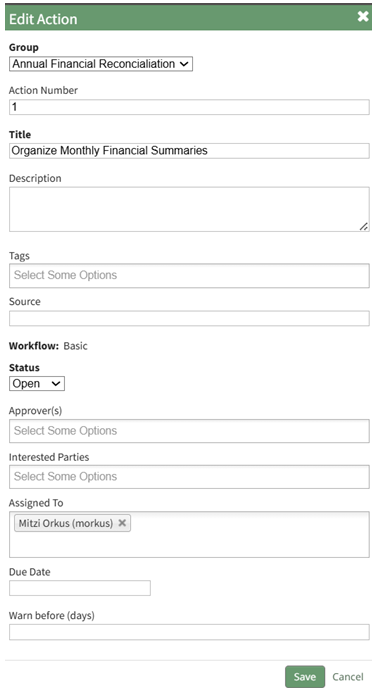


Assign Interested Parties to an Action

Interested Parties can be assigned to an action through the Edit Action Modal.



The 'Edit Action' modal form contains the following fields and options:

- Group:** Annual Financial Reconciliation (dropdown)
- Action Number:** 1 (text input)
- Title:** Organize Monthly Financial Summaries (text input)
- Description:** (text area)
- Tags:** Select Some Options (text input)
- Source:** (text input)
- Workflow:** Basic
- Status:** Open (dropdown)
- Approver(s):** Select Some Options (text input)
- Interested Parties:** Select Some Options (text input)
- Assigned To:** Mitzi Orkus (morkus) (text input with user selection icon)
- Due Date:** (text input)
- Warn before (days):** (text input)

Buttons: Save, Cancel

Edit the "Interested Parties" field to assign users or roles as interested parties 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.

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)

Make the necessary changes to the action and select save.

The screenshot shows the 'Actions' page with a green modal box overlaid on top that says 'SAVED' with a close button (✕). Below the modal, the page shows a list of actions under the heading 'Annual Financial Reconciliation (1)'. The first action is 'Organize Monthly Financial Summaries' with a status of 'Open', a due date of 'Wed Dec 17th 2025', and assigned to 'morkus'. There are 'Collapse All' and 'Expand All' buttons at the top left of the list.

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.

The screenshot shows the individual action page for 'Organize Monthly Financial Summaries'. The title is 'Annual Financial Reconciliation (1)' with an edit icon (✎) to its right. Below the title, there is a yellow dot, the text 'Organize Monthly Financial Summaries', a status of 'Open', a due date of 'Wed Dec 17th 2025', and the name '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

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 22:04:16 UTC by Mitzi Orkus

Updated 2026-02-20 21:10:16 UTC by Mitzi Orkus