Bulk Complete Actions (Routings)

09/16/2024 1:33 pm MDT

When working with a large number of assigned actions, users may prefer to complete actions in bulk.

This also has other applications such as completing actions on behalf of another user.

This option must first be enabled under the user's profile.

Enable

- 1. From the system menu, select **Users** > **Manage Users**.
- 2. Select the pencil icon to edit a user's profile.
- 3. Expand the **System access** section.
- 4. Select the **Enable bulk action completion** checkbox and save.

Complete actions

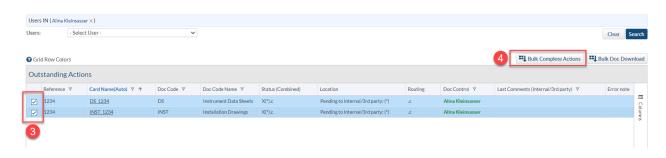
This option is only available in the project **Outstanding Actions** screen. It is NOT available in the **Actions Dashboard**.

- 1. From the Outstanding Actions screen, select a user from the Users dropdown to the top left of the grid.
- 2. Select Search.

Outstanding Actions



- 3. Select all cards for bulk completion.
- 4. Select Bulk complete actions.



5. Select Confirm on the popup that appears. After this, the cards will disappear from the grid unless they have other pending routings. Record is saved in the card history of which user bulk completed the routings if this was done on behalf of another user.