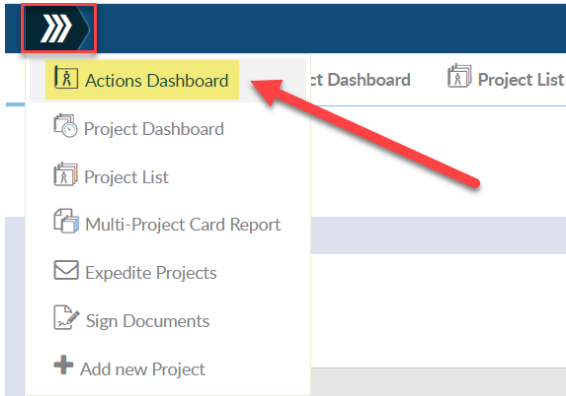


Outstanding Actions

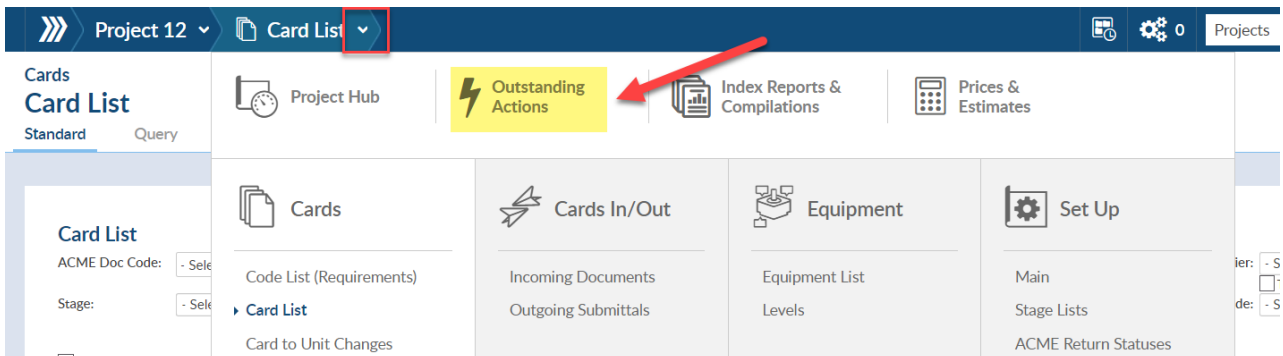
09/16/2024 1:29 pm MDT

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:

Grid Rows Colors

Card Name(Auto)↑	Doc Code	Title	Action Due Date	Due to Customer	Status (Customer)	Doc Control	Engineer	Drafter
A01_8910-02	A01	Document Register	29/11/2022	06/12/2022	2	Tunde Dorloti		
B01_Tag_1	B01	General Arrangement Drawings	29/11/2022	06/12/2022	2	Tunde Dorloti		
B02_8910-02	B02	Vendor Document Register	29/11/2022	06/12/2022	3	Tunde Dorloti		
CD_LT-105	CD	Material Test Certificates	30/11/2022	06/12/2022	NULL	Tunde Dorloti		
D16_LPMC51	D16	Instrument Data Sheet	29/11/2022	06/12/2022	3		Brad Bowyer	
D27_1234	D27	Bill Of Material	29/11/2022	06/12/2022	2	Tunde Dorloti	Brad Bowyer	
I03_1234	I03	Quality Plan	29/11/2022	06/12/2022	2			Brad Bowyer

No more pages | Show on Page: 10

Show my actions only Show hidden projects Show completed projects Show action/card due date problems only

Filter Set: - Select Filter Set - | + Create Filter Set | Update Filter Set | Edit Filter Set | Delete Filter Set

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).

Grid Rows Colors

Card Name(Auto) ↑	Doc Code	Title	Action Due Date	Due to Customer	Status (Customer)	Doc Control	Engineer
A01_8910-02	A01	Document Register	29/11/2022	06/12/2022	Sort Ascending	unde Dorloti	
B01_Tag_1	B01	General Arrangement Drawings	29/11/2022	06/12/2022	Sort Descending	unde Dorloti	
B02_8910-02	B02	Vendor Document Register	29/11/2022	06/12/2022	Columns	unde Dorloti	
CD_LT-105	CD	Material Test Certificates	30/11/2022	06/12/2022	Filters	unde Dorloti	
D16_L_PMC51	D16	Instrument Data Sheet	29/11/2022	06/12/2022	Fit to header		yer
D27_1234	D27	Bill Of Material	29/11/2022	06/12/2022	Fit to content		yer
I03_1234	I03	Quality Plan	29/11/2022	06/12/2022	Auto fit		

No more pages Show on Page: 10

Show my actions only Show hidden projects Show completed projects Show action/card due date problems only

Filter Set: - Select Filter Set - [+ Create Filter Set](#) [Update Filter Set](#) [Edit Filter Set](#) [Delete Filter Set](#)

Grid context menu options: Sort Ascending, Sort Descending, Columns, Filters, Fit to header, Fit to content, Auto fit, Set as 1st column. Filter sub-menu options: Before, After, On, Due within, Overdue.

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

Due to Customer IN (before 07/12/2022 ×)

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”

Outstanding Actions

Due to Customer IN (before 07/12/2022 x)

Grid Rows Colors

Actions

Card Name(Auto)↑	Doc Code	Title						
A01_8910-02	A01	Document Register						
B01_Tag_1	B01	General Arrangement Drawings						
B02_8910-02	B02	Vendor Document Register						
CD_LT-105	CD	Material Test Certificates						
D16_L_PMC51	D16	Instrument Data Sheet	29/11/2022	06/12/2022	3		Brad Bowyer	
D27_1234	D27	Bill Of Material	29/11/2022	06/12/2022	2	Tunde Dorloti	Brad Bowyer	
I03_1234	I03	Quality Plan	29/11/2022	06/12/2022	2			Brad Bowyer

No more pages Show on Page: 10

Show my actions only Show hidden projects Show completed projects Show action/card due date problems only

Filter Set: - Select Filter Set - **+ Create Filter Set** Update Filter Set Edit Filter Set Delete Filter Set

Create Filter Set

Filter Set Name: *

Public Filter Set:

Cancel Save

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](#).

Fabrication Project(1475... Outstanding Actions

Outstanding Actions

Customer Status IN (2 x)

Users: - Select User -

Date Received	Card Name(Auto)↑	Customer Status	Title	Inter
2019-04-29	BOM_E14016-PO-018-RM-400-P-0013_ds1	2	Bill of Material	

No more pages Show on Page: 20

Filter Set: - Select Filter Set - + Create Filter Set Update Filter Set Edit Filter Set Delete Filter Set

Outstanding Action

Card: BOM_E14016-PO-018-RM-400-P-0013_ds1

Stage Review Progress: Admin Tech Internal Queue

Viewer: Off History

Current file in document card

Current File

P7564-PO018-400-30-BOM-0010_A1 Bill of Material + SDocC_Form.pdf

New File

Drag and drop new file Or choose files from disk

Max upload size: 400Mb

Document Info

Linked Equipment Sub-Suppliers

No Data

Document Sub-Supplier Override

- Select Sub-Supplier -

Title

Bill of Material

Wolfe PA Rev #

Cancel Save for later **Complete action**