25.17. Authorisation

Sometimes it is important that certain critical processes are not carried out until they have been **authorised**. mSupply allows authorisation to be set according to local needs for:

- Purchase orders
- Goods receipt
- Supplier invoices
- Customer invoices

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

Goods receiving

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

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

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: (You only need to carry out these steps if you are using remote authorisation - see the 26.15. Remote authorisation section for details).

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 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.

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.

Goods receipt authorisation

When the **Goods received lines must be authorised** store preference is set, each new goods receipt line will contain an **Authorised** checkbox.

An authoriser must check the **Authorised** box before the goods receipt can be confirmed. They may also click on a line and leave an **Authorisation comment** for individual items.

- The **Authorised** box and comments will be disabled for users without permission to authorise.

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.

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.

Invoice 9181, page 2 of 2 — "Unauthorised" watermark

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.

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

---

*Previous: **26.13. Using the mSupply remote client*** | | *Next: **26.15. Remote authorisation***

From:
https://docs.msupply.org.nz/ - **mSupply documentation wiki**

Permanent link:
https://docs.msupply.org.nz/other_stuff:invoice_authorization?rev=1617202292

Last update: **2021/03/31 14:51**