

## 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 notes](#)
- [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**.

**Edit store**

Gyogone Central PMCT NAP

General Preferences Logo Synchronization

☐ Sort available batches by VVM Status rather than Expiry

☐ Patients created in this store not visible in other store

☐ Names created in this store not visible in other stores

☐ 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 automatically

☒ Supplier invoices must be authorised

☐ Confirm Supplier Invoices without asking

☒ Goods received lines must be authorised.

☐ Locations must be entered for goods received.

☐ Able to specify manufacturer when receiving, ordering or quoting for items

☐ Show item unit column while issuing

When finalising a Goods Receipt

☒ Don't receive goods into stock until Supplier Invoice is taken off hold

☐ Receive goods into stock, and leave Supplier Invoice confirmed

☐ Receive goods into stock, and finalise Supplier Invoice immediately

For stock transfers, the Supplier Invoice in the receiving store should be:

☒ Finalised

☐ On hold

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.

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

The screenshot shows the 'Edit user' interface for user 'Alba' in the 'General Warehouse' store. The 'Permissions (2)' tab is selected, showing a list of permissions grouped into 'Names', 'Invoices', 'Builds and bill of materials', 'Cash transactions', 'Transfers', and 'Printing'. The 'Invoices' section is highlighted, and the 'Authorise customer invoices' and 'Authorise supplier invoices' permissions are checked and highlighted with a red box.

Names	Invoices	Builds and bill of materials	Cash transactions	Transfers	Printing
<input checked="" type="checkbox"/> Create customer, supplier & manufacturer names	<input checked="" type="checkbox"/> Create customer invoices	<input checked="" type="checkbox"/> Authorise customer invoices	<input checked="" type="checkbox"/> Make cash payments	<input checked="" type="checkbox"/> Transfer goods between stores	<input checked="" type="checkbox"/> Print duplicate packing slips
<input checked="" type="checkbox"/> View customer, supplier & manufacturer names	<input checked="" type="checkbox"/> View customer invoices	<input checked="" type="checkbox"/> Authorise supplier invoices	<input checked="" type="checkbox"/> Receive cash	<input checked="" type="checkbox"/> Finalise stock transfers	<input checked="" type="checkbox"/> Print duplicate customer invoices
<input checked="" type="checkbox"/> Edit customer, supplier & manufacturer names	<input checked="" type="checkbox"/> Edit customer invoices	<input checked="" type="checkbox"/> View cost prices on builds	<input checked="" type="checkbox"/> Edit payment note field		
<input checked="" type="checkbox"/> Delete names	<input checked="" type="checkbox"/> Create supplier invoices	<input checked="" type="checkbox"/> Finalise builds			
<input checked="" type="checkbox"/> Edit name codes	<input checked="" type="checkbox"/> View supplier invoices	<input checked="" type="checkbox"/> View bill of materials			
<input checked="" type="checkbox"/> Edit name charge code	<input checked="" type="checkbox"/> Edit supplier invoices	<input checked="" type="checkbox"/> Edit bill of materials			
<input checked="" type="checkbox"/> Merge names	<input checked="" type="checkbox"/> Edit comments on finalised invoices	<input checked="" type="checkbox"/> Build items			
<input checked="" type="checkbox"/> Edit name categories	<input checked="" type="checkbox"/> Import supplier invoices	<input checked="" type="checkbox"/> Edit build items			
<input checked="" type="checkbox"/> Create & edit patient events	<input checked="" type="checkbox"/> Duplicate supplier & customer invoices				
<input checked="" type="checkbox"/> Add patients	<input checked="" type="checkbox"/> Finalise multiple invoices				
<input checked="" type="checkbox"/> Edit patient details	<input checked="" type="checkbox"/> Finalise customer invoices				
<input checked="" type="checkbox"/> Add and edit insurance policies	<input checked="" type="checkbox"/> Finalise supplier invoices				
<input checked="" type="checkbox"/> Add / edit name groups	<input checked="" type="checkbox"/> Finalise repacks				
<input checked="" type="checkbox"/> Update master code	<input checked="" type="checkbox"/> Finalise inventory adjustments				
	<input checked="" type="checkbox"/> Cancel finalised invoices				
	<input checked="" type="checkbox"/> Change transportation dates on finalised invoice				
	<input checked="" type="checkbox"/> Edit user fields on finalised invoices				
	<input checked="" type="checkbox"/> Customer stock takes: show internal analysis columns by default				
	<input checked="" type="checkbox"/> Change invoice category on finalised invoice				
	<input checked="" type="checkbox"/> Create cash transactions				

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.

The screenshot shows the 'Authorisers' window with four main columns: 'Store', 'Record Type', 'Sub Type', and 'Authorisers'. The 'Store' column has a plus button highlighted with a red box. The 'Record Type' column also has a plus button. The 'Sub Type' column has a plus button. The 'Authorisers' column is a table with the following headers: Authoriser, Priority, Primary, Active, Auto Authorisation Period (days), Uses Auto Authorisation, and Report Name. The table is currently empty.

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.

The screenshot shows the 'Authorisers' window with the same layout as the previous one. In the 'Store' column, 'Central Medical Store' is selected and highlighted with a blue box. The 'Record Type' column has a plus button highlighted with a red box. The 'Sub Type' column has a plus button. The 'Authorisers' column is a table with the same headers as before, but it is currently empty.

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).

The screenshot shows the 'Authorisers' window with the following filters: Store: Central Medical Store, Record Type: Customer Invoice, Sub Type: default. The 'Authorisers' table is empty.

Authoriser	Priority	Primary	Active	Auto Authorisation Period (days)	Uses Auto Authorisation	Report Name
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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).

The screenshot shows the 'Authorisers' window with the same filters as before. The 'Authorisers' table now contains one row:

Authoriser	Priority	Primary	Active	Auto Authorisation Period (days)	Uses Auto Authorisation	Report Name
Alba	1	<input checked="" type="checkbox"/>	Yes	3	<input checked="" type="checkbox"/>	

## 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

Status: cn

Goods receive ID: 0

Purchase Order ID: 0

Entered by: Sussol

Store: General

Category: None

Default Donor:

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

Authorised

Export batch: 0

Margin: 2.00

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



Supplier: Gold medical supplies

Received date: 05/11/19

Tender reference:

Supplier reference:

Comment:

Store: General Warehouse

Goods received ID: 12

Created by: Admin

Modified by:

Entry date: 05/11/19

Purchase order: 12

Supplier Invoice: 0

Status: mw

Add from purchase order Add an un-ordered item Delete line Check space Print goods receipt

Line	Location	Item code	Item name	Batch	Exp date	Pack Size	Quan	Authorised
1		aci250t	Aciclovir sodium 250mg inj	HYE778	31/5/25	10	20	<input type="checkbox"/>

Authorisation comment:

☐ Finalise

OK & Next Delete OK

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.

## 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 :  
 Nitibe/Ustaco  
 Nitibe, OECUSI

Status: cn  
 Comment : Maria Ribeiro  
 Confirmed: 11/12/2012  
 Printed: 23/05/2013

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Invoice Category :  
 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 :  
 Checked By :  
 Authorised By :

Signature :  
 Signature :  
 Signature :

Delivered By :  
 Received By :

Signature:  
 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...](#)

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