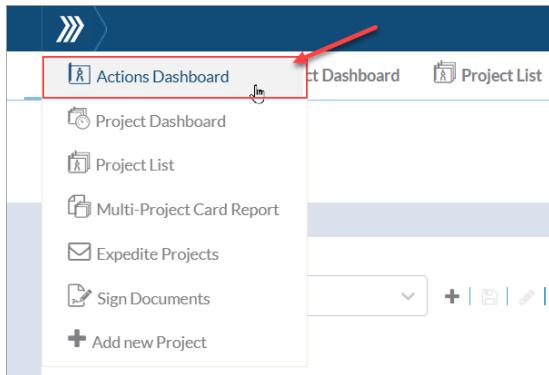


# Outstanding Actions

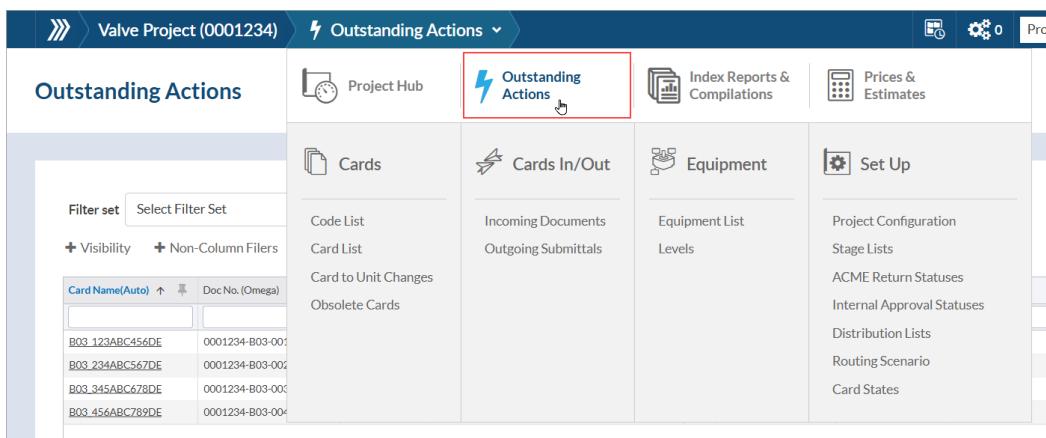
12/02/2025 3:17 pm MST

The outstanding actions grid is used to display a list of all the current assigned actions:

Actions can be checked in the Action Dashboard screen where all actions across all Projects are included **Logo** **Menu > Action Dashboard**)

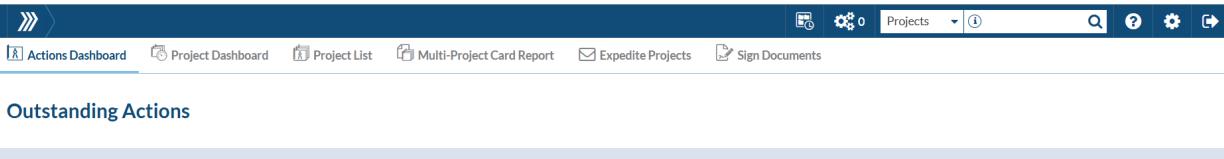


Or in the "Outstanding Actions" grid (**Project Menu > Outstanding Actions**) where only the actions belonging to that specific project are listed.



## Sorting

The cards included in the grid can be sorted to show only the most relevant actions:



The screenshot shows the Actions Dashboard with the 'Outstanding Actions' list. The top navigation bar includes links for Project Dashboard, Project List, Multi-Project Card Report, Expedite Projects, and Sign Documents. The main title 'Outstanding Actions' is displayed in a large, bold, dark blue font. Below the title is a search bar with a placeholder 'Search' and a 'Clear' button. The main content area features a table with columns for Doc Controller, Preparer, Checker, and Approver. The table rows list various actions, such as 'B01\_123-5760' and 'B01\_123-5761', along with their details and assigned users. A 'More Actions' dropdown menu is visible on the right side of the table. The bottom of the page includes a 'Grid row colors' link and a 'Select all (this page only)' checkbox.

			Doc Controller	Preparer	Checker	Approver
B01_123-5760	B01	0001234-B01-017-01	<input type="checkbox"/> 2.dp(*)	General Arrangement Drawings	Alysha Mosveen	Clemente Palermo
B01_123-5761	B01	0001234-B01-018-01	<input type="checkbox"/> 3.dp(*)	General Arrangement Drawings	Alysha Mosveen	Clemente Palermo
B01_123-5759	B01	0001234-B01-016-01	<input type="checkbox"/> 3.dp(*)	General Arrangement Drawings	Alysha Mosveen	Clemente Palermo
B01_123-5733	B01	0001234-B01-015-01	<input type="checkbox"/> 2.dp(*)	General Arrangement Drawings	Alysha Mosveen	Isabela Santos Pereira
B01_Value	B01	01-6789-B01-001-999	<input type="checkbox"/> X Pd<-> (+)	General Arrangement Drawings	Alysha Mosveen	Dwayne Callahan

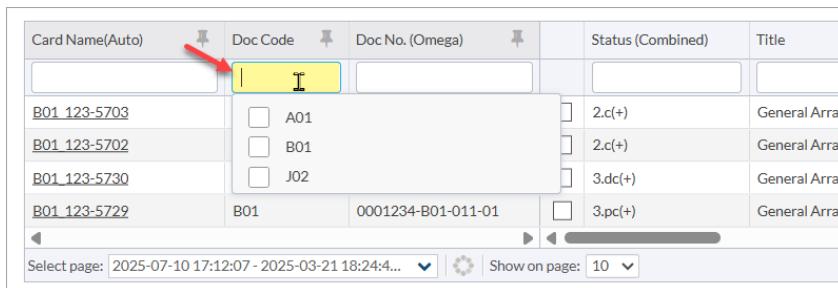
### "Visibility" options:

- Show/hide my actions only: This will show only the actions currently assigned to you. Also, these actions will show your name in green color under the applicable reviewer role (i.e., Doc Controller, Preparer, Checker, Approver) column.
- Show/hide completed projects: This will show the actions that have been assigned on a Project that has been completed
- Show/hide hidden projects: This will show the actions that have been assigned on a Project that has been hidden
- Show/hide action/card due date problems only: This will show only the cards where the action due date is after customer due date

In addition, the grid can be filtered by project users and/or action users using the "Non-Column Filters" options:

## Filters

Filters can be applied directly in the grid using the box under the column header. A value can either be selected from the available options, or typed into the box.



Card Name(Auto)	Doc Code	Doc No. (Omega)	Status (Combined)	Title
B01_123-5703	A01		2.c(+)	General Arran
<a href="#">B01_123-5702</a>	B01		2.c(+)	General Arran
<a href="#">B01_123-5730</a>	J02		3.dc(+)	General Arran
<a href="#">B01_123-5729</a>	B01	0001234-B01-011-01	3.pc(+)	General Arran

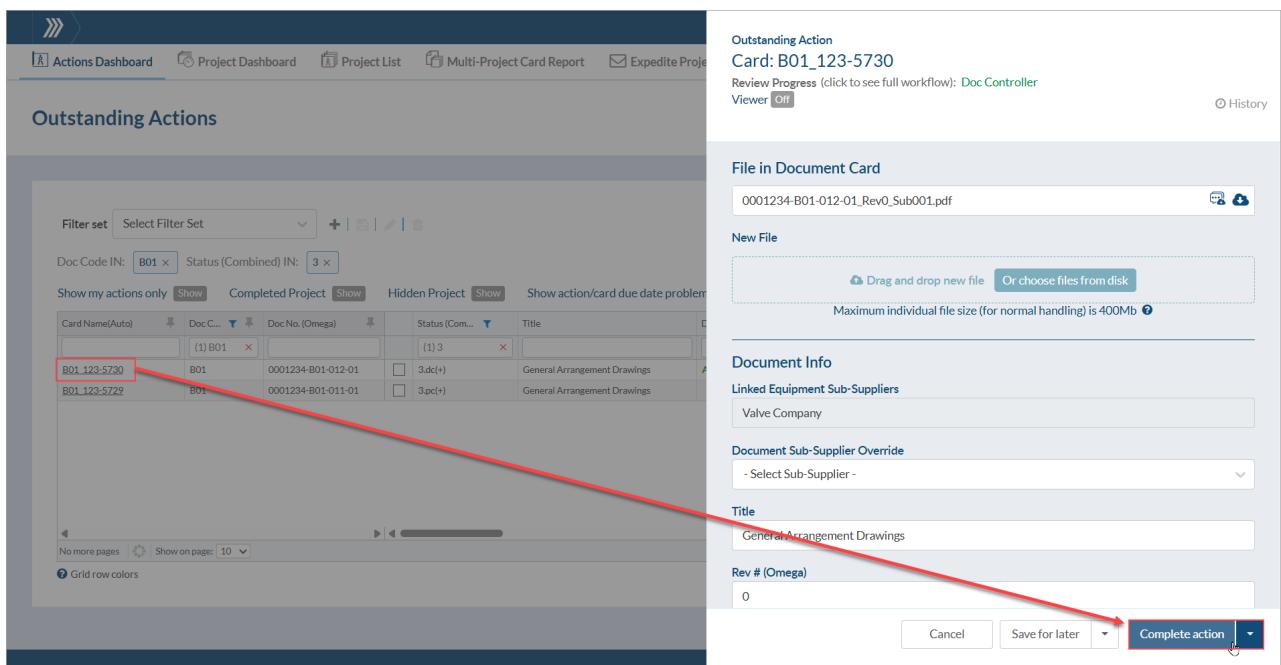
Select page: 2025-07-10 17:12:07 - 2025-03-21 18:24:4... Show on page: 10

Once grid is filtered to show the desired items, the view can be saved using a filter set so it can be used again in the future. For instructions on saving and using filter sets, see this article: [Save filters \(with filter sets\)](#).

## Complete Action

Click the hyperlink in the document name column. The action item can be completed from this grid.

For detailed information about completing outstanding actions, see this article: [Complete an outstanding action](#).



The screenshot shows the 'Outstanding Actions' grid on the left and a detailed view of a specific action card on the right. The grid has a 'Doc Code IN:' filter set to 'B01'. The card view shows the following details:

**Outstanding Action**  
**Card: B01\_123-5730**  
 Review Progress (click to see full workflow): Doc Controller  
 Viewer Off

**File in Document Card**  
 0001234-B01-012-01\_Rev0.Sub001.pdf

**New File**  
 Drag and drop new file Or choose files from disk  
 Maximum individual file size (for normal handling) is 400Mb

**Document Info**  
 Linked Equipment Sub-Suppliers  
 Valve Company

**Document Sub-Supplier Override**  
 - Select Sub-Supplier -

**Title**  
 General Arrangement Drawings

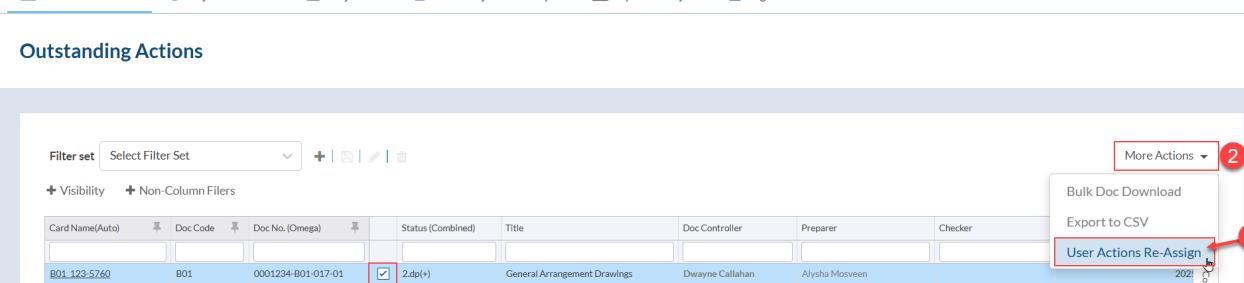
**Rev # (Omega)**  
 0

Buttons: Cancel, Save for later, Complete action

## Re-Assign Action

Actions currently assigned to one user can be re-assigned to another user either indefinitely or on a temporary basis.

To re-assign actions, select the actions needing to be re-assigned, open the "More Actions" menu and choose the "User Actions Re-Assign" option.



Actions Dashboard Project Dashboard Project List Multi-Project Card Report Expedite Projects Sign Documents

## Outstanding Actions

Filter set Select Filter Set + | ☰ | ☰ | ☰ | ☰

+ Visibility + Non-Column Filters

Card Name(Auto)	Doc Code	Doc No. (Omega)	Status (Combined)	Title	Doc Controller	Preparer	Checker	
B01_123-5760	B01	0001234-B01-017-01	<input checked="" type="checkbox"/> 2.dp(+)	General Arrangement Drawings	Dwayne Callahan	Alysha Mosveen		2021
B01_123-5761	B01	0001234-B01-018-01	<input checked="" type="checkbox"/> 3.dp(+)	General Arrangement Drawings	Alysha Mosveen	Clemente Palermo		2021
B01_123-5759	B01	0001234-B01-016-01	<input checked="" type="checkbox"/> 3.dp(-)	General Arrangement Drawings	Alysha Mosveen	Clemente Palermo		2021
B01_123-5733	B01	0001234-B01-015-01	<input checked="" type="checkbox"/> 2.dp(+)	General Arrangement Drawings	Alysha Mosveen	Isabela Santos Pereira	Dwayne Callahan	2021

No more pages Show on page: 10  Select all (this page only)  Select all (all pages)

Grid row colors

More Actions ▾ 2

Bulk Doc Download

Export to CSV

User Actions Re-Assign 3

## Re-Assign Indefinitely

From the pop-up, select the current action owner and the user who the action is being assigned to (i.e., the action assignee). Once saved, any selected cards with assignments to the previous user will be re-assigned to the new user.

User Actions Re-Assign X

---

**Current action owner \***

Alysha Mosveen ▼

---

**Action assignee \***

Clemente Palermo ▼

---

Out of office

---

Cancel Save

If action re-assignment is attempted for cards that are not currently assigned to the selected "current action owner," a notice will appear indicating that these actions have not been transferred.

Some actions were not transferred

---

Some of the selected actions were not eligible for re-assignment.

Some possible reasons:

- The "Current action owner" does not have an existing action on the selected card OR
- The "New action owner" does not have access to the associated project.

Actions successfully transferred: 0

Actions selected but not transferred: 1

---

Ok

## Re-Assign Temporarily (Out Of Office)

From the pop-up, select the current action owner and the user who the action is being assigned to (i.e., the action assignee). Next, enable the "Out of office" option and select the date that the current action owner will return. Once saved, any selected cards with assignments to the previous user will be re-assigned to the new user.



If the re-assigned actions are not completed by the action "expiration date," the action will be re-assigned back to the original action owner to complete upon their return.

