



# Talent Acquisition Process and Applicant Tracking System (ATS), powered by Workable

Interviewers User Guide

January 2025

# Welcome to Talent Acquisition Process and ATS | Interviewers User Guide

The Talent Acquisition team is excited to partner with you on the interview process via our Applicant Tracking System (ATS), powered by Workable. This online tool replaces our manual interviewing and evaluation processes and incorporates an automated process for interviewers.

Moving our recruiting process to a system promises to provide improved capability alongside a user-friendly, measurable experience. This process ensures a fair, equitable interviewing and evaluation process for all candidates and removes potential bias. The interviewers process allows HR and Interviewers to partner with the hiring manager to steward candidates effectively and efficiently through the recruiting process and ensure a sound hire.

## An Important Reminder on Interviewers Service Level Agreements

The Service Level Agreement for response times to any requests from Talent Acquisition, including but not limited to, interview invitations within the ATS, is **2 business days**. If you need more time, please contact the Recruiter to request an extension. Consistent, timely responses are critical to ensuring acceptable time to hire/fill metrics and a good candidate experience.

The Service Level Agreement to submit your Interview Evaluation in the system is **no later than 24 hours** from the interview's completion. It is also required to keep your feedback from your interviews confidential until the Interview Debrief Meeting when all interviews are to share their individually collected interview data. For risk management purposes, all interview evaluations must be submitted in the ATS prior to an offer extension.

In this user guide, you'll find all steps needed to successfully interview and submit your interview feedback for candidates.

## **Table of Contents**

ATS, powered by Workable Account Setup .....	4
Updating Your Profile Features .....	6
Updating Your Preferences Features .....	7
Workable Navigation and Process .....	9
Interviewers   Dashboard Tiles and Menu Options .....	9
Your Interview Guides .....	11
Interview Scheduling .....	12
Interview Evaluation Submission .....	14

## ATS, powered by Workable Account Setup

ATS, powered by Workable, is accessible via single sign-on; simply click the link and bookmark for quick access: <https://water-dot-o-rg.workable.com/signin>.

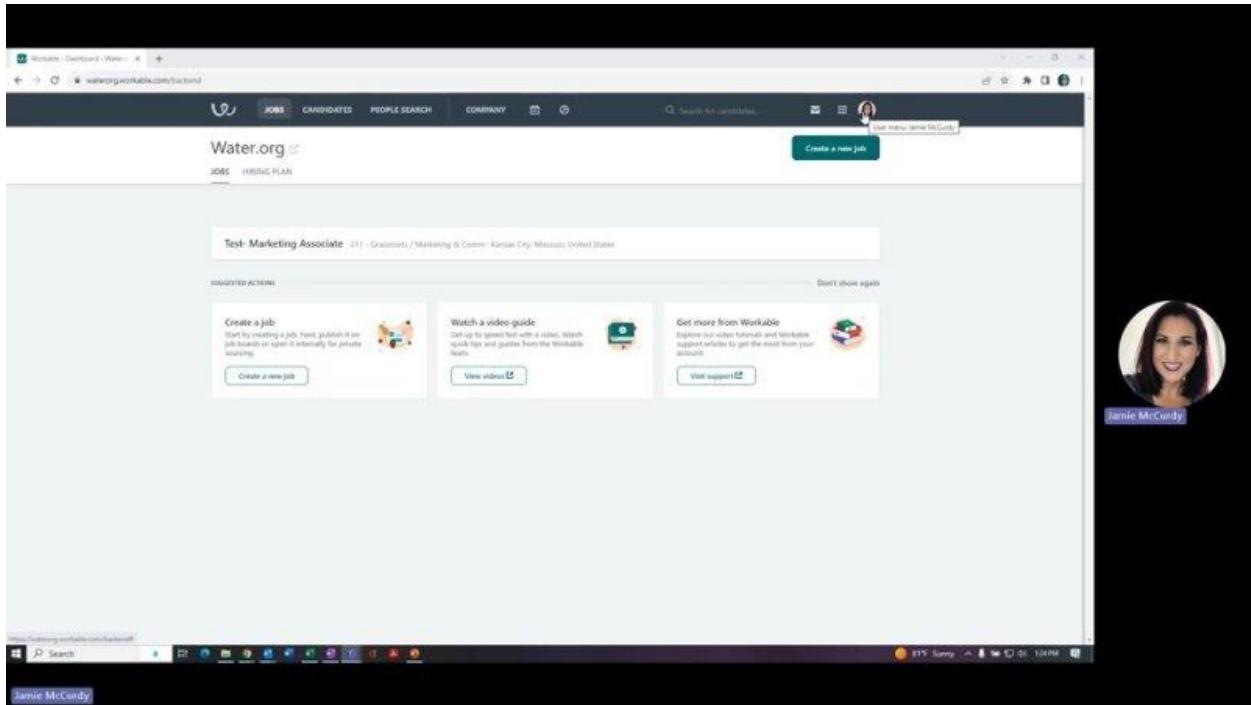
If you have any technical issues, please clear your cache and cookies, close your browser completely, reopen and try again. If you continue to have technical issues, please contact [help@water.org](mailto:help@water.org) for assistance. Please contact [recruiting@water.org](mailto:recruiting@water.org) with any questions.

Your ATS, powered by Workable Profile and Preferences are accessible via the small circle at the top-right of your homepage. Click **Settings**, then visit the **Personal** section in the menu on the left side of your screen.

The **Profile** and **Preferences** provides access to your image, email signature, notifications settings, interview availability, name, job title, time zone, and credentials (see more below).

The screenshot shows the Workable ATS interface. At the top, there's a dark header bar with a search field ('Search for candidates...'), a mail icon, a grid icon, and a user profile icon. Below this is a light-colored sidebar with a user profile picture of Dulce Ortiz and the text 'Dulce Ortiz' and 'Water.org'. The sidebar contains links: 'Settings' (which is highlighted with a blue arrow pointing from the top), 'Help', 'Add a company', and 'Logout'. To the right of the sidebar is the main content area. The main content area has a header with 'JOBS', 'CANDIDATES', 'PEOPLE SEARCH', 'COMPANY', and a search bar ('Search for candidates...'). Below the header, there's a 'PERSONAL' section with a message: 'Looking to update your name, email or avatar? You can do that in the new Your profile page.' It includes a 'Your preferences' link and a 'Your profile' link. There's also an 'EMAIL SIGNATURE' section with a message: 'Add a personal signature to all emails sent via Workable. Customise your signature using the tools below.' A toggle switch is turned on with the text 'Use a personal signature for all emails'. Below this is a rich text editor toolbar with icons for bold, italic, underline, etc. The signature itself contains the name 'Dulce Ortiz (she/her/hers)', the title 'Global Talent Acquisition Recruiter | Water.org', the email 'dortiz@water.org', and the phone number 'o- 816.301.5102'. It also includes a link 'Using market-driven financial solutions to change lives with safe water. [Join us](#)'. A 'Save changes' button is at the bottom of this section. Below the signature section is a 'NOTIFICATIONS' section with a message: 'Get Workable notifications in Slack. Contact your company's admin to enable the integration with Slack for this account.' It includes sections for 'Comments' (with a note 'There are new comments on candidates you're following') and 'Evaluations' (with a note 'Candidate review following an evaluation'). Each section has an 'Email' checkbox.

**Video Resource:** Click on the Tutorial Video below for an overview of the **Workable Account Login and Setup process**.



**Note:** Video will open in another window on your screen. Once you've viewed the video, please return to this document to complete your overview.

## Updating Your Profile Features

From the **Personal** menu, select **Your Profile**, then within the Profile box, add your first name, last name, job title, time zone, and image, then click Save Changes.

In the Credentials box, your email has been auto populated. On the right side of the box, confirm your Outlook account is connected. To do this, look at the Connected apps > Microsoft. If not yet connected, click on this integration link and follow the steps: [Microsoft and Workable Integration](#).

**Note:** If **Disconnect** is listed to the right of Microsoft in your Connected Apps, the above step is complete.

**PROFILE**

\*First name      \*Last name      Job title

Dulce      Ortiz      Global Talent Acquisition Recruiter

Time zone

(GMT-07:00) Mountain Time (US & Canada)

Image

Replace image or drag and drop here

Maximum file size 3MB - acceptable file types .jpg, .jpeg, .gif, .png.

**Save changes**

---

**CREDENTIALS**

\*Email

dortiz@water.org

You can't change your email because it is managed by your company account

Update your password ↴

Connected apps

- Google Connect your account
- LinkedIn Disconnect
- Zoom Connect your account
- Microsoft Disconnect

**Save changes**

## Updating Your Preferences Features

From the **Personal** menu, select **Your Preferences**.

In the Email Signature box, add your Water.org email signature, ensuring the toggle switch is set to “Use a personal signature for all emails”. Click Save changes when complete.

**EMAIL SIGNATURE**

Add a personal signature to all emails sent via Workable. Customise your signature using the tools below.

Use a personal signature for all emails

T B I ≡ ≡ ⚙️ 📸

Dulce Ortiz (she/her/hers)  
Global Talent Acquisition Recruiter | [Water.org](#)  
[dortiz@water.org](mailto:dortiz@water.org) | o- 816.301.5102  
Using market-driven financial solutions to change lives with safe water. [Join us.](#)

**Save changes**

Next review and update your notifications settings based on your preferences. Click Save changes when complete.

**NOTIFICATIONS**

Get Workable notifications in Slack. Contact your company's admin to enable the integration with Slack for this account. X

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

Finally, in the Interview Availability box, select the days and times you are generally available for interviews. The ATS system will confirm your availability for an interview, during these times via an integration with Outlook. Click Save Changes when complete.

INTERVIEW AVAILABILITY

Days Available	From	To
Mon, Tue, Wed, Thu, Fri	06:00 AM	02:30 PM

💡 You can change your timezone in [Your profile page](#).

Save Changes

**Note:** In addition to setting your Interview Availability preferences in the ATS, it is critical that your Outlook calendar reflects your availability. If you expect to be out of the office or otherwise unavailable for an interview, please ensure the time is blocked in your Outlook calendar.

## Workable Navigation and Process

Your ATS, powered by Workable homepage offers menu options for Interviewers to access candidate profiles, interview scheduling, and interview evaluations.

### Interviewers | Dashboard Tiles and Menu Options

The notable sections of the Workable **Homepage** for Interviewers include the following:

The screenshot shows the Workable homepage with several key elements highlighted:

- Header:** Includes the Workable logo, navigation links for JOBS, CANDIDATES, PEOPLE SEARCH, COMPANY, and various icons for search, calendar, and user profile.
- Search Bar:** A search field with the placeholder "Search for candidates..." followed by a magnifying glass icon.
- Job Listing:** A card for a "Marketing Associate" position with status counts: Sourced (1), Applied (7), Shortlisted (1), Manager (1), Recruiter (2), Interviews (2), References (1), Offer (1), Background Check (1), and Background Verify (1). A note says "This job is not published on your careers page or on any job boards".
- Footer:** Shows a summary: "Candidates: 8 total · 8 active in pipeline · Last candidate: a day ago".
- Callout 1:** An orange box highlights the "Inbox" envelope icon in the top right corner of the header.
- Callout 2:** An orange box highlights the "Interviews" step in the job listing card.
- Callout 3:** An orange box highlights the "Create a new job" button in the top right corner of the main content area.

- 1. Inbox:** The Inbox envelope icon provides notifications of actions that need to be taken.
- 2. Interviews:** Click on this recruiting step to view interviewing candidates.

The notable sections of a Workable **Candidate Profile** within the Job for Interviewers include the following:

The screenshot shows a candidate profile for "Jane Doe" within a "Marketing Associate" job listing. Key features highlighted include:

- Header:** The job title "Marketing Associate" and location "211 - Grassroots / Marketing & Comm · Remote · United States · 1 requisition".
- Filter Bar:** Buttons for "All 6", "Sourced 5", "Applied 5", "Shortlisted 1", "Manager Review 1", "Recruiter Screen 1", **Interviews 1** (highlighted with an orange box), "References 1", and "Offer 1".
- Candidate List:** A grid showing "QUALIFIED" and "DISQUALIFIED" candidates. One candidate, "Jane Doe", is highlighted with an orange box and shown in more detail.
- Profile Card:** Details for "Jane Doe":
  - Profile picture and name.
  - Role: Line Worker at Fake Factory.
  - Education: Fake Factory (2014 - 2023) • Fake High School (2009 - 2014).
  - Location: Kansas City, Missouri, United States.
  - Contact: +16785550103.
  - Follow status: 3 people following, with a green "Following" button.
  - Source: via careers page.
- Callout 1:** An orange box highlights the "Interviews" tab in the filter bar.
- Callout 2:** An orange box highlights the "Profile" button in the bottom navigation bar.
- Callout 3:** An orange box highlights the "Timeline", "Communication", and "Review" buttons in the bottom navigation bar.

- 1. Interviews:** Click on this recruiting step to view interviewing candidates.
- 2. Profile:** To view the candidate's application submission information, select the Profile tab within that candidate's profile. The **Profile** tab will provide access to information such as work experience, education, and resume/CV.
- 3. Add Evaluation:**  This icon provides quick access to an evaluation for the candidate.
  -  The Star rating indicates the candidate is strongly recommended.
  -  The Thumbs Up rating indicates the candidate is recommended.
  -  The Thumbs Down rating indicates the candidate is not recommended.

## Your Interview Guides

Prior to interviewing candidates for a position, your recruiter will email your interview guide to use with all candidates for that position.

The screenshot shows a Microsoft Teams meeting setup screen. On the left, there's a 'Send Update' button with a paper airplane icon. The main area has a 'Title' field containing 'SPAM (Partnerships- Infrastructure & Investment)| Recruitment Kickoff call'. To the right of the title is a 'Meeting Insights' button with a lightbulb icon. Below the title are 'Required' and 'Optional' participant lists, both showing names with colored icons (blue for Bruno, yellow for Renato, green for Rocio, red for Ben, and orange for Pablo). Under 'Location', it says 'Microsoft Teams Meeting'. There's a 'Room Finder' button with a magnifying glass icon. The 'Start time' is set for Friday, January 31, 2025, at 9:30 AM Mountain Time (US & Canada), with options for 'All day' and 'Time zones'. The 'End time' is also set for the same date at 10:00 AM Mountain Time. A 'Make Recurring' button is available. At the bottom, there are four attachments listed: 'Bruno\_40027\_SPAM(Infrastructure).xlsx' (49 KB), 'Pablo\_40027\_SPAM(Infrastructure).xlsx' (49 KB), 'Renato\_40027\_SPAM(Infrastructure).xlsx' (49 KB), and 'Rocio\_40027\_SPAM(Infrastructure).xlsx' (49 KB).

Hi everyone,

You have been identified as an interviewer for the **SPAM, MX position**. Recruiter screens are in progress and will be complete on 01/29. You can expect interviews to be scheduled this week and next week.

The purpose of this meeting is for **Bruno** to share what an ideal candidate looks like for this position.

### Timeline

Recruiter screens: January 27- January 29

Interviews: January 27- February 7

Debrief: End of week February 7

Attached you will find your assigned interview guide + JD. 😊 (guides will also be available in workable, ATS)

*Note: Our interview guides are aligned with the competencies and Job-Specific Accountabilities listed in the job description.*

Job post link: <https://apply.workable.com/waterorg/j/175C361689/>

Kind regards,  
Dulce

## Interviewer Process Overview

Upon receiving an email from the Recruiter containing your interview guide for the position you will be interviewing for, you will:

**Step 1:** Update your Interview Availability within Workable, please ensure the interview availability provided aligns to different time zones to accommodate candidates to be interviewed.

**Reminder:** Instructions on the Interview Availability setup is available on page 8 of this guide.

**Step 2:** Review the interview guide provided by the Recruiter for that position's interviews and align your interview preparation (see the Interviewing Best Practices Training for reference).

## Interview Scheduling

### Interviewer Process Overview

Once scheduled for interviews, you will:

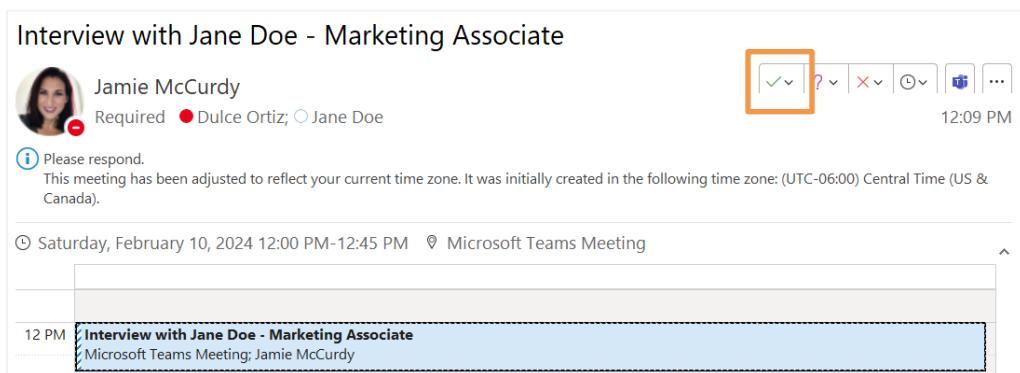
**Step 1:** Review the date and time of the interview to confirm your availability on your Outlook calendar and within Workable. If you need the interview time adjusted, please contact the Recruiter.

**Step 2:** Review the candidate's profile, interview questions, and your interview prepared structure prior to the interview.

**Step 3:** Interview all candidates using the same Interview Guide provided by the Recruiter to ensure a consistent and fair candidate experience.

### ATS Processing Tasks

When you are scheduled to interview a candidate, you will receive an Outlook calendar invitation with the scheduled date and time, based on your availability preferences, calendar availability and the availability of the candidate.



Upon receiving the calendar invitation, click the Accept option (**green checkmark**) to accept the interview invitation and add the event to your Outlook calendar.

**Important:** You will also need to accept the candidate interview in the ATS, powered by Workable. Follow the steps below to log into the ATS, accept the candidate interview, and review the candidate's information in advance of the interview.

A screenshot of the Workable ATS inbox. Step 1 is indicated by a callout pointing to the "Inbox" button. Step 2 is indicated by a callout pointing to the envelope icon with a blue notification badge. Step 3 is indicated by a callout pointing to the green checkmark icon in the event details. The inbox shows an event for "Jane Doe · Marketing Associate · 5 minutes ago" with the subject "Interview · Sat, February 10th at 12:00pm - 12:45pm".

1. Log into the ATS, powered by Workable by following the **View Candidate** link included in the Outlook invitation.
2. Click on the **Inbox** (envelope) icon to view the interview event.

3. Select the **green** checkmark to **accept the interview invitation** and confirm your availability to interview at the designated date and time within the ATS.

Now, when you visit the candidate's profile, you will notice the confirmed interview.

The screenshot shows the Workable ATS interface. At the top, there are tabs for JOBS, CANDIDATES, PEOPLE SEARCH, and COMPANY. Below the tabs, there are filters for QUALIFIED and DISQUALIFIED candidates, and a search bar. On the left, a sidebar shows a recent activity from "Jane Doe". The main area displays the profile of "Jane Doe", a Line Worker at Fake Factory, with details like her education (Fake Factory 2014-2023, Fake High School 2009-2014), location (Kansas City, Missouri, United States), and phone number (+16785550103). A "via careers page" link is also present. Below the profile, there are tabs for Profile, Timeline (which is selected and highlighted in orange), Communication, and Offer. The Timeline tab shows an event titled "Interview with Jane Doe - Marketing Associate" scheduled for Saturday, 10 February 2024, from 12:00 PM to 12:45 PM via Microsoft Teams. The event details include the interviewer (Dulce Ortiz) and a message to Jane. To the right of the timeline, a callout box highlights Dulce Ortiz's profile with the text "Dulce Ortiz has accepted".

4. Select the '**Timeline**' tab within the profile
5. Check to ensure there is a **green** checkmark next to your Workable profile within the corresponding event.

## **Interview Evaluation Submission**

---

### **Interviewer Process Overview**

Once interviews are complete, you will:

**Step 1:** Complete the Interview Evaluation within 24 hours of the completion of the interview with each candidate.

**Step 2:** Accept and attend the Interview Debrief Meeting scheduled by the Recruiter.

**Step 3:** Verbally share your interview feedback collected for each candidate during the Interview Debrief Meeting.

### **ATS Processing Tasks**

Following your interview with the candidate you will submit your interview evaluation.

Interview evaluations are located within the candidate's profile in the ATS. Within the interviewed candidate's Profile, click the **Add Evaluation** icon > to display the Add evaluation • Interviews pop up box.

Complete each of the required evaluation fields:

**Qualifications Assessment:** use the star/thumbs-up/thumbs-down indicators and add notes to share your assessment of the candidate related to the required qualifications for the position.

**Skills + Competencies**

**Assessment:** use the star/thumbs-up/thumbs-down indicators and add notes to share your assessment of the candidate related to the required skills and competencies for the position.

**Key strengths candidate displays related to the position:** use the star/thumbs-up/thumbs-down indicators and add notes to share the strengths you assessed in the candidate that align with the position.

**Areas of opportunity for candidate related to the position:** use the star/thumbs-up/thumbs-down indicators and add notes to share the areas the candidate is lacking relative to the position based on your interview.

**Overall comments directly related to the position:** use the star/thumbs-up/thumbs-down indicators and add notes to share any additional comments as it relates to the position requirements based on the behavioral interview you conducted with the candidate.

When complete, click **Add evaluation** to submit to the recruiter. Click Cancel to exit without submitting.

**Reminder:** More information on the evaluation icons is available on page 10 of this guide.

**Questions?**  
Email [recruiting@water.org](mailto:recruiting@water.org)