Complete an Outstanding Action

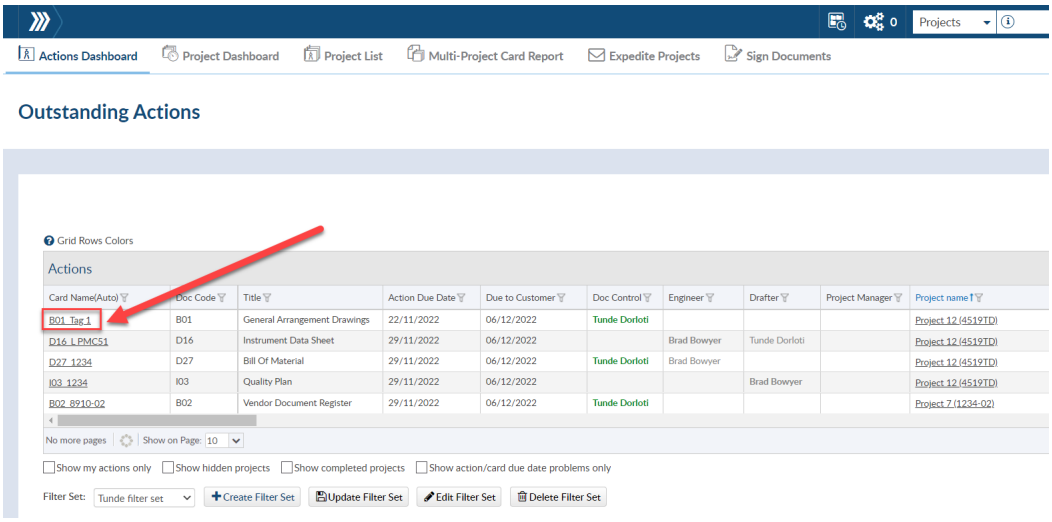
09/28/2026 8:55 am MDT

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.**

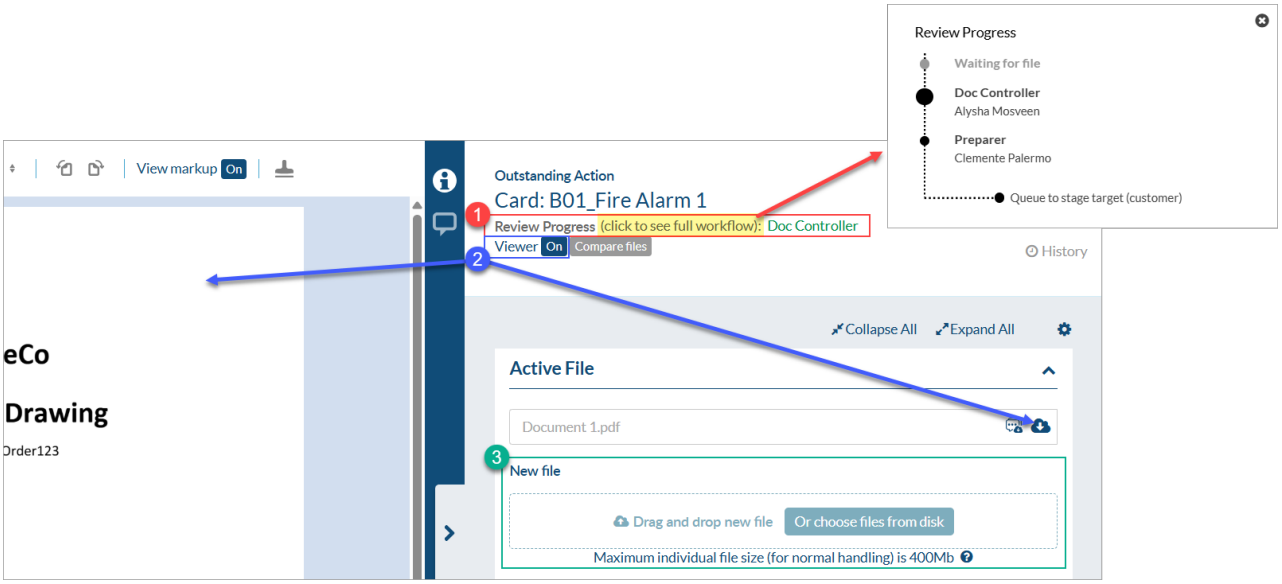
Both grids have filter and sorting options. For details, see this article: Outstanding Actions.

Open the Action Card

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



Review progress, active file, and/or upload new file



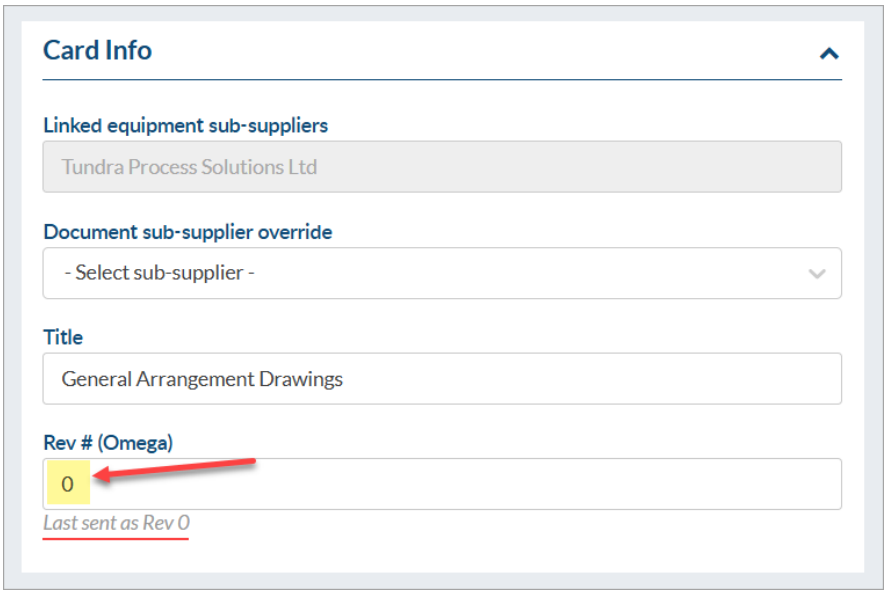
- **1. Review Progress**: will show the current assignment status (in green color) and the next step(s) after the current action is completed (by selecting the "click to see full workflow" text).

- **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 will download the file in your computer.

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

Card Info

Review the details of the card and update the primary revision number.



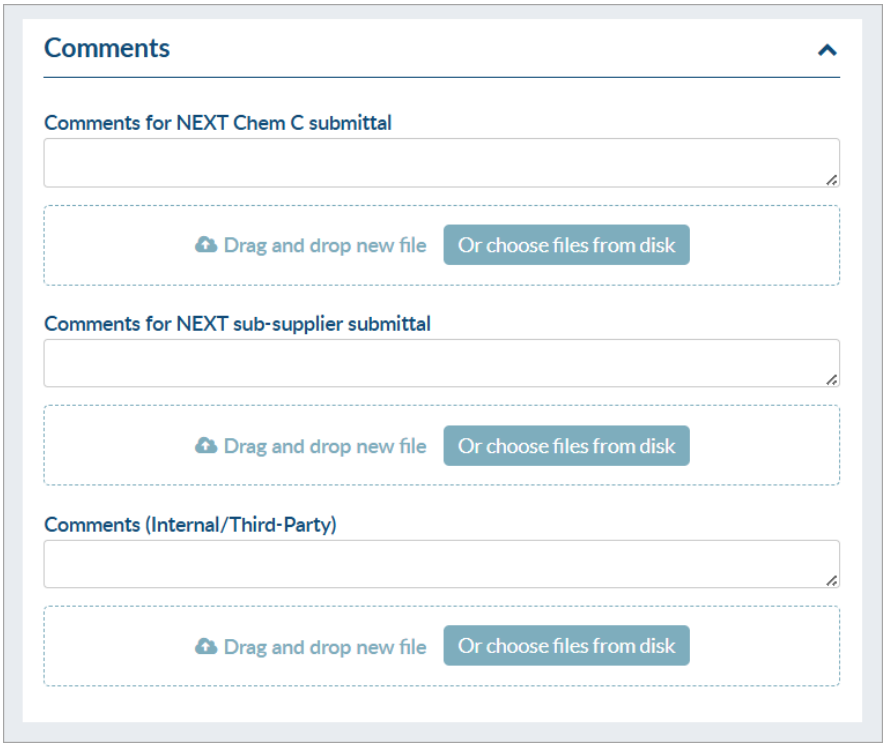
Rev # (*Company Name*): the primary rev number of the document can be updated here - there it is also included the previous revision for reference

Comments

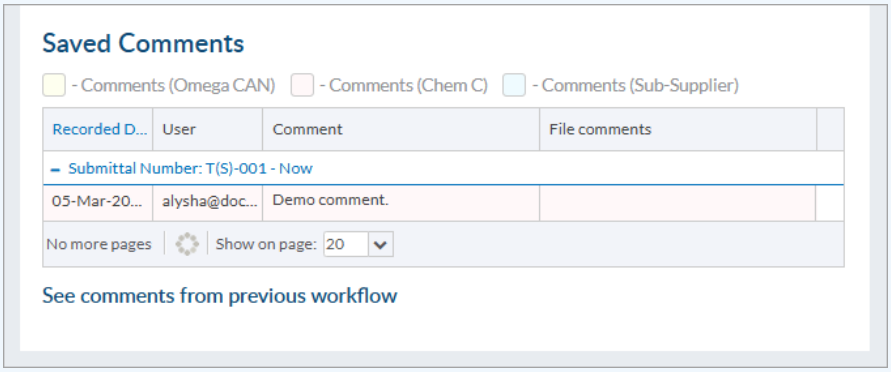
Comments for NEXT [*Customer*] submittal: allows you to add comments for the customer (i.e. explain changes made to the document), which can be included in the cover page. Also, if customer requires a CRS this is the place where it can be uploaded and it will be included in the submittal along with the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

Comments for NEXT sub-supplier submittal: allows you to add sub-supplier notes (i.e., 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.

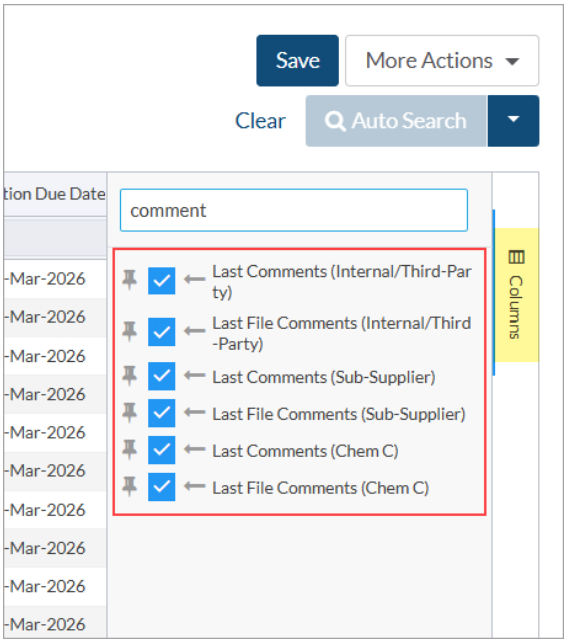
Comments (Internal): allows you to add internal comments for your colleagues with notes and upload support files.



Comments/comment files previously added to the card will be available in the "Saved Comments" area of the "Comments" section.

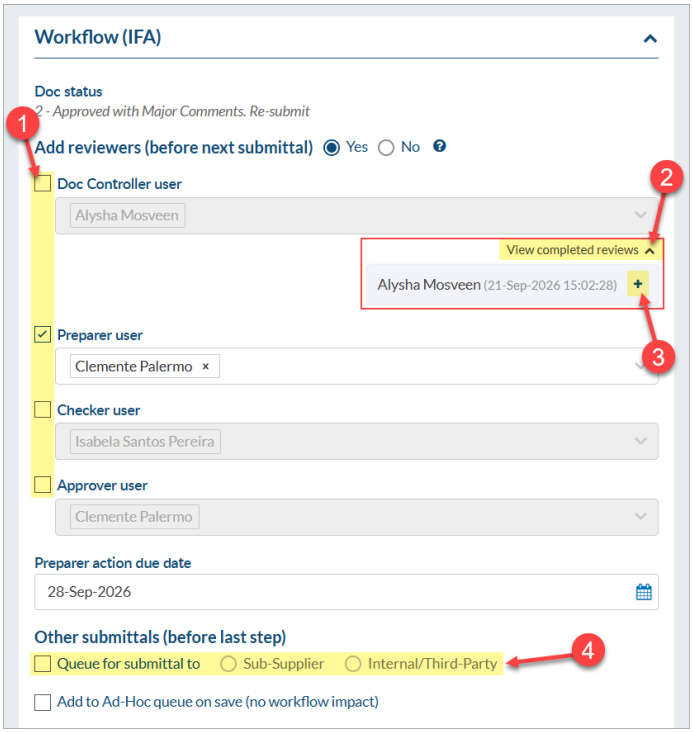


Last comments can be also be accessed from the Outstanding Actions grid by enabling the "Last Comments" columns.



Workflow

Add reviewers, see completed reviews, and/or queue other submittals within the current stage workflow prior to submitting to the target.



Options:

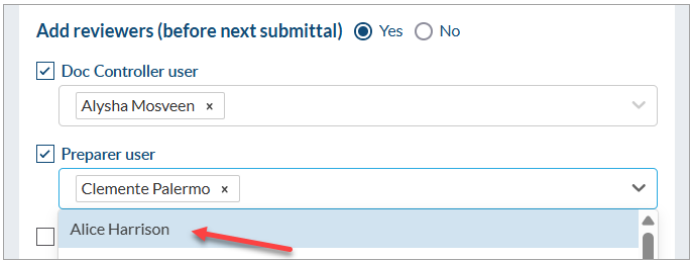
- 1. Select routing to additional DocBoss users

- 2. See who has completed a review (per role)

- 3. Re-route the card to users who completed their review previously

- 4. Queue the card for submittal to Sub-Supplier OR Internal/Third-Party

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.

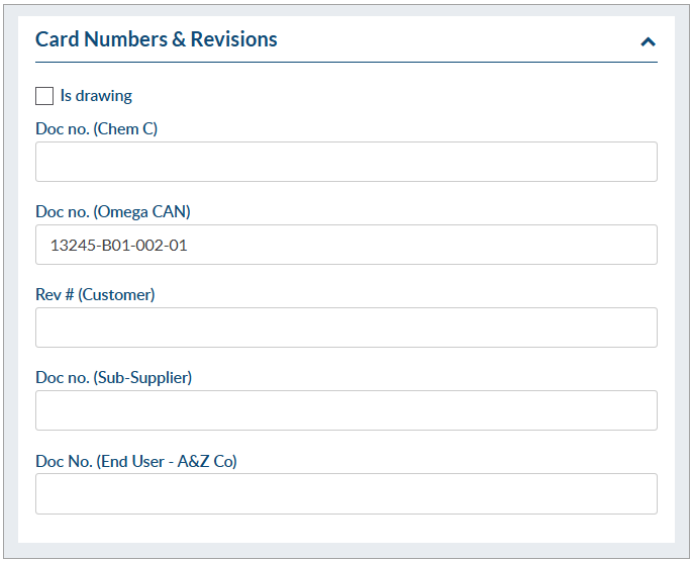


Once the action(s) is completed for that role (e.g., doc control user) and the card moves to the next routing role (e.g., engineer user), the action due date will **automatically** update to the number of action turn around days (set on project main - see article: Turn Around Days) after the current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

For example, if the doc controller role completed their action(s) on October 10th, the action due date for the next role (i.e., the preparer) would be set to 5 days later (October 16th).

Card Numbers & Revisions

Add/change any applicable document numbers and/or update the secondary revision number (if applicable).



Custom Fields

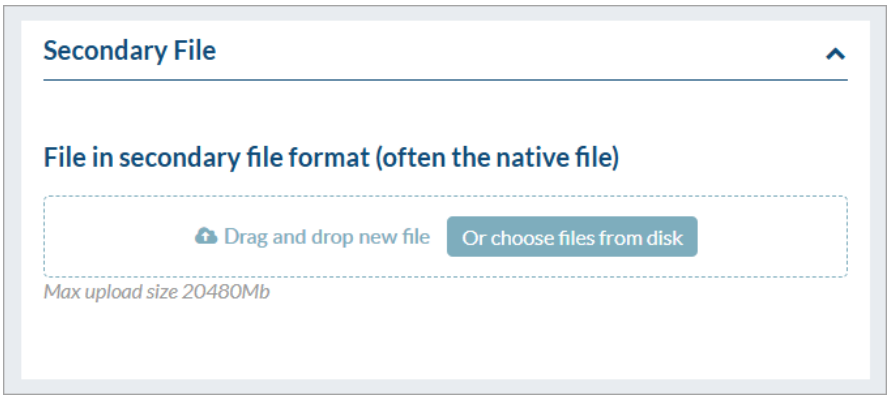
Add/change any applicable custom fields.



Secondary File

If secondary (i.e., native) files are required to be included as part of 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.

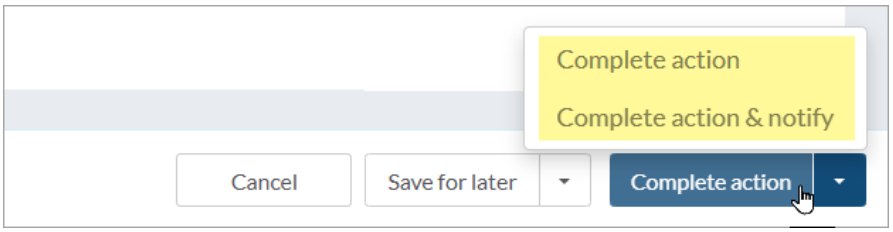


Click Save for Later & Complete Action

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

You also have the ability to send other DocBoss users an alert to let them know you have completed your 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:

- 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.