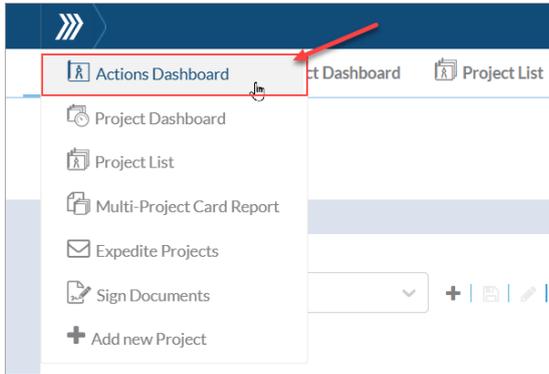


# Outstanding Actions

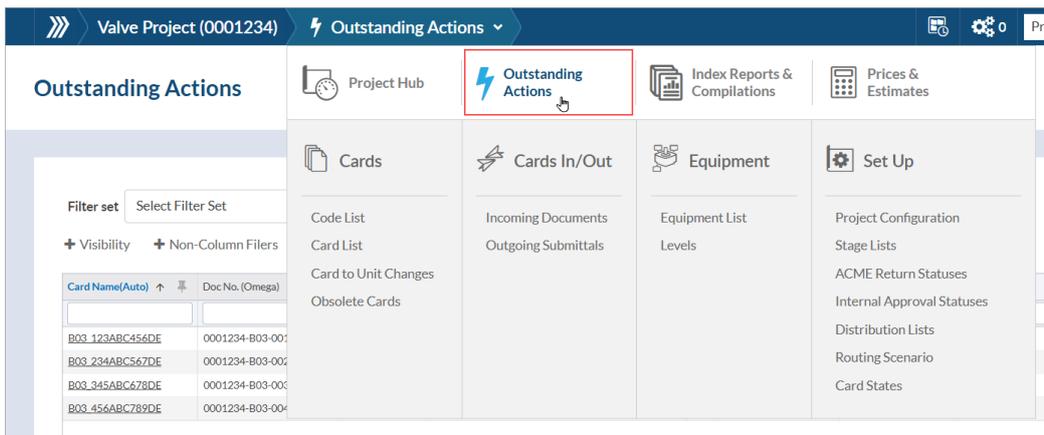
03/06/2026 2:09 pm MST

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 'Outstanding Actions' dashboard. At the top, there are navigation tabs: Actions Dashboard, Project Dashboard, Project List, Multi-Project Card Report, Expedite Projects, and Sign Documents. The main content area is titled 'Outstanding Actions'. Below the title, there is a 'Filter set' dropdown menu set to 'Select Filter Set'. To the right of the filter set are icons for adding, deleting, and refreshing filters. Below the filter set, there is a '+ Visibility' button and a '+ Non-Column Filters' button. The '+ Visibility' button is highlighted with a red box. Below these buttons, there are four filter options: 'My actions only', 'Completed Projects', 'Hidden Projects', and 'Action/card due date problems only'. The 'My actions only' option is selected. Below the filter options, there is a table with columns: Card Name(Auto), Project, Action, Status, Action Type, Action User, Doc Controller, Preparer, Checker, and Approver. The table contains several rows of data, including actions for 'B01\_123-5760', 'B01\_123-5761', 'B01\_123-5752', 'B01\_123-5733', and 'B01 Valve'. The 'Action User' column for all rows is 'Alysha Mosveen'. The 'Doc Controller' column for the first four rows is 'Clemente Palermo', and for the last row, it is 'Isabela Santos Pereira'. The 'Preparer' column for the first four rows is 'Clemente Palermo', and for the last row, it is 'Dwayne Callahan'. The 'Checker' and 'Approver' columns are empty. At the bottom of the grid, there are options for 'Show on page: 30', 'Select all (this page only)', and 'Select all (all pages)'. There is also a 'Grid row colors' option.

### "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:

The screenshot shows the 'Outstanding Actions' dashboard with the 'Non-Column Filters' dropdown menu open. The dropdown menu has two tabs: 'Project Users' and 'Action Users'. Below the tabs, there is a search box with the text 'Select or type ahead...'. A red arrow points to the '+ Non-Column Filters' button. The table below the dropdown menu shows the same data as the previous screenshot, but with the 'Action User' column highlighted in green for all rows.

## 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
<a href="#">B01_123-5703</a>	<input type="checkbox"/> A01		<input type="checkbox"/> 2.c(+)	General Arran
<a href="#">B01_123-5702</a>	<input type="checkbox"/> B01		<input type="checkbox"/> 2.c(+)	General Arran
<a href="#">B01_123-5730</a>	<input type="checkbox"/> J02		<input type="checkbox"/> 3.dc(+)	General Arran
<a href="#">B01_123-5729</a>	B01	0001234-B01-011-01	<input type="checkbox"/> 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' interface. On the left, a grid lists actions with columns for Card Name(Auto), Doc Code, Doc No. (Omega), Status (Combined), and Title. The action 'B01\_Fire Alarm 1' is highlighted. On the right, a detailed view for this action is shown, including the title 'Card: B01\_Fire Alarm 1', a 'Review Progress' link, and a 'Viewer' button. Below this, there is a section for 'Active File' with a file upload area and options to 'Collapse All' or 'Expand All'. At the bottom, there are buttons for 'Cancel', 'Save for later', and '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.

**Outstanding Actions**

Filter set: Select Filter Set

+ Visibility + Non-Column Filers

Card Name(Auto)	Doc Code	Doc No. (Omega)	Status (Combined)	Title	Doc Controller	Preparer	Checker
B01-123-5760	B01	0001234-B01-017-01	2.dp(+)	General Arrangement Drawings	Dwayne Callahan	Alysha Mosveen	
B01-123-5761	B01	0001234-B01-018-01	3.dp(+)	General Arrangement Drawings	Alysha Mosveen	Clemente Palermo	
B01-123-5759	B01	0001234-B01-016-01	3.dp(+)	General Arrangement Drawings	Alysha Mosveen	Clemente Palermo	
B01-123-5733	B01	0001234-B01-015-01	2.dp(+)	General Arrangement Drawings	Alysha Mosveen	Isabela Santos Pereira	Dwayne Callahan

More Actions

- Bulk Doc Download
- Export to CSV
- User Actions Re-Assign

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

## 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**

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.

The screenshot shows a 'User Actions Re-Assign' dialog box with the following fields and options:

- Current action owner \***: Alysha Mosveen
- Action assignee \***: Clemente Palermo
- Out of office**
- Expires at \***: 2025-10-10

A calendar overlay is shown for October 2025, with the date 10th selected. The calendar grid is as follows:

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15

Buttons at the bottom of the dialog include 'Cancel' and 'Save'. The calendar overlay also has 'Today' and 'Clear' buttons.