

Configure Expedite Reports

08/02/2024 1:44 pm MDT

Where to find?

These settings are inside each project in the Setup > Expediting Settings area.

Target and Recipients

Users must enable the targets they wish to expedite. The default is for customers and outstanding actions (defaults can be changed on the admin template). They must also select a report format (html or Excel).

Targets and recipients for each target

Select expediting targets

- Customer
- Sub-Suppliers
- Internal/3rd party
- Outstanding actions

Report format *



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


You must:

- 1: Ensure the company is enabled.
- 2: Click the tools icon to create/select the distribution list for the recipients

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

Select sub-suppliers and recipients

	Tools	Name ↑	Recipient
<input type="checkbox"/>		ABB	
<input type="checkbox"/>		AbsolutAire	
<input type="checkbox"/>		ActuatorCo	
<input type="checkbox"/>		AGCO	
<input type="checkbox"/>		ALFA	
<input checked="" type="checkbox"/>		Fisher	TO: Fred Funk (Order Mgmt)
<input checked="" type="checkbox"/>		Honeywell	
<input type="checkbox"/>		Jamesbury	
<input type="checkbox"/>		Rotork	
<input type="checkbox"/>		Wolfe PA (Demo)	

No more pages  Show on Page: 10

Cards Grouping / Sorting

Users can decide how the expediting report will appear to customers with the options in this section. Note that the report layouts are only configurable with these options - they have fixed layouts and are not (currently) individually customizable (columns, spacing etc).

Group emails by

- Submittal
- Coming Due / Recently Overdue / Quite Overdue
- Doc Code

Sort inside the group by

- Most to least overdue
 - Least to most overdue
 - Doc No. (Customer)
- Include coming due document
- Expedite NULL cards [only for Type = Generated (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

Template Selection

Email templates can be selected for each project, for each target. They are created in the admin templates area. The default values are defined in the admin area also.

Customer email template

Document Request (Customer) ▼

Sub-Suppliers email template

Document Request (Sub-Supplier) ▼

Internal/3rd Party email template

Document Request (Internal) ▼

Outstanding actions email template

Document Request (Reviewer) ▼

To edit or create a new email template follow the steps from article: [Create a New Email Template](#)
