

## 25.16. 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:

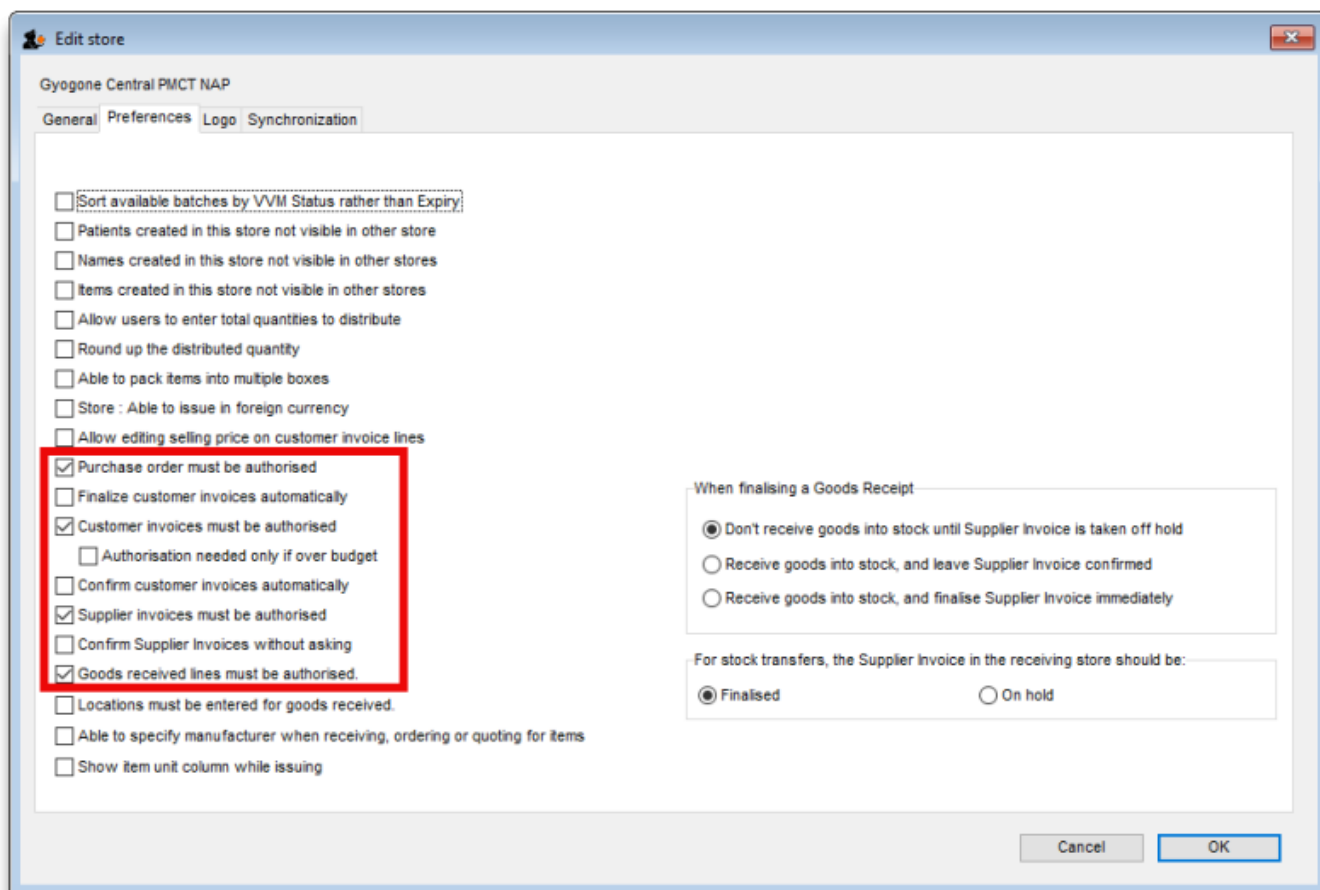
- Unauthorised invoices are held at suggested (sg) status
- The official invoice cannot be printed
- Goods are not removed from or received into stock

## 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  Store:

**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

**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

**Supplier invoices with issued stock**

- Update pack size, cost and sell price

**Admin**

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

**Goods receiving**

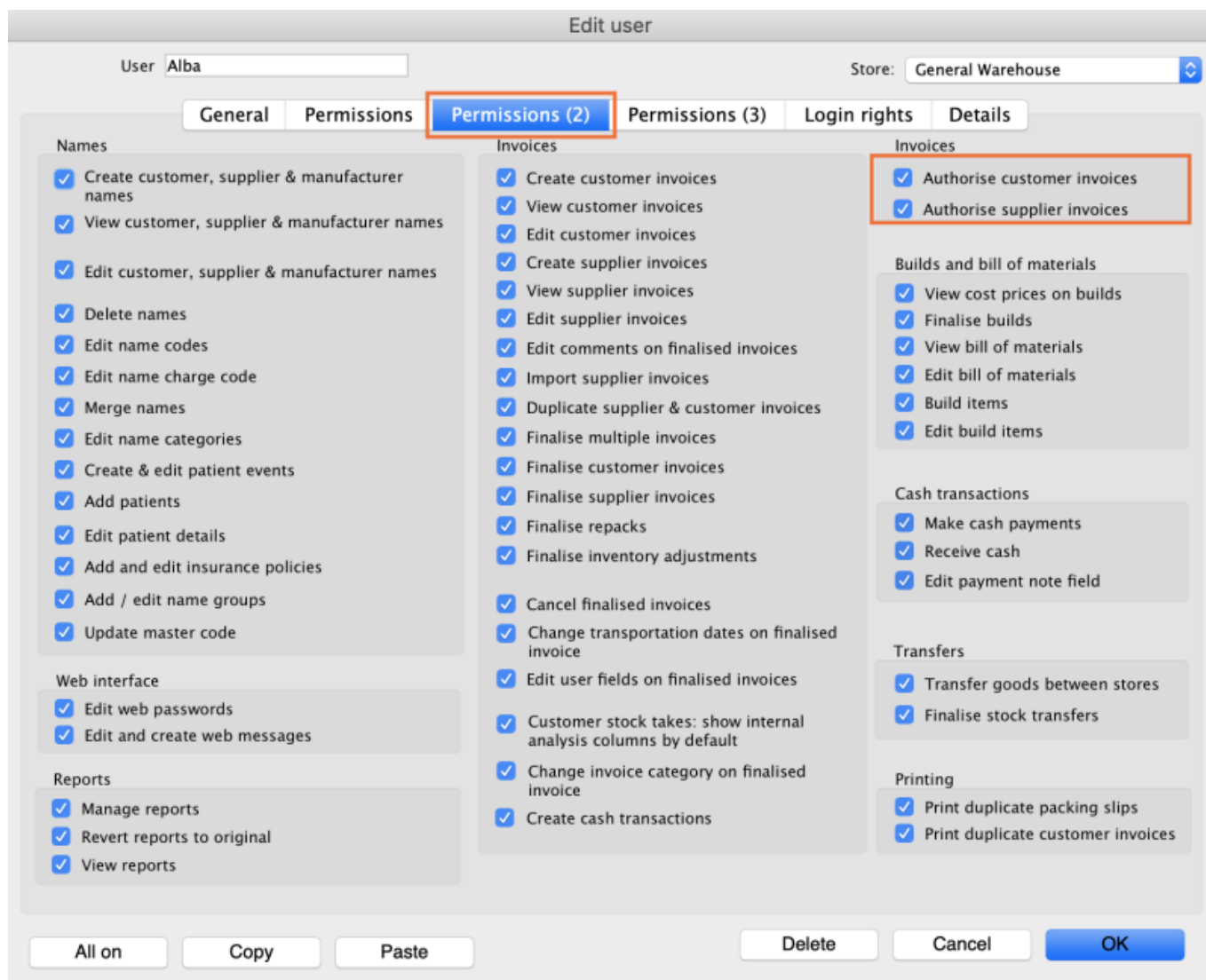
- View goods received
- Add/edit goods received
- Authorise goods received
- Finalise goods received

**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

**Tenders...**

- Create & edit tenders

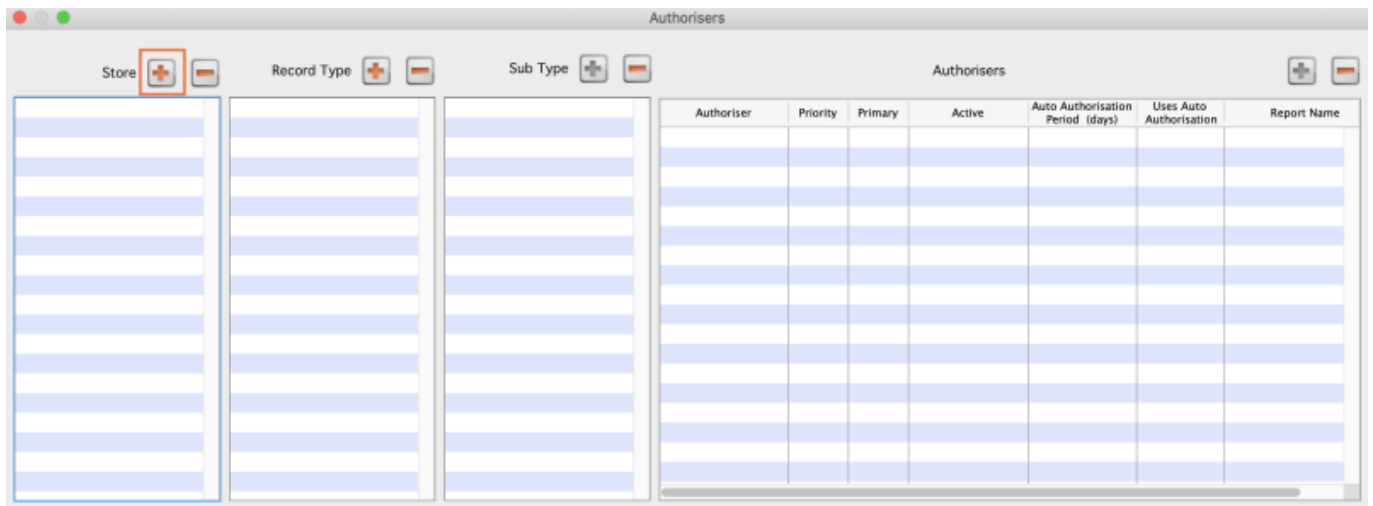


3. Click **OK** until you return to the navigator home page.

**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).

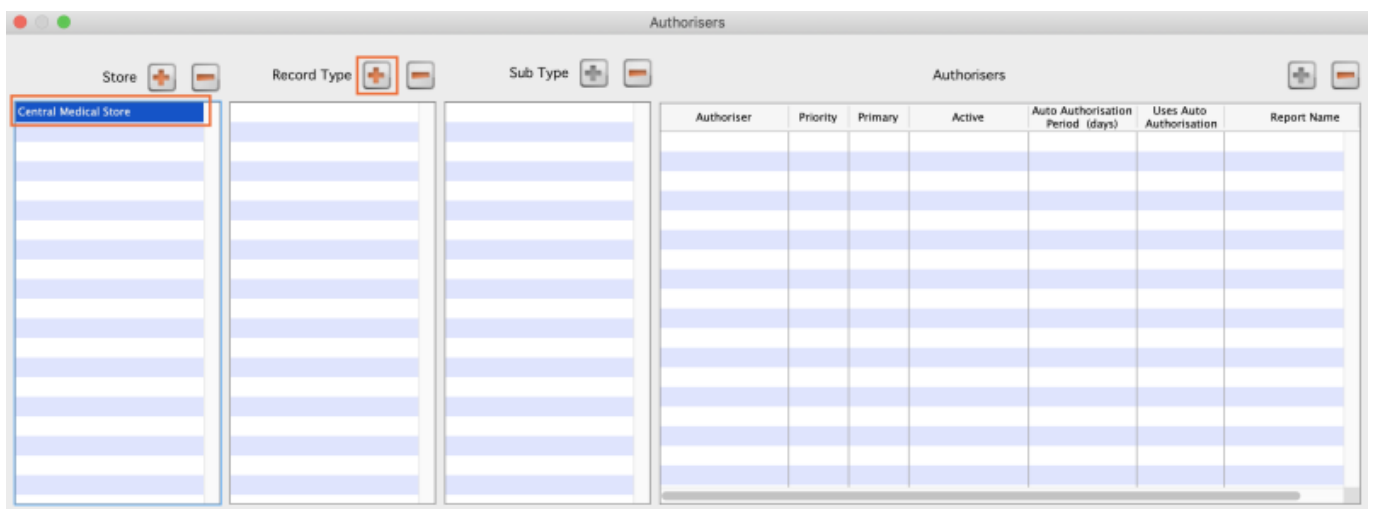
4. Click on **Special > Show Authorisers**.

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



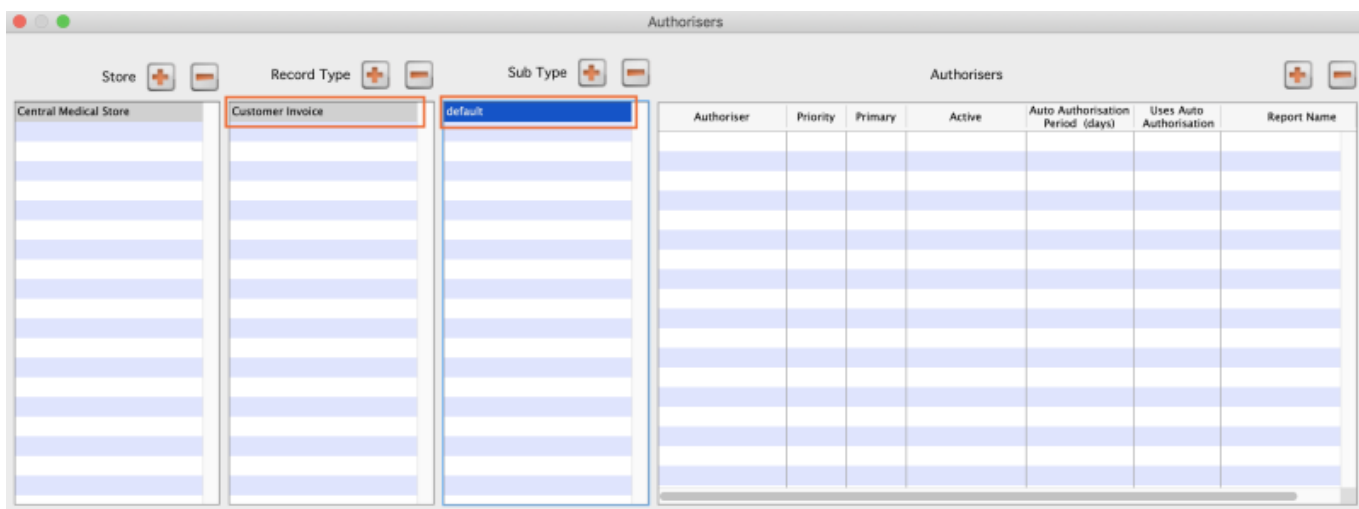
6. Choose the store to allocate authorisers to and click **OK**.

7. Select the store from the list, then click the **Plus** button in the **Record Type** column.

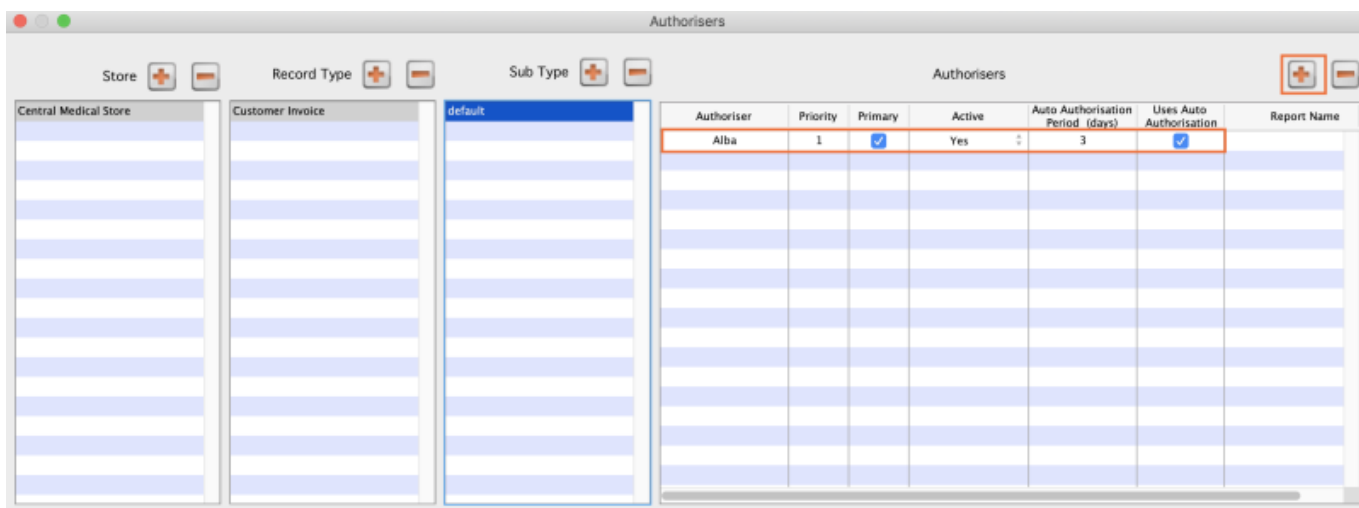


8. Choose the type of transaction to allocate authorisers. Select from Customer Invoices, Supplier Invoices, Request Requisitions or Response Requisitions and click **OK**.

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.

Supplier invoice

Name: Abbot Laboratories (singapore PTE.LTD) Entry date: 22/05/2013 Colour: **Black**

Their ref: SNG102 Confirm date: 22/05/2013 Invoice number: 2,010

Comment: Status: cn

Goods receive ID: 0

Purchase Order ID: 0

Category: None Entered by: Sussol

Default Donor: Store: General

New line Delete line

General Summary by Item Summary by Batch Price Log

Lo...	Item Name	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	Abacavir 300 mg	10	1	1.1.1	01/01/2016	20.00000	20.40000	200.00000

Other charges

Item(s):

Amount: 0.00000

Subtotal: 200.00000

0 % tax: 0.00000

Total: 200.00000

Hold

Finalize

Export batch: 0

Margin: 2.00

**Authorised**

OK & Next Delete OK

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



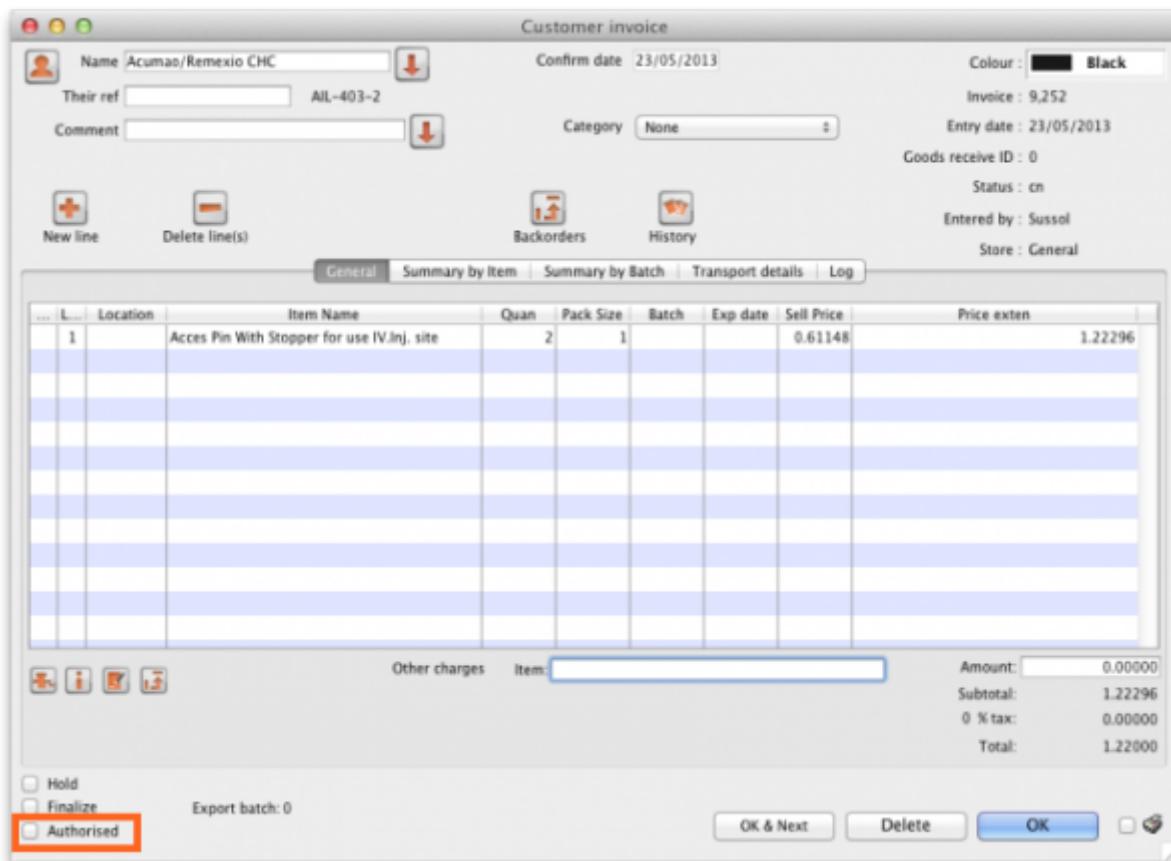
- If the invoice has a **new (nw)** status then it has not been entered into stock. If you unauthorise it, users can edit it and you will still control the process of authorisation before the goods are entered into stock.
- However, if the invoice is **confirmed (cn)**, the goods have already been entered 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.



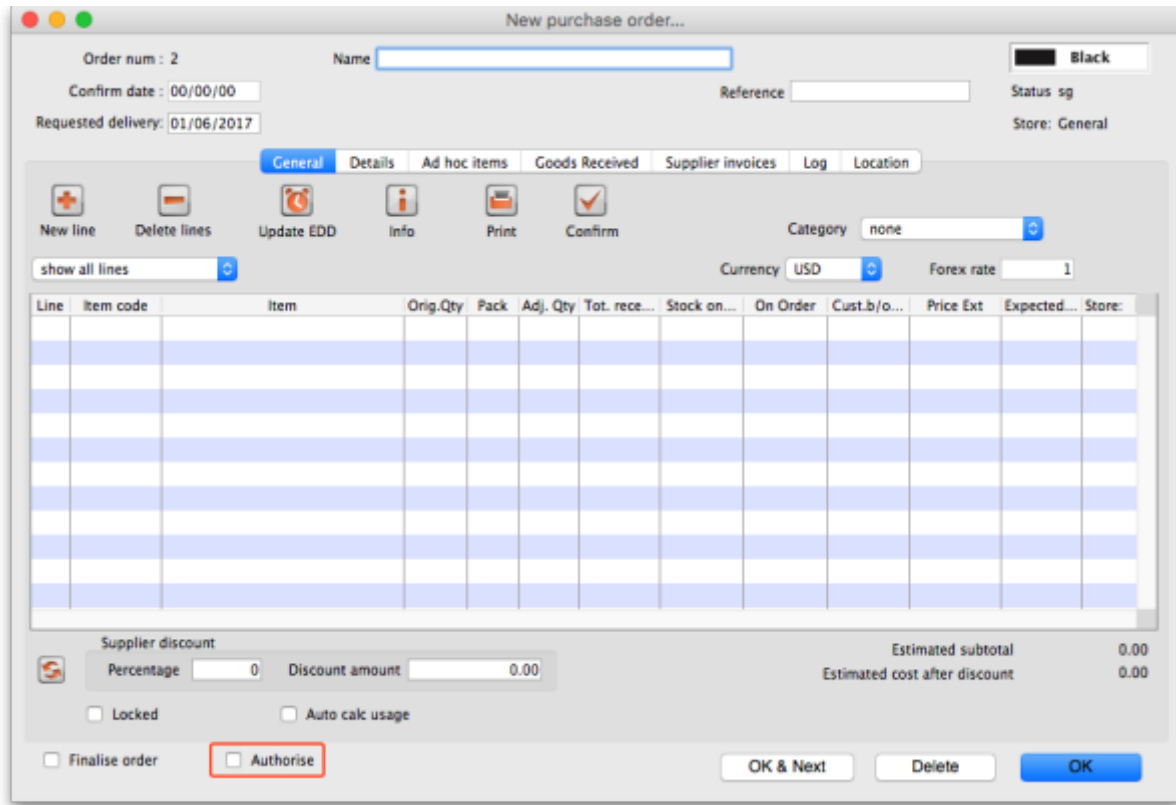
## Goods receipt authorisation

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.






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.



**Sames**

**Invoice: 9181**  
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Supplied to : Status: cn  
 Nitibe/Ustaco Comment : Maria Ribeiro  
 Nitibe, OECUSI Confirmed: 11/12/2012

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Invoice Category : Printed: 23/05/2013  
 Comments : Maria Ribeiro Authorized by :  
Collected by :

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Line	Item	Quan	Pack	Batch	Expiry	Price	Extension	Box
24	Syringe Disposable 2.5 ml w/needle 0.6x 25 mm 2,5ml	100	1	none	00/00/00	0.00	0.00	
25	Syringe Disposable 5 ml, w/needle 0.7x30 mm 5ml	100	1	4204003	31/12/16	0.00	0.61	
26	Disposable Needle 19 G x 1.1/2 (box/100) 1.1 x 40 mm	100	1		00/00/00	0.01	1.22	
27	Disposable Needle 21 G x 1.1/2 (box/100) 0.7 x 25 mm	100	1		00/00/00	0.01	1.00	
28	Disposable Needle 23 G x 1.1/4 0.65 x 32mm	100	1		00/00/00	0.01	1.00	
<b>Total: 647.68000</b>								

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Prepared By : Signature : Delivered By : Signature:

Checked By : Signature : Received By : Signature:

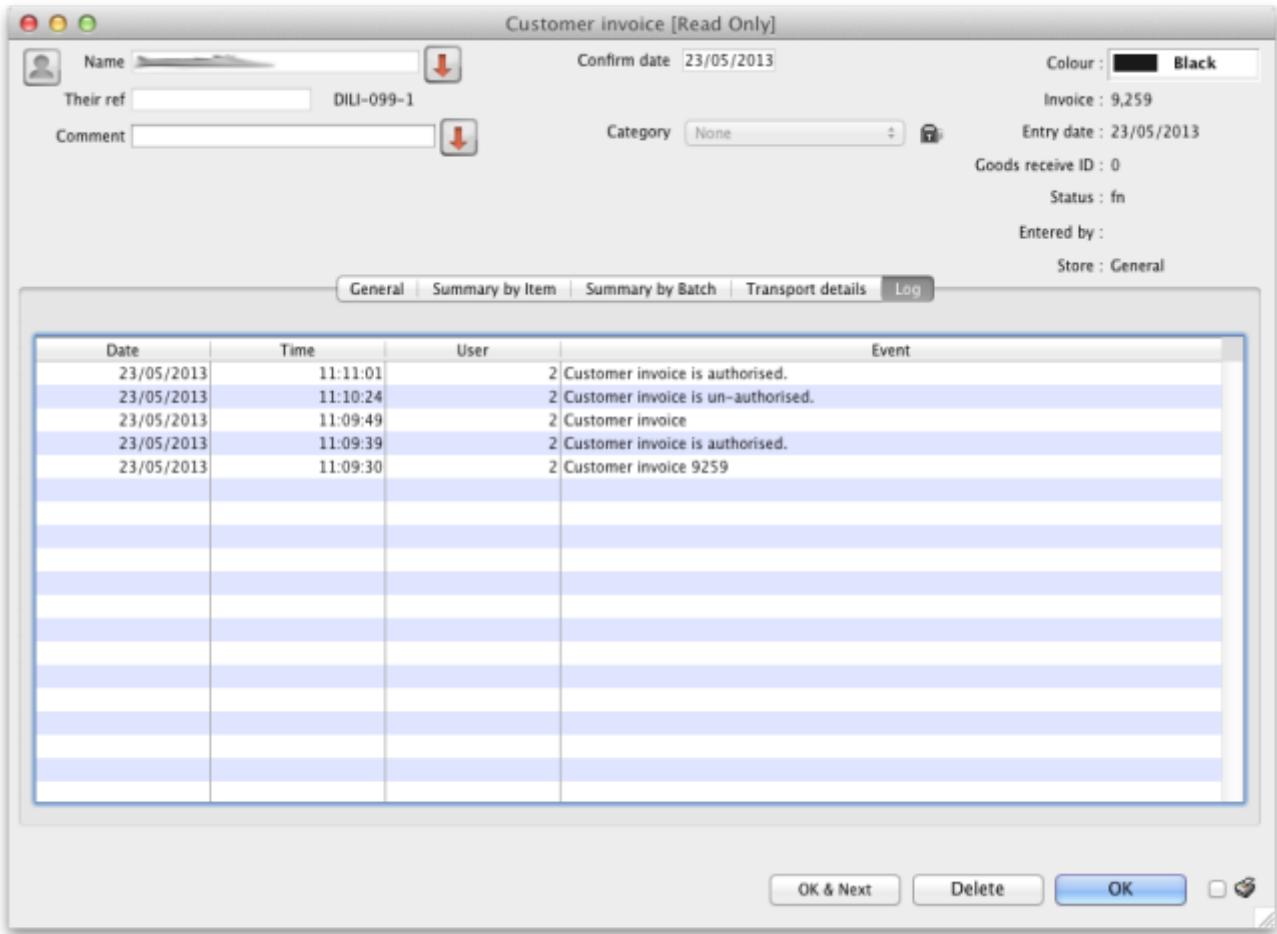
Authorised By : Signature :

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### 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](#)

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