



Standard Member User Guide

Workflow Best Practices
For Standard Members



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 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

The screenshot displays the Workable homepage for a user named John Long. The interface is clean and modern, with a dark green header bar containing navigation links for 'JOBS', 'CANDIDATES', and 'REPORTS'. On the left, a user profile card shows the initials 'JL' and the name 'John Long, Manager of Customer Enablement'. The main content area is divided into several sections: a 'Hello John!' greeting, a calendar view for Thursday 27 June 2024 showing 'No events', a 'To-dos' section showing 'All done for today', and a 'Jobs' section listing two published positions: 'Customer Support Representative' and 'Director of Finance'. A 'Create job' button is visible in the top right of the Jobs section. A footer banner promotes a webinar on optimizing jobs.

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 and event buffers) 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).

NOTIFICATIONS

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

...     Move to Hired ▼



Authenticate your Google account

To check team availability and schedule events faster, authorize Workable to access your corporate Google Calendar.

[Authenticate your account](#)



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. AI Sourcing & Screening Tools

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

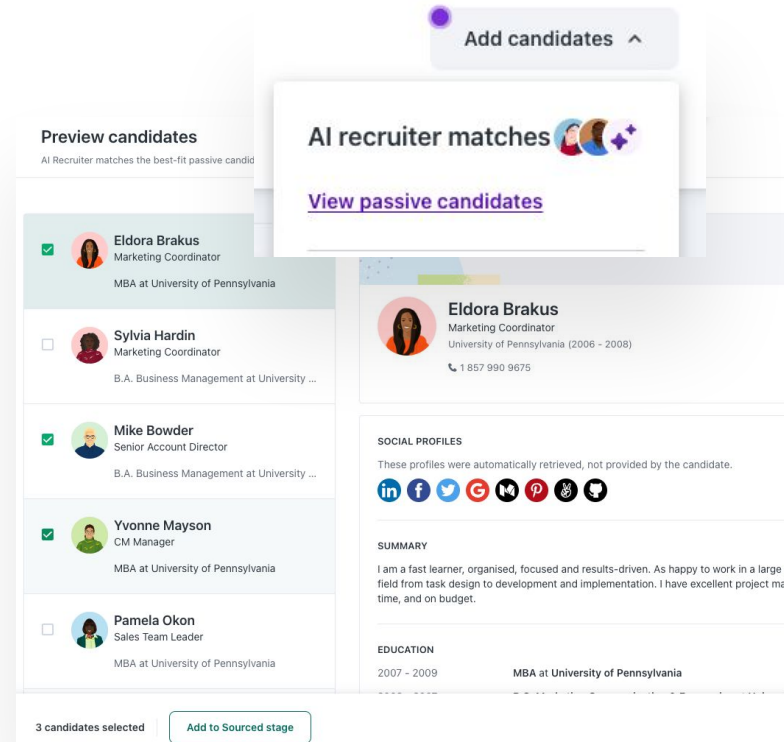
Sourcing with AI Recruiter

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.

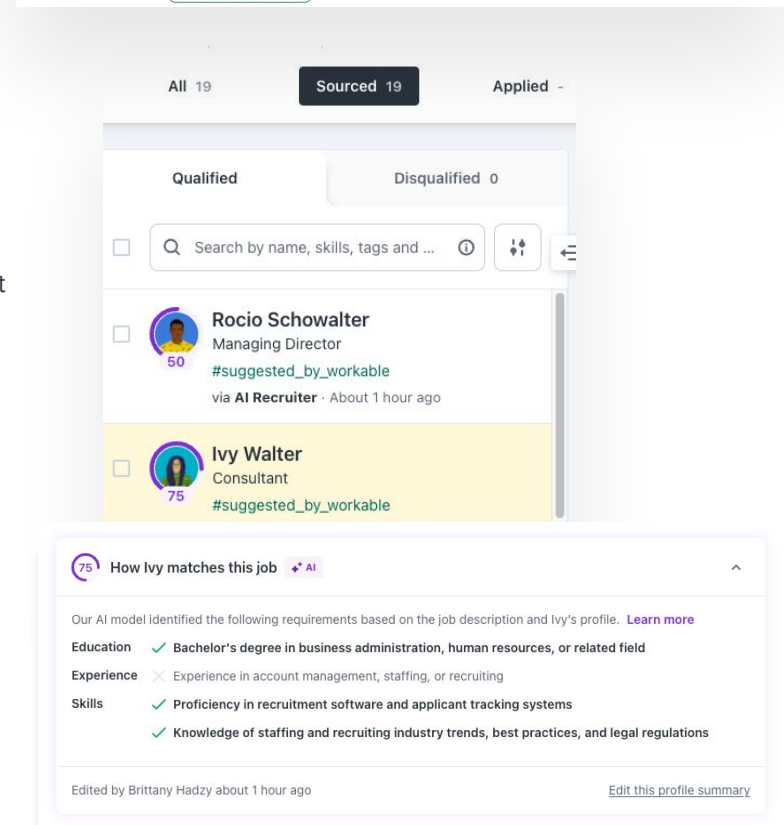


Screening Assistant

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.





5. 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.

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.

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 shows a candidate management interface. At the top, there are tabs for job stages: 'tag...', '6 Executive Int...', '2 Offer', and 'Hired'. Below this is a toolbar with icons for mail, calendar, comment, disqualify, and evaluate, along with a 'Move to Phone Screen' button. The main content area displays the profile of Nick Bojovic, a Marketing Manager. His profile includes his name, title, education (INBETA at University of Southern California), location (Independence, Kansas), and phone number (+1 857 990 9675). He has a 'Following' status and is associated with 'indeed.com'. Below the profile, there are tabs for 'Profile', 'Timeline', 'Communication', 'Review', 'Comments', 'Offer', and 'Files'. The 'Communication' tab is active, showing a message from Natalie Sung scheduling an interview. The message details include the date (Sunday, 14 May 2023), time (06:01 AM - 06:31 AM), attendees (Nick Bojovic as Candidate and Eduardo Vallente), location (79 Madison Avenue, New York, NY 10016), and event title (Executive interview with Nick Bojovic).

6. 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

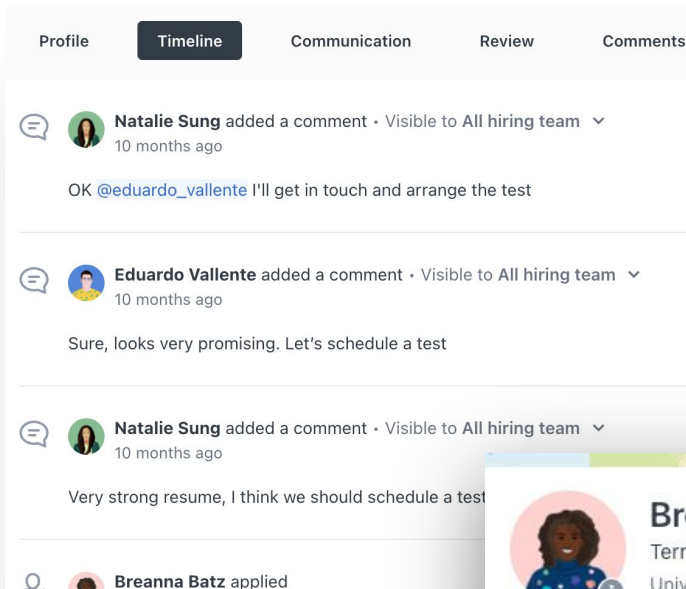
Comments left for the candidate will be listed here. Candidates will never see these comments. They are only for internal use.

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.

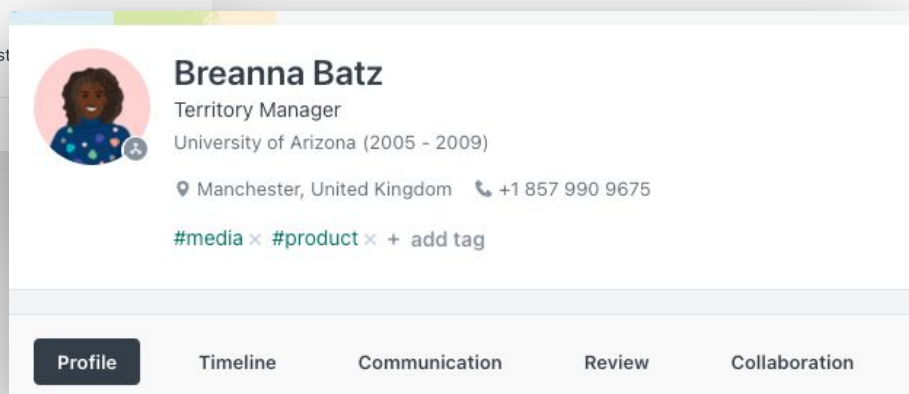
Files

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.



Profile | **Timeline** | Communication | Review | Comments

-  **Natalie Sung** added a comment · Visible to All hiring team ▾
10 months ago
OK @eduardo_valente I'll get in touch and arrange the test
-  **Eduardo Vallente** added a comment · Visible to All hiring team ▾
10 months ago
Sure, looks very promising. Let's schedule a test
-  **Natalie Sung** added a comment · Visible to All hiring team ▾
10 months ago
Very strong resume, I think we should schedule a test
-  **Breanna Batz** applied



 **Breanna Batz**
Territory Manager
University of Arizona (2005 - 2009)
📍 Manchester, United Kingdom 📞 +1 857 990 9675
#media × #product × + add tag

Profile | Timeline | Communication | Review | Collaboration

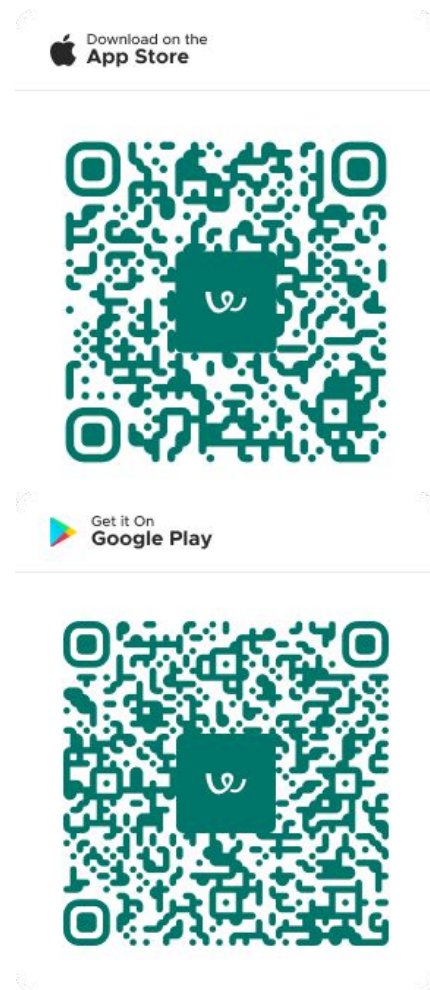
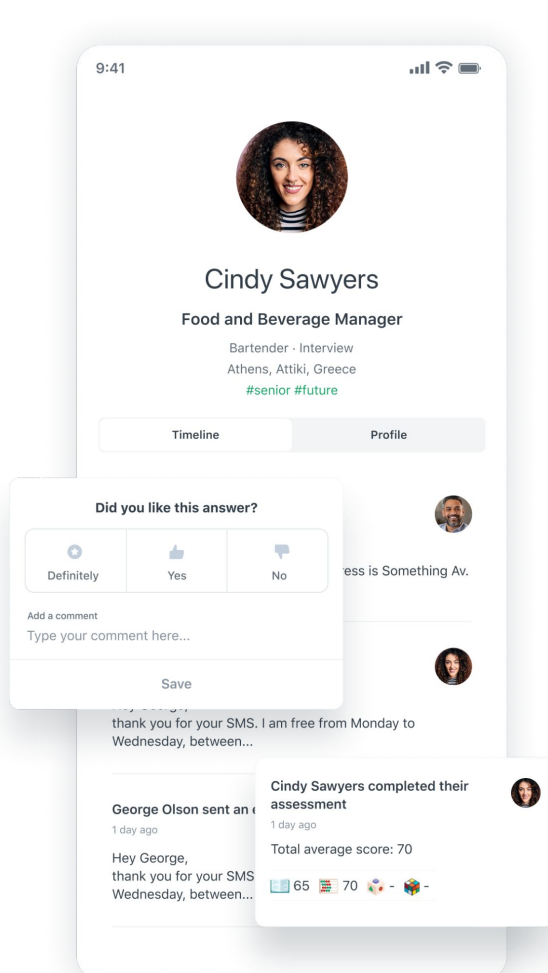
7. Workable Mobile

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.





Advanced usage



Looking for more advanced guidance? Learn how to create jobs, review requisitions and pull important reports.



8. Jobs & requisitions

If you have a more active role in the hiring process you may be required to create jobs and review requisitions (if your company's account uses the Hiring Plan feature).

Job creation

Standard Members cannot publish jobs directly, but can request publication from a Super Admin. Create your job by following the [job board guidelines](#) and make sure you add a full location (even for fully [remote jobs](#)).

Once you click 'Publish' you will be prompted to send a publish request to an admin. The job will be stored as draft until an admin reviews it.


Review requisitions

If your company's account uses Hiring Plan, you may be requested to review a requisition.

If you are involved in the approval process you will receive an approval request email and an Inbox notification with a call to action.

If you reject the request, you can leave a note with the reason for the rejection.

Send a request to publish this job


 Only admins can publish jobs. Choose an admin from the list below to request that they complete this on your behalf.

AP Emma Stone

AA Alex Stone

Send publish request

Send publish request



Natalie Sung · Financial Analyst · less than a minute ago

Natalie Sung asked you to approve the requisition for a Financial Analyst in Los Angeles

✓
✗
📄

REQUISITION DETAILS

| | |
|----------------------|---|
| Code | REQ16 |
| Job title | Financial Analyst |
| Job location | On-site · New York, United States |
| Department | Finance |
| Requisition location | Los Angeles, CA |
| Hiring manager | Alexia Middleton |
| Requisition owner | Brittany Snow |
| Plan date | May 2024 |
| Reason | New Hire |
| Employment type | Full-time |
| Experience | Director |
| Salary range | US\$40,000.00 – US\$60,000.00 per year |
| Approvers | Must be approved by: |
| | <div style="display: flex; align-items: center; justify-content: center;"> KP ? John Long </div> |



9. Pulling reports

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

 Reporting Basics

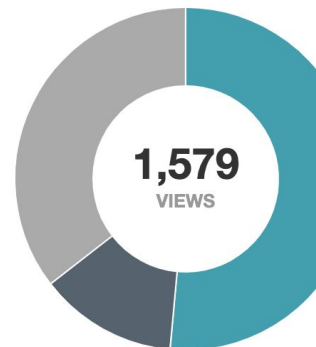
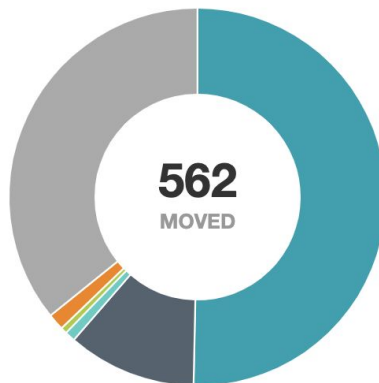
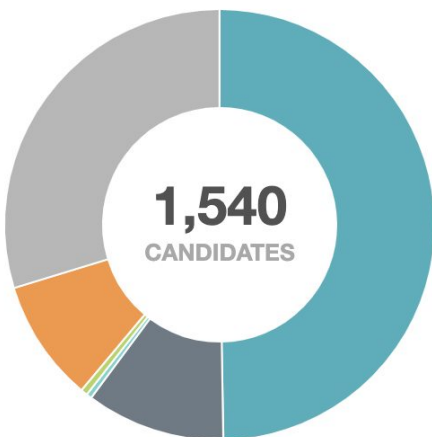


View a recruiting snapshot

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

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”**
