

Complete an Outstanding Action

09/05/2025 12:30 pm MDT

Once an action has been applied to a card, it remains in the "Outstanding Actions" grid until all actions have been **completed**.

To view all outstanding actions for an individual project, navigate to **Project Menu > Outstanding Actions**. To view all outstanding actions across multiple projects, navigate to **Logo Menu > Actions Dashboard**.

Both grids have filter and sorting options. For details, see this article: [Outstanding Actions](#).

Open the Action Card

Click on the applicable card under the Card Name(Auto) column of the grid.

The screenshot shows the 'Outstanding Actions' grid. The grid has columns: Card Name(Auto), Doc Code, Title, Action Due Date, Due to Customer, Doc Control, Engineer, Drafter, Project Manager, and Project name. The first row is highlighted with a red box and a red arrow pointing to it. The first row contains: B01_Tag1, B01, General Arrangement Drawings, 22/11/2022, 06/12/2022, Tunde Dorloti, Brad Bowyer, Tunde Dorloti, and Project 12 (4519TD).

Card Name(Auto)	Doc Code	Title	Action Due Date	Due to Customer	Doc Control	Engineer	Drafter	Project Manager	Project name
B01_Tag1	B01	General Arrangement Drawings	22/11/2022	06/12/2022	Tunde Dorloti	Brad Bowyer	Tunde Dorloti		Project 12 (4519TD)
D16_L_PMC51	D16	Instrument Data Sheet	29/11/2022	06/12/2022	Tunde Dorloti	Brad Bowyer			Project 12 (4519TD)
D27_1234	D27	Bill Of Material	29/11/2022	06/12/2022	Tunde Dorloti	Brad Bowyer			Project 12 (4519TD)
I03_1234	I03	Quality Plan	29/11/2022	06/12/2022	Tunde Dorloti		Brad Bowyer		Project 12 (4519TD)
B02_8910-02	B02	Vendor Document Register	29/11/2022	06/12/2022	Tunde Dorloti				Project 7 (1234-02)

Reviews stage status, current file and upload new file

The screenshot shows the 'Outstanding Action' card for 'Card: D01_1234'. The card has three main sections: 'Review Progress', 'File in Document Card', and 'New File'. The 'Review Progress' section shows a workflow: Waiting for file, Doc Control (Alysha Mosveen), Preparer (Alina Sonke, Lisa Simpson), and Checker (Jessica Jones). The 'File in Document Card' section shows 'Document 1.pdf' with a download button. The 'New File' section has a dashed box for uploading files, with a note: 'Maximum individual file size (for normal handling) is 400Mb'.

- **1. Review Progress:** will show the current assignment status (in green color) and the next step(s) after the current action is completed (by selecting the "click to see full workflow" text).

- **2. Current File:** "Viewer On" will open the most current version of the document that is attached to the card. Clicking on the download button in the "File in Document Card" field will download the file in your computer.

- **3. New File:** this allows you to upload a new document to the card.

Review the details of the card and update revision

Document Info

Linked Equipment Sub-Suppliers
Supplier1

Document Sub-Supplier Override
- Select Sub-Supplier -

Title
General Arrangement Drawings

Wolfe PA Rev #
1

Last sent as Rev 0

Instance Rev #: the primary rev number of the document can be updated here - there it is also included the previous revision for reference

Comments

Comments

Comments for NEXT ACME submittal

Comments for NEXT Sub-Supplier submittal

Comments (Internal)

Comments for NEXT CUSTOMER submittal: allows you to add comments for the customer (i.e. explain changes made to the document), which can be included in the cover page. Also, if customer requires a CRS this is the place where it can be uploaded and it will be included in the submittal along with the primary file.

Comments for NEXT Sub-Supplier Sub-Supplier submittal: allows you to add sub-supplier notes (ie. instructions for changes) which can be included in the sub-supplier cover page. Here it is possible also to attach comment sheets or CRS from customer for their revision also.

Comments (Internal): allows you to add internal comments for your colleagues with notes and upload support files.

Saved Comments

☐ - Comments (Internal) ☐ - Comments (Customer) ☐ - Comments (Sub-Supplier)

Recorded Da...	File comments	Comment	User
- Submittal Number: T-004 - Now			
25/11/2022 ...		Check file and send to customer	tunde@do...
No more pages Show on Page: 20			

[See comments from previous workflow](#)

Saved Comments: this displays any comments or comment files that have previously been added to the card

Last comments can be also easily accessed by enabling the "Last Comments" columns in the Outstanding Actions Grid.

Grid Rows Colors

Actions

Card Name(Auto) ▾	Doc Code ▾	Title ▾	Action Due Date ▾	Due to Customer ▾	Doc Control ▾	Engineer ▾	Drafter ▾	Project Manager ▾
B01 Tag 1	B01	General Arrangement Drawings	22/11/2022	06/12/2022				
D16 L PMCS1	D16	Instrument Data Sheet	29/11/2022	06/12/2022			lowyer	Tunde Dorloti
D27 1234	D27	Bill Of Material	29/11/2022	06/12/2022				
I03 1234	I03	Quality Plan	29/11/2022	06/12/2022				
B02 8910-02	B02	Vendor Document Register	29/11/2022	06/12/2022				

No more pages Show on Page: 10

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

Filter Set: Tunde filter set Create Filter Set Update Filter Set Edit Filter Set Delete Filter Set

Columns ▾
Sort Ascending
Sort Descending
last
Last Comments (Internal)
Last File Comments (Internal)
Last Comments (Sub-Supplier)
Last File Comments (Sub-Supplier)
Last Comments (Customer)
Last File Comments (Customer)

Routing

Routing

Queue for Submittal

☐ Queue for submittal to ☐ Sub-Supplier ☐ Internal

Internal (User) Routing

☒ Doc Control User

Tunde Dorloti

☐ Engineer User

Tunde Dorloti

☐ Drafter User

Tunde Dorloti

☐ Project Manager User

Tunde Dorloti

Due to Doc Control Date

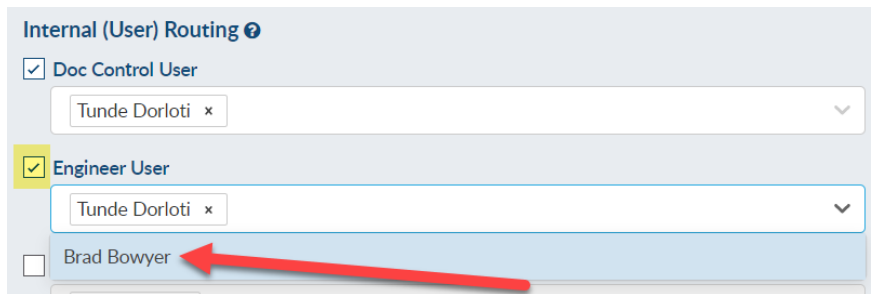
22/11/2022

This allows you to set up additional routing (if applicable). Options for setting up addition routings are to:

- Queue the document for submittal to Internal or Sub-Supplier for review/revision, or

- Select routing to additional DocBoss users.

Multiple users can be selected for each role, if desired. Click the drop down to add more users to a role, and each user will appear in a removable block. As always, the roles are sequential reviews.



Internal (User) Routing ⓘ

☒ Doc Control User

Tunde Dorloti x

☒ Engineer User

Tunde Dorloti x

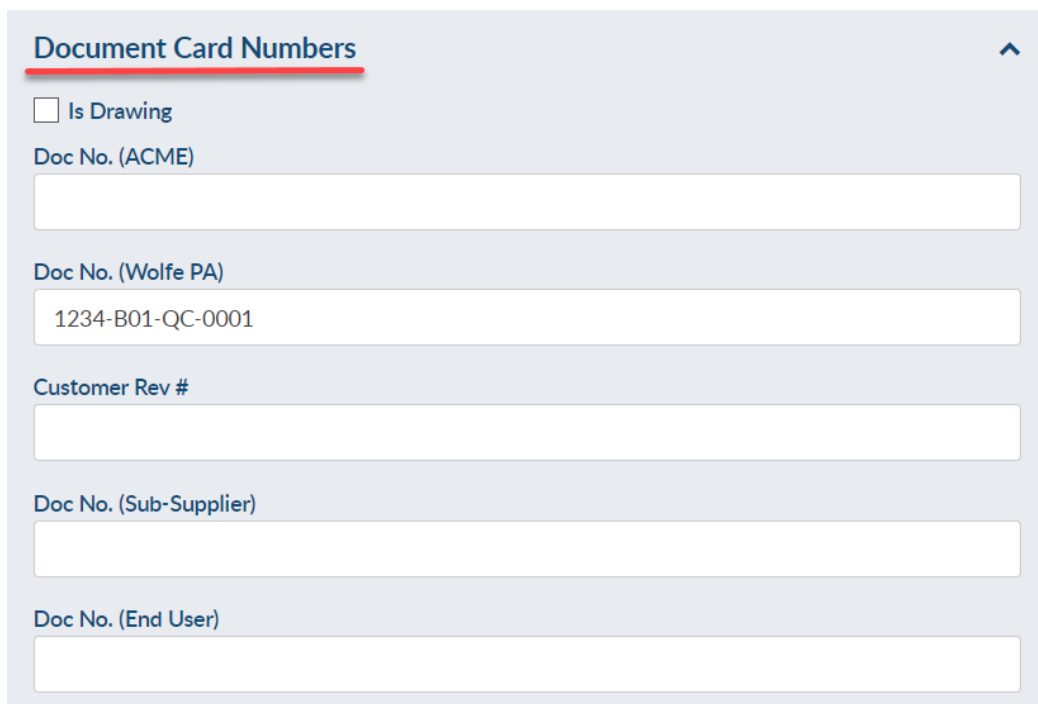
☐ Brad Bowyer



Once the action(s) is completed for that role (e.g., doc control user) and the card moves to the next routing role (e.g., engineer user), the action due date will **automatically** update to the number of action turn around days (set on project main - see article: [Turn Around Days](#)) after the current date. By default, this is set to 5 days.

For example, if the doc control role completed their action(s) on September 1st, the action due date for the next role (i.e., the engineer) would be set to 5 days later (September 6th).

Document Card Numbers



Document Card Numbers ^

☐ Is Drawing

Doc No. (ACME)

Doc No. (Wolfe PA)

1234-B01-QC-0001

Customer Rev #

Doc No. (Sub-Supplier)

Doc No. (End User)

Allows you to add/change any applicable document number

Custom Fields(s)

Allows you to add/change any applicable custom fields

Native File

If natives files are required to be included in the submittal this is the place where it can be uploaded and it will be included along with the primary file.

*Note: If there are multiple files to be included in this field, you need to include them in zip file and upload the zip file here.

Click Save for Later & Complete Action

Once all the changes have been applied, the last step is to Complete action.

And if you are not the user that set up/manages the project you also have the ability to send them an alert to let them know you have completed the action. This way they are informed that document it is ready to send to the customer and they can start the submittal.

If the document it is not ready to be completed, there is also the option to "Save for later" and this will just save all the changes made so far and will keep the action pending to be completed.

Action Alert & Outstanding Action Report

Each user can decide how to receive the email notifications for new actions assigned to them.

Options are:

- Receive an individual action email notification immediately when an action has been assigned to you.
- Receive a report with all the open actions which can be sent daily or weekly to your email by subscribing to the

Outstanding Actions Report.

Both options can be enabled or disabled from your user profile. For details, see our article [here](#).
