



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

Reviewers User Guide

March 2024

Welcome to Talent Acquisition Process and ATS | Reviewers User Guide

The Talent Acquisition team is excited to partner with you to review and process requisitions and/or offers via our Applicant Tracking System (ATS), powered by Workable. This online tool replaces our Staffing Request and Resource Committee processes and incorporates a review process for offer letters.

The processes outlined in this guide and incorporated into the Applicant Tracking System manage requisitions of all types for budgetary and statutory compliance. They also ensure alignment for offers with our compensation philosophy and internal equity. Finally, the review processes allow Human Resources, Finance, and Compensation to partner with management to effectively steward both internal and external people resources toward prioritized business needs.

An Important Reminder on Reviewers Service Level Agreements

The Service Level Agreement for response times on requisitions and offers 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.

In this guide, you will find all the steps needed to review and process a requisition and/or offer.

Table of Contents

ATS, powered by Workable Account Setup	4
Updating Your Profile Features.....	6
Updating Your Preferences Features	7
Workable Navigation Requisition and Offer Review and Processing	9
Water.org's Requisition Process	9
Requisition Processing Dashboard Tiles and Menu Options.....	9
Requisition Review and Action.....	11
Water.org's Offer Process.....	12
Offer Processing Dashboard Tiles and Menu Options	12
Offer Review and Action	13

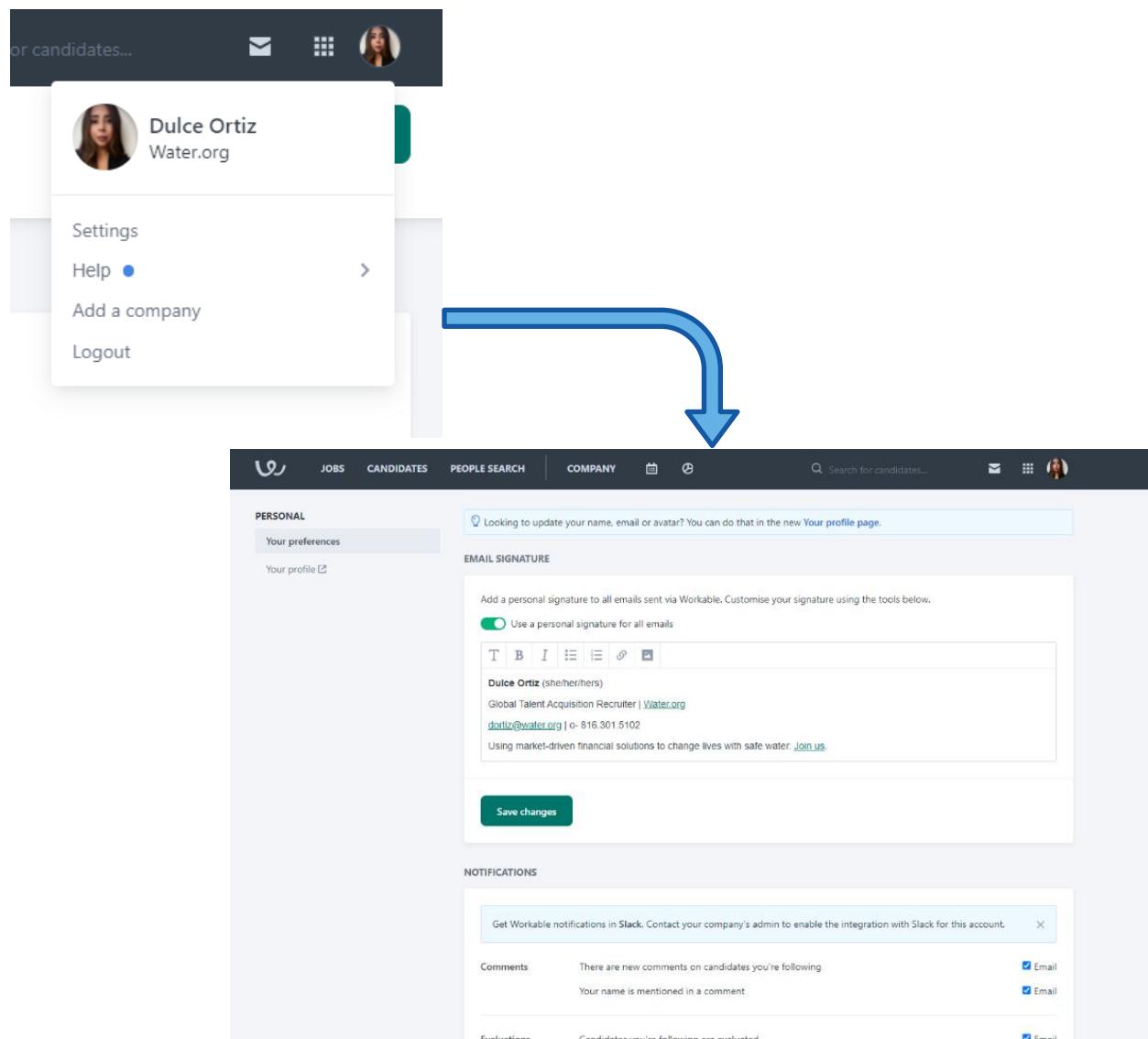
ATS, powered by Workable Account Setup

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

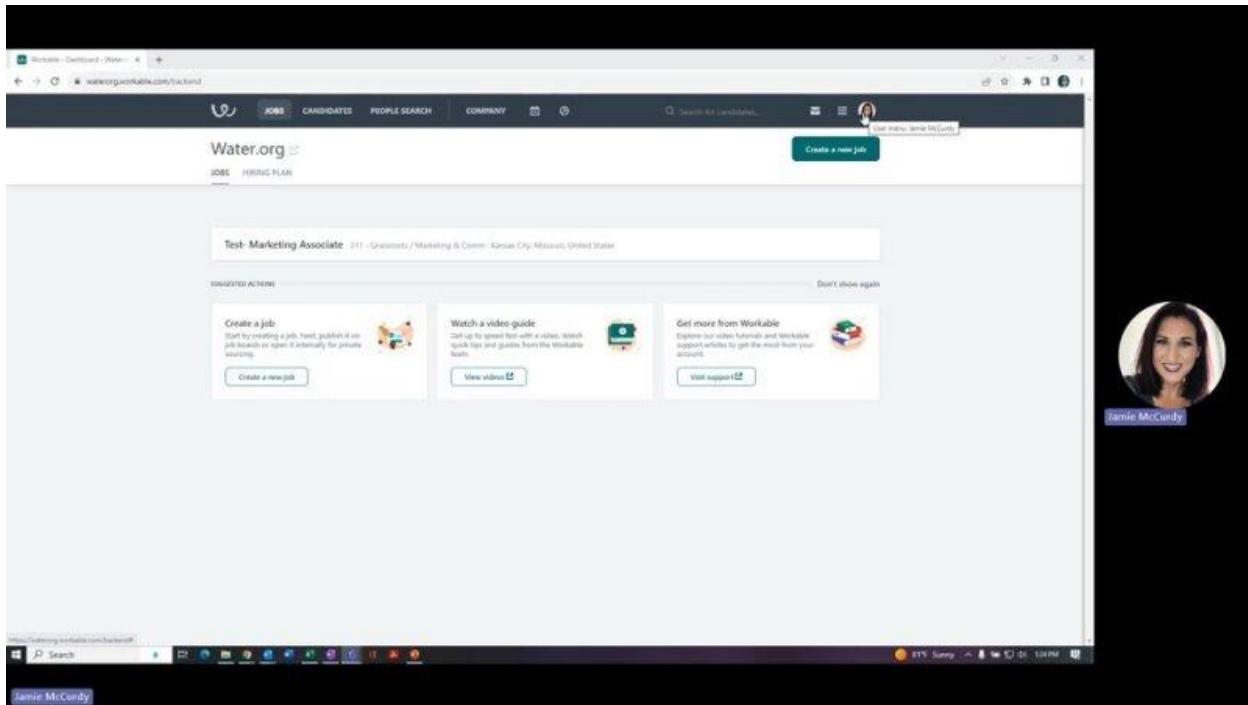
If you have any technical issues, please clear your cache and cookies, close your browser completely, reopen and try again. If you continue to have technical issues, please contact help@water.org for assistance. Please contact recruiting@water.org with any questions.

Your ATS account 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).



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.

The screenshot shows the 'EMAIL SIGNATURE' section of the preferences. At the top, a note says 'Add a personal signature to all emails sent via Workable. Customise your signature using the tools below.' Below this is a toggle switch labeled 'Use a personal signature for all emails' which is turned on. A toolbar with icons for text, bold, italic, lists, and images follows. The signature itself contains the name 'Dulce Ortiz (she/her/hers)', title 'Global Talent Acquisition Recruiter | Water.org', email 'dortiz@water.org | o- 816.301.5102', and a mission statement 'Using market-driven financial solutions to change lives with safe water. [Join us.](#)'. At the bottom is a teal 'Save changes' button.

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

The screenshot shows the 'NOTIFICATIONS' section. It includes a note about enabling Slack integration. Below are three categories: 'Comments', 'Evaluations', and 'Candidates'. Each category has two notification types listed with checkboxes for 'Email'. In 'Comments', both are checked. In 'Evaluations', both are checked. In 'Candidates', the first is checked and the second is unchecked.

Category	Notification Type	Email Status
Comments	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 | Requisition and Offer Review and Processing

The ATS, powered by Workable homepage offers menu options for the Reviewers to access requisitions or offers for review and processing.

Water.org's Requisition Process

The requisition details align to the decision-making criteria that you will use to make decisions.

Step 1: Submitted Requisitions will be processed by Human Resources. Hiring Managers will be consulted to align on any clarifying details for the requisition submission.

Step 2: Submitted Requisitions will be reviewed by the Talent Acquisition, Human Resources, Finance, and a Business Representative to complete the evaluation process.

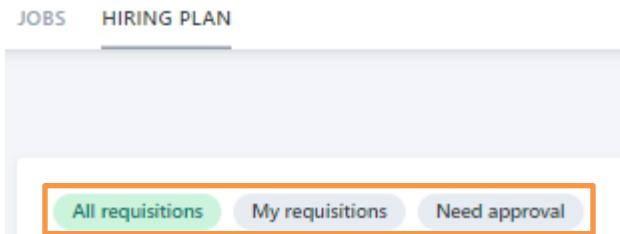
Step 3: If a decision is deferred, additional information will be captured in the notes for resolution.

Requisition Processing | Dashboard Tiles and Menu Options

The notable sections of the Workable homepage for requisition review and processing include the following:

The screenshot shows the Water.org Workable homepage. At the top, there is a navigation bar with links for JOBS, CANDIDATES, PEOPLE SEARCH, COMPANY, and a search bar labeled "Search for candidates...". On the far right of the top bar is a user profile icon. Below the navigation bar, the Water.org logo is displayed, followed by a "HIRING PLAN" button, which is highlighted with an orange box and labeled "2.". To the right of the hiring plan button is a green "Create a new requisition" button. The main content area is titled "Planned for this year" and includes a "Clear filters" link. Below this, there is a table header with columns: Requisition, Hiring manager, Requisition Owner, Salary, Plan date, and Status. A single requisition row is shown: "1 Marketing Associate" with "Dulce Ortiz" as the hiring manager and "Jamie McCurdy" as the requisition owner. The plan date is listed as "April 2024". To the right of this row is a three-dot menu icon, which is highlighted with an orange box and labeled "3.". A dropdown menu from this icon lists several options: View requisition, View associated job, Edit requisition, Clone requisition, Cancel requisition, and Delete requisition. The "Edit requisition" option is preceded by a green checkmark icon.

- 1. Inbox:** The Inbox envelope icon provides notifications of actions that need to be taken.
- 2. Hiring Plan:** When you receive a notification to act on a requisition, you will navigate to the Hiring Plan tab to review the requisition details. Notice the three tabs (All requisitions, My requisitions, and Need approval) to narrow your search.



- 3. Kebab menu:** This menu appears as three vertical dots and provides quick access to review the requisition for action. You can also click on the requisition title for quick access.

A screenshot showing a kebab menu (three vertical dots) open, listing actions: View requisition, View associated job, Edit requisition, Clone requisition, Cancel requisition, and Delete requisition. To the right, a requisition card is shown with the title "Requisition", subtitle "1 Marketing Associate", and details "211 - Grassroots / Marketing & Comm - United States".

- OR -

Requisition Review and Action

When a requisition requires your review for processing, you will receive an email notification containing the requisition details for your review and consideration:

Requisition pending approval

 notifications@notifications.workablemail.com
To Dulce Ortiz

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

ATTENTION: This email originated from outside of Water.org.

Your approval is required - Marketing Associate requisition

Hello,
Jamie McCurdy has prepared a requisition for a Marketing Associate. Please check and approve the following details:

Code	1
Job	Marketing Associate
Department	211 - Grassroots / Marketing & Comm
Location	United States
Hiring manager	Dulce Ortiz
Requisition owner	Jamie McCurdy

The requisition must be fully approved before you can begin hiring for the associated job.

[Approve the requisition](#) or [reject](#)

Thanks,
The Workable Team

At the bottom of the email, you will see an option to 'Approve the requisition' or 'Reject.' By selecting one or the other, you will successfully process your decision for that requisition.

Note: If you 'Reject' the requisition, you will be asked to add your feedback for the reason of rejection.

Processing your request. X

Requisition rejected

Why did you reject this requisition?

Add your feedback (optional)

Send feedback

Water.org's Offer Process

The offer details align to the decision-making criteria that you will use to make decisions.

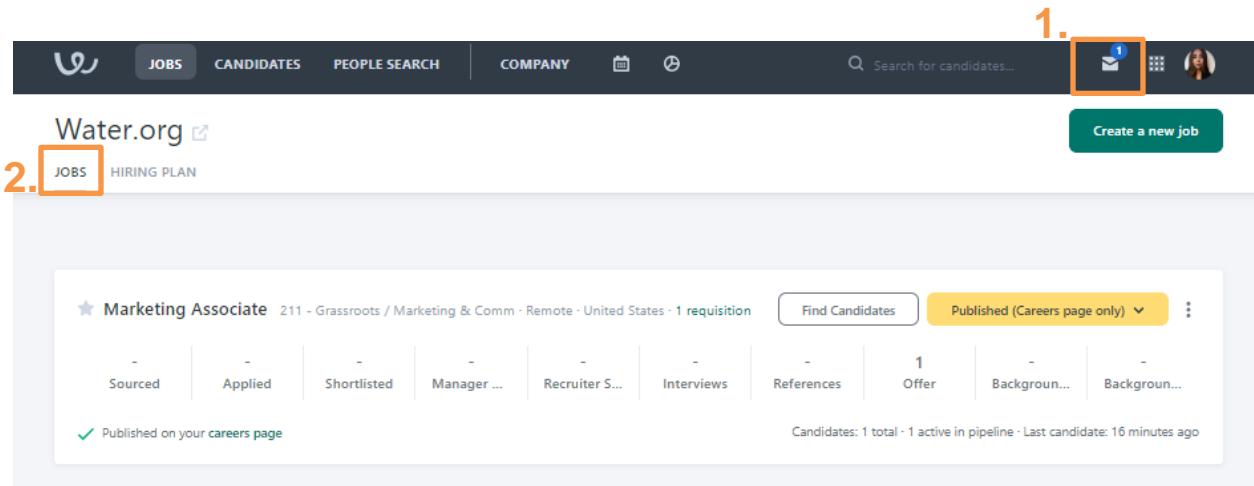
Step 1: Submitted Offers will be processed by Talent Acquisition. Hiring Managers will be consulted to align on any clarifying details for the offer submission.

Step 2: Submitted Offers will be reviewed by the Talent Acquisition, Compensation, and the Hiring Manager to complete the evaluation process.

Step 3: If a decision is deferred, additional information will be captured in the notes for resolution.

Offer Processing | Dashboard Tiles and Menu Options

The notable sections of the Workable homepage for offer review and processing include the following: Inbox icon (envelope), and Jobs tab (under Water.org, next to Hiring Plan).



- 1. Inbox:** The Inbox envelope icon provides notifications of actions that need to be taken.
- 2. Jobs:** When you receive a notification to act on an offer, you will navigate to the Jobs tab to review the offer details. Notice the offer section of the workflow to narrow your search.



Offer Review and Action

When an offer requires your review for processing, you will receive an email notification containing the offer details for your review and consideration:

Your approval is required - Offer to Jane Doe

 4e45rxqajmpf+2hqj@notifications.workablemail.com
To • Dulce Ortiz

i If there are problems with how this message is displayed, click here to view it in a web browser.

 US_Offer_Template.pdf 586 KB ▾

ATTENTION: This email originated from outside of Water.org.

Your approval is required - Offer to Jane Doe

Hello,

an offer has been prepared for [Jane Doe](#) in relation to the [Marketing Associate](#) job.
Please check and approve the following details before the offer is sent:

Candidate	Jane Doe
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At the bottom of the email, you will see an option to 'Approve This Offer' or 'Reject.' By selecting one or the other, you will successfully process your decision for that offer.

Note: If you 'Reject' the offer, you will be asked to add your feedback for the reason of rejection.

Offer rejected

Why did you reject this offer?

Add your feedback (optional)

Send feedback

Questions?

Email recruiting@water.org