

# Configuration

## How do I assign a Document or Report?

### Where is Document/Report Assignment?

- **Configuration > Report and Document Maintenance**

### Why Assign a Document or Report?

Assign a Document or Report to different users, stations or partners. This allows custom forms or requested reports to be used by specific users.

### How to Assign a Document or Report to a Station, Partner, or User

1. **Configuration > Report and Document Maintenance.** If forms and documents have not been assigned yet, all reports and documents default to the company level.
2. Left click the **Reports Tab** to modify Reports. Left click **Documents Tab** to modify Documents.
3. Select a Document type from the radio button list on the left side. The center grids may populate with information. Once a document type is selected, all available documents will populate in the bottom section.
4. In the **Document Consumer** field (or **Reports Consumer** field), choose who will be using the document. Left click the drop-down menu to view a list of possible recipients.
5. Left click to select the Station, Partner, or User who will receive the new Document. **Tip:** The list includes partners first, then stations, then users. If you don't see who you are looking for, scroll down to see more options in the list.
  - **Example:** If a new Bin tag design is wanted at one of the Supplier Receipt stations, select the name of the Station.
6. Left click and drag the document name up to the top grid to apply it to this consumer.
7. Left click **Set as Default**.
8. Click **Save and Close**.

### Troubleshooting and Tips:

- If the Company default document/report is updated after a User, Partner, or Station document/report has been modified, these documents/reports will NOT update automatically. Modify the document/report at the company level, save, and then update the Station, Partner, and User documents/reports manually by dragging and dropping the new design.
- If you need to delete a design, uncheck the **Set as Default** and delete the design.
- Sales Order Reports must be saved by user in Report and Document Design.

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