

Assign an Action

Actions 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 "Assigned To" field to assign users to 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.

— ○ [Annual Financial Reconciliation](#) (1)
● [Organize Monthly Financial Summaries](#) Open morkus 

Click the edit action icon opening the Edit Action Modal.

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Select Some Options

Interested Parties
Select Some Options

Assigned To
Mitzi Orkus (morkus) ✕

Due Date

Warn before (days)

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**

— **Annual Financial Reconciliation (1)** 📄 ✎

● [Organize Monthly Financial Summaries](#) Wed Dec 17th 2025 morkus

SAVED ✕

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](#) 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 22:03:38 UTC by Mitzi Orkus

Updated 2026-02-20 21:07:12 UTC by Mitzi Orkus