Workday Job Aid for Managers

Manage Goals: Bulk Approval

Use this job aid to approve goals for multiple colleagues.

To learn more, find job aids and videos at the Workday Help website at workday.trinity-health.org.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website at workday.trinity-health.org

As of July 25, 2017
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Business Process Steps and Roles

Managers are required to approve colleagues’ goals within the Workday system.

- **Enter Goals:** Colleague
- **Review Goals (Bulk Approval):** Manager

**Before You Start**

Ensure local policies and procedures are followed. This may include:

- Managers discuss and assign goals to colleagues, considering both organization goals (if applicable) and goals to support performance
- Colleagues enter goals in Workday and submit for approval

**NOTE:**
This job aid provides instructions for the Manager step only.
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Process Steps
1. Log in to Workday
2. Click the **Inbox**
3. Click the **drop down arrow** in the Actions tab
Manage Goals: Bulk Approval

4. Click **Bulk Approve**

5. Click the box for Select All to approve all Manage Goals tasks
   OR
   Select/unselect specific Manage Goals tasks to approve some

6. Click **OK**

7. Selected goals are approved; click **Done**
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**End of Process: Next Steps**

- Colleagues manage and report on goals by adding milestones and updates for the mid-year review and the annual performance review.