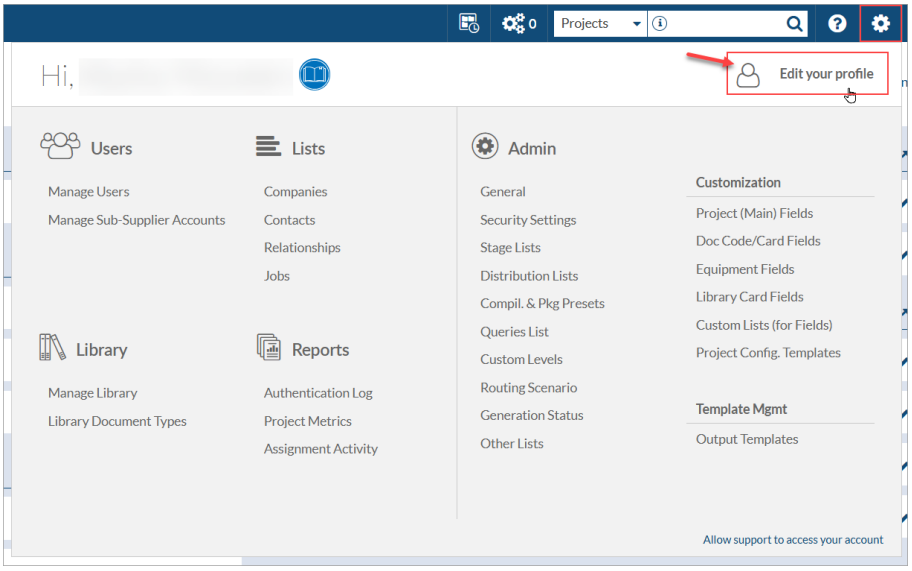
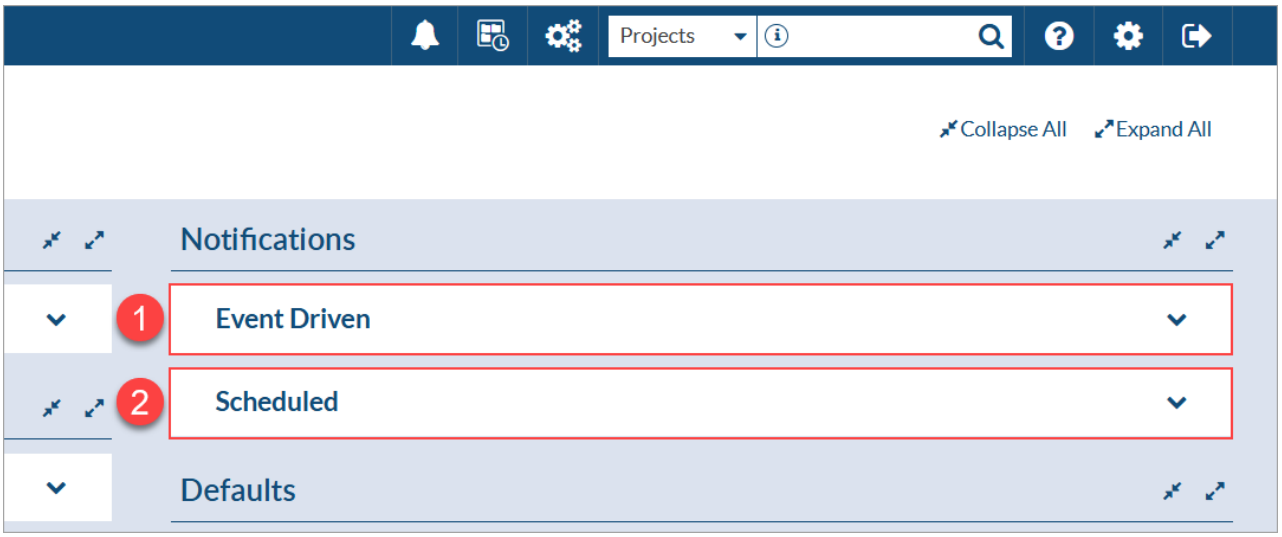
Automated email reports from user profile

09/28/2026 9:51 am MDT

To view and enable automated email reports, first navigate to your User Profile (**System Menu > Edit your profile**).



Under the "Notifications" section, there are two types of reports: (1) Event Driven, and (2) Scheduled.

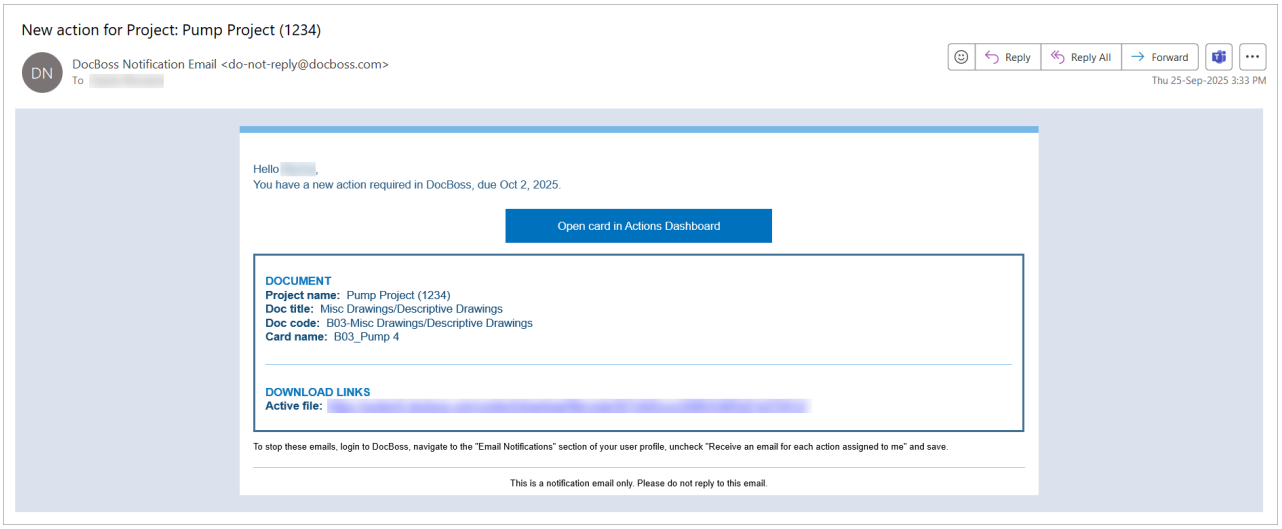


Event Driven

Action-related

Email notifications sent as soon as an action has been assigned to you.

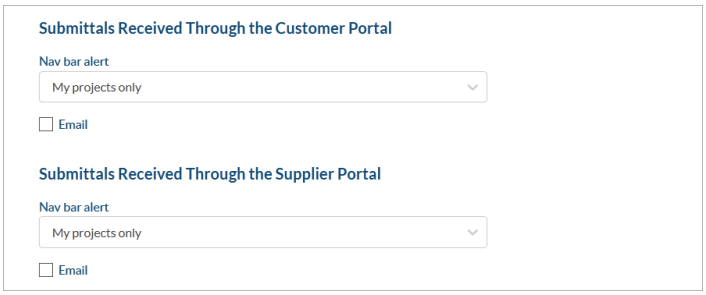


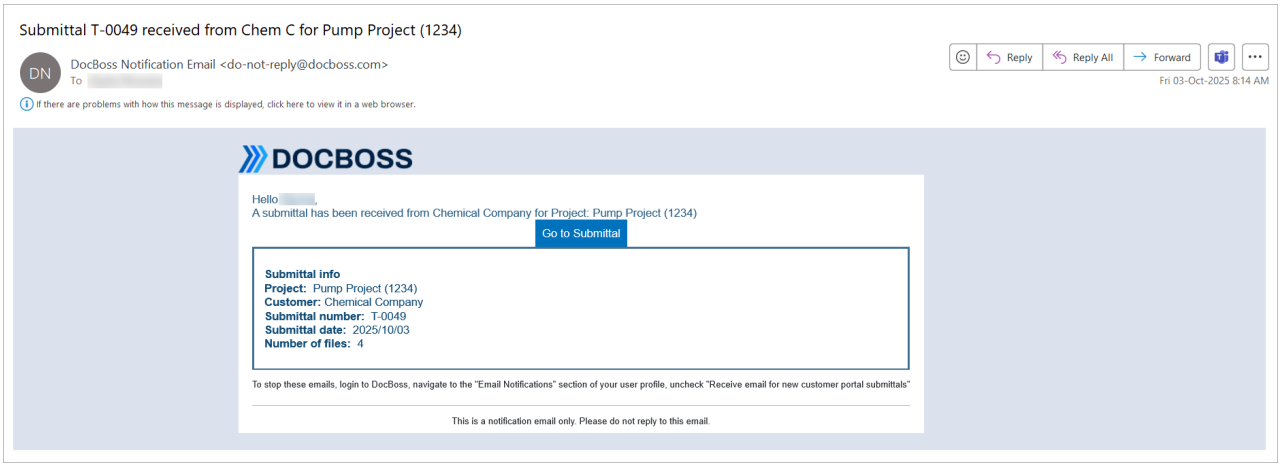


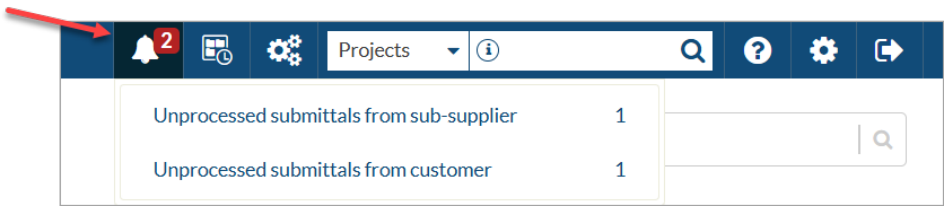
Incoming submittals

Unprocessed submittals (received via portal)

Email notifications sent as soon as a portal submittal is received (for the project(s) you've selected). System (navigation bar) notifications will always appear for portal submittals, but you can choose to see this notification for all projects OR only the projects you're assigned to.



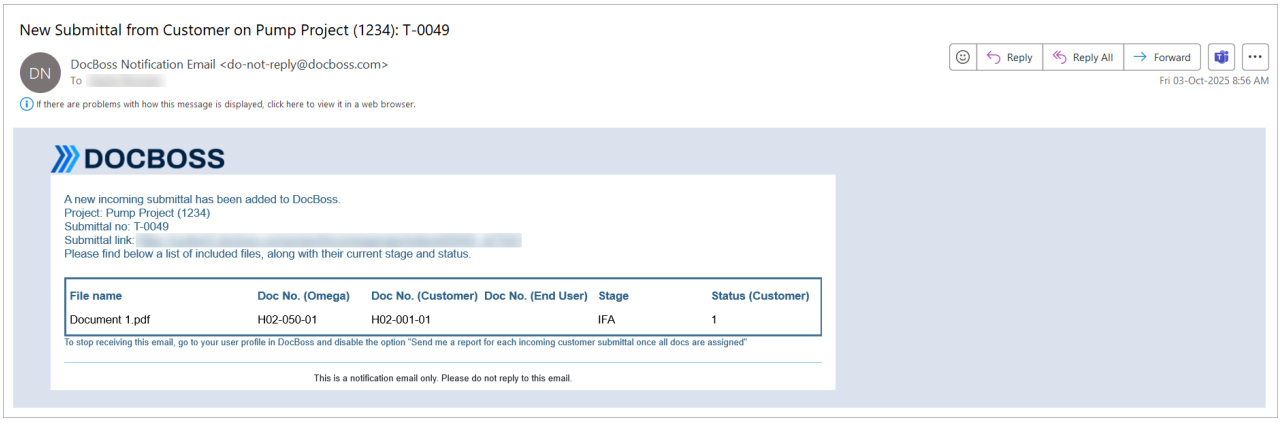




Processed submittals

Email notifications sent as soon as all files in an incoming submittal have been assigned to their corresponding cards (for the project(s) you've selected). Each report is source-specific (customer, sub-supplier, internal). Output can be filtered by a pre-established multi-project card report filter set.



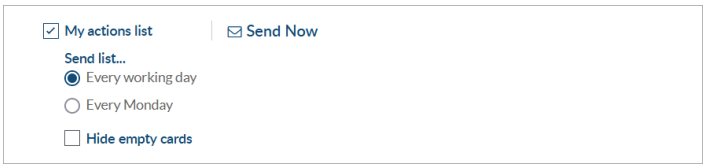


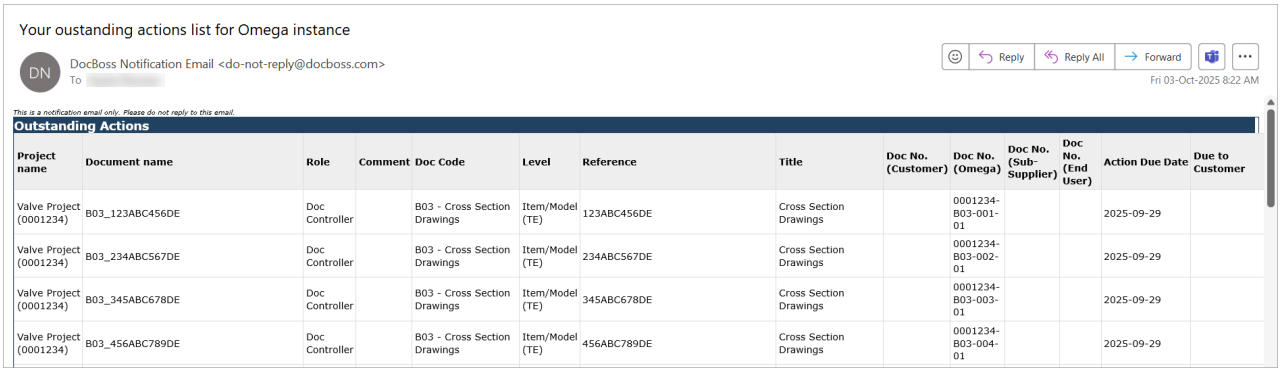
If additional files are added to an incoming submittal where all files have already been assigned/processed (i.e., a "completed" incoming submittal), an **additional** email report will be sent. This additional report will include all files assigned as part of the submittal, including those that were included on the previous report.

Scheduled

Outstanding actions

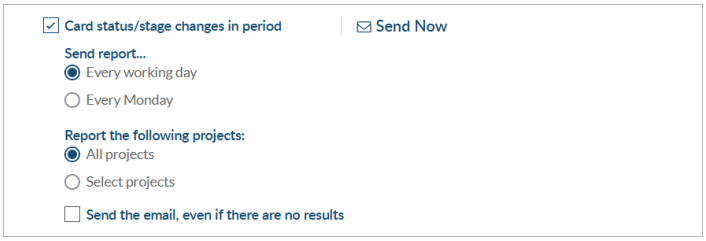
Email notifications sent daily or weekly listing all outstanding actions assigned to you (across all projects).

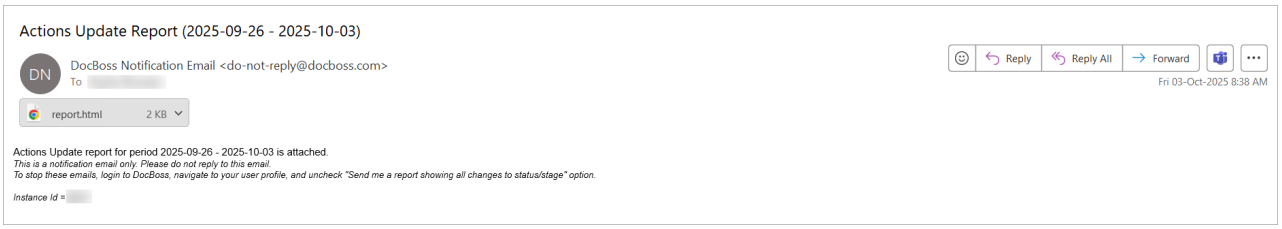




Changes to card status/stage

Email notifications sent daily or weekly listing all changes to card's status/stage (for the project(s) you've selected). Typically used by project managers and/or document controllers. Report sent as a downloadable .html file.

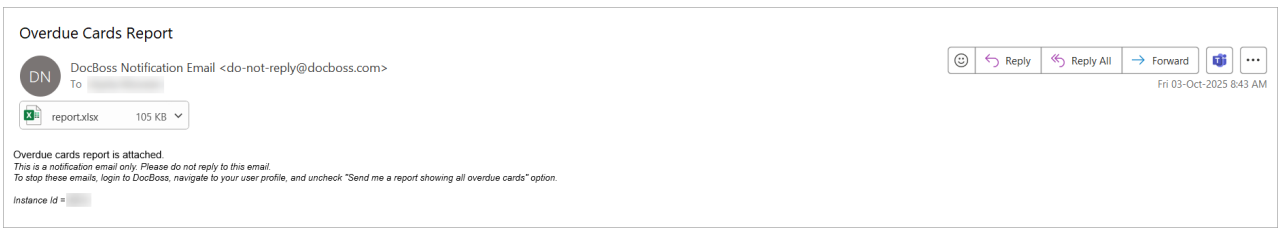




Overdue cards

Email notifications sent daily or weekly listing all overdue cards (as well as cards approaching their due date (within 5 days)) for the project(s) you've selected. Report sent as a downloadable .xlsx file. Report can be customized using a template - see this article for details: Edit the Default Overdue Cards Report.





Submittals not downloaded

Email notifications sent daily listing all outgoing submittals which have not yet been downloaded by the target (for the project(s) you've selected). Report sent as a downloadable .csv file. For more information about not downloaded links, see this article: List of Completed Submittals.



