



# Use Case: Creating job offer and selecting potential employees using Workable

---

*Instructions: This document provides a detailed guide for creating job offer and later to evaluate candidates experience quickly and easily.*

## Overview

Workable is comprehensive AI-powered recruitment software that helps HR teams and recruiters manage job vacancies, track candidates and collaborate seamlessly.

## Steps:

### Step 1: Sign up or login

Go to website: [www.workable.com](http://www.workable.com) Click "Login" if you already have an account or sign up using your details.

#### Tips:

You can sign up using your email, Google, Microsoft or LinkedIn account.

### Step 2: Activate your account

Open your e-mail inbox and find a creating account confirmation letter. Click "Confirm email address", to finish activation process.

#### Tips:

### Step 3: Log in to your account and set up your company profile

After logging in, your profile tab will appear in the top right corner of the page. Click on the logo to choose from several options.

- add your company name (exactly as you would like this to appear for candidates) and your company website,
- add a company description introducing your company's mission and values. Prospective applicants will see this description when they view your jobs on the job board.



**Tips:**

You can edit all the information you have added about your company at any time.

## *Section 1 – Creating job offer*

### **Step 4: Creating job offer**

To create a new job offer navigate to the Job dashboard in the left-hand menu, click “Jobs”. Then click “Create a New Job” in the upper-right corner of the screen to begin building your posting.

**Tips:**

### **Step 5: Enter basic job information**

Provide information:

- job title,
- job location (on-site, hybrid, remote).

**Tips:**

Workable will automatically suggest standard job titles to improve search visibility.

You may also add multiple locations if the role is open in several regions. If the desired location isn’t listed, choose “Add it manually” and enter it yourself.

### **Step 6: Create the job description**

Fill in the job description areas, which typically include: primary responsibilities, required qualifications, preferred skills, benefits and perks, information about your company.

Add additional information about targeting and role attributes - these fields help job boards categorize and promote your listing e.g. industry, function / department, employment type (full-time, part-time, contractor, etc.), experience level, salary range (optional but recommended), keywords / skills etc.

**Tips:**

You can create the job description on you own or click “Generate with AI” so Workable will prepare it for you based on similar past job offers. You can also click “Salary estimator” so AI will estimate potential salary to your job offer.



Many job boards require a minimum length (approx. 700 characters), so keep the description detailed and structured.

The more complete this section is, the better Workable can optimize the posting.

### **Step 7: Configure the Application Form**

After saving the job basics, configure the application form:

- select which fields are required (e.g., CV, cover letter, portfolio links),
- add custom questions (multiple choice, text responses, yes/no, file upload),
- use conditional questions if needed for screening.

This helps filter candidates early in the process.

Once you have filled in the content and details of the job offer, Workable will ask you to define the application form - decide which fields are mandatory and which are optional.

#### **Tips:**

### **Step 8: Save or Publish the Job**

At the bottom of the form, choose the best option. You can click “Save as a draft” (saves the job for review or later editing) or “Save & Continue / Publish” (it will move you forward to the publishing and distribution settings.).

Once published, the job appears on your Workable careers page. It is also automatically submitted to free job boards (e.g., LinkedIn, Google for Jobs, Indeed, Glassdoor, Jobcase), but you have to connect earlier your Workable account with these platforms.

#### **Tips:**

These two options depends on your permission level - If you are an Admin Click “Publish” to make the job live immediately. If you have Standard Access - your publication request will be sent to an Admin for approval.

Connection Workable with e.g. LinkedIn etc. may be chargeable, depending on the pricing plan selected on your Workable account.

## *Section 2 – Screen and evaluate job applicants*



### **Step 9: Screen the applicants**

Click “Jobs” tab on the top of screen and select the job offer you want to review applications forms.. You can sort and filter candidates by: application date, AI match score, location, tags, ratings, custom fields etc.

#### **Tips:**

All new applicants appear in the Applied stage. Candidates added manually or through sourcing tools appear in Sourced

### **Step 10: Use AI Screening Assistant to Speed Up Selection**

You can use AI Screening Assistant to speed up candidates selection. Go to “Job” tab and open the job for which you want to use AI screening. Enter the Pipeline view and look for the “Screening Assistant” or “AI Screening” panel (usually on the right side or top of the pipeline). If it is not active yet: you will see a prompt such as “Set up Screening Assistant” or “Start AI screening”

#### **Tips:**

AI Screening Assistant is usually enabled automatically, but it must be activated for each job.

You should set up your requirements, skills, experience etc. in a job offer so AI Screening Assistant will analyse it in applicant forms. You can customize your criteria for AI evaluation - in the “Job pipeline”, open the “Screening Assistant panel”. You can review the automatically extracted criteria (keep, remove or add requirements manually).

### **Step 11: Extraction of matching criteria**

After activating AI Screening tool, it becomes visible throughout the pipeline. According to analyzed candidate you will see a match summary, skills etc. As soon as there are candidates in the job pipeline, the matching criteria will be displayed at the top of the candidate profile.

#### **Tips:**

The matching criteria are grouped in the following categories: education, experience, skills, other (added manually).

The soft skills are skipped, they are usually assessed in later stages.

### **Step 12: AI evaluations of candidate profiles**

AI will use the information available in the candidate profile and specifically the following sections:

- Profile Summary: The summary that is written by the candidates.
- Education: The education experience.



- Experience: The past job experiences, including the experience summaries where the candidates usually elaborate on each past work experience.
- Skills: The list of skills that come with each candidate's profile.
- Resume: Any other pertinent information based on the candidate's attached resume file.

**Tips:**

The screening assistant will use the information available in the candidate profile sections (education, experience, etc) as well as the attached resume file.

If a candidate profile doesn't include any of the above sections, AI won't return any evaluations.

**Step 13: Sorting candidates by best match**

You can sort candidates to easily identify strong matches – or those that don't meet basic requirements. Under the 'Sort & filter" menu, select to sort by "Best match".

**Tips:**

**Step 14: Candidate Evaluation**

You can evaluate every candidate and easily sent your scores to team members . To do so, Click on a candidate's name to open their profile. Add a Scorecard: click "Add Evaluation". You can write comments in the "Notes section".

**Tips:**

Add comments for your team to improve collaboration and record important insights.

**Step 15: Sorting candidates by best match**

You can sort candidates to easily identify strong matches – or those that don't meet basic requirements. Under the 'Sort & filter" menu, select to sort by "Best match".

**Tips:**

**Step 16: Move candidates through the Pipeline or disqualify**

If a candidate meets your requirements: click "Move to next stage", or select a specific stage (e.g., Phone Screen, Interview, Assessment).

If a candidate does not meet the requirements: select "Disqualify" and choose a reason (optional).



**Tips:**

You can also bulk-move multiple candidates at once. Disqualified candidates are not deleted; they remain searchable in your database and can be considered for future roles.

**Step 17: Use reporting tools to analyze your screening process**

You can use several helpful reports - from the menu, click Reports, e.g. Candidate Flow Report (shows how many applications you received and how many progressed through early stages), Recruiting Pipeline Reports – you can monitor e.g. number of candidates per stage, conversion rates between stages etc.

**Tips:**

You can click “Export” to download data in CSV format.

**Optional Enhancements**

You can download Workable’s mobile App for IOs and Android.

**Resources**

- Workable Help Center: <https://help.workable.com/hc/en-us/sections/20589026240791-Support>
- Workable product walkthrough: <https://www.youtube.com/watch?v=TKZvRFIkKsU>
- Workable Academy: <https://www.workableacademy.com/>
- Visual guides & webinars: <https://help.workable.com/hc/en-us/categories/115001836608>
- YouTube tutorial: <https://www.youtube.com/watch?v=dKzVbamvWa4>