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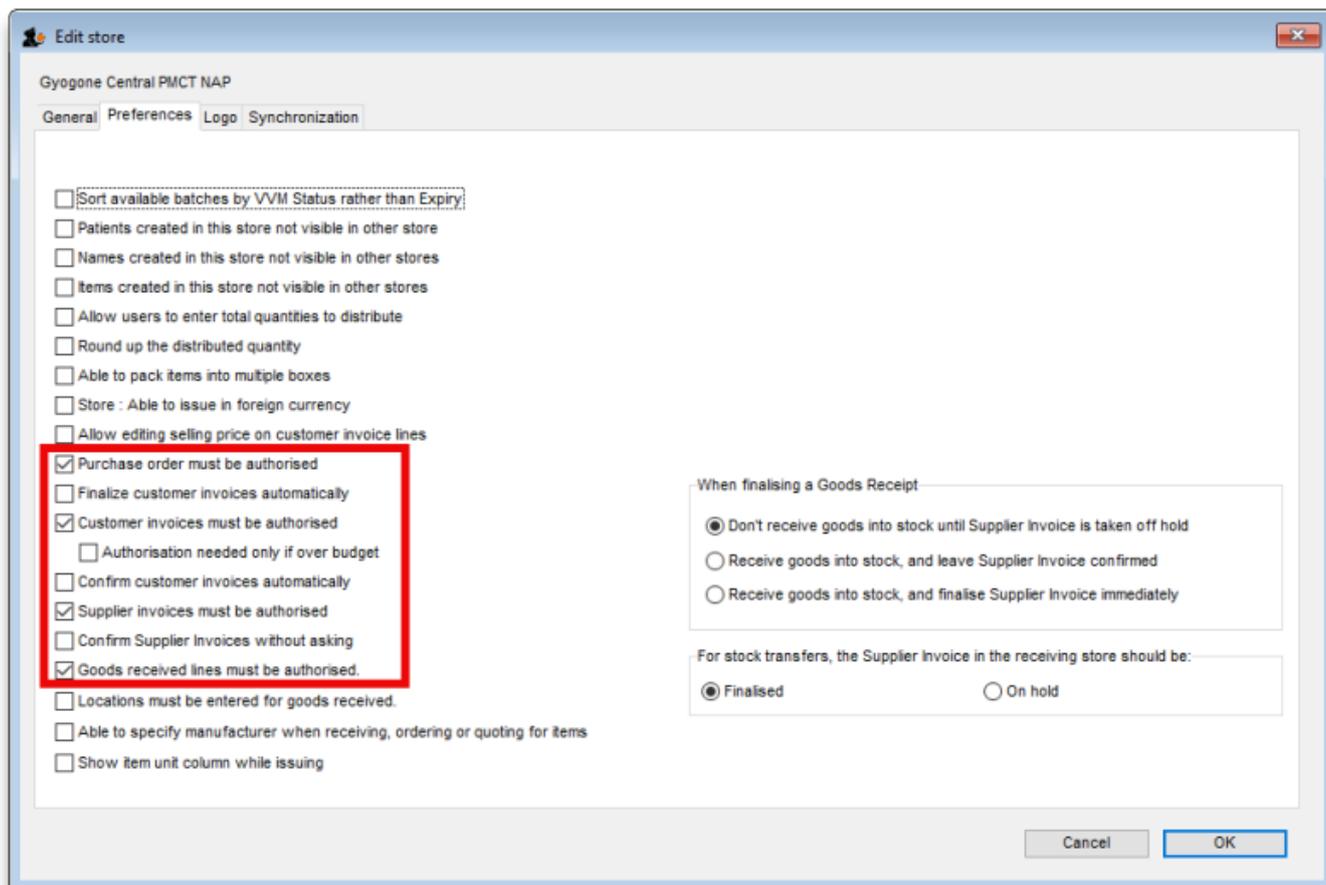
From now on, the transaction types you set the preferences for must be authorised before being confirmed.

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   ☑ Create purchase orders
☑ Delete purchase orders   ☑ Confirm purchase orders
☑ Edit purchase orders   ☑ Create & edit backorders
☑ Edit purchase order pricing   ☑ Create new quotes
☑ Manage tenders   ☑ Edit & delete quotes
☑ Finalise purchase orders   ☑ Duplicate purchase orders
☑ Authorise purchase orders   ☑ Print purchase orders

Items

☑ Create new items   ☑ View inventory adjustments
☑ View items   ☑ Enter inventory adjustments
☑ Edit items   ☑ Edit Inventory adjustments
☑ Delete items   ☑ View cost prices of stock
☑ Duplicate items   ☑ Edit item names, codes and units
☑ Create repacks or split stock   ☑ View DDD information for items
☑ Edit repacks   ☑ Manage item access
☑ View pricing information for items ☑ Manage drug interaction groups
☑ Edit item units list   ☑ Manage locations
☑ Merge two items...   ☑ Make item inactive
☑ Add / edit departments   ☑ Edit item default price
☑ Modify sell and cost prices of existing stock ☑ Consolidate stock
☑ Add / edit master list   ☑ View stock
☑ Create and edit custom stock field value lists ☑ Edit stock
                                  ☑ Modify donor on stock and
                                     transaction lines

Admin

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

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

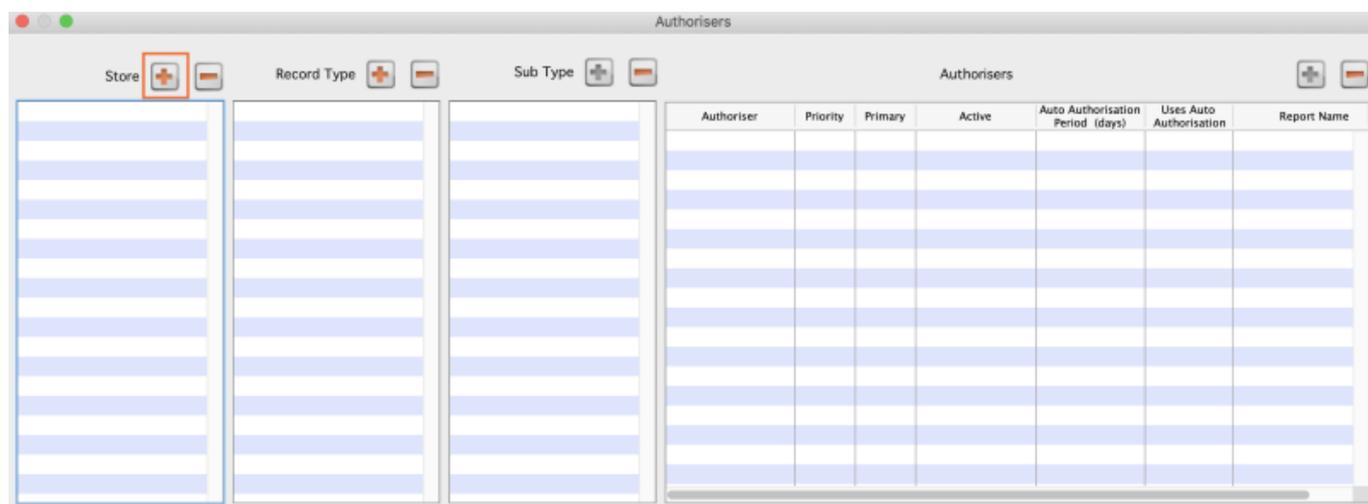All on   Copy   Paste   Delete   Cancel   OK
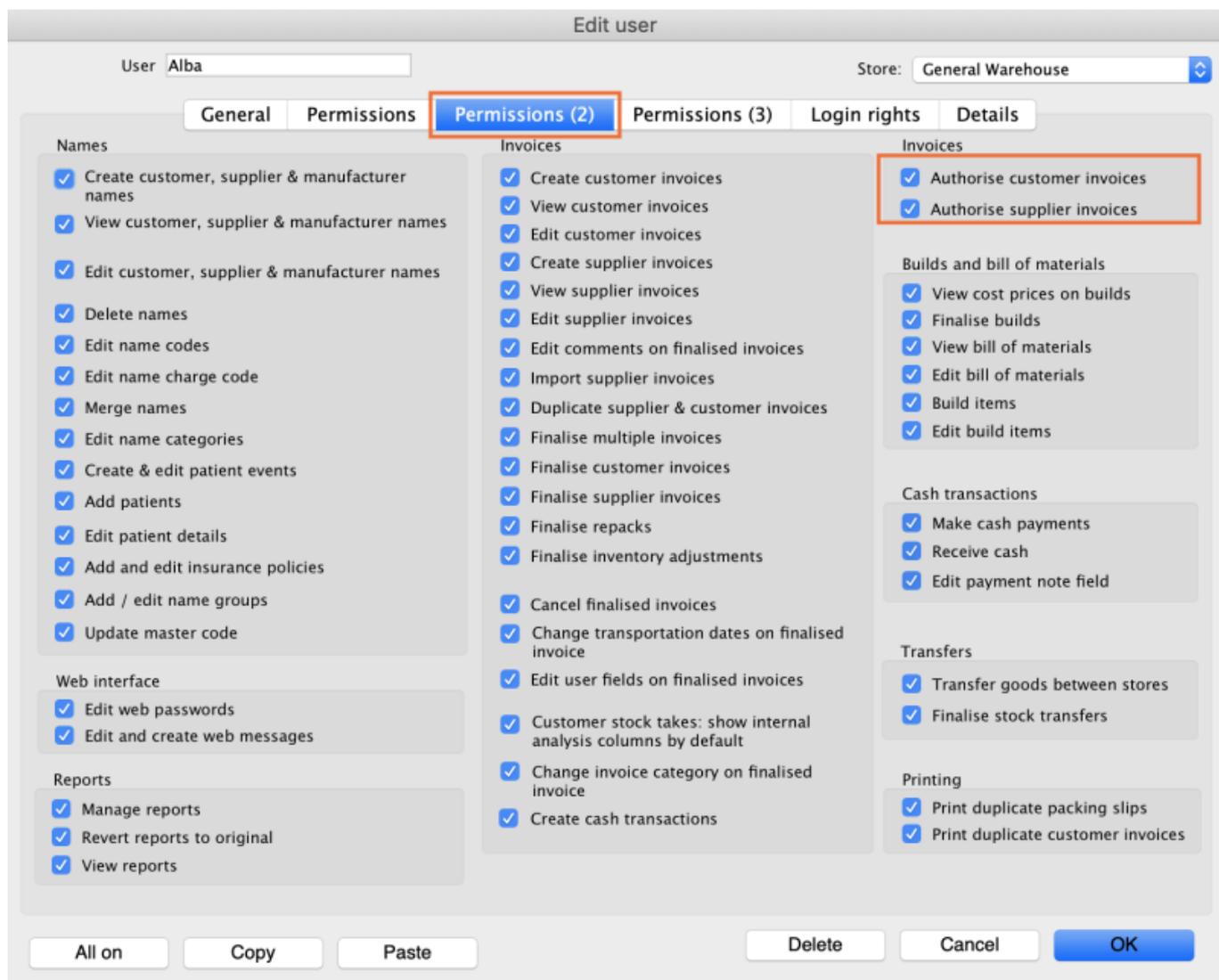
3. Click **OK** until you return to the navigator home page.
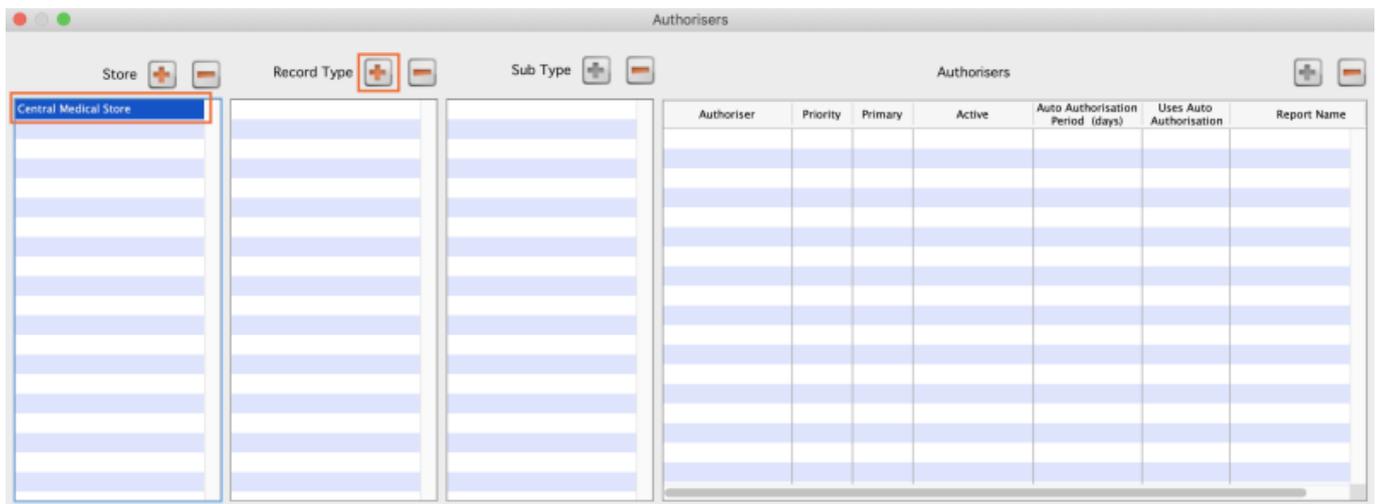
Allocate authorisers to tasks:

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).
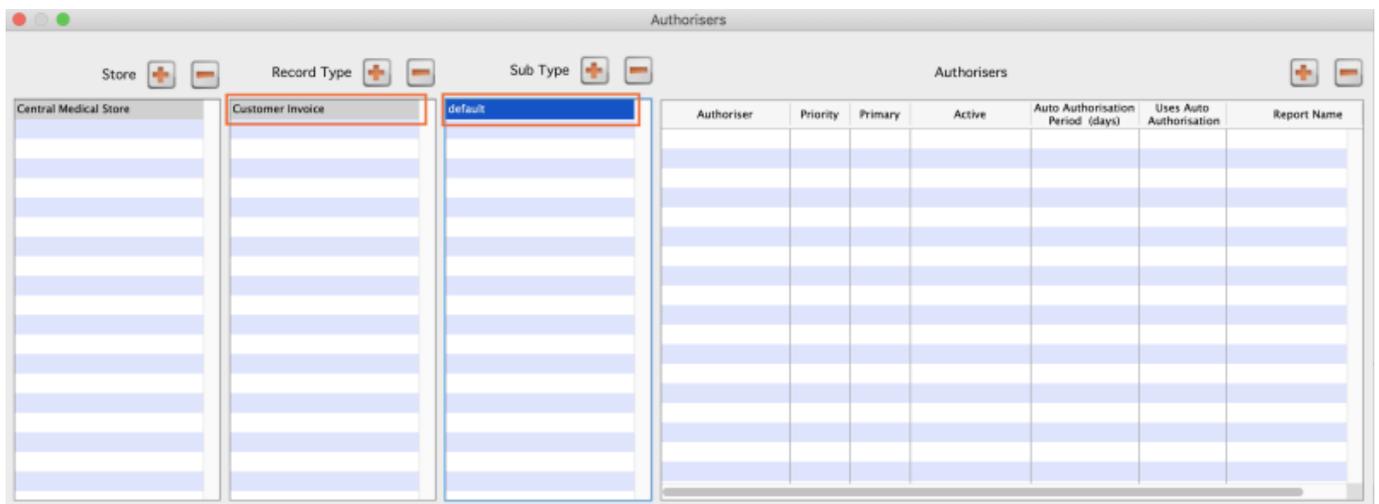
10. In the **Authorisers** section, click the **Plus** button to add authorisers for that specific transaction type (and sub type) in that specific store. You will only be able to allocate users that have permission to be authorisers (steps 1 - 3).
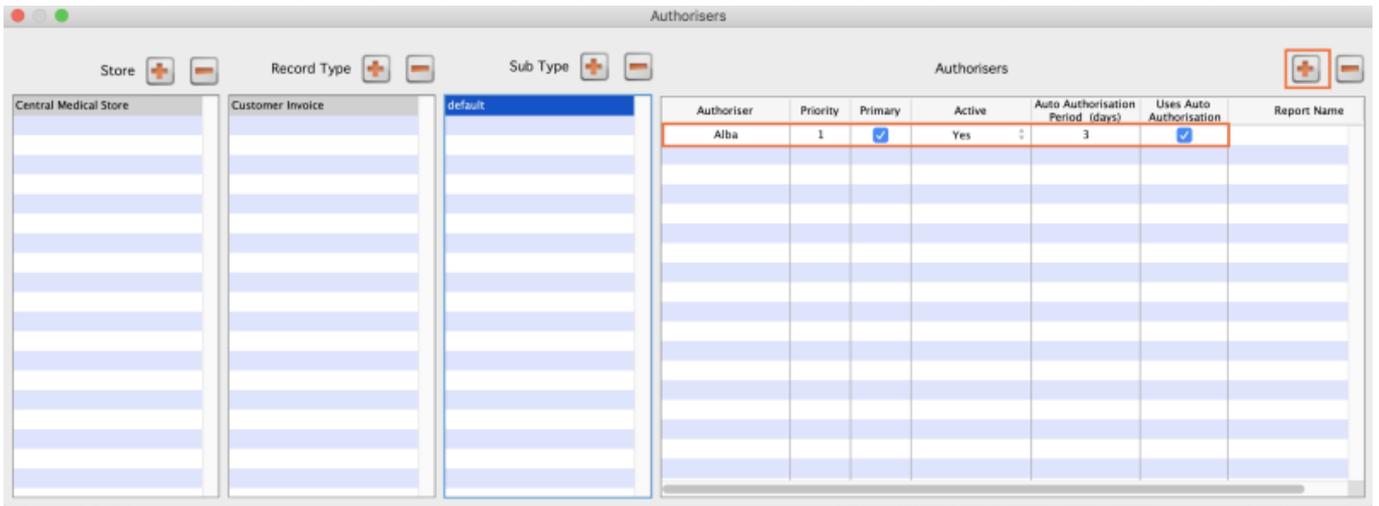
Supplier invoice authorisation

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.
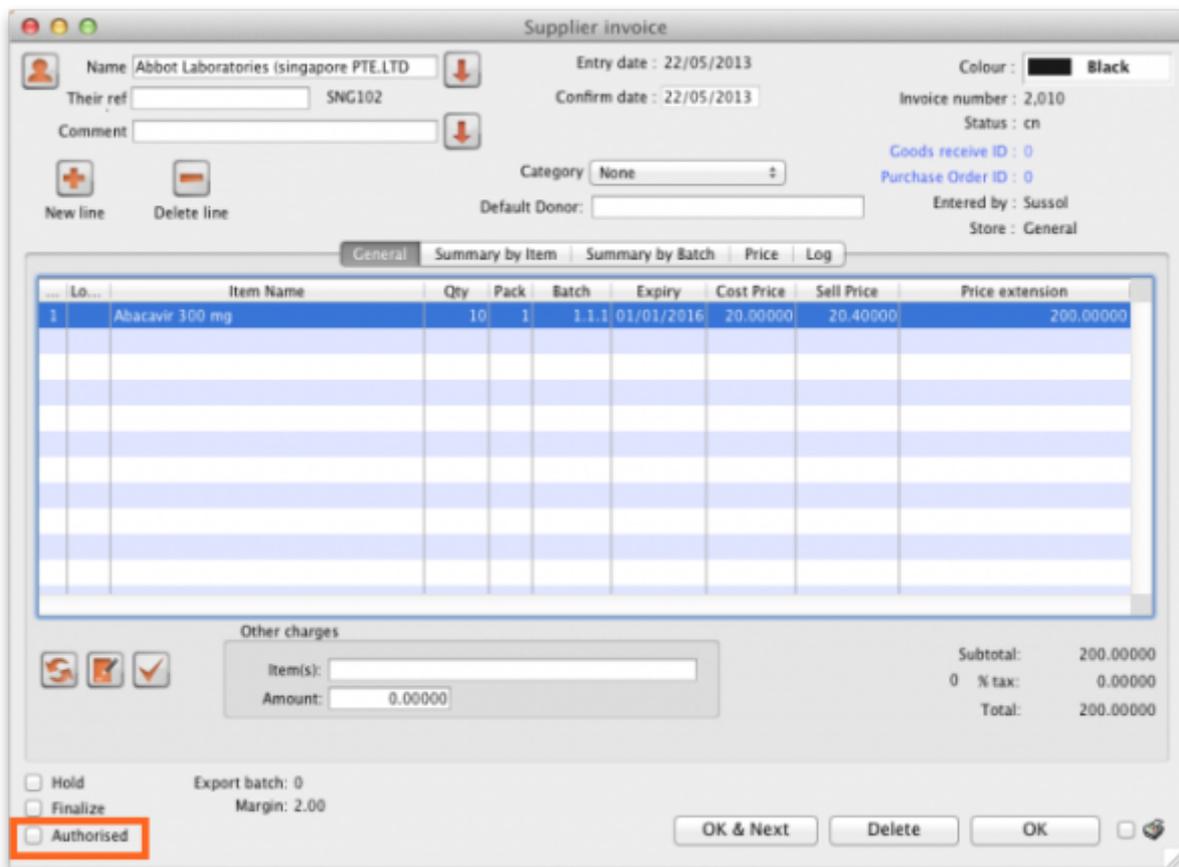
Unauthorising supplier invoices and inventory additions

If you have permission to authorise an invoice, you can also unauthorise it. If the invoice has status "NW" then it has not been entered into stock, and you can allow users to edit it and you will still control the process of authorisation before the goods are put into stock. *However,* if the invoice is already confirmed, the goods have already been entered into stock, and 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 then delete the whole invoice) and require users to enter a new invoice to receive the stock, and the normal authorisation process will 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.
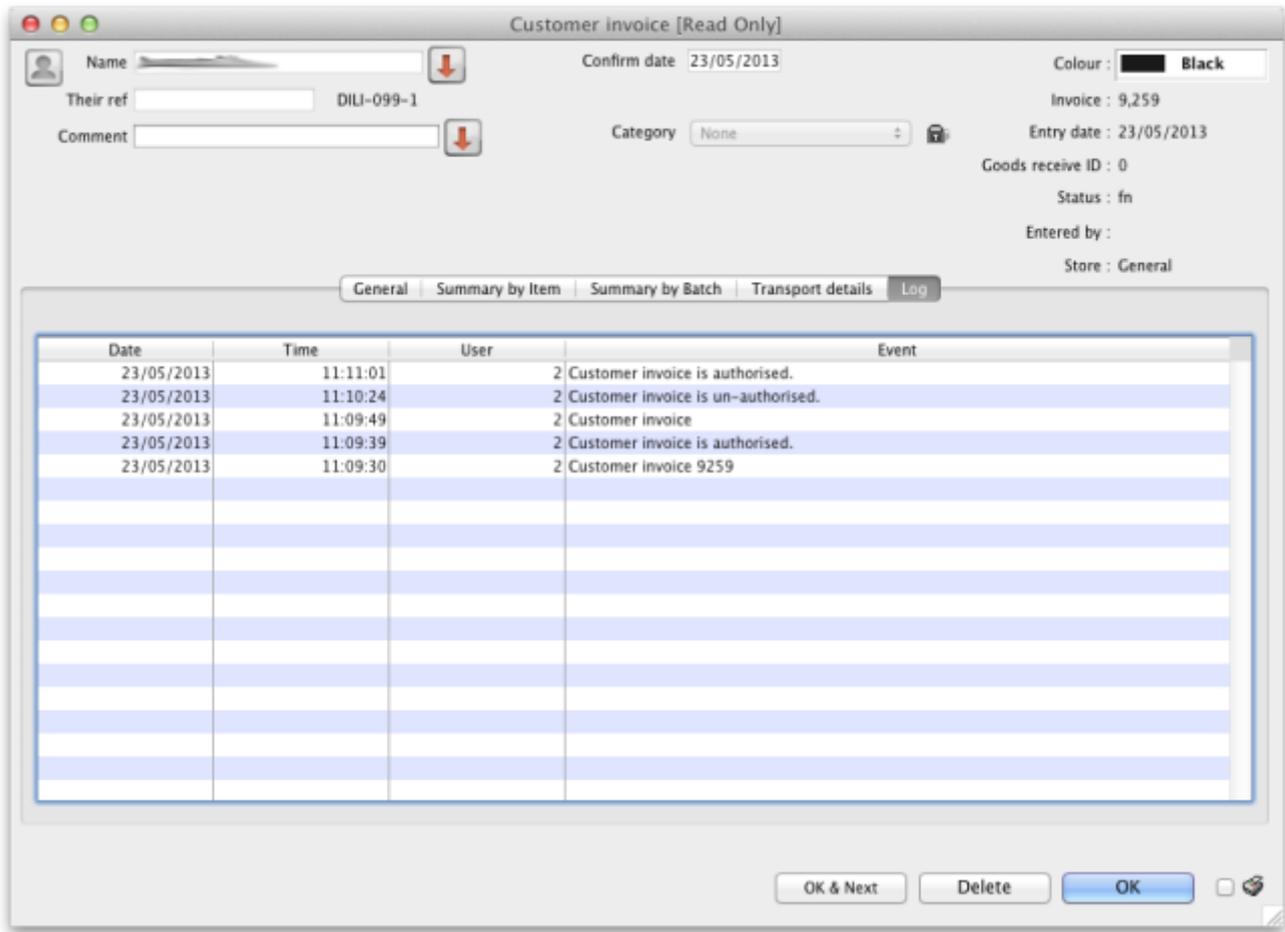
You can also view all logs from **Special > View log…**. See here for details.

Previous: Foreign currency transactions *Next:* Miscellaneous labels