22.16. Authorisation

Sometimes it is important that goods are not distributed to customers or received into stock until such an action has been **authorised**.

mSupply has invoice authorisation functionality to make this possible and allows, for example, a manager to control the processing of invoices.

Authorisation can be set according to local needs for:

- Customer Invoices
- Supplier Invoices
- Request Requisitions
- Response Requisitions
- Purchase Orders

Authorisation can either occur within mSupply or externally using the mSupply web authorisation system (see **Remote authorisation**).

> ⚠️ Invoices can be edited after authorisation but **goods receipt lines cannot be unauthorised** to fix mistakes! Any authorised errors can only be fixed using stock adjustments.

> 💡 When invoices have to be authorised, they **cannot be confirmed until they are authorised**. Until then:
>
> - Unauthorised invoices are held at suggested (sg) status
> - The official invoice cannot be printed
> - Goods are not removed from or received into stock

Configuring mSupply for authorisation

Turning on authorisation

Authorisation must be set up for **each store independently**. For each store, you can decide which transaction types require authorisation.

1. Click the **Special** tab, then click **Stores**.

2. Double click the store to edit.

3. Click the **Preferences** tab.

4. Check the boxes to set compulsory authorisation for specific transaction types at that store.

5. Click **OK**.

From now on, the transaction types you set the preferences for must be authorised before being confirmed.

Setting up authorisers

To use the authorisation module, certain users must be designated as **Authorisers** for each store and transaction type requiring authorisation.

Give the user permission to be an authoriser:

1. Click the **Admin** tab, then click **Edit Users**. Double click on the user to edit.

2. Go to the **Permissions** tab and the **Permissions (2)** tab and check the boxes that give the user permission to authorise specific transaction types.

Edit user

User Alba   Store: General Warehouse

| General | **Permissions** | Permissions (2) | Permissions (3) | Login rights | Details |

Ordering

- ☑ View purchase orders
- ☑ Delete purchase orders
- ☑ Edit purchase orders
- ☑ Edit purchase order pricing
- ☑ Manage tenders
- ☑ Finalise purchase orders
- ☑ Authorise purchase orders

- ☑ Create purchase orders
- ☑ Confirm purchase orders
- ☑ Create & edit backorders
- ☑ Create new quotes
- ☑ Edit & delete quotes
- ☑ Duplicate purchase orders
- ☑ Print purchase orders

Admin

- ☑ Add / edit users
- ☐ Access server administration
- ☑ Edit authorisers
- ☑ Clone database
- ☑ Edit insurance providers
- ☑ Edit periods and period schedules

Items

- ☑ Create new items
- ☑ View items
- ☑ Edit items
- ☑ Delete items
- ☑ Duplicate items
- ☑ Create repacks or split stock
- ☑ Edit repacks
- ☑ View pricing information for items
- ☑ Edit item units list
- ☑ Merge two items...
- ☑ Add / edit departments
- ☑ Modify sell and cost prices of existing stock
- ☑ Add / edit master list
- ☑ Create and edit custom stock field value lists

- ☑ View inventory adjustments
- ☑ Enter inventory adjustments
- ☑ Edit Inventory adjustments
- ☑ View cost prices of stock
- ☑ Edit item names, codes and units
- ☑ View DDD information for items
- ☑ Manage item access
- ☑ Manage drug interaction groups
- ☑ Manage locations
- ☑ Make item inactive
- ☑ Edit item default price
- ☑ Consolidate stock
- ☑ View stock
- ☑ Edit stock
- ☑ Modify donor on stock and transaction lines

Goods receiving

- ☑ View goods received
- ☑ Add/edit goods received
- ☑ Authorise goods received
- ☑ Finalise goods received

Special

- ☑ Add / edit currencies
- ☑ Add / edit reminders
- ☑ View and print labels
- ☑ Add / edit misc labels
- ☑ Add / edit abbreviations
- ☑ Add / edit warnings
- ☑ Add / edit prescribers
- ☑ Add / edit transaction categories
- ☑ Add / edit contacts
- ☑ Merge prescribers
- ☑ Add and edit options

Supplier invoices with issued stock

- ☐ Update pack size, cost and sell price

Tenders...

- ☑ Create & edit tenders

| All on | Copy | Paste | | Delete | Cancel | **OK** |

3. Click **OK** until you return to the navigator home page.

Allocate authorisers to tasks:

4. Click on **Special > Show Authorisers**.

5. Click the **Plus** button in the **Store** column.

6. Choose the store to allocate authorisers to and click **OK**.

7. Select the store from the list, then click the **Plus** button in the **Record Type** column.
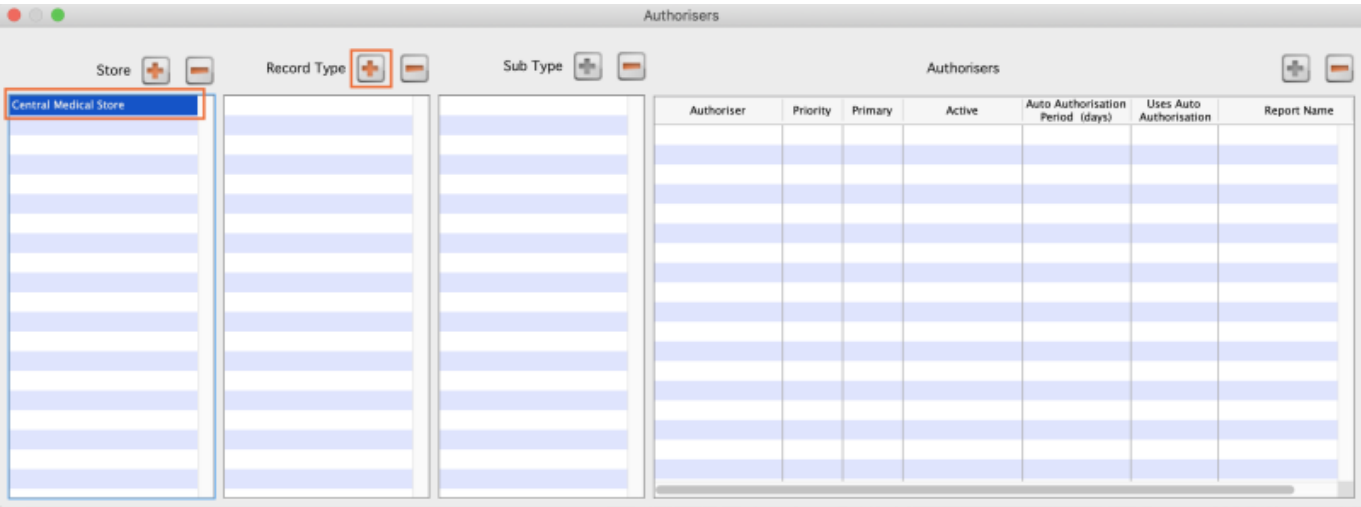
8. Choose the type of transaction to allocate authorisers. Select from Customer Invoices, Supplier Invoices, Request Requisitions or Response Requisitions and click **OK**.

9. Select the record type from the list, then click **Default** to allow authorisation for all sub types. Alternatively, click the **Plus** button in the **Sub Type** column to create further specifications (e.g. if certain users can authorise customer invoices for some facilities only).
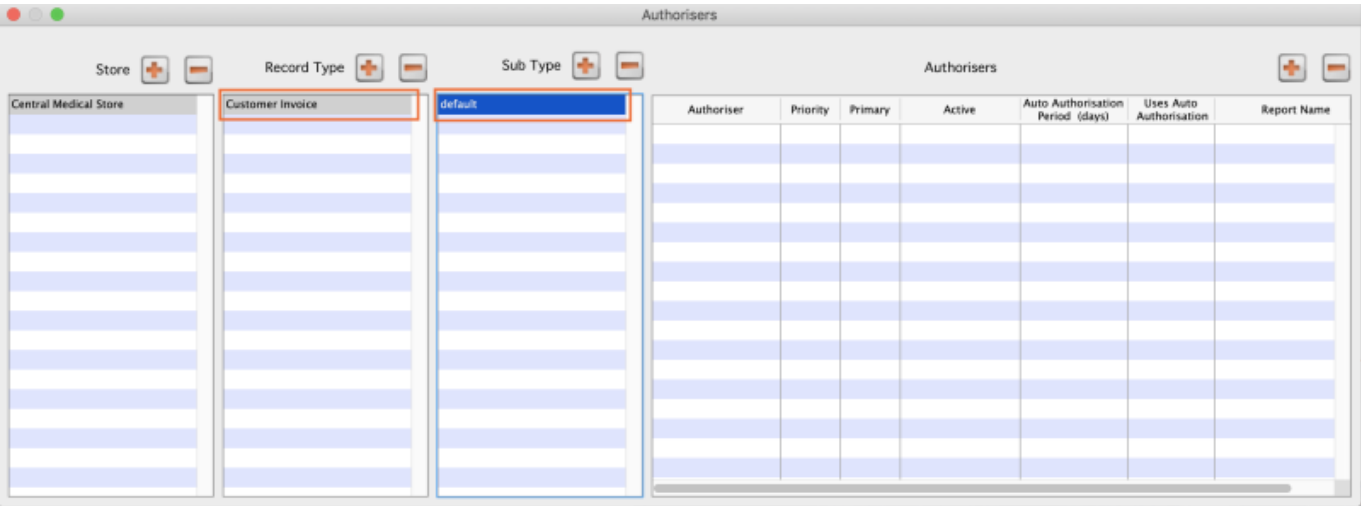
10. In the **Authorisers** section, click the **Plus** button to add authorisers for that specific transaction type (and sub type) in that specific store. You will only be able to allocate users that have permission to be authorisers (steps 1 - 3).

Supplier invoice authorisation

When the **Supplier invoices must be authorised** store preference is set, new supplier invoices will contain an **Authorised** checkbox.

An authoriser must check the **Authorised** box before the supplier invoice can be finalised.

- The **Authorised** box will be disabled for users without permission to authorise.
- If the **OK** button is clicked while the **Authorised** box is unchecked, a warning message will appear stating that unconfirmed invoices cannot be confirmed and nothing will happen.

If you have permission to authorise a supplier invoice, you can also **unauthorise** it.

- If the invoice has a **new (nw)** status then it has not been entered into stock. If you unauthorise it, users can edit it and and you will still control the process of authorisation before the goods are entered into stock.
- However, if the invoice is **confirmed (cn)**, the goods have already been entered into stock. If you unauthorise it, any changes users make will affect stock levels **immediately**, even though the invoice is not authorised.
- Therefore, only unauthorise a confirmed invoice to make immediate changes yourself, then immediately reauthorise it.
- Alternatively, if goods have not been issued, you can delete the lines off the invoice (and optionally delete the whole invoice) and require users to enter a new invoice to receive the stock. The normal authorisation process will then apply to the new invoice.

Customer invoice authorisation

With the *Customer invoices must be authorised* store preference set, newly created customer invoices will look like this:

Again, notice the *Authorised* checkbox at the bottom left of the window. This behaves exactly the same as the *Authorised* checkbox on the bottom left of a supplier invoice: the customer invoice cannot be confirmed until this checkbox is saved as checked. And, once again, if you do not have the *Can authorise invoices* permission set, it will be disabled and you will be unable to authorise the invoice; someone else, with the permission set, must do it for you.

Printing invoices which must be authorised

When an invoice is not authorised an attempt to print it will produce an invoice with an 'Unauthorised' watermark, just like this:

As soon as the invoice is authorised it will print normally without the unauthorised watermark.

Purchase order authorisation

Purchase Orders can also be authorised - refer to Authorising Purchase Orders.

View authorisation logs

mSupply records the authorisation and unauthorisation of invoices and creates a log record every time the authorisation status of an invoice changes. To view the log records click on the log tab of an invoice, as shown in the screenshot below.

You can also view all logs from **Special > View log…**. See here for details.

Previous: *Foreign currency transactions* *Next:* *Miscellaneous labels*