Remove an Action

09/16/2024 1:34 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 options below the grid. You have the ability to select "Show my actions only"

Step 1. Click on the applicable card under the card (Auto) column of the grid.

Outstanding A	Actions					
Date Received 🗑	Card Name(Auto)	Customer Status 🍸	Title 🗑	Stage 🗑	Level 🗑	Wolfe PA Doc # 🗑
2019-04-29	BOM E14016-PO-018-RM-400-P-0013 ds1	2	Bill of Material	IFA	Order	147568-0011.BOM
4						
lo more pages 🛛 🛟	Show on Page: 20 🗸					

Step 2 Review the details of the card included in the article Complete an Outstanding Action.

Step 3. Uncheck whoever has been marked off for Internal (User) Routing and click Complete Action.

tage Review Progress: <u>Admin</u> → Te	ech → Internal Queue 🕜	Quistan
/iewer Off		 History
itatus & Routings		^
Approval Status *		
A - Approved		~
Queue for Submittal		
Queue for Submittai		
	Sub-Supplier	
 ✓ Queue for submittal to ✓ Send the original document 		
_	+ cover page	
Send the original document	+ cover page	
 ✓ Send the original document · Internal (User) Routing - Approv ✓ Admin User 	+ cover page	
Send the original document	+ cover page	*
 ✓ Send the original document · Internal (User) Routing - Approv ✓ Admin User 	+ cover page	*
 Send the original document Internal (User) Routing - Approv Admin User Brad Bowyer 	+ cover page	*
 Send the original document - Internal (User) Routing - Approv Admin User Brad Bowyer Tech User 	+ cover page	♥
 Send the original document - Internal (User) Routing - Approv Admin User Brad Bowyer Tech User Tunde Dorloti 	+ cover page	*

If you are not the User that set up/manages the project you will get a pop up asking if you want to send them an alert to let them know the action has been removed (this is optional)

We've i	noticed that you have changed	the routing for this o	document
Would	you like to notify anyone?		
⊖ Yes	Brad Bowyer		~
No			
		Cancel	Continu