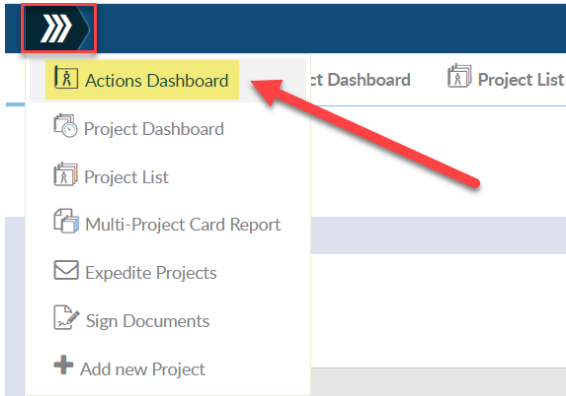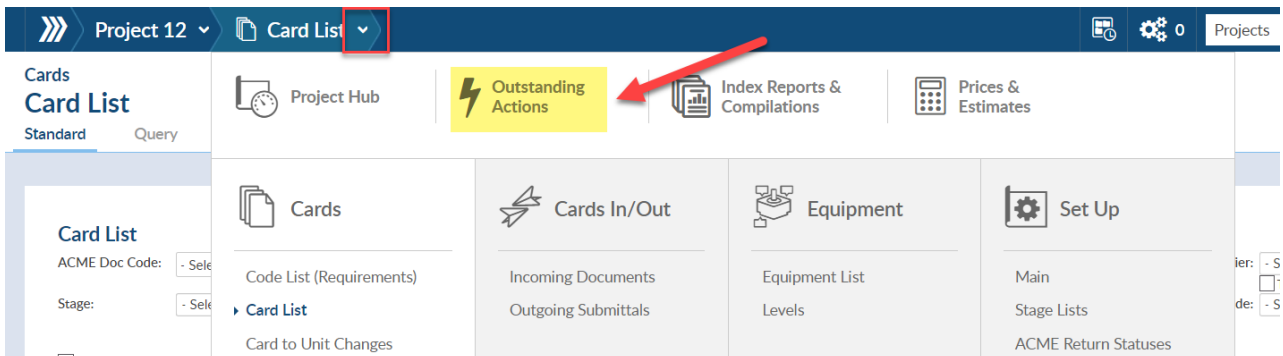# Outstanding Actions

09/16/2024 1:29 pm MDT

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 (DocBoss logo > Action Dashboard)

Or in the Outstanding Actions Grid from the Project Menu 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:

Options are:

- Show 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 (ie. Doc Control, Engineer, Drafter, Project Manger) column.

- Show hidden projects: This will show the actions that have been assigned on a Project that has been hidden

- Show completed projects: This will show the actions that have been assigned on a Project that has been completed

- Show action/card due date problems only: This will show only the cards where the action due date it is after customer due date

Filters

A filter set filters can be created the Outstanding Actions Grids, and then save the filters as views for ease of use in the future:

Hover over the column header that contains the value you want to filter, then click the drop-down arrow. Hover over "Filter" and select applicable value (or enter text if applicable).

Once selected the filter value appears in the display area above the grid. (Click search once all applicable filters have been added)

Saving View

If there is a specific filter that you want to be able to load in the future you can save it as a Filter Set.

Add applicable filters (as discussed above) and then below the grid click "Create Filter Set"

Filter sets can be saved as private view (only you will have access to it) or they can be marked as a public view and all users in your instance will have access to use.

The next time you want to use that view simply select from the drop down below the grid and all applicable filters will be applied.

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 our article here.