

Complete an Outstanding Action

03/05/2026 4:58 pm MST

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.

Card Name(Auto)	Doc Code	Title	Action Due Date	Due to Customer	Doc Control	Engineer	Drafter	Project Manager	Project Name
B01_Tag 1	B01	General Arrangement Drawings	22/11/2022	06/12/2022	Tunde Dorloti				Project 12 (45191D)
D16_L_PMC51	D16	Instrument Data Sheet	29/11/2022	06/12/2022	Tunde Dorloti	Brad Bowyer	Tunde Dorloti		Project 12 (45191D)
D27_1234	D27	Bill Of Material	29/11/2022	06/12/2022	Tunde Dorloti	Brad Bowyer			Project 12 (45191D)
I03_1234	I03	Quality Plan	29/11/2022	06/12/2022			Brad Bowyer		Project 12 (45191D)
B02_8910-02	B02	Vendor Document Register	29/11/2022	06/12/2022	Tunde Dorloti				Project 7 (1234-02)

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

Review Progress

- Waiting for file
- Doc Controller
Alysha Mosveen
- Preparer
Clemente Palermo
- Queue to stage target (customer)

Outstanding Action Card: B01_Fire Alarm 1

Review Progress (click to see full workflow): Doc Controller

Viewer On Compare files

Active File

Document 1.pdf

New file

Drag and drop new file Or choose files from disk

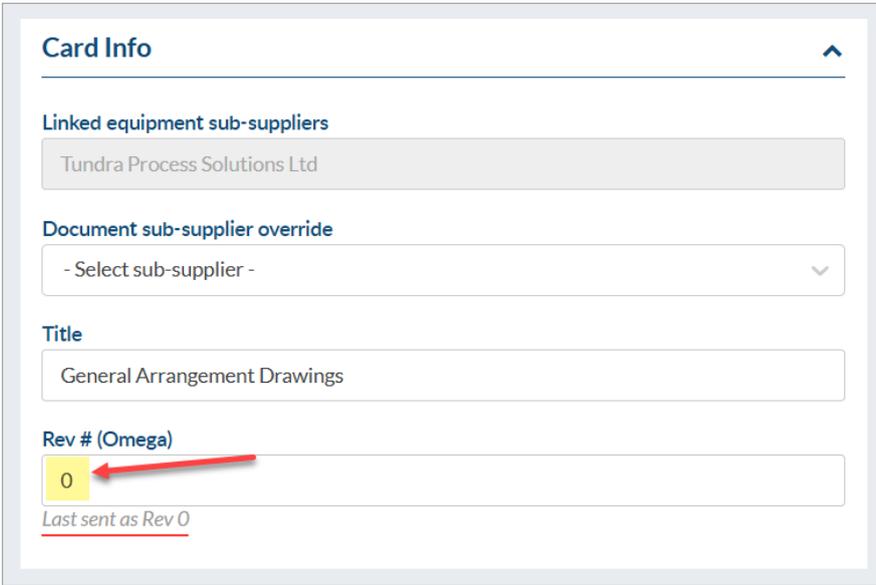
Maximum individual file size (for normal handling) is 400Mb

- **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 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.



The screenshot shows a 'Card Info' form with the following fields:

- Linked equipment sub-suppliers:** A text box containing 'Tundra Process Solutions Ltd'.
- Document sub-supplier override:** A dropdown menu with the text '- Select sub-supplier -'.
- Title:** A text box containing 'General Arrangement Drawings'.
- Rev # (Omega):** A text box containing '0'. A red arrow points to the '0'.

Below the 'Rev # (Omega)' field, there is a red underline and the text 'Last sent as Rev 0'.

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 ^

Comments for NEXT Chem C submittal

📁 Drag and drop new file
Or choose files from disk

Comments for NEXT sub-supplier submittal

📁 Drag and drop new file
Or choose files from disk

Comments (Internal/Third-Party)

📁 Drag and drop new file
Or choose files from disk



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

Saved Comments

- Comments (Omega CAN)
 - Comments (Chem C)
 - Comments (Sub-Supplier)

Recorded D...	User	Comment	File comments
- Submittal Number: T(S)-001 - Now			
05-Mar-20...	alysha@doc...	Demo comment.	

No more pages | Show on page: 20 ▼

[See comments from previous workflow](#)

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

Save More Actions ▾

Clear Q Auto Search ▾

tion Due Date

comment

-Mar-2026	<input checked="" type="checkbox"/>	← Last Comments (Internal/Third-Party)
-Mar-2026	<input checked="" type="checkbox"/>	← Last File Comments (Internal/Third-Party)
-Mar-2026	<input checked="" type="checkbox"/>	← Last Comments (Sub-Supplier)
-Mar-2026	<input checked="" type="checkbox"/>	← Last File Comments (Sub-Supplier)
-Mar-2026	<input checked="" type="checkbox"/>	← Last Comments (Chem C)
-Mar-2026	<input checked="" type="checkbox"/>	← Last File Comments (Chem C)
-Mar-2026		

Columns

Workflow

Add reviewers and/or other submittals to the current stage workflow prior to submitting to the target.

Workflow (IFA) ▲

Doc status
B - Approved with Major Comments. Re-submit

Add reviewers (before next submittal) Yes No

Doc Controller user
Alysha Mosveen x

Preparer user
Clemente Palermo x

Checker user
Select or type ahead...

Approver user
Dwayne Callahan

Doc Controller action due date
12-Mar-2026

Other submittals (before last step)

Queue for submittal to Sub-Supplier Internal/Third-Party

Add to Ad-Hoc queue on save (no workflow impact)

Options:

- Select routing to additional DocBoss users, and/or
- Queue the document 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.

Add reviewers (before next submittal) Yes No

Doc Controller user

Preparer user

Alice Harrison 



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).

Card Numbers & Revisions 

Is drawing

Doc no. (Chem C)

Doc no. (Omega CAN)

Rev # (Customer)

Doc no. (Sub-Supplier)

Doc No. (End User - A&Z Co)

Custom Fields

Add/change any applicable custom fields.

Custom Fields 

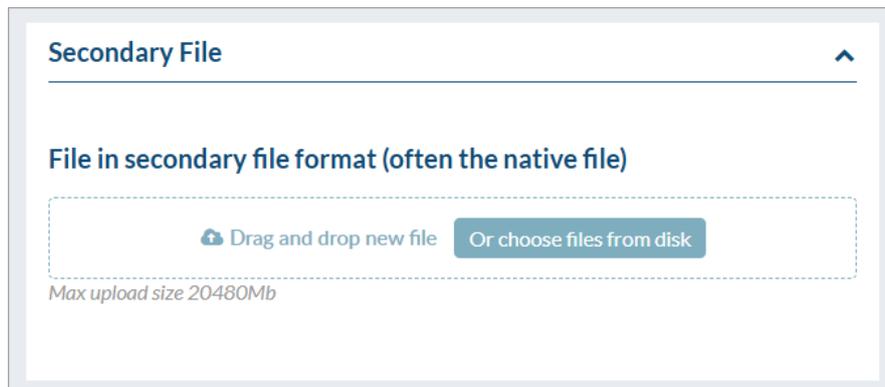
Note

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.

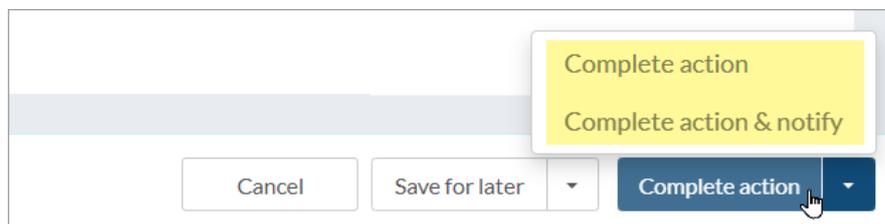


Click Save for Later & Complete Action

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](#).
