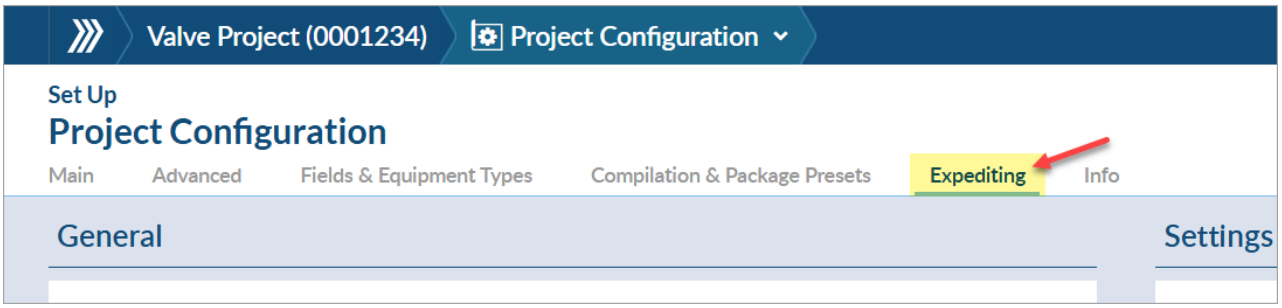
Configure Expedite Reports

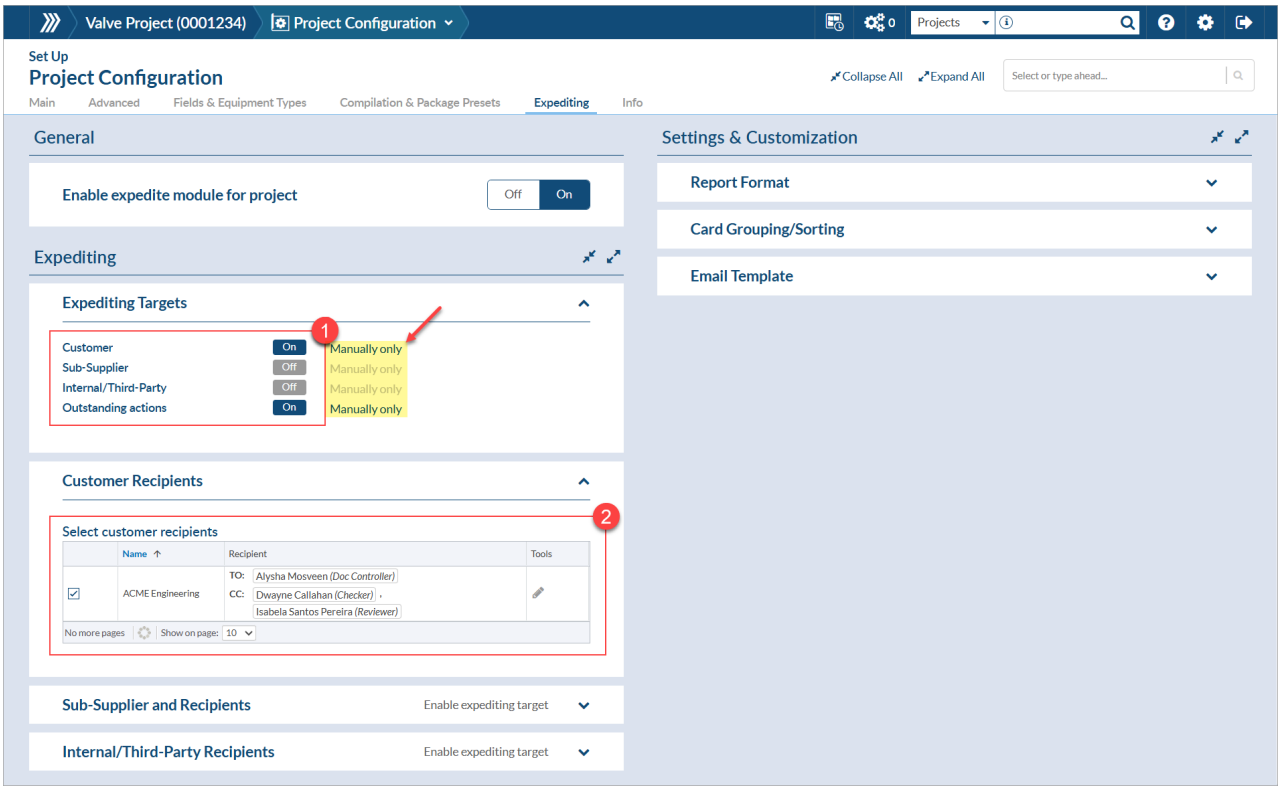
09/28/2026 9:36 am MDT

The settings for expedite reports are managed from each project individually. To configure expedite reports, navigate to the "Expediting" Tab of the **Project Configuration** page (Project Menu > Set Up > Project Configuration).



Expediting

Users must enable the targets and select the recipients they wish to expedite to. By default, emails to enabled targets will be set to send only when manually triggered, but they can also be sent automatically on a schedule (see article: Run Automatic Expedite Reports).

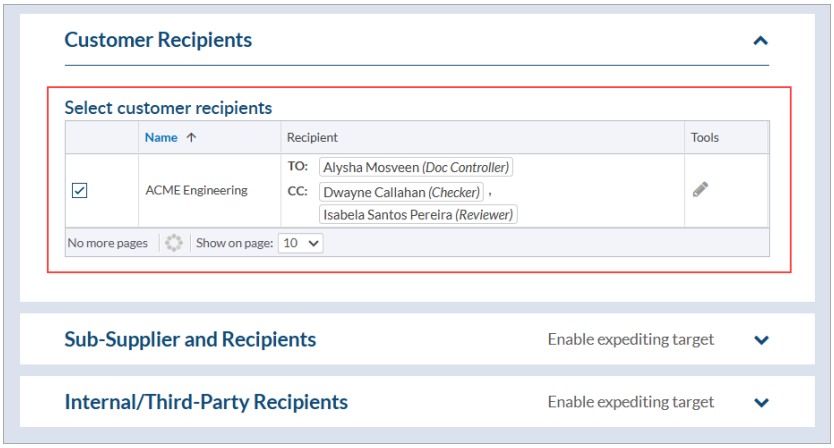


As selections are made, additional grids will appear showing the actual companies to expedite.

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.

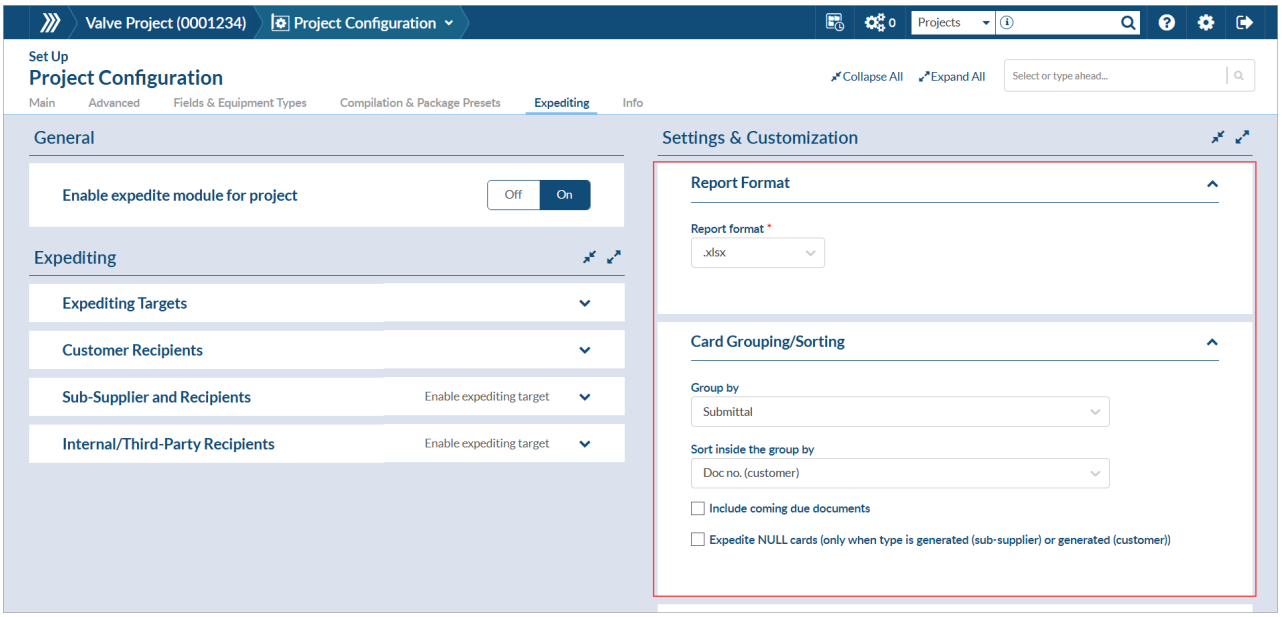
3. Once the distribution list is added/selected, the list will appear in the "Recipient" column.



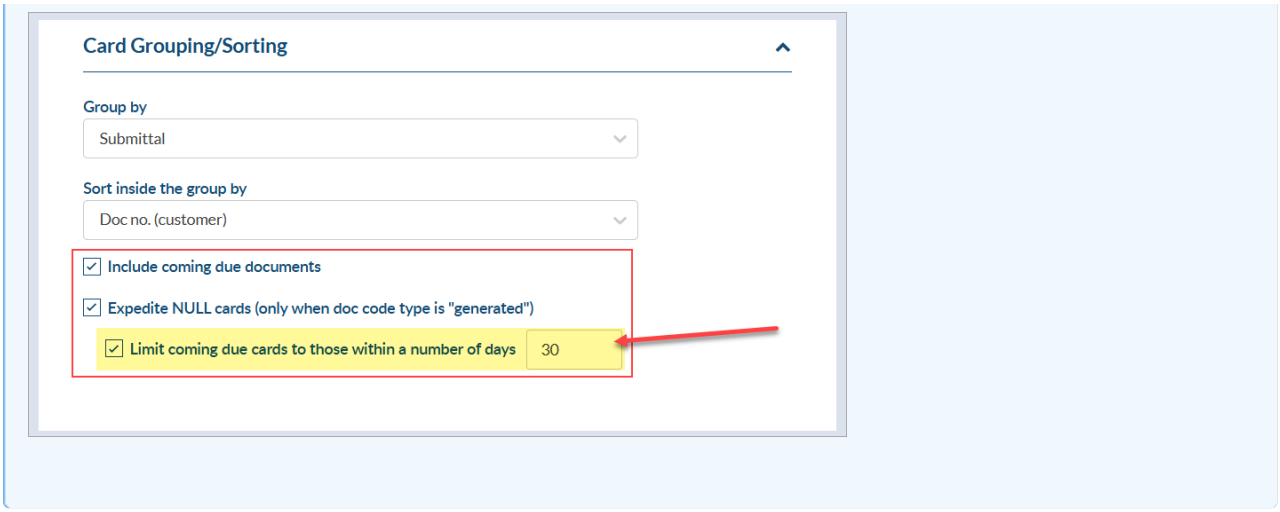
The list of suppliers is pulled from the tagged equipment list, major tags, and any cards with a manually defined sub-supplier override.

Settings & Customization

The report format must be selected (either HTML or Excel), and options can be adjusted pertaining to the way cards are grouped and sorted.



If expedite reports are set up to include both coming due and NULL cards, it is possible to limit the NULL cards to only include those which are due within a set number of days. With this option selected, NULL cards which are overdue will still be included, and cards without a due date will be excluded from the report.



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

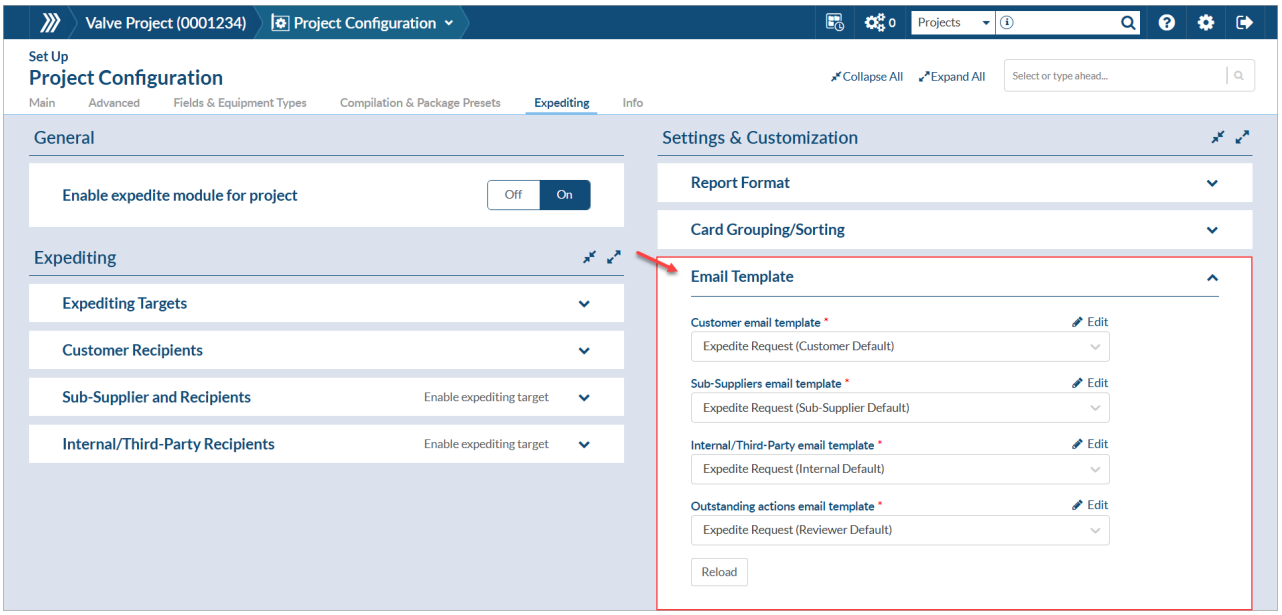
Code	Doc No. (INPEX)	Doc No. (Wolfe PA)	Title	Rev	Days overdue	Due date	Submitted date
Quite Overdue							
IN01	K090-0090-IN01-0001-001	J887-IN01-0001-001	Dimensional Drawings	000	52	2020-09-21	2020-09-06
Q01	K090-0090-Q01-0001-001	J887-Q01-0001-001	MTR - Pkg	000	646	2019-02-05	2019-01-15
Q01	K090-0090-Q01-0002-001	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

Also in this section is the option to select the email template for each target. 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.



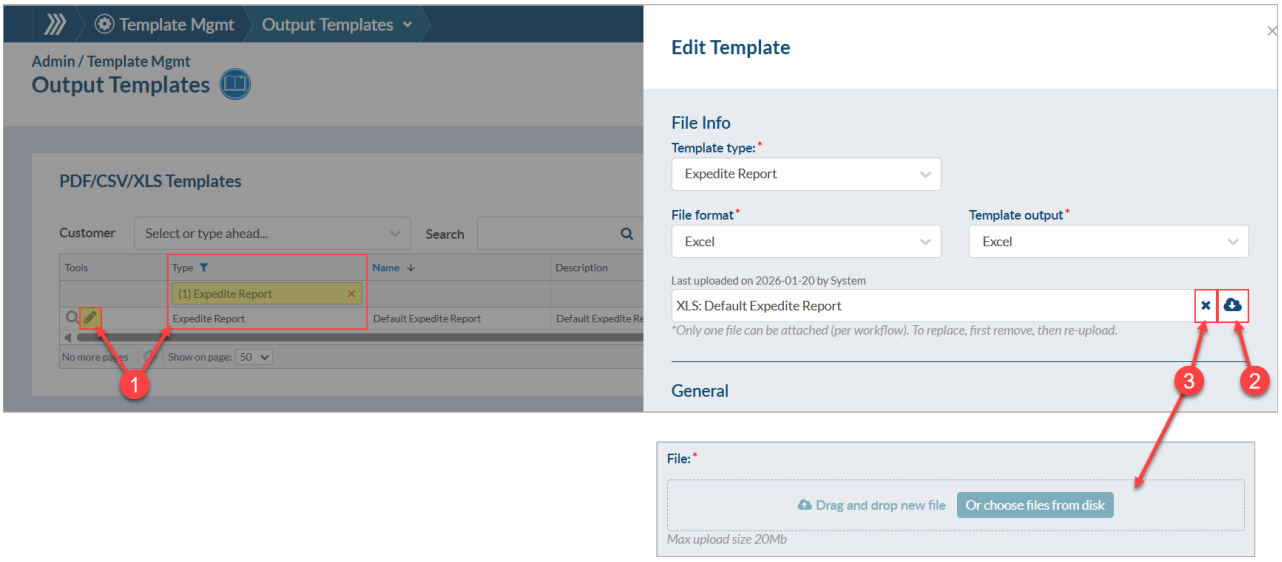
Report layout

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 XLS file and customize the template to your preferences using the variables from the "TYPE=Reports" sheet. For more information on customizing templates, see our support article.

3. Once the template is ready, remove the existing XLS file and upload the updated version.



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.