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**.

Gyogone Central PMCT NAP General Preferences Logo Synchronization		×
 Sort available batches by VVII Status rather than E Patients created in this store not visible in other store Names created in this store not visible in other store Items created in this store not visible in other stores Allow users to enter total quantities to distribute Round up the distributed quantity Able to pack items into multiple boxes Store : Able to issue in foreign currency Allow editing selling price on customer invoice lines Purchase order must be authorised Finalize customer invoices automatically Customer invoices must be authorised Authorisation needed only if over budget Confirm Customer invoices without asking Goods received lines must be authorised. Locations must be entered for goods received. Able to specify manufacturer when receiving, order Show item unit column while issuing 	When finalising a Goods Receipt	
	Cancel OK]

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

Setting up authorisers

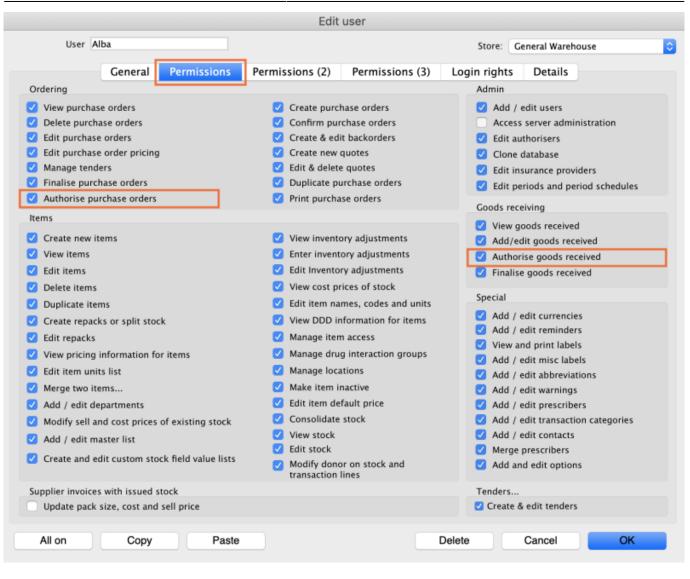
To use the authorisation module, certain users must be designated as **Authorisers** for each store and transaction type requiring authorisation.

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.

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User Alba Store: Ceneral Warehouse Ceneral Permissions Ceneral Permissions Permissions (2) Permissions (3) Login rights Details Names . Create customer, supplier & manufacturer Permissions (3) Login rights O tiew customer, supplier & manufacturer names Create customer invoices Create customer, supplier & manufacturer names Create supplier invoices Create castomer supplier & manufacturer names Create supplier invoices Create castomer supplier & manufacturer names Create supplier invoices Create castogores Create customer invoices Create castogores Create castogores Create castogores Create customer invoices Catit name codes Citit name codes Catit name codes Citit supplier invoices Catit name codes Citit supplier invoices Create castogores Finalise customer invoices Create castogores Finalise customer invoices Create castogores Finalise customer invoices Catit name groups Catit name supplier invoices Catit patient details Cator at supplier invoices Catit patient details Cator at supplier invoices Catit tame groups Catit customer supplier invoices Catit tame groups Catit influe ensure policies Catit tame groups Catit customer invoices Catit tame groups Catit influe ensure Catit tame groups Catit influe ensure Catit tame groups Catit influe ensupportation dates on finalised i		Edit user	
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 Add and edit insurance policies Add / edit name groups Update master code Cancel finalised invoices Change transportation dates on finalised invoices Change transportation dates on finalised invoices Edit web passwords Edit web messages Edit and create web messages Customer stock takes: show internal analysis columns by default Change invoice category on finalised invoice Finalise stock transfers Printing Printing Print duplicate packing slips Print duplicate customer invoices Print duplicate customer invoices 	Edit patient details	Finalise repacks	Make cash payments
 Add / edit name groups Update master code Web interface Edit web passwords Edit and create web messages Reports Manage reports Revert reports to original View reports View reports 		Finalise inventory adjustments	Receive cash
 Update master code Web interface Edit web passwords Edit and create web messages Reports Manage reports Revert reports to original View reports View reports 		Concel Realized Investors	Edit payment note field
Web interface Invoice Transfers Veb interface Edit user fields on finalised invoices Transfer goods between stores Edit and create web messages Customer stock takes: show internal analysis columns by default Finalise stock transfers Manage reports Change invoice category on finalised invoice Printing Reports Create cash transactions Print duplicate packing slips View reports View reports Print duplicate customer invoices			
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Reports Image reports Image reports Change invoice category on finalised invoice Image reports Create cash transactions Image reports Print duplicate packing slips Image reports Print duplicate customer invoices Image reports Image reports		Customer stock takes: show internal	Finalise stock transfers
Image reports Invoice Image reports Image reports Image reports Image reports Image r	Edit and create web messages	analysis columns by default	
 Manage reports Revert reports to original View reports 	Reports		Printing
Image: Comparison of the second se	Manage reports		Print duplicate packing slips
Delete Cancel OK	Revert reports to original		Print duplicate customer invoices
All on Copy Paste Delete Cancel OK	View reports		
All on Copy Paste Delete Cancel OK			
All on Copy Paste Delete Cancel OK		Delete	Canaal
	All on Copy Paste	Delete	Cancel

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.

• •		Au	thorisers						
Store 📻 🚍	Record Type 🛖 📻	Sub Type 📑 💻				Authorisers			•
			Authoriser	Priority	Primary	Active	Auto Authorisation Period (days)	Uses Auto Authorisation	Report Name

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.

• •		Aut	thorisers						
Store 🛖 📻	Record Type 🔚 🚍	Sub Type 📑 📒				Authorisers			-
Central Medical Store			Authoriser	Priority	Primary	Active	Auto Authorisation Period (days)	Uses Auto Authorisation	Report Name
									_

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).

• • •		1	uthorisers						
Store 🛖 📻						Authorisers			•
Central Medical Store	Customer Invoice	default	Authoriser	Priority	Primary	Active	Auto Authorisation Period (days)	Uses Auto Authorisation	Report Name

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).

0		A	uthorisers						
Store 🔶	Record Type 📥	Sub Type 📥 💻				Authorisers			•
Central Medical Store	Customer Invoice	default	Authoriser	Priority	Primary	Active	Auto Authorisation Period (days)	Uses Auto Authorisation	Report Name
			Alba	1		Yes 🗘	3		
			-						

Supplier invoice authorisation

18:29

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 confirmed.

- 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 unauthorised invoices cannot be confirmed and nothing will happen.

0 0	Supplier invoice	
Name Abbot Laboratories (singapore PTE.LT Their ref SNG102 Comment New line Delete line	Confirm date : 22/05/2013 Invoice number : 2,010 Status : cn Category None Category None Category None Category State Sta	ck
Lo Item Name	Qty Pack Batch Expiry Cost Price Sell Price Price extension	
	Image: Section of the section of th	
Other charges Item(s): Amount: 0	0 % tax: 0.1	0000
Hold Export batch: 0 Finalize Margin: 2.00 Authorised	OK & Next Delete OK	•

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

When the **Customer invoices must be authorised** is set, new customer invoices will contain an **Authorised** checkbox.

An authoriser must check the **Authorised** box before the customer invoice can be confirmed.

- 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 unauthorised invoices cannot be confirmed and nothing will happen.

Their			AlL-403-2		 -			Invoice : 9,2	
Comm Mew line		Delete line(s)	General Summary	Backe	Histor	y Transport de	tails Log	Entry date : 23/ Goods receive ID : 0 Status : cn Entered by : Sus Store : Cen	sol
	Location		Name	Quan	Batch	Exp date		Price exten	
		Acces Pin With Stoppe	r for use IV.linj. site	3			0.61148		1.22296
Hold			Other charg	pes item				Amount: Subtotal: 0 % tax: Total:	0.0000 1.2229 0.0000 1.2200

Purchase order authorisation

When the **Purchase order must be authorised** store preference is set, new purchase orders will contain an **Authorised** checkbox.

An unauthorised purchase order **can** still be confirmed and have goods receipted against it so it is not as restrictive as, for example, a customer invoice or supplier invoice.

• • •				N	lew purc	chase ord	er					
Order	num : 2	Name										Black
Confirm	date : 00/00/00						Ref	erence			Status sg	
Requested del	ivery: 01/06/201	7									Store: Ge	neral
		General Details	Ad hoc	items	Goods	Received	Supplier inv	oices Log	Location			
•		0				\checkmark						
New line	Delete lines		nfo	Print	- C	onfirm		Categ	ory none		0	
show all lines	•						Cur	rency USD	0	Forex rate	1	
Line Item co	de	Item	Orig.Qty	Pack	Adj. Qty	Tot. rece	Stock on	On Order	Cust.b/o	Price Ext	Expected	Store:
_	centage	0 Discount amoun	t	0	.00				Est Estimated co	imated subto st after disco		0.0
	cked	Auto calc usa	ge									
Finalise o	nder 🗌	Authorise						OK & Next		Delete		ж

However, an unauthorised purchase order will print with an **Unauthorised** watermark across it. An authorised purchase order will print without the watermark.

Monitoring authorisations

Printing unauthorised invoices

When an invoice is **not** authorised, it will print with a clear **Unauthorised** watermark. Authorised invoices will print without the watermark.

statist com							Page 2 of 2
Supplied to :							Status: cn
Nitibe/Ustaco						Comment : Ma	ria Ribeiro
Nitibe, OECUSSI						Confirmed: 1	1/12/2012
						Printed: 2	3/05/2013
invoice Category :					A	uthorized by :	
Comments :	Maria Ribeiro			\sim		Collected by :	
Line Item		Quan	Pack Batch	Expiry	Price	Extension	Box
	Disposable 2.5 ml w/needle 0.6x 25 mm 2,5ml	100	1 none	00/00/00	0.00	0.00	
	Disposable 5 ml, w/needle 0.7x30 mm 5ml	100	1 4204003	31/12/16	0.00	0.61	
	le Needle 19 G x 1.1/2 (box/100) 1.1 x 40 mm	100		00/00/00	0.01	1.22	
27 Disposab	ie Needle 21 G x 1.1/2 (box/100) 0.7 x 25 mm	100		00/00/00	0.01	1.00	
28 Disposab	le Needle 23 G x 1.1/4 0.65 x 32mm	100	1	00/00/00	0.01	1.00	
		1.1	~		Т	tal: 647.68000	
		<u>av</u>					
Prepared By :	Signature :	Delivered By :	Signature:				
Checked By :	Signature :	Received By :	Signature:				
Authorised By :	Signature :						
Automotioed by .	ognaure .						

Viewing authorisation logs

mSupply records the authorisation and unauthorisation of invoices and creates a record every time the authorisation status of an invoice changes.

To view the records, click the **Log** tab of an invoice.

0		Customer invoice	[Read Only]			
Name	- 1	Confirm date	e 23/05/2013		Colour :	Blac
Their ref	DILI-099-1	2			Invoice :	9,259
Comment		L Categor	y None	: 6:	Entry date :	23/05/2013
		•			Goods receive ID :	0
					Status :	fn
					Entered by :	
						General
	General Su	mmary by Item Summary b	y Batch Transport det	tails Log	June .	General
Date	Time	User		Event		
23/05/2013	11:11:01		pice is authorised.			
23/05/2013	11:10:24		pice is un-authorised.			
23/05/2013	11:09:49	2 Customer invo				
23/05/2013	11:09:39		pice is authorised.			
23/05/2013	11:09:30	2 Customer invo	bice 9259			
			OK & I	New T	Delete	OK

Advanced users can also view all logs by going to **Special > View log...**

Previous: Foreign currency transactions Next: Miscellaneous labels

