

# Using Workable

A Quick Introduction



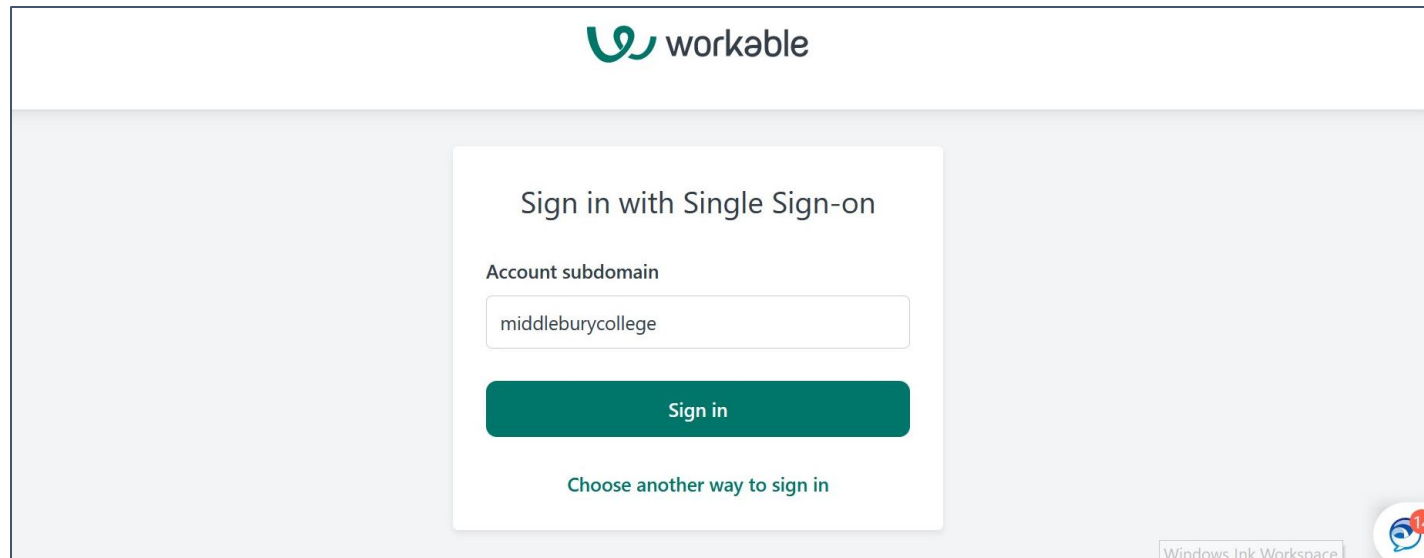
A better way to find, evaluate  
and hire better candidates.



Middlebury

## Logging in and Setting Up Your Profile:

Go to [Workable.com](https://workable.com) or [go/workable/](https://go.workable/) and log in. To do so you will need to use Single Sign-On (SSO) option and use middleburycollege as the domain (see image below). Once logged click on your initials in the top right corner of the page and navigate to [Your Profile](#). To get the most out of Workable make sure you toggle on the Office365 and Zoom integrations and click on Connect your Account.

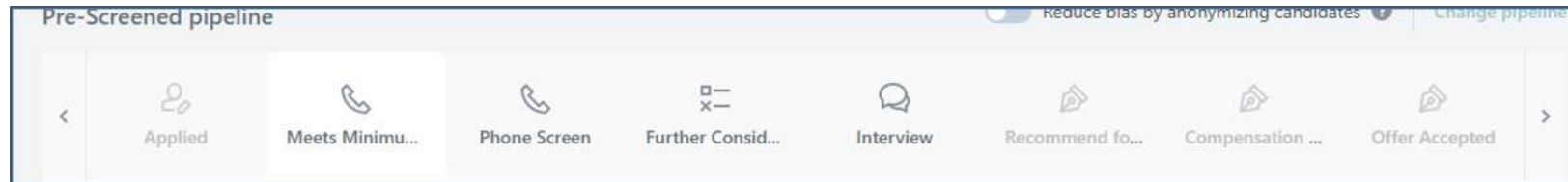


The screenshot shows the Workable login interface. At the top, the Workable logo is displayed. Below it, a central white box contains the text "Sign in with Single Sign-on". Underneath, there is a label "Account subdomain" followed by a text input field containing "middleburycollege". A prominent green "Sign in" button is located below the input field. At the bottom of the white box, there is a link that says "Choose another way to sign in". In the bottom right corner of the screenshot, there is a "Windows Ink Workspace" notification and a circular icon with the number "14".



## Candidate Pipeline Explained:

The candidate pipeline captures the various stages within the recruitment process. Candidates will progress through the pipeline as they move closer to hire. Each stage of the pipeline is tied to reporting metrics and therefore it is important to make sure you move candidates to the appropriate stage. Likewise, Middlebury has requirements for reporting on our recruitment and hiring decisions, therefore it is very important that you disqualify candidates in the system. Please do so thoughtfully and by using the preapproved reasons if possible.



[More from Workable on Pipelines](#) and [Changing or Updating Pipelines.](#)



# Candidate Stages Explained:

**Sourced:** These are candidates that have been identified via Workable or HR as being potential matches for the open position. These candidates have not applied for the position. When reaching out to sourced candidates please use one of the standard templates (Contact Sourced Position).

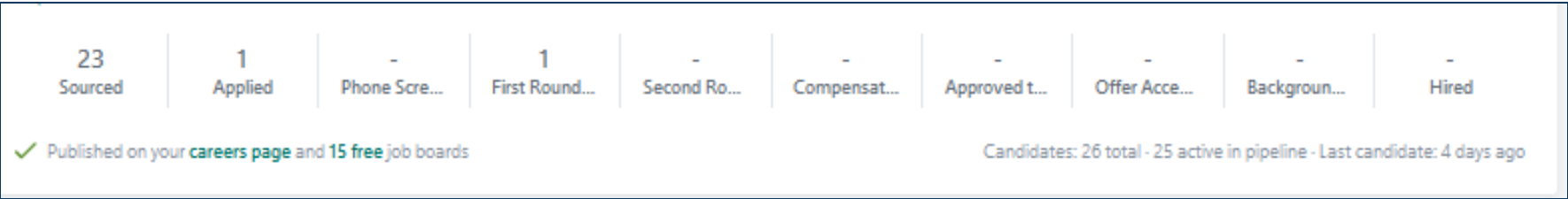
**Applied:** These are the candidates that have actually applied for the position you posted. Candidates that meet the minimum qualifications of the job should be moved from this stage into the Phone Screen stage.

**Phone Screen.** A phone screen is a quick standardized phone call with the candidate to ensure that they understand the position and would be qualified for the role before moving to a more formal interview. Consistency is important so please think through your questions prior to calling and record your answers.

**Assessments:** Work with your HR Business Partner to develop consistent assessments for the position so that you can fairly and accurately grade your candidates. Assessments will not be applicable to all positions and are an optional part of the candidate pipeline:

[More from Workable on Assessments.](#)

**Interview Stages:** Depending on the type of position and the department interviewing there may be many different types of interviews conducted. Work with your HR Business Partner to make sure that your pipeline matches your practice when it comes to interviews. You and your search committee members can comment on candidates.



## Candidate Stages Explained (continued):

**Compensation Review:** Candidates should be placed in this stage when they have been identified as a finalist for the position. Your HR Business Partner will reach out to you (or you can @tag your HR Business Partner) to start the discussion on Skills Matrix Placement for the candidate.

**Offer Approved/Offer Accepted:** These stages are for candidates that you have been approved to make an offer on. Once a candidate accepts an offer please move them to Offer Accepted and disqualify all remaining candidates. There will no longer be separate hiring proposal. HR will communicate the approved hiring range within Workable when they move the candidate into the Approved to Make Offer Stage. Hiring Manager should indicate the amount of accepted offer using the comments in Workable and @tag their HR Business Partner.

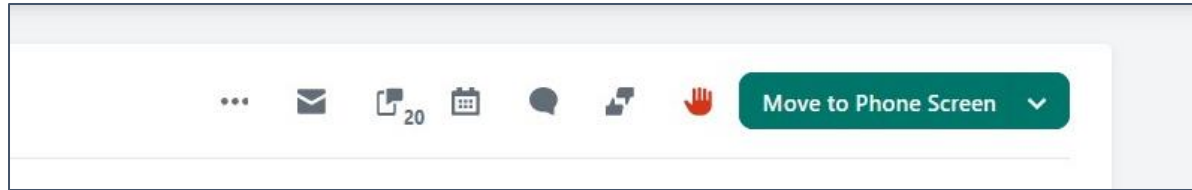
**Background Check:** Workable integrates directly with Checkr our new background check provider. Please indicate whether the position requires any additional checks (Motor Vehicle Records check, Employee Credit Check, Education Verification Check). **HR alone can initiate and view background checks.**

More on from Workable on the [types of Background Checks](#) we can run and the [candidate experience using Checkr](#).

**Hired:** HR will move the candidate to Hired once a salary and start date has been confirmed. You may also be asked to confirm whether this is a driving position, whether the position will be remote/hybrid/on campus, the manager for the position or position code, if you have not already done so. Once set to the hired status the candidate information will be uploaded to Oracle. **HR alone can move candidates into the Hired stage**



## Using the Navigation Bar for in the Candidate Profile



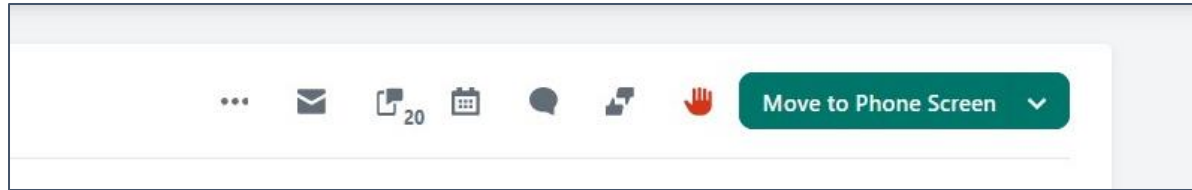
**Comments:** Click the icon that looks like a speech bubble to add comments within the candidate profile. Workable was modeled in part on social media and as such it uses @tags to notify users in the system of a comment directed to them. You can @tag HR or your search committee members if you want them to get an email notification (and an in-app notification). You and your search committee can communicate about the candidate and this information will be saved into the candidate profile timeline.

**Moving Candidates:** Use the green button in the top right of the candidate profile to move a candidate to the next stage in the pipeline. To skip a stage use the arrow on the right side of that button to select the appropriate stage.

**Using Templates:** Workable has stored templates that will pre-populate with the candidate or job information. Click the envelope icon to email a candidate directly or to see the available templates. All of the templates from PeopleAdmin have been copied over to Workable. However, workable has the additional functionality of being able to build templates for specific departments or jobs. Please work with HR Business Partner to develop appropriate templates for your area.



## Using the Navigation Bar for in the Candidate Profile (Continued)



**Scheduling:** Workable is directly integrated with our Office365 calendars. Click the calendar icon to schedule an interview directly into your calendar via Workable and can even use a “Self-Schedule Link” to allow candidates to schedule time directly on to your calendar. Zoom is also integrated with Workable so you can add a personal Zoom link to those emails as well.

[More from Workable on Scheduling.](#)

**Disqualifying Candidates:** It is important for reporting purposes that we move candidates through the pipeline as they proceed and that we disqualify candidates (and provide a reason for disqualification) when they are no longer under consideration or when a hire is made. Each stage of the pipeline will present you with different disqualification reasons. To disqualify a candidate, click the red hand in the top right of the candidate’s profile and select an option from the drop-down menu. Candidates that have been disqualified from a job will continue to be visible and can be reverted to active candidates at a later date.

[More from Workable on Disqualifying Candidates.](#)



## Other Workable Features:

**Referring Candidates:** If you know someone who you think would be a good fit for a position at Middlebury, feel free to refer them, you can do so directly via email or social media via our [Referrals website](#) or new [Careers page](#).

**Customizing Settings:** You can add a signature to your emails, set your interview availability (for self-schedule link) and change the settings for which and how many notifications you receive. Navigate to your initials in the top right and select settings. Look for the personal settings at the bottom of the left side bar.

[More from Workable on Customizing your settings.](#)

**Offer Letters:** Offer letters templates can be built into Workable and tied to specific locations, departments or jobs. HR will manage the Offer Letter templates but please let us know if there are specific requirements.

## What about!!!???:

**Finding Position Descriptions:** Workable is not a position management solution and does not house Job Descriptions. HR is developing solutions for storing and displaying our position descriptions but in the meantime all positions can be found in the [position description library](#). Ask your HR Business Partner if you want an editable word document version of a position description.

**Requesting Job Descriptions? Other job changes?** Workable is an exciting new platform for applicant tracking but it is not a Position Management platform and therefore will not replace every PeopleAdmin feature. Workable will be used only to request and approve positions for posting. We will be providing more information in the coming days about how the other aspects of Position Management will be handled.





Still got questions? We got you covered:

We have scheduled a Zoom drop in sessions for hiring where we would be happy to answer any additional questions.

[July 5th from 3:00 PM EST to 5:00 PM EST](#)

[July 8th from 11:30 AM EST to 1:30 PM EST](#)

[July 15th from 11:30 AM EST to 1:30 PM EST](#)

[July 22nd from 11:30 AM EST to 1:30 PM EST](#)

[Workable Help Center](#)

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