

Complete an outstanding action

09/16/2024 1:29 pm MDT

Once an action has been applied to a card, it remains in the Outstanding Actions grid until the action has been marked **complete** or **removed**.

You can view all Outstanding Actions (for all projects in your instance) OR you can view Outstanding Actions specific to a project.

Both grids have filter and sorting options. For details, see our article [here](#).

Open the Action Card

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

The screenshot shows a navigation bar with 'Actions Dashboard', 'Project Dashboard', 'Project List', 'Multi-Project Card Report', 'Expedite Projects', and 'Sign Documents'. Below is the 'Outstanding Actions' section with a table of actions. A red arrow points to the first row, 'B01_Tag 1'.

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.PMCS1	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)

Reviews stage status, current file and upload new file

The screenshot shows the 'Outstanding Action Card: B01_Tag 1' interface. It features a 'Stage Review Progress' section with a green bar and a dropdown menu. Below is a 'Current file in document card' section with a 'Current File' section showing a PDF file and a 'New File' section for uploading.

- 1. Stage Review Progress: will show the current assignment status (in green color) and the next step after the current action is completed
- 2. Current Document: "Viewer On" will open the most current version of the document that is attached to the card and by clicking the "Current File" download icon will allow also to 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

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)

Drag and drop new file Or choose files from disk

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_Tag1	B01	General Arrangement Drawings	22/11/2022	06/12/2022				
D16_LPMCS1	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 probk

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

Sort Ascending

Sort Descending

Columns

- Filters
- Fit to header
- Fit to content
- Auto fit
- Set as 1st column

last

- Last Comments (Internal)
- Last File Comments (Internal)
- Last Comments (Sub-Supplier)
- Last File Comments (Sub-Supplier)
- Last Comments (Customer)
- Last File Comments (Customer)

Routings

Routings

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) 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.

Internal (User) Routing

Doc Control User

Tunde Dorloti x

Engineer User

Tunde Dorloti x

Brad Bowyer

- 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:

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)

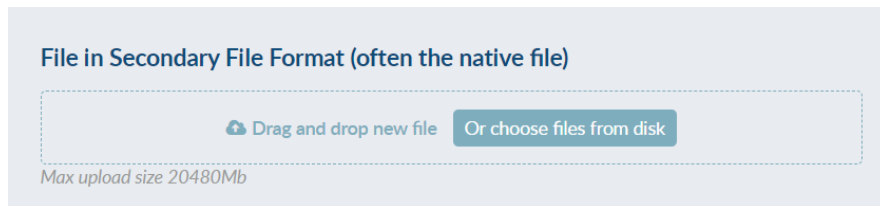
Custom Field(s)

Document Comment

MDR Section

Allows you to add/change any applicable custom fields

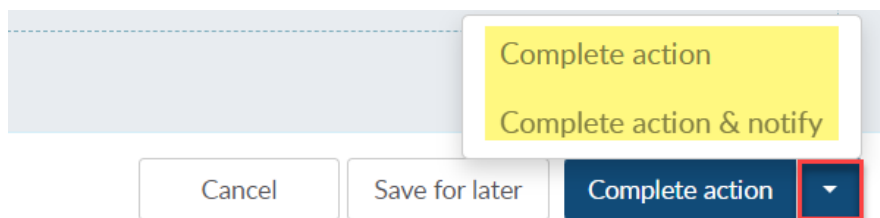
Native File



If native 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](#).
