

Bulk Complete Actions (Routings)

12/02/2025 3:21 pm MST

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. To begin, this option must first be enabled under the user's profile.

Enable

1. Navigate to **System Menu > Users > Manage Users**.
2. Select the pencil icon to edit a user's profile.
3. In the **"Access"** section, expand the **"Permissions"** drop-down.
4. Check the box to **"Enable bulk action completion"** and save.

Complete actions in bulk

To complete actions in bulk, open the appropriate project and navigate to **Project Menu > Outstanding Actions**.



Note: This option is only available from the Outstanding Actions screen on projects, and is not available from the Actions Dashboard.

1. From the **Outstanding Actions** screen, filter the list to a specific user from the **"Non-Column Filters"** user drop-down (top left above of the grid).

Card Name/Action	Preparer	Checker	Approver	Date Assigned
E11 P-300 Compressor				2025-10-30
E11 P-450 Compressor				2025-10-30
E11 P-750 Industrial Pump				2025-10-30

2. Select all cards for bulk completion.
3. Open the "More Actions" drop-down and select **Bulk complete actions**.

Compressor Project (19283) Outstanding Actions

Filter set: Select Filter Set

+ Visibility + Non-Column Filters Action Users IN: Alysha Mosveen x

Card Name(Auto)	Doc No. (Omega)	Doc Code	Title	Status (Combined)	Doc Controller	Preparer	Checker
E11 P-300 Compact Pump	19283-E11-001-01	E11	Misc. Drawings	3.d(+)	Alysha Mosveen		
E11 P-450 Centrifugal Pump	19283-E11-002-01	E11	Misc. Drawings	3.d(+)	Alysha Mosveen		
E11 P-750 Industrial Pump	19283-E11-003-01	E11	Misc. Drawings	3.d(+)	Alysha Mosveen		

Save More Actions

Bulk Complete Actions

- Bulk Doc Download
- Export to CSV
- Update Action Due Dates for Null Cards
- User Actions Re-Assign

4. Select **Confirm** on the popup that appears.

Compressor Project (19283) Outstanding Actions

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+ Visibility + Non-Column Filters Action Users IN: Alysha Mosveen x

Card Name(Auto)	Doc No. (Omega)	Doc Code	Title	Status (Combined)	Doc Controller	Preparer	Checker	Approver	Date Assigned
E11 P-300 Compact Pump	19283-E11-001-01	E11	Misc. Drawings	3.d(+)	Alysha Mosveen				2025-10-30
E11 P-450 Centrifugal Pump	19283-E11-002-01	E11	Misc. Drawings	3.d(+)	Alysha Mosveen				2025-10-30
E11 P-750 Industrial Pump	19283-E11-003-01	E11	Misc. Drawings	3.d(+)	Alysha Mosveen				2025-10-30

Save More Actions

Clear Q Auto Search

Confirm

This will complete all actions for Alysha Mosveen for the selected cards. This cannot be undone. Proceed?

Cancel Ok

Once complete, 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.