



RIVAL WORKFLOW BULK ACTION

QUICK START GUIDE

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RIVAL

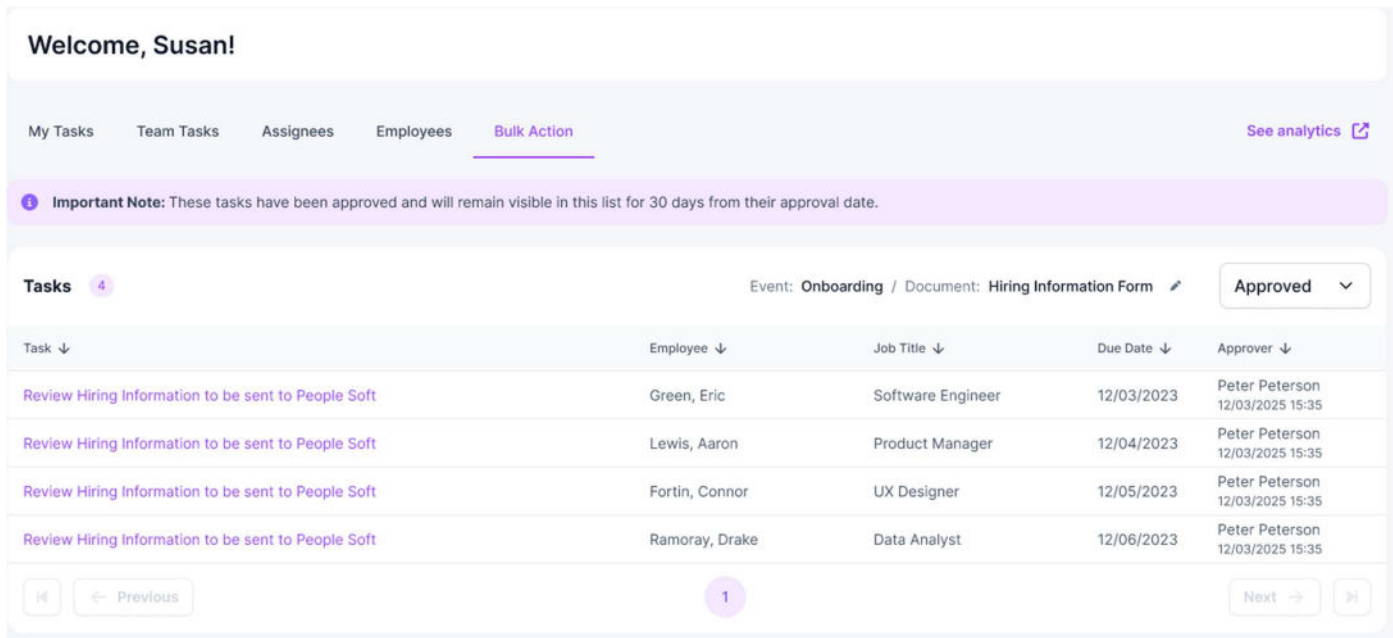
Overview

Bulk Action allows you to review and approve multiple employee forms from a single dashboard—saving time compared to reviewing forms one at a time.

Best for: High-volume form reviews (e.g., onboarding documents for batch hires)

Where to Find It

- Go to **Dashboard Summary**
- Select the **Bulk Action** tab
- Choose the **Event** and **Form** you want to review



The screenshot shows a dashboard interface for a user named Susan. At the top, there's a navigation bar with tabs: My Tasks, Team Tasks, Assignees, Employees, and Bulk Action (which is selected). A 'See analytics' link is on the right. Below the navigation is an 'Important Note' banner. The main content area is titled 'Tasks' and shows a list of 4 tasks. The tasks are filtered by 'Event: Onboarding' and 'Document: Hiring Information Form'. The list has columns for Task, Employee, Job Title, Due Date, and Approver. The tasks are all 'Review Hiring Information to be sent to People Soft' and are approved by Peter Peterson. At the bottom, there are navigation controls for 'Previous' and 'Next'.


Task ↓	Employee ↓	Job Title ↓	Due Date ↓	Approver ↓
Review Hiring Information to be sent to People Soft	Green, Eric	Software Engineer	12/03/2023	Peter Peterson 12/03/2025 15:35
Review Hiring Information to be sent to People Soft	Lewis, Aaron	Product Manager	12/04/2023	Peter Peterson 12/03/2025 15:35
Review Hiring Information to be sent to People Soft	Fortin, Connor	UX Designer	12/05/2023	Peter Peterson 12/03/2025 15:35
Review Hiring Information to be sent to People Soft	Ramoray, Drake	Data Analyst	12/06/2023	Peter Peterson 12/03/2025 15:35

How to Use It

1. Select Forms to Review



Choose the event and form type to load all forms ready for review.

2. Preview Each Form

Click the  (eye icon) to review form details before taking action.

 *You must preview forms before approving or returning them*

3. Approve or Return

-  **Approve:** Approve individually or select multiple forms to approve at once
-  **Return:** Send a form back if updates are needed

4. Completion

- Approved forms are automatically completed
- The system records who approved the form and when

What to Expect

- You'll review **one form type at a time**
- Works for both **My tasks** and **Team tasks**
- Approved forms remain visible based on system settings (default 30 days)

Good to Know

- **Bulk Action must be enabled** in Admin Settings (Admin > Settings > Other)
- Forms must be configured for **Bulk Approval** within the form's review task
- Returned forms go back to the **previous step in the workflow**
- Returned forms will **not reappear in Bulk Action**
- If you don't see your form, try searching by name

Need Help?

Contact your CSM or Rival Support if you have questions about setup or usage.

Product Documentation:

https://workflow-help.rival-hr.com/topics/Dashboard_Summary_overview.htm

https://workflow-help.rival-hr.com/topics/Associating_a_form_with_a_task.htm