Complete an outstanding action

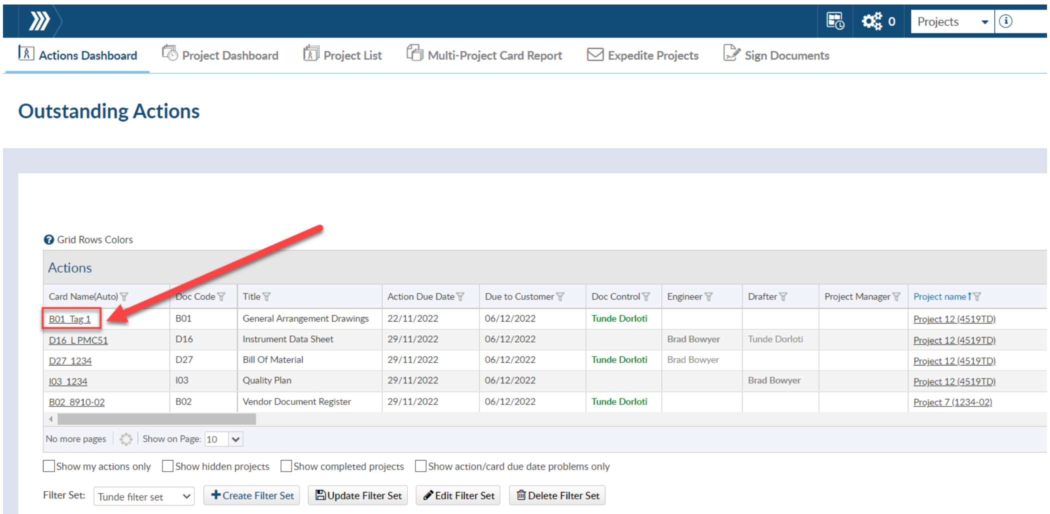
07/14/2025 9:33 am MDT

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.**

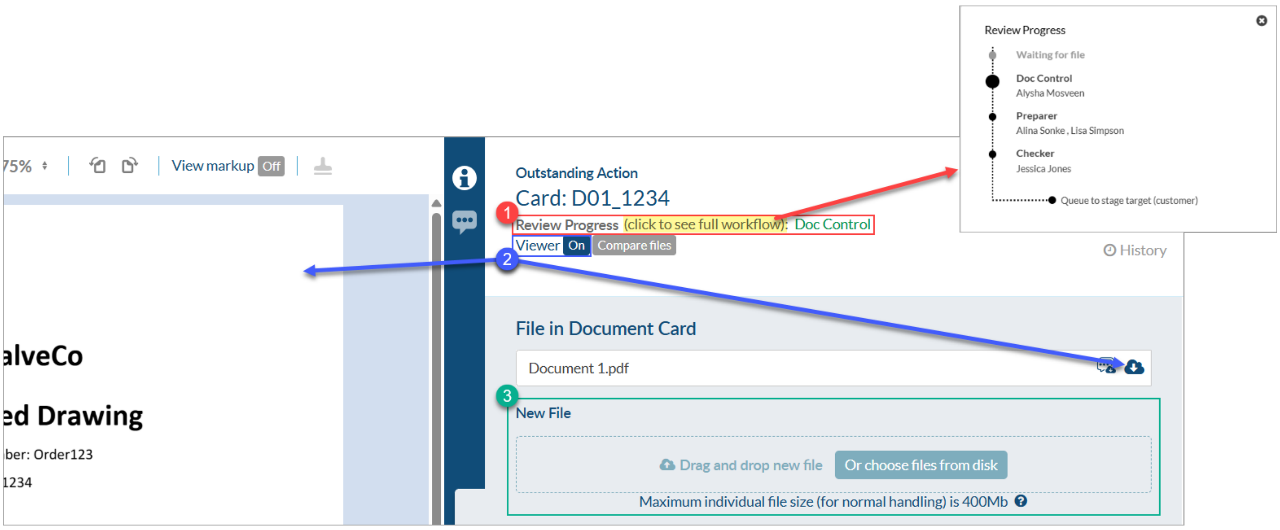
Both grids have filter and sorting options. For details, see this article: Outstanding Actions.

Open the Action Card

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



Reviews stage status, current file and upload new file

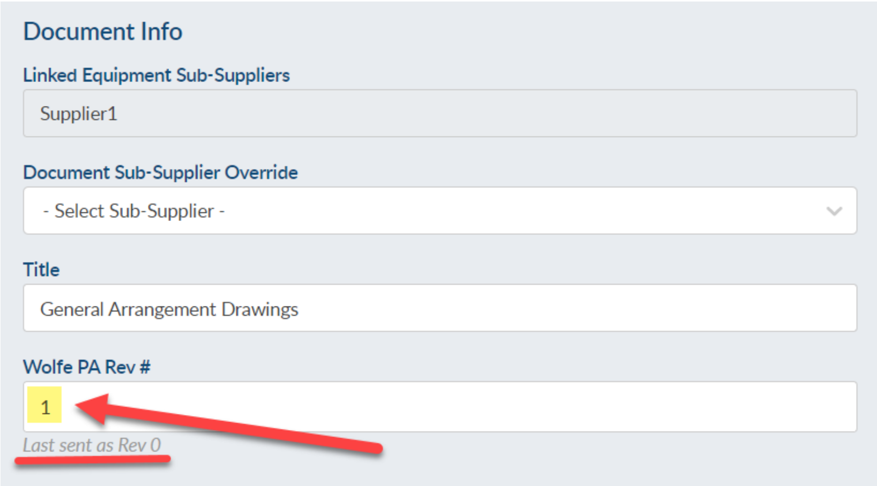


- **1. Review Progress**: will show the current assignment status (in green color) and the next step(s) after the current action is completed (by selecting the "click to see full workflow" text).

- **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 in the "File in Document Card" field will download the file in your computer.

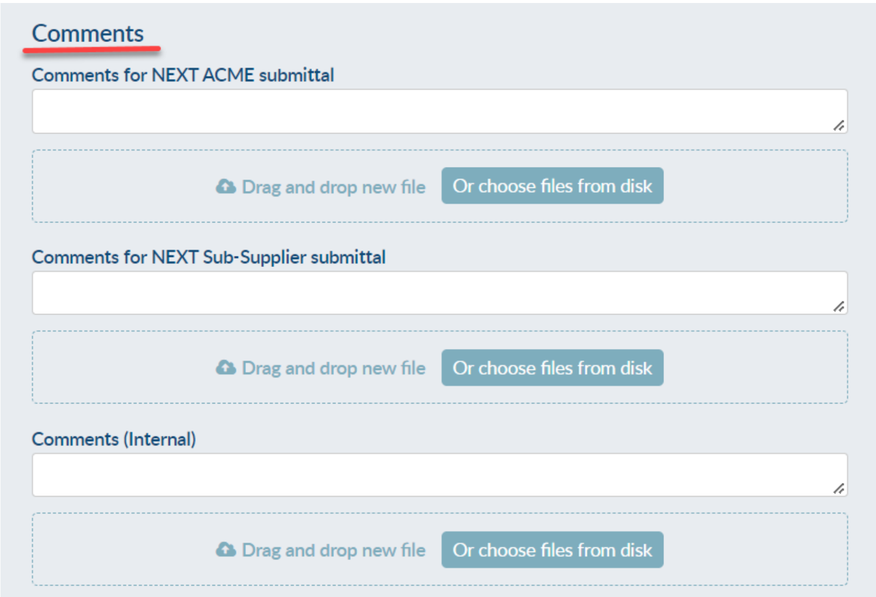
- **3. New File**: this allows you to upload a new document to the card.

Review the details of the card and update revision



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

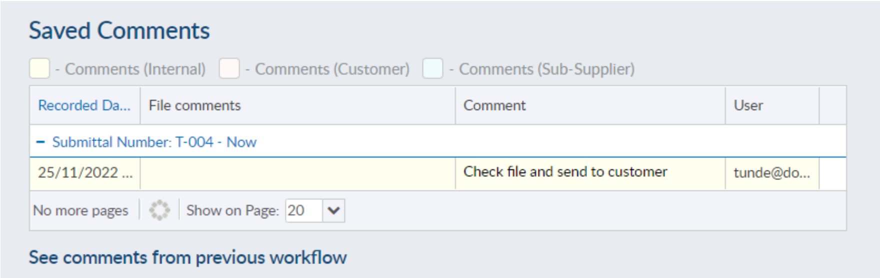
Comments



Comments 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.

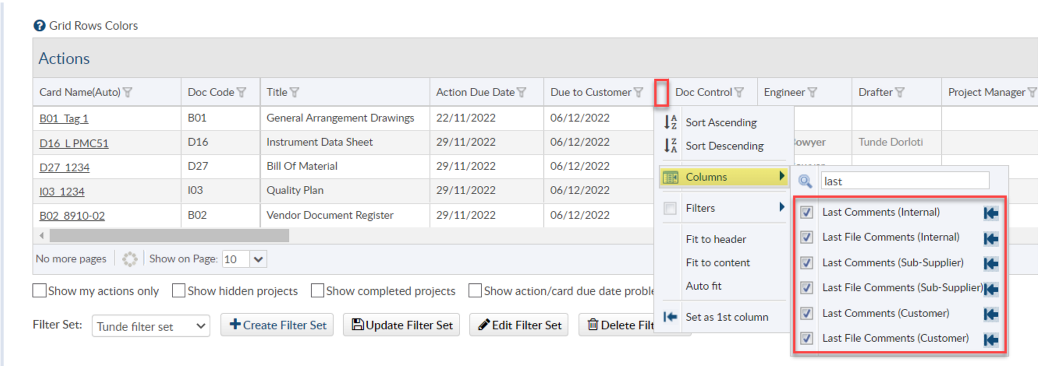
Comments for NEXT Sub-Supplier Sub-Supplier submittal: allows you to add sub-supplier notes (ie. instructions for changes) which can be included in the sub-supplier cover page. Here it is possible also to attach comment sheets or CRS from customer for their revision also.

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

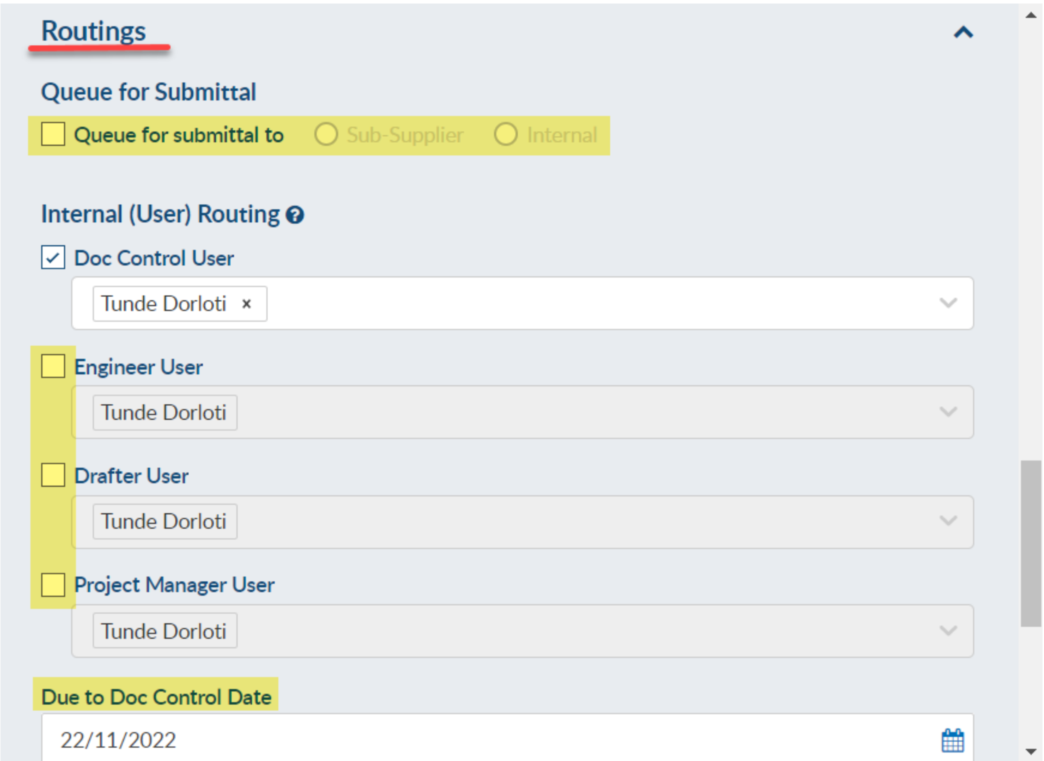


Saved Comments: this displays any comments or comment files that have previously been added to the card

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



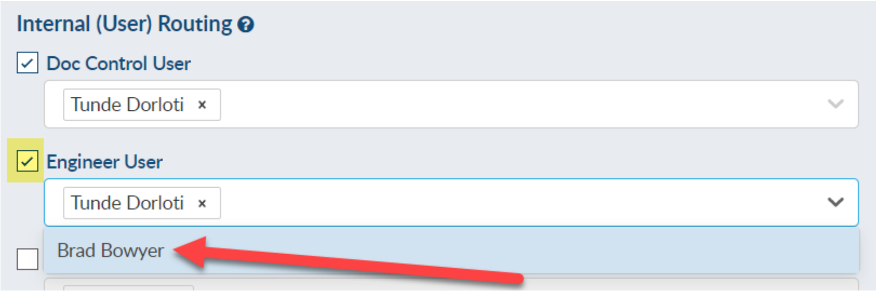
Routings



This allows you to set up additional routing (if applicable) and update the due date expected to complete the action.

Options for setting up addition routings are to add the document to Queue for Submittal to Internal or Sub-Supplier to be sent to them by email for revision or to select routing to another DocBoss user.

There is also the option to select multiple people for each role.

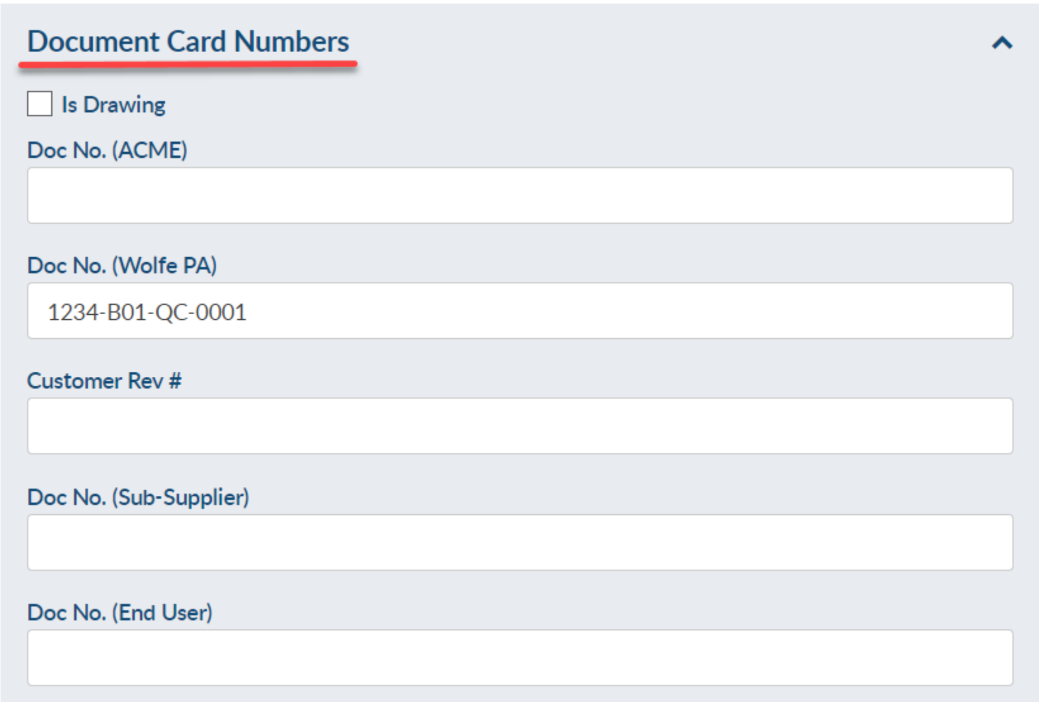


- each user appears in a removable block.

- click the drop down to add more users to the routing.

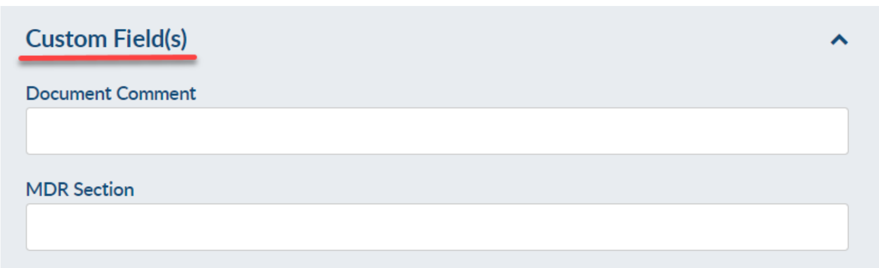
As always - the roles are sequential reviews.

Document Card Numbers:



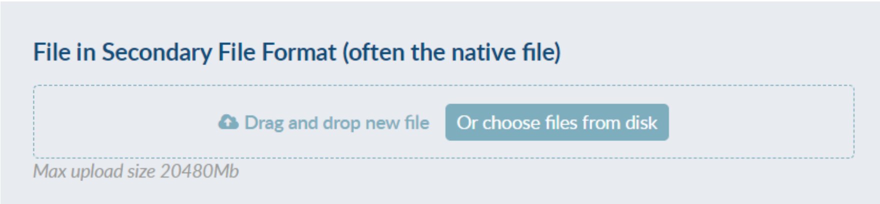
Allows you to add/change any applicable document number

Custom Fields(s)



Allows you to add/change any applicable custom fields

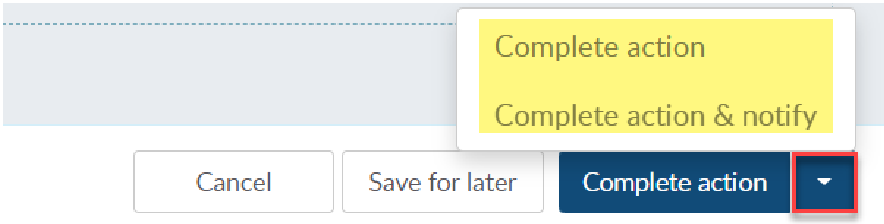
Native File



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 articlehere.