

Assign an Action Approver

Action Approvers can be assigned to users through the Edit Action Modal.

Edit Action

Group

Annual Financial Reconciliation

Action Number

1

Title

Organize Monthly Financial Summaries

Description

Tags

Select Some Options

Source

Workflow: Basic

Status

Open

Approver(s)

Select Some Options

Interested Parties

Select Some Options

Assigned To

Mitzi Orkus (morkus)

Due Date

Warn before (days)

Save

Cancel

Edit the "Approver(s)" field to assign users as approvers for the action.

How To: Edit an Existing Action

An Action can be edited through the Edit Action Modal or the specified action's detail page.

To Edit Through the Edit Action Modal

Alter the filter on the Actions Module Action Home Page to see the action you wish to edit. If the actions are displayed by group or due date, expand the section containing the action. Hover your cursor over the individual action you wish to edit displaying the edit action icon to the right of the Action Title.



Click the edit action icon opening the Edit Action Modal.

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Miltzi Orkus (morkus)

Due Date

Warn before (days)

Save

Cancel

Make the necessary changes to the action and select save.

Actions

Actions that are relevant to you

View: As Placed Show C

Show groups that are Active

Collapse All

Expand All

Annual Financial Reconciliation (1)

Organize Monthly Financial Summaries

Open

Wed Dec 17th 2025

morkus

A confirmation modal stating “Saved” will appear, and the changes to the action will now be visible.

To Edit Through an Individual Action Page

Clicking the Action Title will open the individual action’s Action Page.

Annual Financial Reconciliation (1)

Organize Monthly Financial Summaries

Open

Wed Dec 17th 2025

morkus

The action can be edited by selecting the edit icon to the right of the action title.

Organize Monthly Financial Summaries

Wed Dec 17th 2025

Actions > Annual Financial Reconciliation > Organize Monthly Financial Summaries

In Annual Financial Reconciliation

Action created by Mitzi Orkus (morkus) on Tue Dec 16th 2025

Status:

Open

Assigned To:

morkus

Approver(s):

Unassigned

Interested Parties:

Unassigned

Files

Drag and drop or click for advanced options

No files have been uploaded

Actions Taken / Comments

Mitzi Orkus / Tue Dec 16th 2025 at 2:05 PM

Mitzi Orkus (morkus) was assigned

Add a comment

Add

Revision #4
Created 2025-12-18 22:03:59 UTC by Mitzi Orkus
Updated 2026-02-20 21:09:05 UTC by Mitzi Orkus