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.

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.

Examples:

By Sent Submittal

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.

> 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.