

Configure Expedite Reports

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The settings for expedite reports are managed from each project individually. To configure expedite reports, navigate to **Project Menu > Setup > Expediting Settings**.

Target and recipients

Users must enable the targets they wish to expedite. The default is for customers and outstanding actions (Note: Defaults can be changed on the admin template). In addition, the report format must also be selected (HTML or Excel).

As selections are made, additional grids will appear showing the actual companies to expedite.

For each grid, do the following:

1. Ensure the company is enabled.
2. Click the pencil icon under "Tools" to create/select the distribution list for the recipients.
3. Once the distribution list is added/selected, the list will appear in the "Recipient" column.

Select customer recipients

	Name ↑	Recipient	Tools
<input checked="" type="checkbox"/>	Chemical Company	TO: Marie Stiles, Juan Pérez CC: Paul Smith BCC: Yamada Taro (Admin)	

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The list of suppliers is pulled from the tagged equipment list, major tags, and any cards with a manually defined sub-supplier override.

Card grouping / sorting

Users can decide how the expediting report will appear to customers with the options in this section.

Cards Grouping/Sorting

Group emails by

- ☒ Submittal
☐ Coming Due / Recently Overdue / Quite Overdue (14d+)
☐ Doc Code

Sort inside the group by

- ☐ Most to least overdue
☐ Least to most overdue
☒ Doc No. (Customer)

- ☐ Include coming due documents
☐ Expedite NULL cards (only when type is Generated (Sub-Supplier) or Generated (Customer))

Examples:

By Sent Submittal

Vessels for Ichthys Gas Field							
INPEX							
Code	Doc No. (INPEX)	Doc No. (Wolfe PA)	Title	Rev	Days overdue	Due date	Submitted date
T-006							
Q01	K090-0090-Q01-0001-001	J887-Q01-0001-001	MTR - Pkg	000	646	2019-02-05	2019-01-15
Q01	K090-0090-Q01-0002-001	J887-Q01-0002-001	MTR - Pkg	000	646	2019-02-05	2019-01-15
T-007							
Q01	K090-0090-Q01-0003-001	J887-Q01-0003-001	MTR - Pkg	000	413	2019-09-26	2019-09-12
Q01	K090-0090-Q01-0004-001	J887-Q01-0004-001	MTR - Pkg	000	413	2019-09-26	2019-09-12
T-012							
D02	K090-0090-D02-0001-001	ENG-00011212	General Arrangement - ISO				2020-09-06
T-011							
IN01	K090-0090-IN01-0001-001	J887-IN01-0001-001	Dimensional Drawings	000	52	2020-09-21	2020-09-06

By Due Date

Vessels for Ichthys Gas Field INPEX

Code	Doc No. (INPEX)	Doc No. (Wolfe PA)	Title	Rev	Days overdue	Due date	Submitted date
Quite Overdue							
IN01	K090-0090-IN01-0001-001	J887-IN01-0001-001	Dimensional Drawings	000	52	2020-09-21	2020-09-06
Q01	K090-0090-Q01-0001-001	J887-Q01-0001-001	MTR - Pkg	000	646	2019-02-05	2019-01-15
Q01	K090-0090-Q01-0002-001	J887-Q01-0002-001	MTR - Pkg	000	646	2019-02-05	2019-01-15
Q01	K090-0090-Q01-0003-001	J887-Q01-0003-001	MTR - Pkg	000	413	2019-09-26	2019-09-12
Q01	K090-0090-Q01-0004-001	J887-Q01-0004-001	MTR - Pkg	000	413	2019-09-26	2019-09-12
None							
D02	K090-0090-D02-0001-001	ENG-00011212	General Arrangement - ISO				2020-09-06

By Document Code

Vessels for Ichthys Gas Field INPEX

Code	Doc No. (INPEX)	Doc No. (Wolfe PA)	Title	Rev	Days overdue	Due date	Submitted date
D02							
D02	K090-0090-D02-0001-001	ENG-00011212	General Arrangement - ISO				2020-09-06
IN01							
IN01	K090-0090-IN01-0001-001	J887-IN01-0001-001	Dimensional Drawings	000	52	2020-09-21	2020-09-06
Q01							
Q01	K090-0090-Q01-0001-001	J887-Q01-0001-001	MTR - Pkg	000	646	2019-02-05	2019-01-15
Q01	K090-0090-Q01-0002-001	J887-Q01-0002-001	MTR - Pkg	000	646	2019-02-05	2019-01-15
Q01	K090-0090-Q01-0003-001	J887-Q01-0003-001	MTR - Pkg	000	413	2019-09-26	2019-09-12
Q01	K090-0090-Q01-0004-001	J887-Q01-0004-001	MTR - Pkg	000	413	2019-09-26	2019-09-12

Report layout

The layout of expedite reports can be further adjusted by customizing the template. To customize the expedite report template, navigate to **System Menu > Template Mgmt > Output Templates > PDF/CSV/XLS Templates**.

1. Filter by "Type = Expedite Report", and click the pencil icon under "Tools" of the default expedite report template.
2. Download the expedite report template file, as well as the template instruction sheet. Customize the template to your preferences using the variables on the "TYPE=Reports" sheet. For more information on customizing templates, see our [support article](#).
3. Once the template is ready, upload it by navigating back to the default template and changing the file.

The screenshot shows the 'Output Templates' page in a system. An 'Edit Template' modal is open for the 'Default Expedite Report' template. Red arrows indicate the following steps:

- 1**: Click on the 'PDF/CSV/XLS Templates' section in the left sidebar.
- 2**: Click on the 'Download Instructions for XLS(x) templates' link in the modal.
- 3**: Click on the 'Change' button in the modal.



Updates made to the expedite report template will only apply to the Excel output. Updates made to the template **do not** apply to the HTML output.

Email template selection

Email templates for each target can be selected for each project. These templates are set from **System Menu > Template Mgmt > Output Templates > Email Templates**. To edit or create a new email template, follow the steps from our [support article](#).

Email Template Selection

Customer email template *

Expedite Request (Customer Default)

Internal/Third-Party email template *

Expedite Request (Internal Default)

Sub-Suppliers email template *

Expedite Request (Sub-Supplier Default)

Outstanding actions email template *

Expedite Request (Reviewer Default)