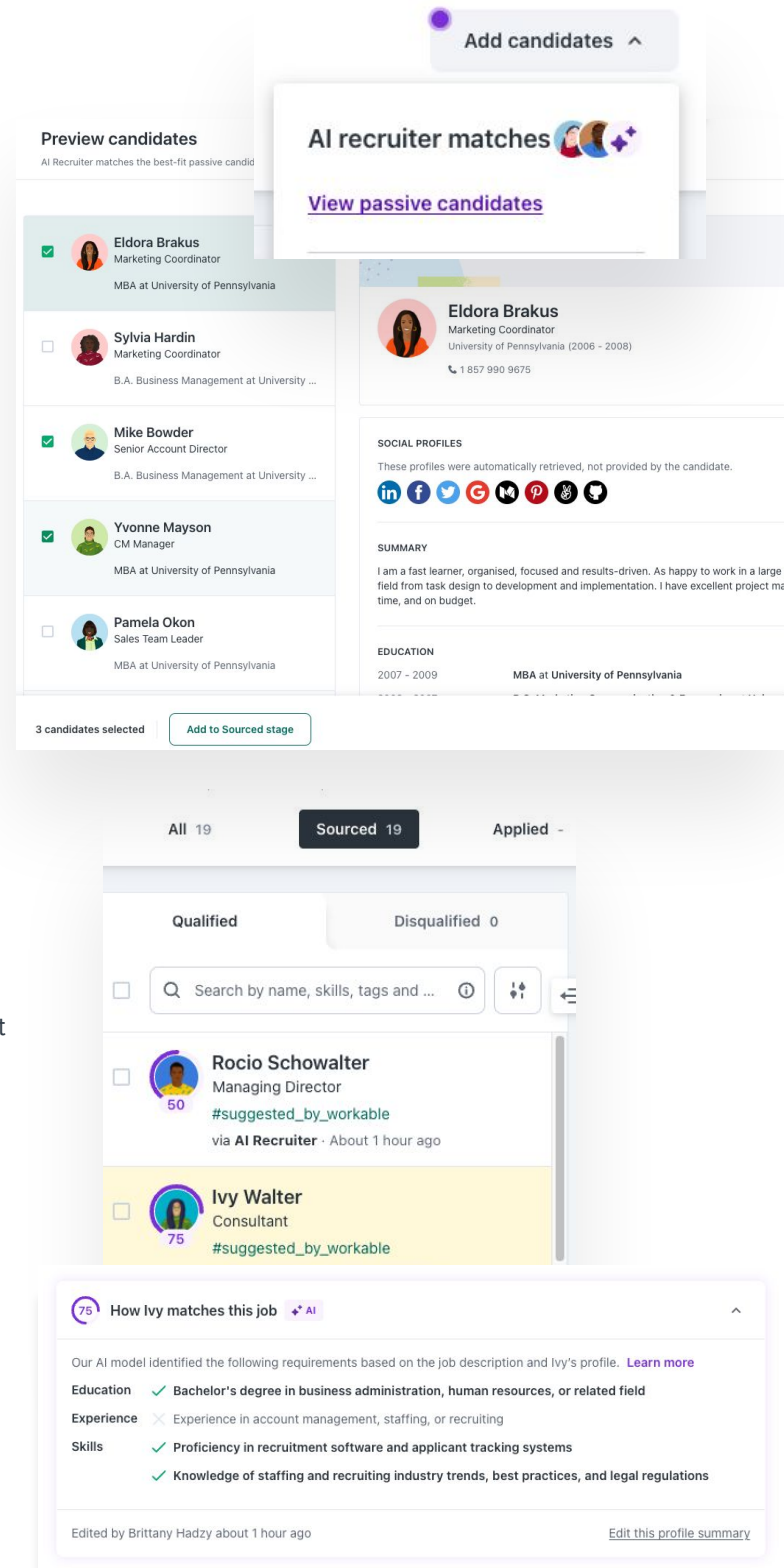
Added profiles will be removed from the list and will be sent to the Sourced stage of your job. Candidates will be automatically tagged with "#suggested\_by\_workable" so you can easily differentiate those you've uploaded yourself from AI Recruiter results.

## Screening Assistant

The Screening assistant uses AI technology to review and shortlist candidates at the Sourced and Applied stages of your recruiting pipeline.

AI analyzes job descriptions to extract and rephrase hard skills concisely. These matching criteria are displayed at the top of the candidate's profile and in the candidate avatar. You can sort candidates by Best match under the 'Sort & filter' menu to identify strong matches or those not meeting basic requirements.

Override AI decisions by using the **Edit this profile summary** functionality. Tick or untick the criteria you would like to show as matching for the specific candidate. Upon saving, the name of the last user that performed the edit/review will be displayed.





# 7. Interacting with candidates

From the main Jobs page, click on any stage in a job to view its candidates. Select a candidate to view the candidate profile and toolbar.

## Mail

Send an email to the applicant. When a candidate replies you'll get a copy to your email as well as your Workable inbox. You can reply from your regular email inbox. Email threads will be logged in the candidate's Timeline in Workable automatically. **Note:** As a Recruiting Admin you can save templates when sending an email only for your assigned department(s)/location(s).

## Schedule

When it's time to talk or meet with a candidate, you can send a calendar invite right from Workable. Add attendees, set the location, date, and time. **Note:** As a Recruiting Admin you can save templates when sending an event only for your assigned department(s)/location(s).

## Comment

Leave an internal note on a candidate's profile. Use this option if something stood out on their resume or to have another team member check out the profile.

## Evaluate

You can evaluate a candidate during each stage of the pipeline. Multiple people can provide evaluations. Leave ratings of: Definitely / Yes / No

## Disqualify

If a candidate doesn't seem like a good fit for the role, you can Disqualify them. Disqualifying will help you manage your workload more easily. Candidates are not automatically notified when you disqualify them.

## Change stages

Move a candidate to the next stage in the hiring pipeline (you can also use the dropdown arrow to move them to any stage, backwards or forwards).

## More options

Click the three dots for extra candidate management options.

The screenshot displays a candidate profile for Nick Bojovic, Marketing Manager. The profile includes contact information, location, and tags. Below the profile, a communication history is shown, with a selected event titled "Executive Interview" scheduled for Sunday, May 14, 2023, from 06:01 AM to 06:31 AM. The event attendees are Nick Bojovic (Candidate) and Eduardo Vallente. The location is 79 Madison Avenue, New York, NY 10016, United States. A toolbar at the bottom of the communication card offers various actions: a three-dot menu, email, calendar, chat, share, a hand icon, and a "Move to Phone Screen" button.



# 8. Viewing a candidate profile

Under the toolbar, you'll see a panel with some basic candidate details. Every candidate in Workable has a candidate profile. The different tabs are where you can review a candidate's application details and track team interactions.

## Profile

The section includes information provided by the candidate when they applied for the job. If they uploaded a resume it will be here. Any custom fields will also be included. Candidate answers to questions you added to the application will be found here as well. If the candidate was referred then referrals information will be listed.

## Timeline (all items)

The Timeline provides a chronological view of all activities and interactions. This includes emails sent, interviews scheduled, notes left, and any other significant events. A descriptive icon that matches the toolbar will be visible next to each item for easier distinction.

## Communication

The **Messages** tab includes emails and text messages between the hiring team and the candidate, including messages sent using automated actions and esignature requests. All scheduled event information will be recorded in the **Events** tab.

## Review

The Review tab this includes **Evaluations, Assessments, Video interviews, External feedback, Background checks,** and **Reference check**, each with their own respective subtabs, when applicable.

## Comments

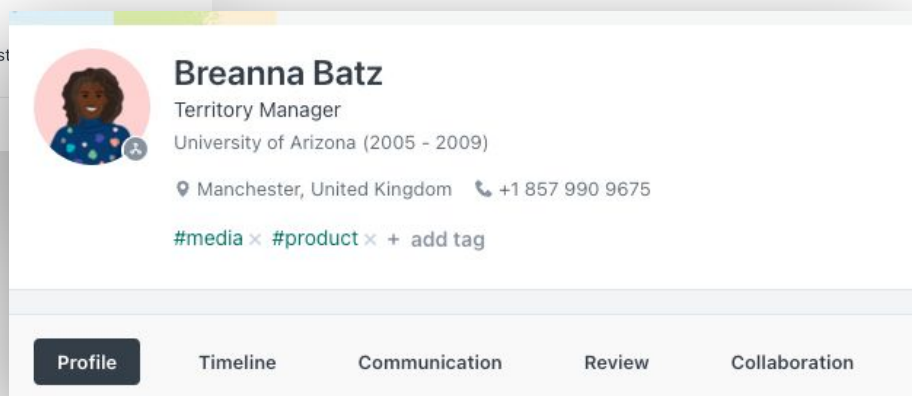
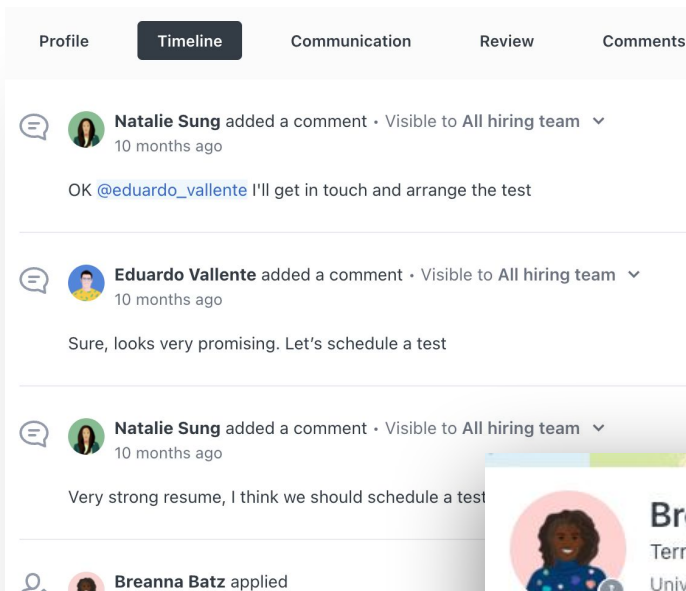
Comments left for the candidate will be listed here. Candidates will never see these comments. They are only for internal use.

## Offer

This tab will appear if you have sent or completed an offer e-signature request to the candidate. Offer audit trails will also appear here.

## Files

If a file was attached to a comment or email then a Files tab will be displayed. E-signature completion and offer acceptance files will also appear here.



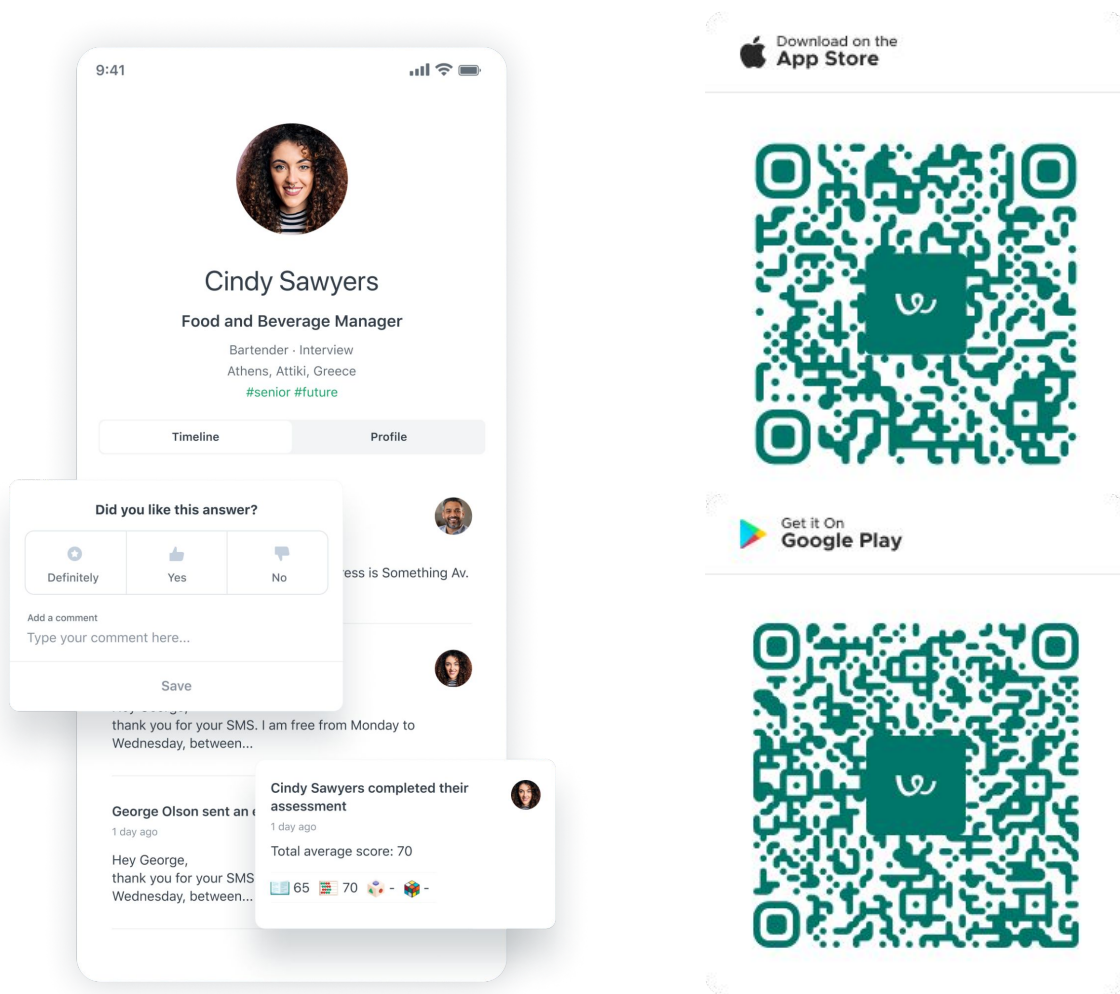
# 9. Workable Mobile

Mobile minded? Use the Workable app for all your candidate review and tracking.

Download the Workable mobile app for free on iOS and Android phones to:

- Review resumes and profile info
- See upcoming events
- Complete evaluations/interview scorecards

You'll receive notifications when something requires your attention or you need to take action with a candidate.





# 10. Pulling reports

Showcase results and check the progress of your recruiting with Workable reports. Click on **Reports** to get started.

Reporting Basics



## View a recruiting snapshot

The [Current Pipeline report](#) is your recruiting snapshot. This report shows you what's going on with each job. How long has it been open for? Is the pipeline full? You can even break down each position by stage to gather more specific information: Where are the bottlenecks and what are the holdups at each stage? What areas do you need to focus on?

## Explore your recruiting mix

The [Candidate Sources report](#) explores your recruiting mix. It'll tell you where your candidates are coming from as a whole. Which avenues are working and which are not?

## Monitor Time to Hire

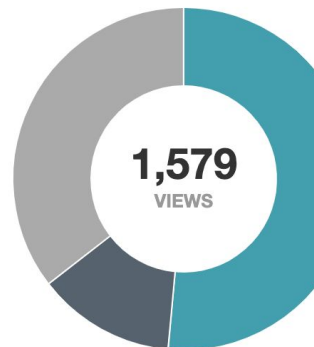
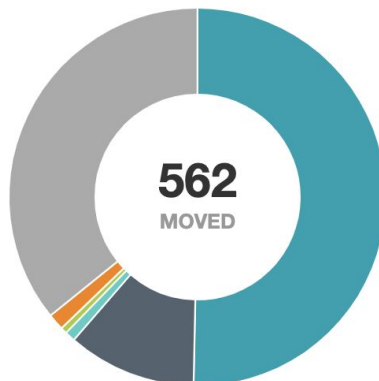
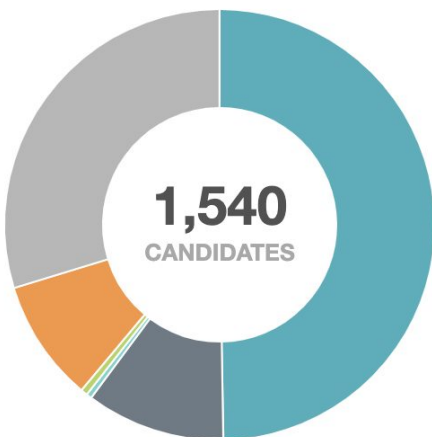
The [Time to Hire report](#) shows how long it takes you to hire for a position, while the [Historic Pipeline](#) shows you why it takes that long.

Review the recruiting pipeline for time sinks and implement process changes if needed.

## Filtering reports

Reports can be filtered by department (including sub-departments), location, job, and date. Keep in mind that for each report the date filter may operate differently. Data shown between different reports may not be comparable.

Check more [here](#).





# Support when you need it

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[help.workable.com](https://help.workable.com)

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[support@workable.com](mailto:support@workable.com)

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**+44 (0) 800 086 8870**

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

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

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