



Workable User Guide



WORKABLE Recruitment workflow

Now your account is set up, you're ready to use the platform!

The current recruitment process will remain the same other than using workable for shortlisting , screening, scheduling and interviewing candidates instead of using LinkedIn, SEEK or BambooHR separately.

It is a centralised system for all applicants which will make tracking candidates so much easier!

As a reminder, here is the current recruitment process and where workable comes in:

1. Approvals/RR form: Follow the current approval process by submitting a recruitment request (RR) through BambooHR.
2. Job Brief: Once approved, The Talent team will schedule a job brief with you to discuss role requirements. (please ensure you have an updated PD at this meeting)
3. Workable & recruitment process: The TA BP will post the job Ad on WORKABLE. All recruitment processes from shortlisting , screening, scheduling and interviewing candidates will be performed on Workable by the hiring manager.
4. Offer: When ready to Offer, move candidate to offer stage on the workflow in Workable.
5. CIF Form: Head back to BambooHR and submit a contract information form for this candidate as per the current process.
6. Contract & Onboarding documentation: P&C team will take over from here with contract and onboarding.

What to expect with this guide?

This presentation deck will give you an overview of you need to know to use the platform.

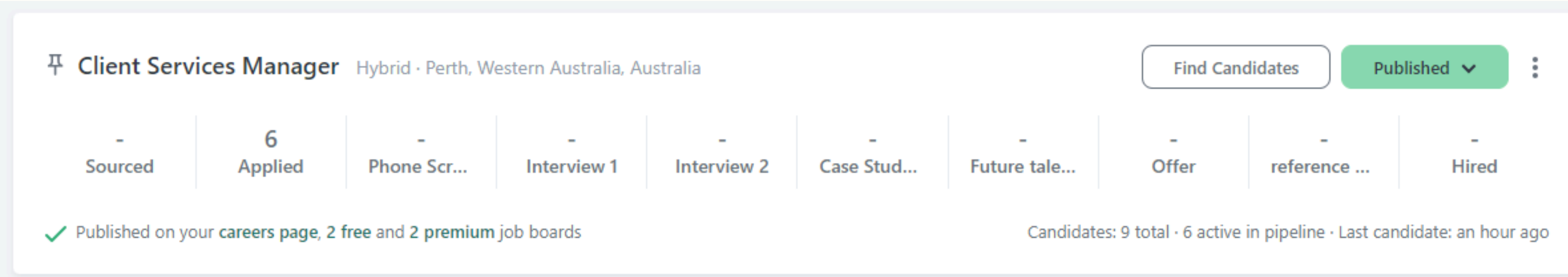
It will take you through:

- viewing the home page
- what details and tabs you can use to view candidate details
- moving candidates through the pipeline
- managing communication between candidates and your team.

You as Hiring manager will own the pipeline with the support from the TA BP.

Other employees can be added to the job if necessary, otherwise it will be private to you and Talent Team.

Home page overview



- This screenshot above shows what your home page will look like. You will only see jobs linked to you and your team.
- Here you can see the stages of the recruiting pipeline of each job you are part of and get a quick overview of how your hiring progress is going.
- See the number of candidates within each stage as they move from Sourced or Applied to Hired.
- Click on any stage in a job's pipeline to easily access the candidates' timelines within that job.

Access key job functions

The screenshot shows a recruitment workflow for a role titled 'Client Services Manager' located in 'Perth, Western Australia, Australia'. The workflow consists of several stages: Sourced (0), Applied (6), Phone Screen (0), Interview 1 (0), Interview 2 (0), Case Study (0), Future talk (0), Offer (0), reference check (0), and Hired (0). A green status button labeled 'Published' is visible, along with a 'Find Candidates' button. A green circle highlights a three-dot menu icon next to the 'Published' button. Below the workflow, a green checkmark indicates the job is 'Published on your careers page, 2 free and 2 premium job boards'. A summary at the bottom states 'Candidates: 9 total · 6 active in pipeline · Last candidate: an hour ago'.

When reviewing the recruitment workflow for the new role it will look like the screenshot above:

- The new role will be assigned a workflow which is discussed in the job brief with the TA BP and totally customizable.
- The standard workflow process is, Apply -Phone Screen- Interview(s)- Offer - Ref checks - Hired.
- Next to each job's status button, you can find the job dropdown menu.
- Click on the three dots to select key actions for each job, from Previewing the job, editing it, to adding candidates and viewing reports
- All roles can be edited and updated automatically.

This screenshot shows a dropdown menu for a job titled 'Executive Inte...'. The menu is open, displaying several actions: 'Preview job', 'Edit job', 'Archive job' (highlighted in yellow), 'Refer candidates', 'Upload candidates', 'View reports', 'Clone job', and 'Leave job'. The background shows a recruitment workflow with stages like 'Executive Inte...' (6) and 'Off...' (2), and a 'Find Candidates' button. A green circle highlights the three-dot menu icon that triggered the dropdown.

The Pipeline view

- When you click on the job title, you will view all applicants for the open role.
- You can see how many candidates are in each stage of the pipeline under the job title and click on each applicant individually.
- Keep the pipelines updated so that you know who and how many applicants still need to be reviewed or moved to the next stage of the process.

The screenshot displays the 'Client Services Manager' pipeline view. At the top, the job title 'Client Services Manager' is shown with a location filter 'Hybrid · Perth, Western Australia, Australia' and an 'Add candidates' button. Below this, a horizontal bar indicates the number of candidates in each stage: All 7, Sourced -, Applied 7, Phone Screen -, Interview 1 -, Interview 2 -, Case Study/as..., Future talent ..., Offer -, reference che..., and Hired -. The main content area is divided into three sections. On the left, a list of candidates is shown, with tabs for 'Qualified' and 'Disqualified 3'. Each candidate entry includes a checkbox, a search bar, a profile picture, a name, a source (e.g., 'via linkedin.com premium' or 'via seek.com.au premium'), and a timestamp. The middle section shows a detailed view of a candidate's profile, including their name, location, education, and a 'Move to Phone Screen' button. The right section shows a 'Candidate overview' panel with a 'Latest message' from Laura Griffin. At the bottom, a 'Details' section provides an AI-generated match score of 100% and a list of requirements based on the job description and the candidate's profile.

Client Services Manager Add candidates ▾

Hybrid · Perth, Western Australia, Australia

All 7 Sourced - **Applied 7** Phone Screen - Interview 1 - Interview 2 - Case Study/as... - Future talent ... - Offer - reference che... - Hired -

Qualified Disqualified 3

☐

☐ via linkedin.com premium · 9 minutes ago

☐ via linkedin.com premium · About 2 hours ago

☐ Customer Service Office at Toll dnata via seek.com.au premium · 1 day ago

☐ Contract Casual at DUNNS HERBAL CLINIC via seek.com.au premium · 2 days ago

☐ Account Manager at Pioneer Credit via seek.com.au premium · 3 days ago

☐ Recruitment Consultant at Verse Group via seek.com.au premium · 3 days ago

Door Dash (2021 - now) · Federation University Australia (n/a - 2016) via linkedin.com premium

+ add tag

Profile Timeline Communication Review Comments

100 How matches this job

Our AI model identified the following requirements based on the job description and saikiran yadav's profile. [Learn more](#)

Education Tertiary qualified

Experience Experience in Event or ticketing roles

Skills Understanding or ability to learn ticketing systems and processes

[Edit this profile summary](#)

Details

Actions completed

Access candidate profiles

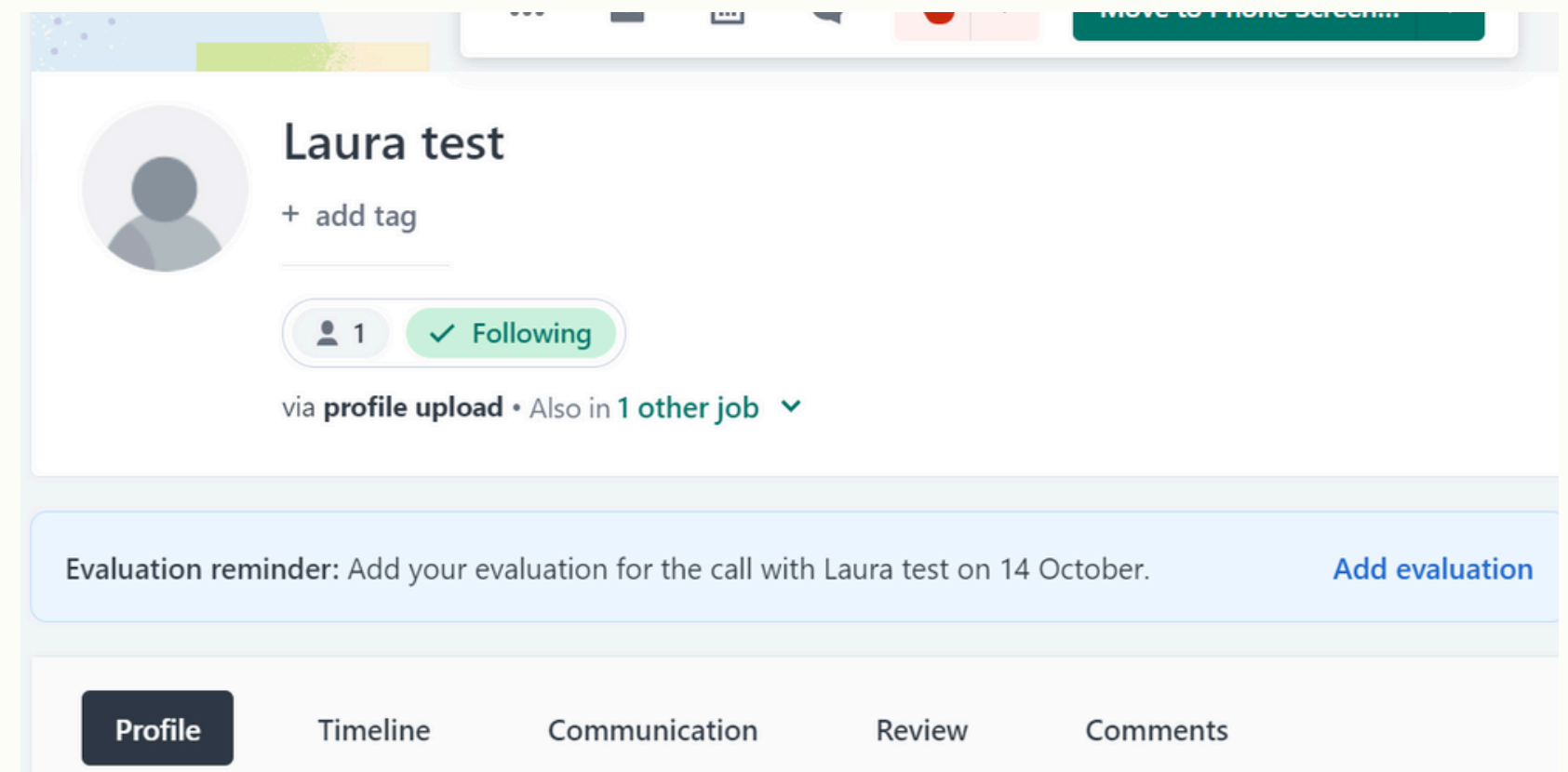
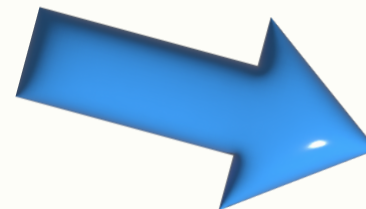
Every candidate in Workable has a candidate profile.

This is where you can review a candidate's resume and application details. It's also a place for actions add/view comments, send emails, invite candidates for interviews, or move them on to the next stage in the pipeline.

Profile will show you the candidate's resume and answers to standard questions: salary, notice etc.

Communication will show all emails/ messages sent to the candidate.

Comments show all comments you have made on the candidate (candidate has no visibility of them)



Manage candidates through the pipeline

Director of Finance

US/4/HAM · Finance · On-site · New York, United States

Add candidates

All 67

Sourced 11

Applied 24

Phone Screen 14

Video Interview 2

Assessment 10

Hiring Manag... 4

Executive Int... -

Offer 1

Hired 1

QUALIFIED 2

DISQUALIFIED 0

Search by name, skills, tags and ...

Jay Botha

Account Management Director

#media #project_manager #manager

via twitter.com · 5 months ago

Marian Von

Client Relationship Executive

#social_media #ecommerce

via twitter.com · 5 months ago

John Terry

Business Development Manager

#digital_marketing #node

via careers page · 5 months ago

Rose Deckow

Brand, Advertising and Marketing Communic...

#it_director #ae #strategy

via monster.com · 5 months ago

Jay Botha

Account Management Director

University of Arizona (2005 - 2009)

Delaware, United States +1 857 990 9675

#media #project_manager #manager + add tag

Profile

Timeline

Communication

Review

Comments

Details

SUMMARY

I am an experienced, organised and focused manager with a background in on and offline services. Highly motivated, I love learning new technology and sharing that knowledge to nurture and enhance the skills of the team.

EDUCATION

2005 - 2009

B.A. Business Management at University of Arizona

Candidate overview

Other job

Jay Botha is also in the following job:

Financial Analyst

Finance · New York, United States

Phone Screen · 4 months ago

Latest comments

Natalie Sung

5 months ago

OK @eduardo_vallente I'll get in touch and arrange the call

Eduardo Vallente

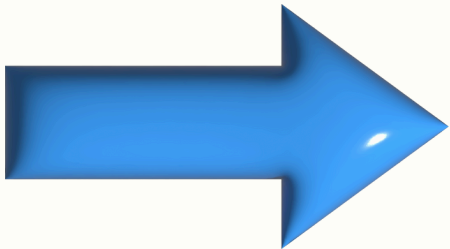
5 months ago

Sure, looks very promising. Let's schedule a phone interview

Latest messages

4 months ago

We would highly recommend Watching this short video for a step-by-step visual of how to manage candidates in the pipeline and how to use each feature!



Candidate profile in Pipeline
View overview – Workable
Help

How to filter the applications by specific requirements to make shortlisting easier.

- in the applications list , click the filter tab and choose how you want to shortlist candidates based on the application questions eg salary/ notice/location etc.

The screenshot displays a recruitment application management interface. The main header shows the job title "Customer Solutions Representative" and location "Ticketek AU · On-site · Sydney, New South Wales, Australia". Below this, a navigation bar includes tabs for "All 624", "Sourced", "Applied 615", "Phone Screen...", "Interview 1", "Interview 2", "Future talent ...", and "Offer".

The left sidebar contains a "Qualified" section with a search bar and a list of candidate cards. A green circle highlights a filter icon in the top right of this section. The main content area shows a candidate profile for "Select Insure Pty Ltd and Laverne Capital (2024 - now) · Jamia Millia Islamia (n/a)" with details on location and contact information. Below the profile, there is a section for "Get more responses with Texting" and a "Text candidate" button.

The right sidebar, titled "Sort and filter", is open and shows options for sorting and filtering candidates. The "Sort by" section includes "Newest in stage" (selected), "Oldest in stage", and "Best match". The "Filter by" section has a "Clear" button. The "Saved candidates" section includes a "Saved only" toggle. The "Candidate location" section has a "Search locations" input. The "Show candidates" section includes "New", "Unread", and "All" buttons. A green circle highlights the "Custom fields" section, which lists several application questions: "Are you comfortable working 4 days onsit...", "Do you identify Aboriginal, Torres Strai...", "Please select the gender you most identi...", and "Reason for disqualification".

Future talent tab OR Talent pooling

🔍 Accounts Payable Officer Finance · Hybrid · Sydney, New South Wales, Australia

Find Candidates Used Confidentially ⋮

845 Sourced	- Applied	- Phone Scree...	- Interview 1	- Interview 2	- Future talent...	- Offer	- reference ch...	- Hired
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✗ This job is not published on your careers page or on any job boards 🔗

Candidates: 1 total · 0 active in pipeline · Last candidate: 15 days ago

With every job workflow there will be a tab called ‘**future talent**’.

This tab is to keep candidates that would be more suitable for the same team or similar role on different level/sal range. It operates as a talent pool that’s specific to the position.

If you feel another live role in the business is more suitable for a candidate you can move them to a different job in the platform by clicking the three dots in the candidates profile and clicking move to job.

⋮ ✉ 📅 💬 🚫 ⌵ Move to Phone Screen... ⌵

Laura test

+ add tag

1 ✓ F

via profile upload

Snooze candidate

Share candidate

Print profile

Copy to job

Move to job

Delete candidate

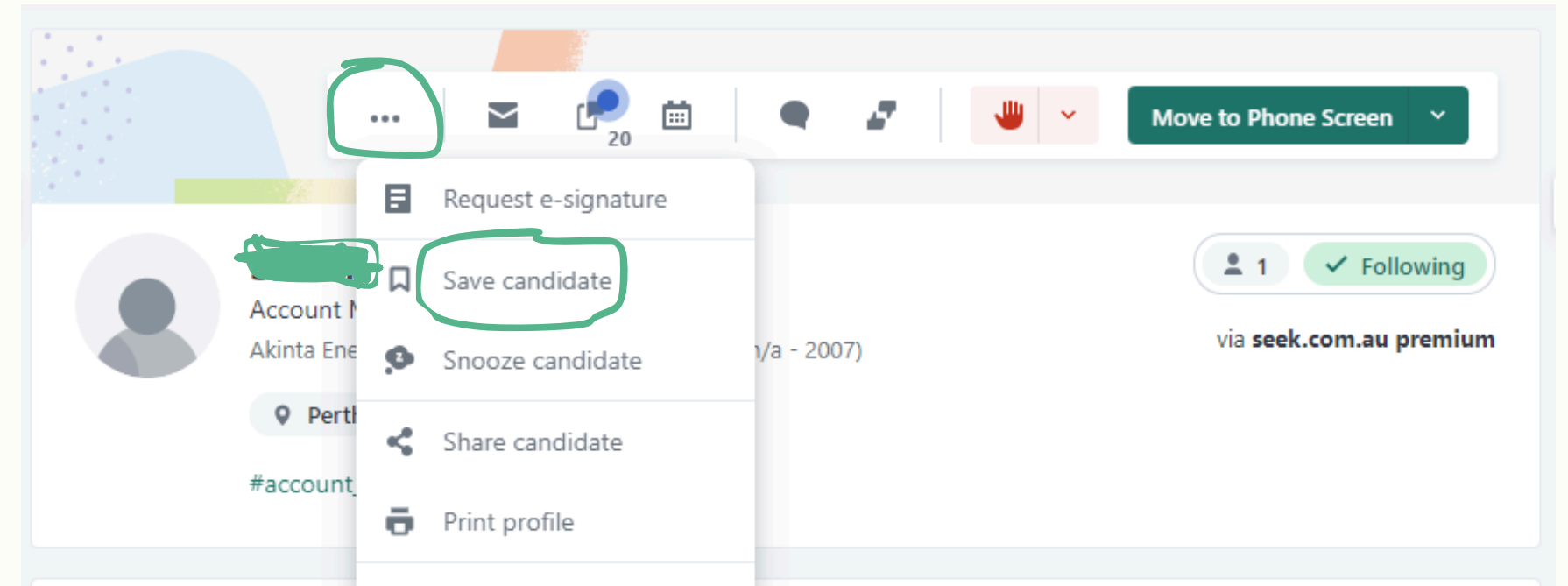
Edit candidate

Evaluation reminder: Add your evaluation on 14 October.

Add evaluation

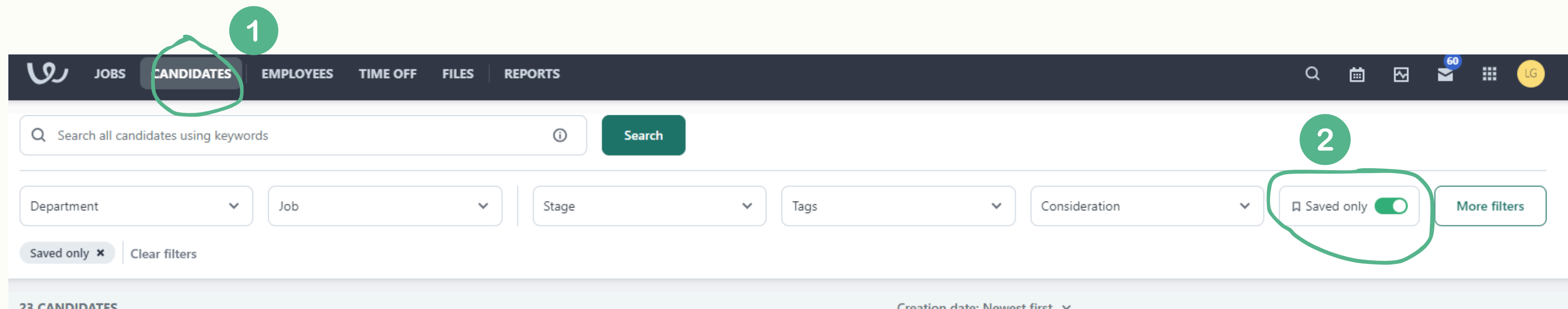
Saving Candidates

Unfortunately on the platform you cannot ‘move’ candidates into the ‘talent pool’, instead if you want to save a candidate for future roles not aligned to the specific live Ad, I would suggest to ‘**save**’ the candidates. This way you can search the Job Ad/ skills and the candidate will appear.

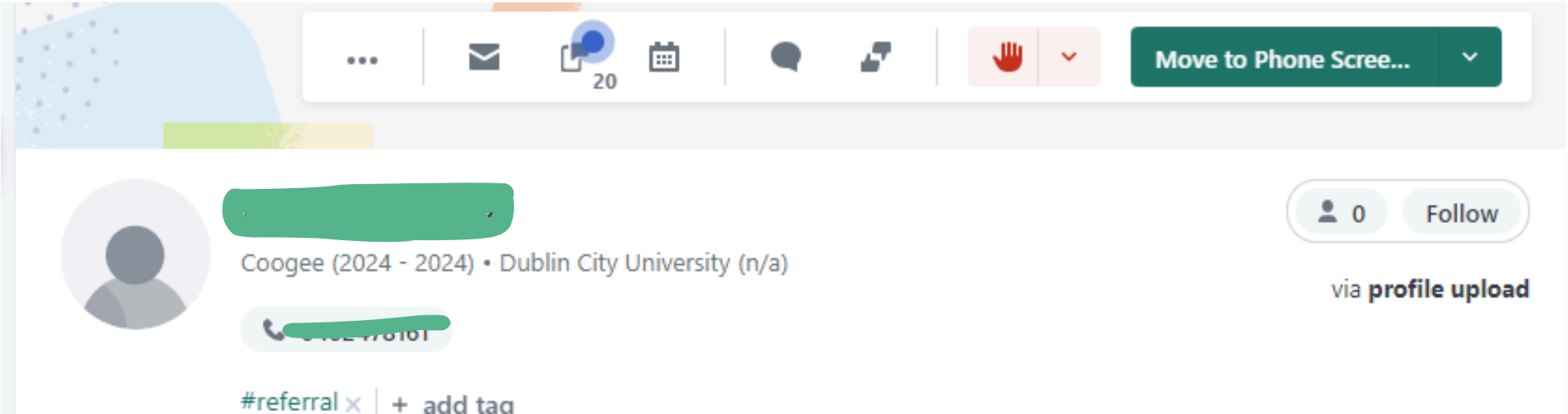


How to do this:

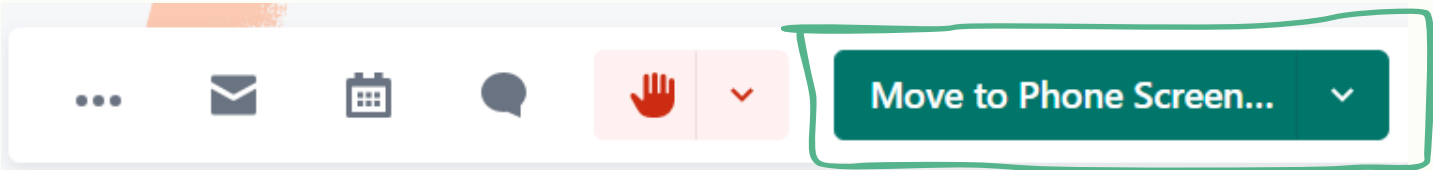
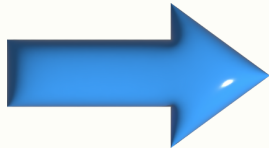
1. Click Candidates
2. move to the saved only tab and click ‘on’.
3. use the filters to see saved candidates under specific stages/location/skills/tags



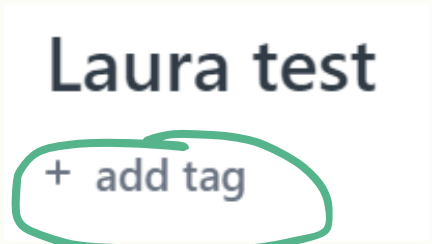
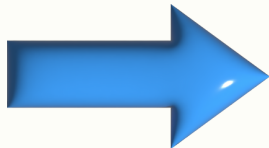
Quick guide for functions on the candidate profiles:



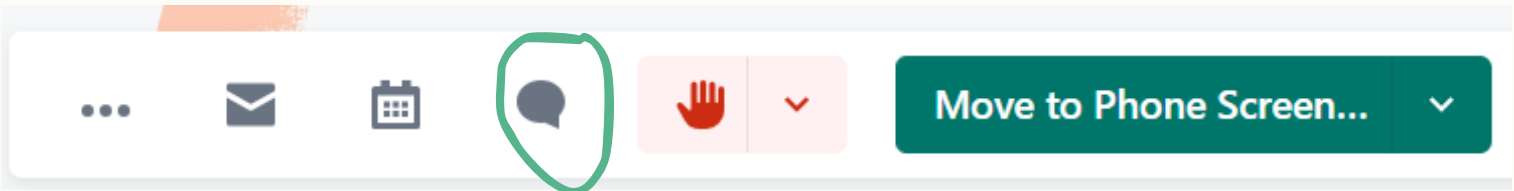
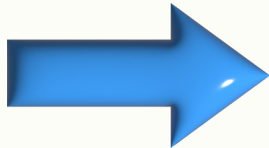
Moving candidates through stages of the pipeline. Click the green button to chose where to move them too. You can skip stages if needed.



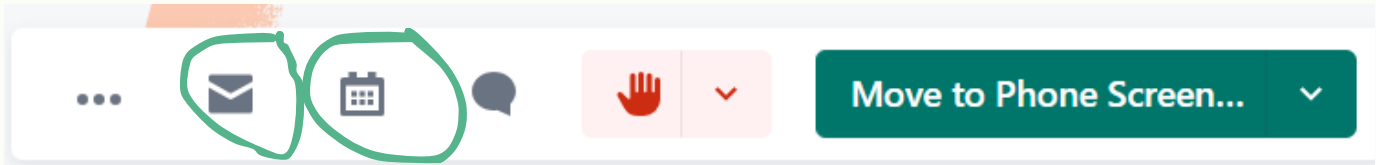
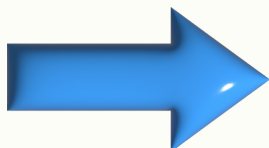
Adding tags: If tagging, be consistent with tags so that you can search candidates based on a particular category/skillset eg. 'overqualified'/'



Comments- you can tag someone in the hiring team or recruiter to action or view something in comments



you can **schedule candidate interviews** using the calender icon or send an email to schedule.

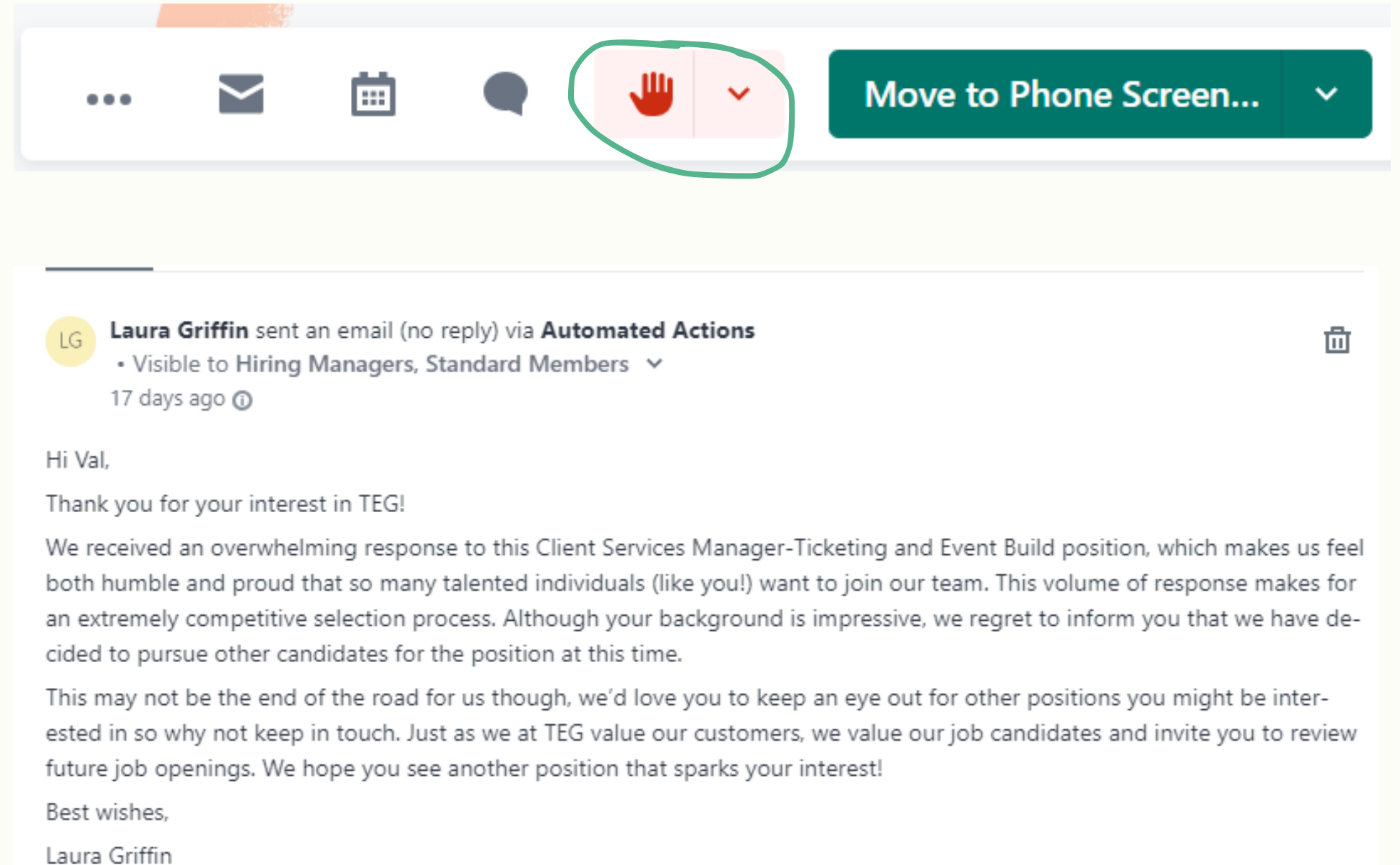


Quick guide for functions on the candidate profiles:

Disqualifying icon - if you click this icon at the 'apply' stage an automated 'disqualification email' will be sent to the candidate after 1 day.

Individual rejection messages can be sent at any stage, especially after phone screen/ interviews.

Templates are set up for convenience to send out comms to candidates or schedule interviews. They are all edible.

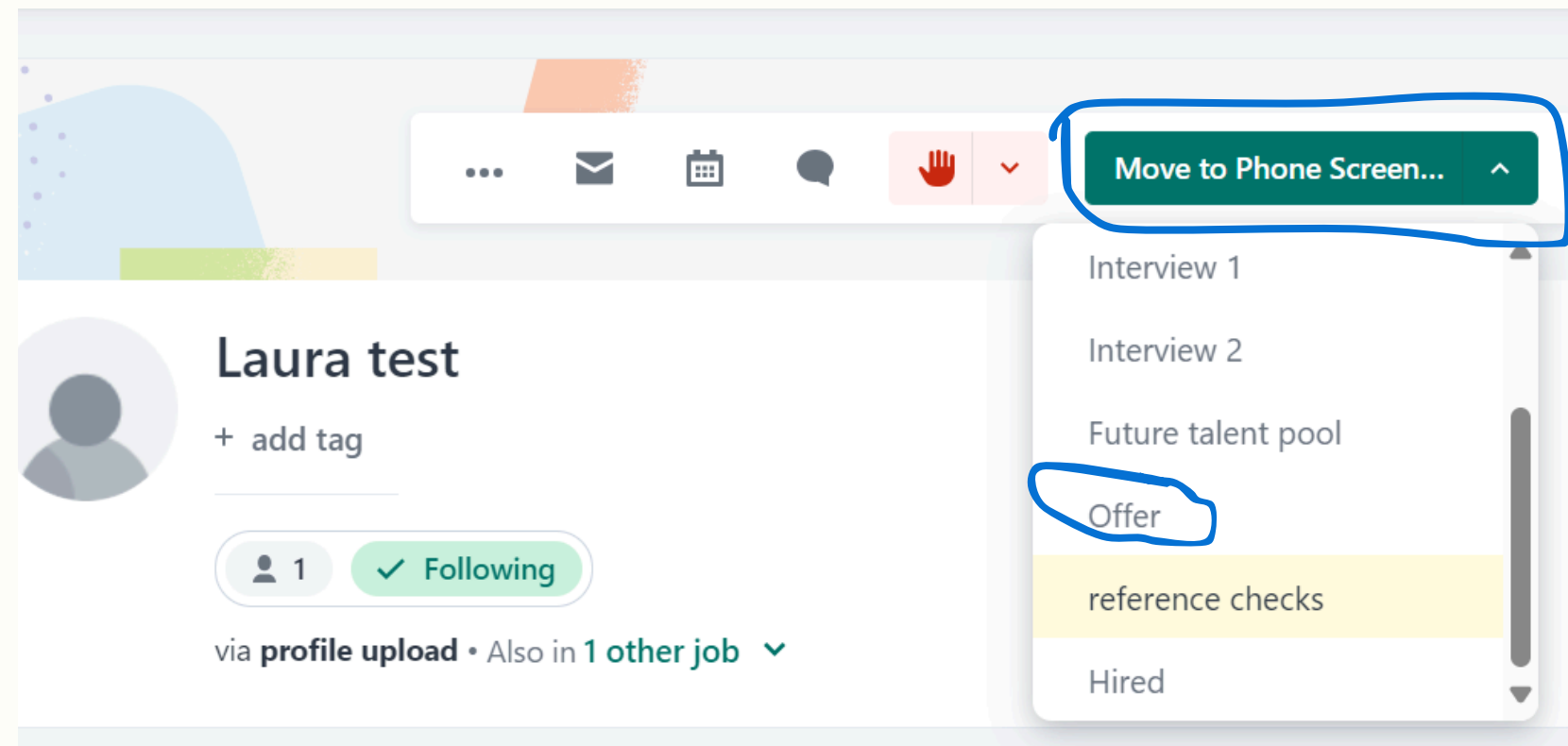


Step 4. Offer stage

When managing the candidates yourself from interview to offer stage, please call the candidate with verbal offer, If accepted complete a Contract Information Form on Bamboo and notify the TA team.

You can notify the TA team by @ them in the comment section. This will indicate the TA team to reach out for ref checks.

The P&C team will look after the contract, reference checks and onboarding documentation from here



Final stages- Reference Checks to hired.

- If a verbal offer is accepted, The TA team will move the candidate to the last two stages- reference checks and hired depending on where they are at in the process.
- No action is required at these stages. It is more of a visual for you and Talent team of what stage the candidate is sitting.

Further actions

- Should require additional support please reach out to Laura- TA BP.
- You also have a helpful resource on workable for all guides by clicking your initials on the top right corner- help- guides & resources.

