

26.15. 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:

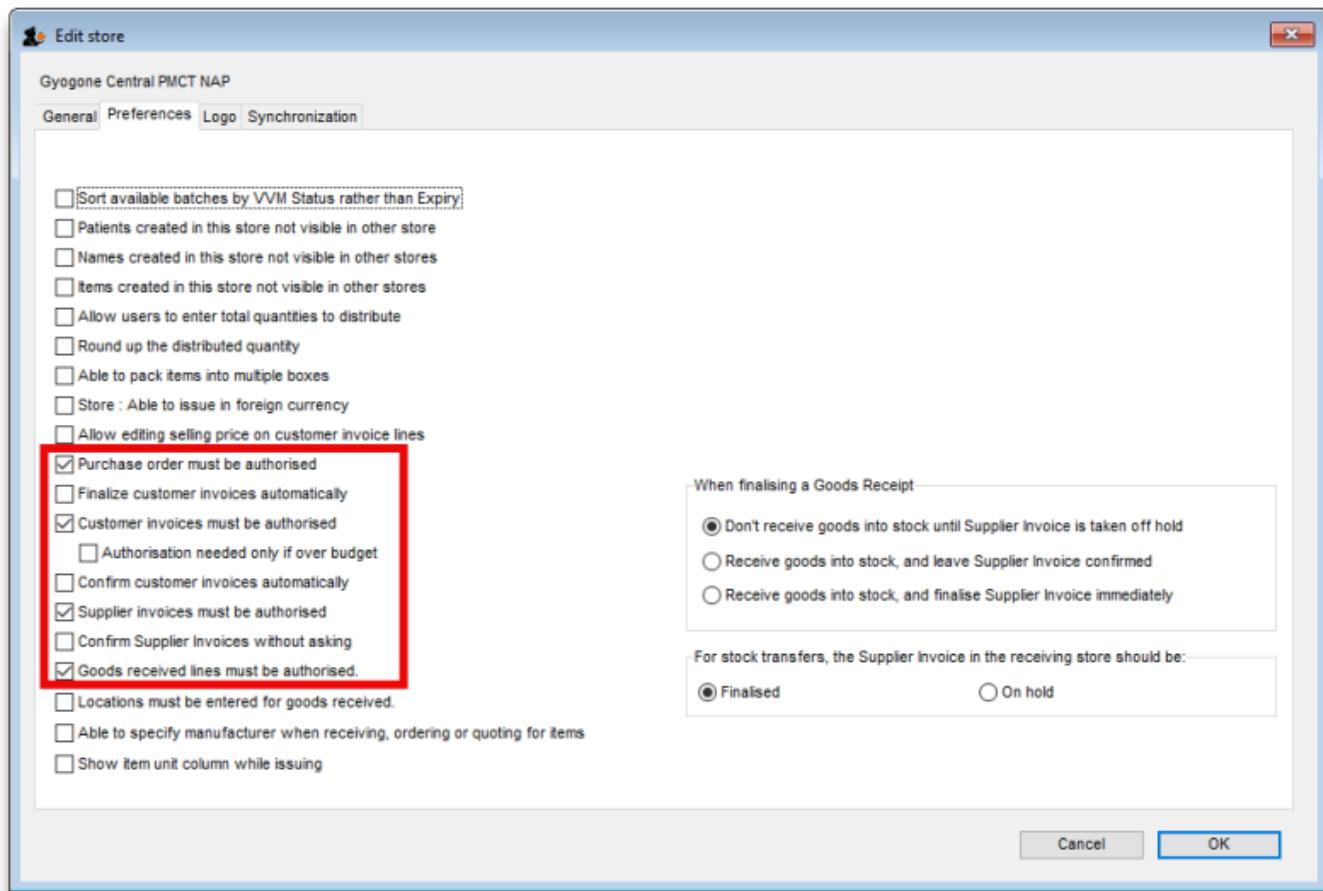
- Unauthorised invoices are held at suggested (sg) status
- The official invoice cannot be printed
- Goods are not removed from or received into stock

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

<input checked="" type="checkbox"/> View purchase orders	<input checked="" type="checkbox"/> Create purchase orders
<input checked="" type="checkbox"/> Delete purchase orders	<input checked="" type="checkbox"/> Confirm purchase orders
<input checked="" type="checkbox"/> Edit purchase orders	<input checked="" type="checkbox"/> Create & edit backorders
<input checked="" type="checkbox"/> Edit purchase order pricing	<input checked="" type="checkbox"/> Create new quotes
<input checked="" type="checkbox"/> Manage tenders	<input checked="" type="checkbox"/> Edit & delete quotes
<input checked="" type="checkbox"/> Finalise purchase orders	<input checked="" type="checkbox"/> Duplicate purchase orders
<input checked="" type="checkbox"/> Authorise purchase orders	<input checked="" type="checkbox"/> Print purchase orders

Items

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

Supplier invoices with issued stock

Update pack size, cost and sell price

Admin

<input checked="" type="checkbox"/> Add / edit users
<input type="checkbox"/> Access server administration
<input checked="" type="checkbox"/> Edit authorisers
<input checked="" type="checkbox"/> Clone database
<input checked="" type="checkbox"/> Edit insurance providers
<input checked="" type="checkbox"/> Edit periods and period schedules

Goods receiving

<input checked="" type="checkbox"/> View goods received
<input checked="" type="checkbox"/> Add/edit goods received
<input checked="" type="checkbox"/> Authorise goods received
<input checked="" type="checkbox"/> Finalise goods received

Special

<input checked="" type="checkbox"/> Add / edit currencies
<input checked="" type="checkbox"/> Add / edit reminders
<input checked="" type="checkbox"/> View and print labels
<input checked="" type="checkbox"/> Add / edit misc labels
<input checked="" type="checkbox"/> Add / edit abbreviations
<input checked="" type="checkbox"/> Add / edit warnings
<input checked="" type="checkbox"/> Add / edit prescribers
<input checked="" type="checkbox"/> Add / edit transaction categories
<input checked="" type="checkbox"/> Add / edit contacts
<input checked="" type="checkbox"/> Merge prescribers
<input checked="" type="checkbox"/> Add and edit options

Tenders...

<input checked="" type="checkbox"/> Create & edit tenders

All on Copy Paste Delete Cancel OK

Edit user

User: Alba

Store: General Warehouse

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

Permissions (2)

Names

- Create customer, supplier & manufacturer names
- View customer, supplier & manufacturer names
- Edit customer, supplier & manufacturer names
- Delete names
- Edit name codes
- Edit name charge code
- Merge names
- Edit name categories
- Create & edit patient events
- Add patients
- Edit patient details
- Add and edit insurance policies
- 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

Permissions (3)

Invoices

- Create customer invoices
- View customer invoices
- Edit customer invoices
- Create supplier invoices
- View supplier invoices
- Edit supplier invoices
- Edit comments on finalised invoices
- Import supplier invoices
- Duplicate supplier & customer invoices
- Finalise multiple invoices
- Finalise customer invoices
- Finalise supplier invoices
- Finalise repacks
- Finalise inventory adjustments
- Cancel finalised invoices
- Change transportation dates on finalised invoice
- Edit user fields on finalised invoices
- Customer stock takes: show internal analysis columns by default
- Change invoice category on finalised invoice
- Create cash transactions

Invoices

- Authorise customer invoices
- Authorise supplier invoices

Builds and bill of materials

- View cost prices on builds
- Finalise builds
- View bill of materials
- Edit bill of materials
- Build items
- Edit build items

Cash transactions

- Make cash payments
- Receive cash
- Edit payment note field

Transfers

- Transfer goods between stores
- Finalise stock transfers

Printing

- Print duplicate packing slips
- Print duplicate customer invoices

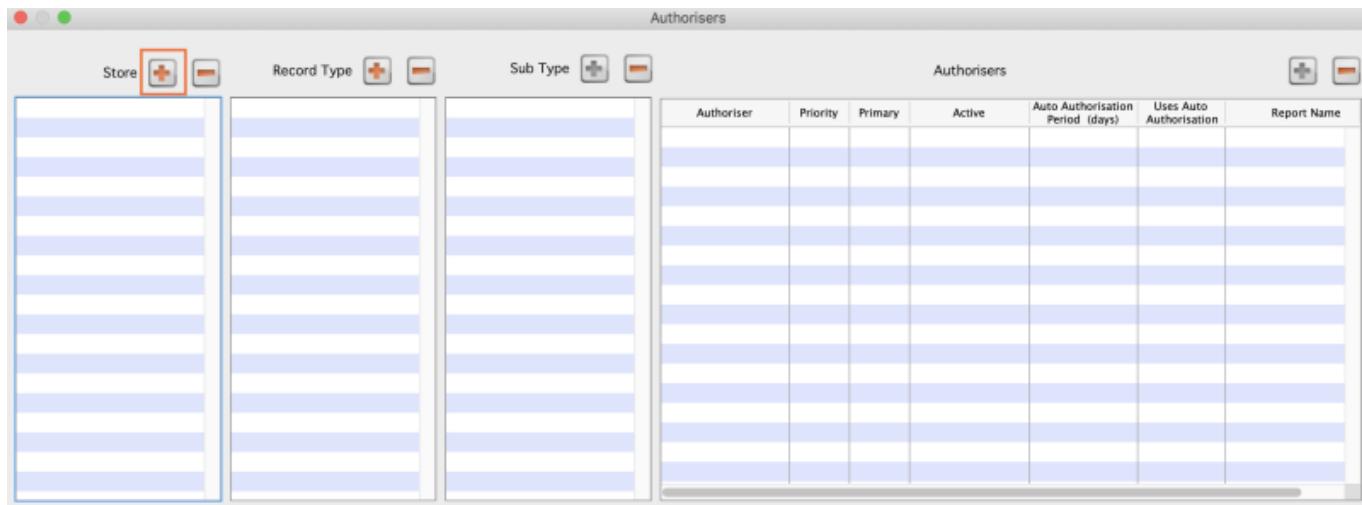
All on Copy Paste Delete Cancel OK

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

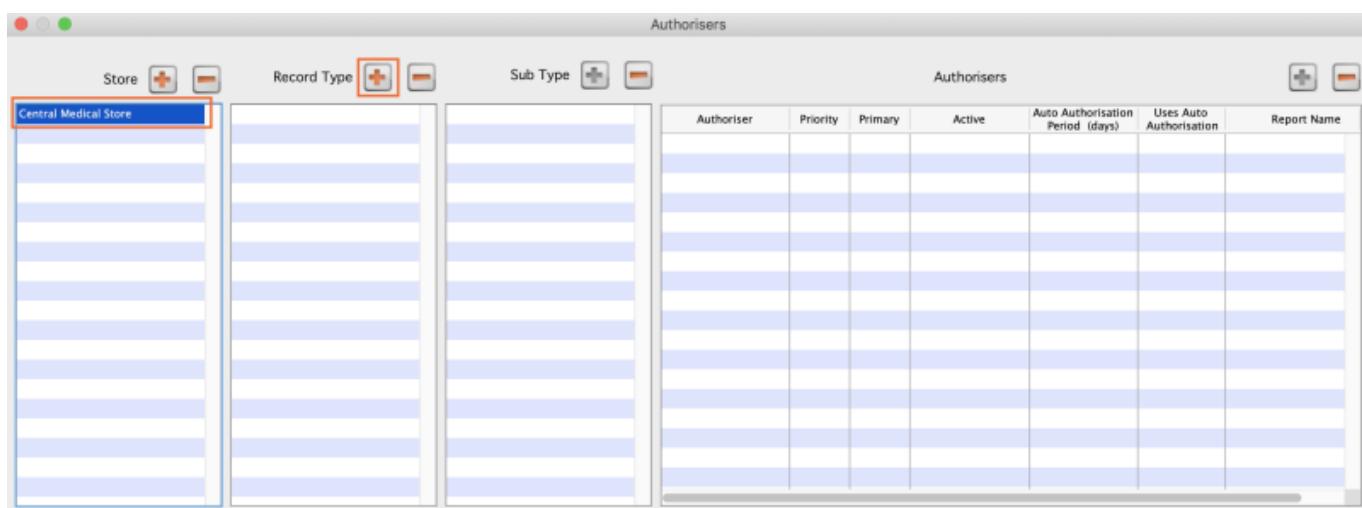
Allocate authorisers to tasks: (You only need to carry out these steps if you are using remote authorisation - see the [26.15. Remote authorisation](#) section for details).

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

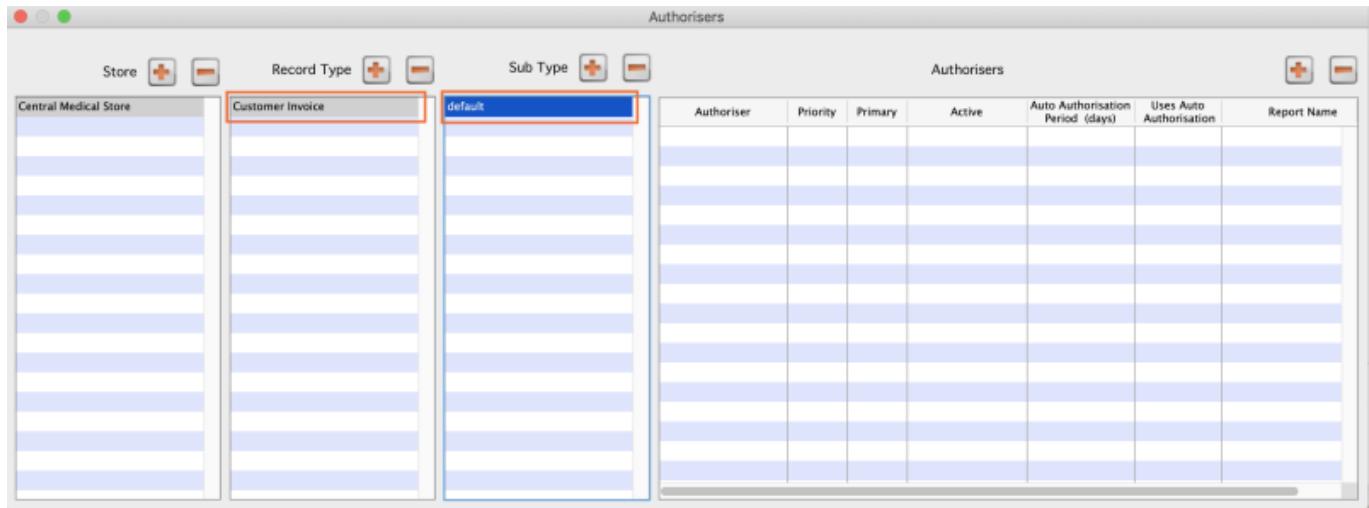
5. Click the **Plus** button in the **Store** column.



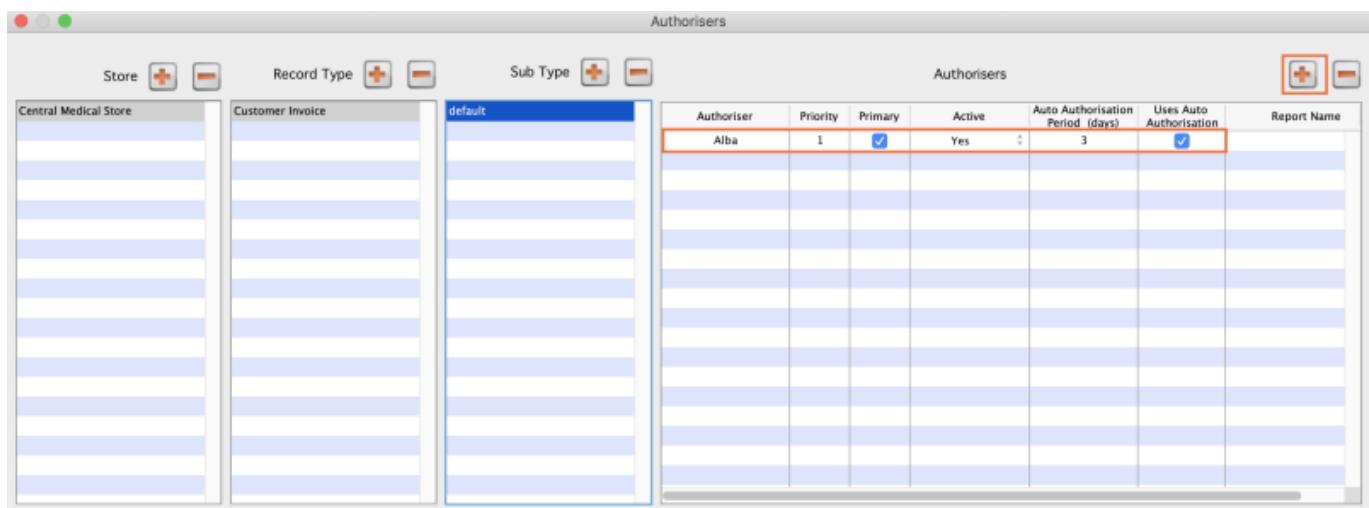
6. Choose the store to allocate authorisers to and click **OK**.
7. Select the store from the list, then click the **Plus** button in the **Record Type** column.



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.

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							
<input type="button" value="New line"/>	Category: None	Goods receive ID: 0						
<input type="button" value="Delete line"/>	Default Donor:	Purchase Order ID: 0						
Entered by: Sussol		Store: General						
<input type="button" value="General"/> <input type="button" value="Summary by Item"/> <input type="button" value="Summary by Batch"/> <input type="button" value="Price"/> <input type="button" value="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 <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> Item(s): <input type="text"/> Amount: <input type="text"/> 0.00000 Subtotal: 200.00000 0 % tax: 0.00000 Total: 200.00000								
<input type="checkbox"/> Hold <input type="checkbox"/> Finalize <input checked="" type="checkbox"/> Authorised		Export batch: 0		Margin: 2.00		<input type="button" value="OK & Next"/> <input type="button" value="Delete"/> <input type="button" value="OK"/>		

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



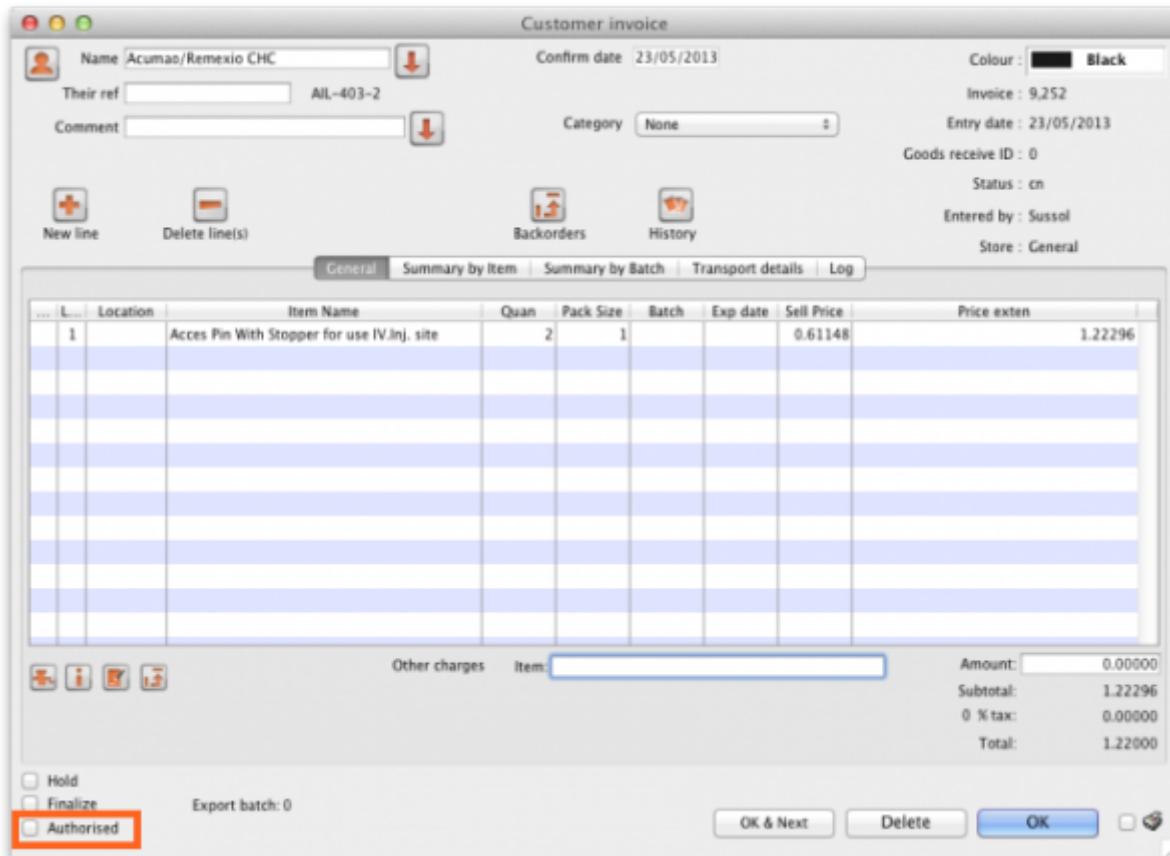
- If the invoice has a **new (nw)** status then it has not been entered into stock. If you unauthorise it, users can edit it and you will still control the process of authorisation before the goods are entered into stock.
- However, if the invoice is **confirmed (cn)**, the goods have already been entered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

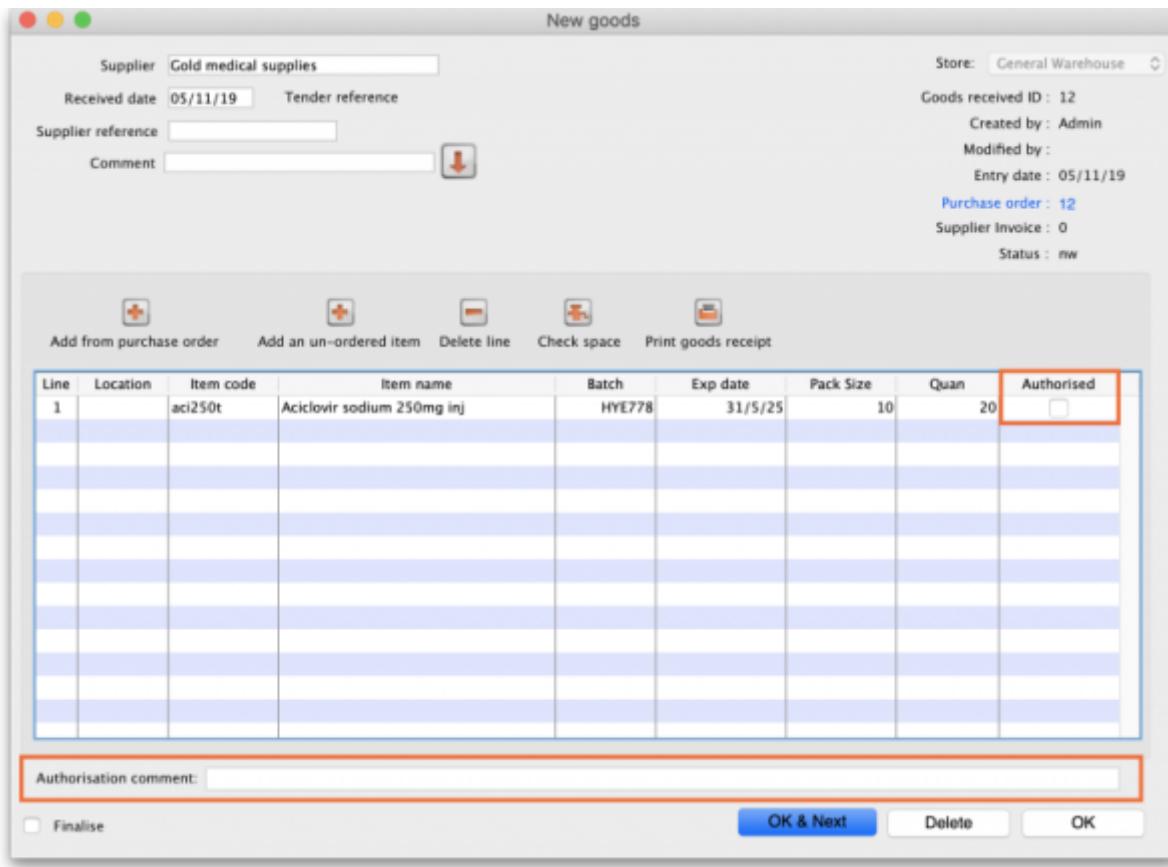
An authoriser must check the **Authorised** box before the customer invoice can be confirmed.

- 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, a new Authorised column will be displayed and will contain a checkbox for each goods receipt line. It looks like this:



The screenshot shows the 'New goods' window in mSupply. At the top, there are fields for 'Supplier' (Gold medical supplies), 'Received date' (05/11/19), 'Tender reference', 'Supplier reference', 'Comment', and a 'Store' dropdown set to 'General Warehouse'. To the right, status information is displayed: 'Goods received ID : 12', 'Created by : Admin', 'Modified by :', 'Entry date : 05/11/19', 'Purchase order : 12', 'Supplier Invoice : 0', and 'Status : mw'. Below these are several buttons: 'Add from purchase order', 'Add an un-ordered item', 'Delete line', 'Check space', and 'Print goods receipt'. The main area is a grid table with columns: Line, Location, Item code, Item name, Batch, Exp date, Pack Size, Quan, and Authorised. The first row shows an item: Line 1, Location aci250t, Item code aciclovir sodium 250mg inj, Item name Aciclovir sodium 250mg inj, Batch HYE778, Exp date 31/5/25, Pack Size 10, Quan 20. The 'Authorised' checkbox in this row is highlighted with a red border. Below the grid is a 'Authorisation comment:' field with a red border. At the bottom are buttons: 'Finalise' (unchecked), 'OK & Next' (blue), 'Delete' (grey), and 'OK' (grey).

Users who have the *Authorise goods received* permission turned on can check the *Authorised* checkbox for each line that is authorised. When the goods received note is finalised, only lines that are authorised will be added to the supplier invoice to be received into stock. The unauthorised lines will remain on the finalised goods received note as a permanent record of what was actually received but not authorised.



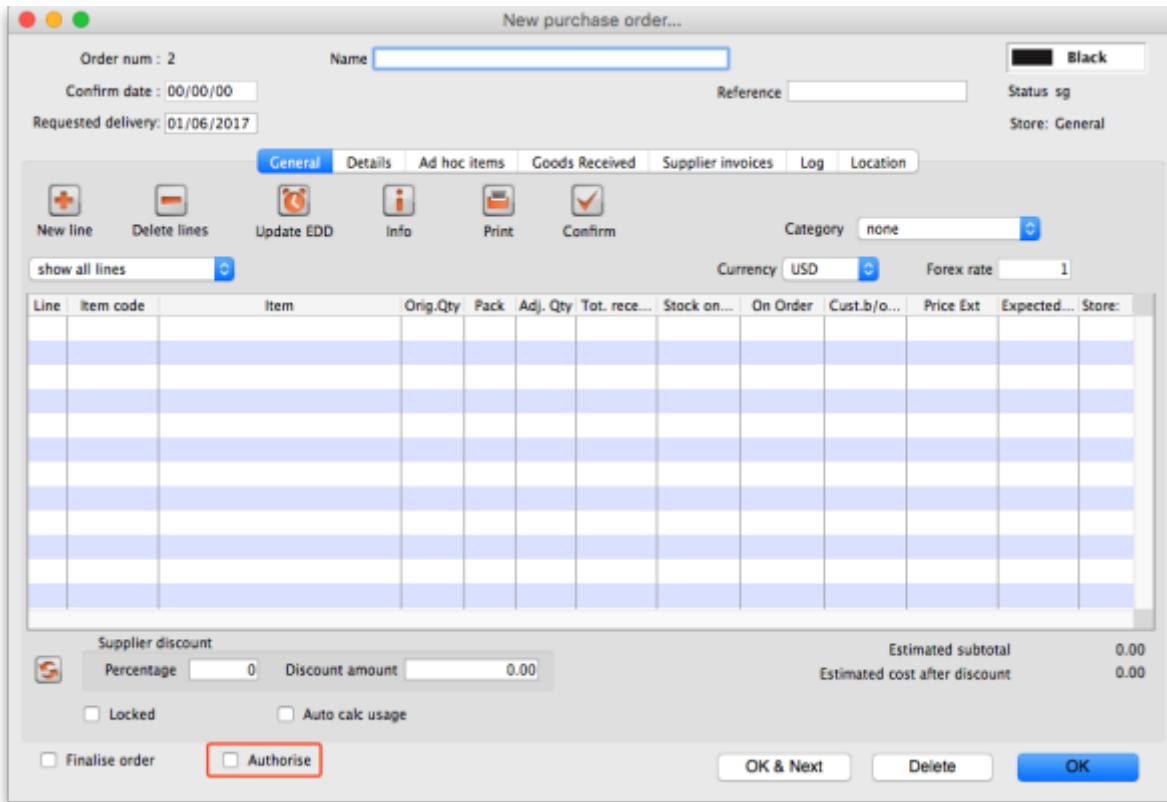
Any unauthorised goods received note lines do not count towards stock received against purchase orders or on goods received notes so they can be received again at a later date if they are resent by your supplier.

Users who have the *Authorise goods received* permission turned on may also leave a comment in the **Authorisation comment** field to record anything that needs to be noted.

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.

Sames								
Invoice: 9181								
Page 2 of 2								
Supplied to : Nitibe/Ustaco Nitibe, OECUSSI				Status: cn Comment : Maria Ribeiro Confirmed: 11/12/2012 Printed: 23/05/2013				
Invoice Category : Comments : Maria Ribeiro				Authorized by : Collected by :				
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	
Total: 647.68000								
Prepared By :		Signature :		Delivered By :		Signature:		
Checked By :		Signature :		Received By :		Signature:		
Authorised By :		Signature :						

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=1634299707

Last update: **2021/10/15 12:08**

