24.18. Remote authorisation

Function added: mSupply version 4.01

Sometimes it is important that goods are not distributed to customers or received into stock until such an action has been authorised.

Remote authorisation allows users to authorise transactions *via a web app*. This allows authorisers to participate in the authorisation process without using mSupply (see **26.14. Authorisation** for authorising *within mSupply*).

When an authorisation request is made, authorisers receive an email containing a link to the web app. When the authoriser logs in, they are shown all pending authorisations which they can either approve or deny. The transaction can only be confirmed by the user in mSupply once it has been authorised by everybody in the chain.

Sequential authorisation

The remote authorisation module allows **sequential authorisation**, where authorisation is requested from users in order of **priority**. Authorisers will only receive an authorisation request when the transaction is approved by the authoriser(s) with a lower priority level.

Authorisers can also be set up with **auto-authorisation**, where transactions will automatically be authorised if the user has not approved or denied the transaction before the set **auto-authorise period** is reached.

Vertical program authorisation

Transactions can be set up to authorise via **vertical programs**. To do this, each vertical program must be set up with a **master list** of items.

When authorisation is requested, mSupply will go through the transaction to check whether any items in the transaction are associated with a vertical program. If so, users will be asked whether they would like to request authorisation through a vertical program or through the generic (default) method.

Configuring mSupply for remote authorisation

Turning on remote authorisation

Remote authorisation must be set up for **each store independently**. For each store, you can decide which transaction types require remote authorisation.

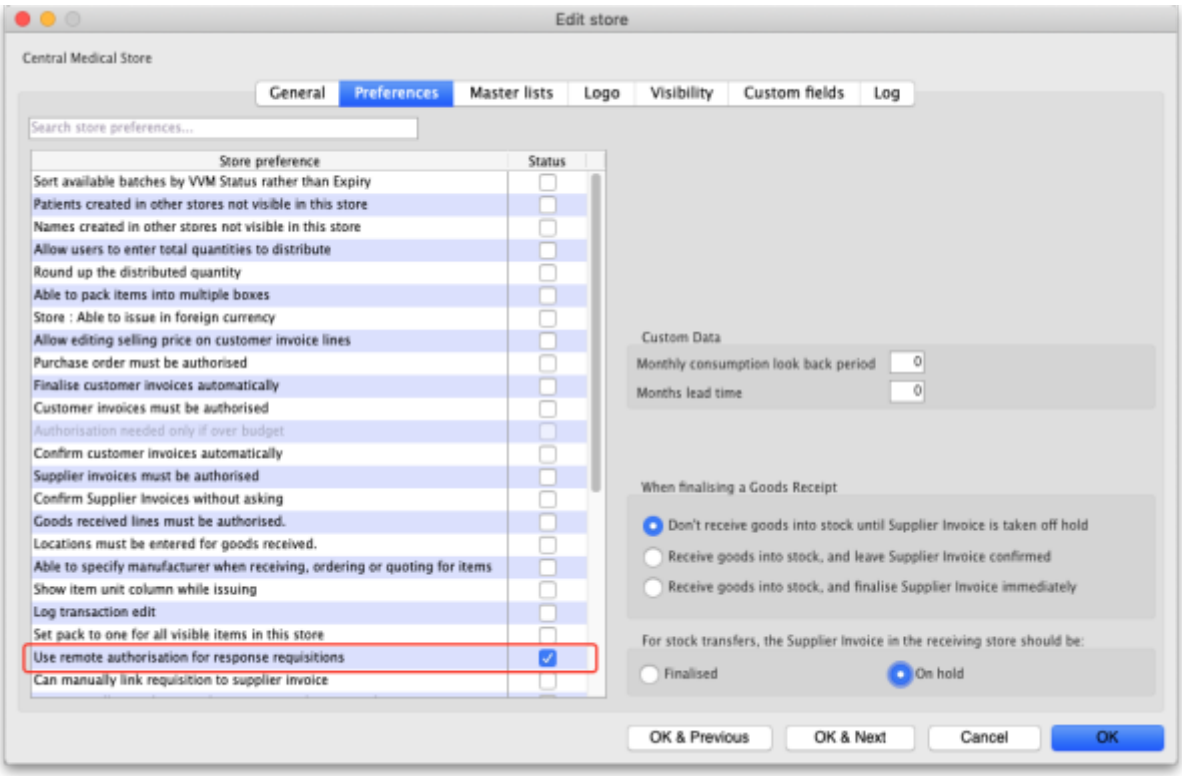
1. Click the **Special** tab, then click **Stores**.

2. Double click the store to edit.

3. Click the **Preferences** tab.

4. Check the boxes to set compulsory remote authorisation for specific transaction types at that store.

5. Click **OK**.

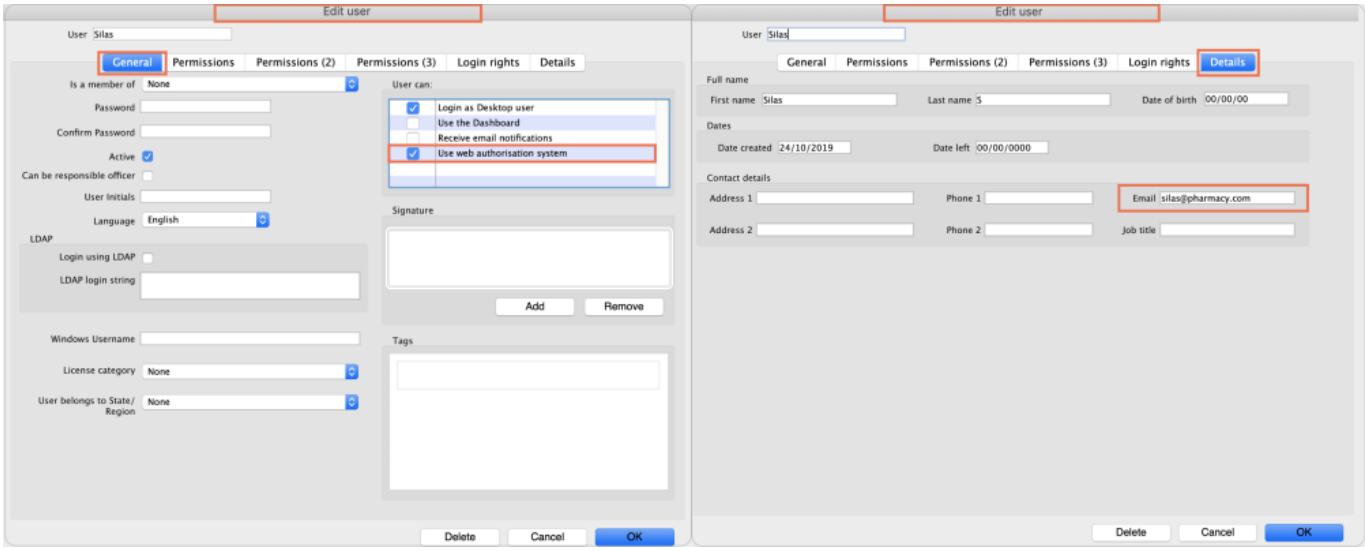


From now on, the transaction types you set the preferences for must be authorised before being confirmed.

Setting up authorisers

ALL remote authorisers require an mSupply user account even if they only use the web app and never use mSupply itself. This is necessary to set up their authoriser permissions and record their authorisations.

Make sure each authoriser has **permission to use the web authorisation system** and an **email address** entered in their **mSupply user account**: this is how they will be notified of authorisation requests!



Importing authorisers

Authorisers can be set up by importing an Excel spreadsheet containing the required details.
For setting up authorisers manually refer to 26.14. Authorisation >setting_up_authorisers

1. Create an Excel spreadsheet with the following headings and details:

> The Excel spreadsheet must be created with the **EXACT headings, spellings and requirements** specified below.

- **Store**: Enter the store code, which must match a store code in mSupply.
- **Record Type**: Enter the transaction type the user can authorise, which will be:
  - **customerInvoice** or
  - **supplierInvoice** or
  - **requestRequistion** or
  - **responseRequisition** or
  - **purchaseOrder**
- **Username**: Enter the authoriser's username, which must match a username in mSupply.
- **Priority**: If sequential authorisation is being used, set the order in which each user is required to give authorisation. For example, a user with priority 2 will only be requested to authorise a transaction once it has been authorised by a user with priority 1. If sequential authorisation is **not** being used, give all authorisers priority 1.

Store	Record Type	Username	Priority
GEN	customerInvoice	Admin	1
GEN	customerInvoice	Hufflepuff	2

2. Save the Excel spreadsheet.

3. In mSupply, go to **File > Import > Import authorisers...**

4. Select the Excel file and click **Open**.

5. A message will appear stating that the authoriser list has been successfully imported. Click **OK**.

If the authoriser list was **not** successfully imported, an alert will notify you of an error. Carefully check that your Excel spreadsheet is set up according to the **exact** specifications above.

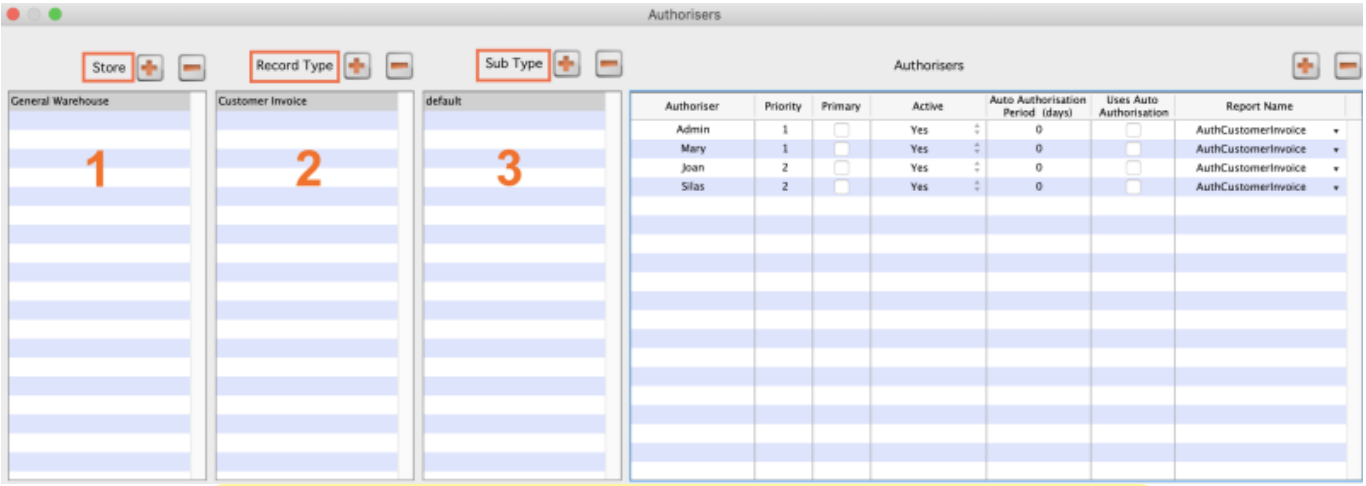
Viewing and editing authorisers

To view the authorisers for a particular transaction type:

1. Go to **Special > Show authorisers...**

2. Click the **Store**, **Record Type** and **Sub Type** of interest to see the authorisers for that transaction type in that store.

3. You can also edit authorisers from this screen and add further details such as allocating **Primary** authorisers, specifying whether the person **Uses Auto Authorisation** and, if so, the **Auto Authorisation Period (Days)**.



You can set 'backup' authorisers by allocating two authorisers to the **same priority level** and checking the **Priority** box **only** for the regular authoriser.

If the primary (regular) authoriser goes on leave and changes their status to **inactive** in the web portal, the 'backup' authoriser will automatically start receiving their authorisation requests.

When the primary authoriser returns from leave and changes their status back to **active** in the web portal, the 'backup' authoriser will stop receiving their authorisation requests.

Updating the authorisers list

You can update authorisers directly in the screen above or you can export the list from mSupply, edit it in Excel, and import the new list into mSupply again.

1. Go to **File > Export > Export authorisers...**

2. Name the Excel spreadsheet to be created and click **Save**.

3. Open the Excel spreadsheet. It will list the **Store**, **Record Type**, authoriser's **Username** and **Priority** among other details.

4. Make any required changes and save the new spreadsheet.

5. Import the new spreadsheet into mSupply, following the instructions in this guide.

When you import a new list over an existing list of authorisers with the same store code:

- New authorisers will be added.
- Existing authorisers will be updated according to the new list (e.g. if they now have a different priority level).
- Old authorisers removed from the list will **not** be deleted - this must be done manually.

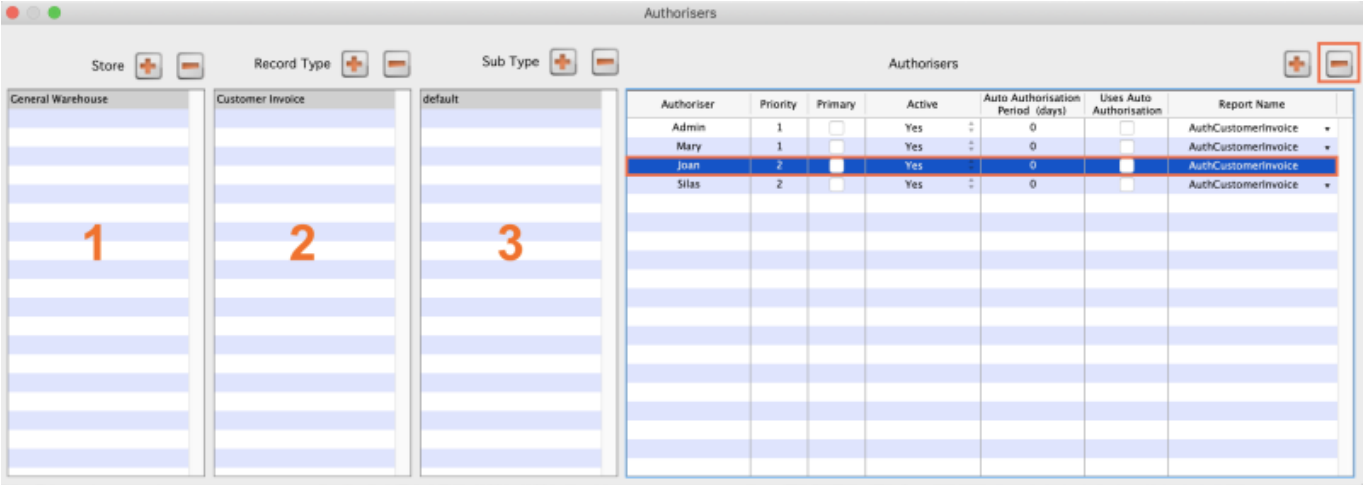
To delete an authoriser

1. Go to **Special > Show authorisers...**

2. Click the **Store**, **Record Type** and **Sub Type** where an authoriser is to be deleted.

3. Select the authoriser to be deleted.

4. Click the **Minus** button.

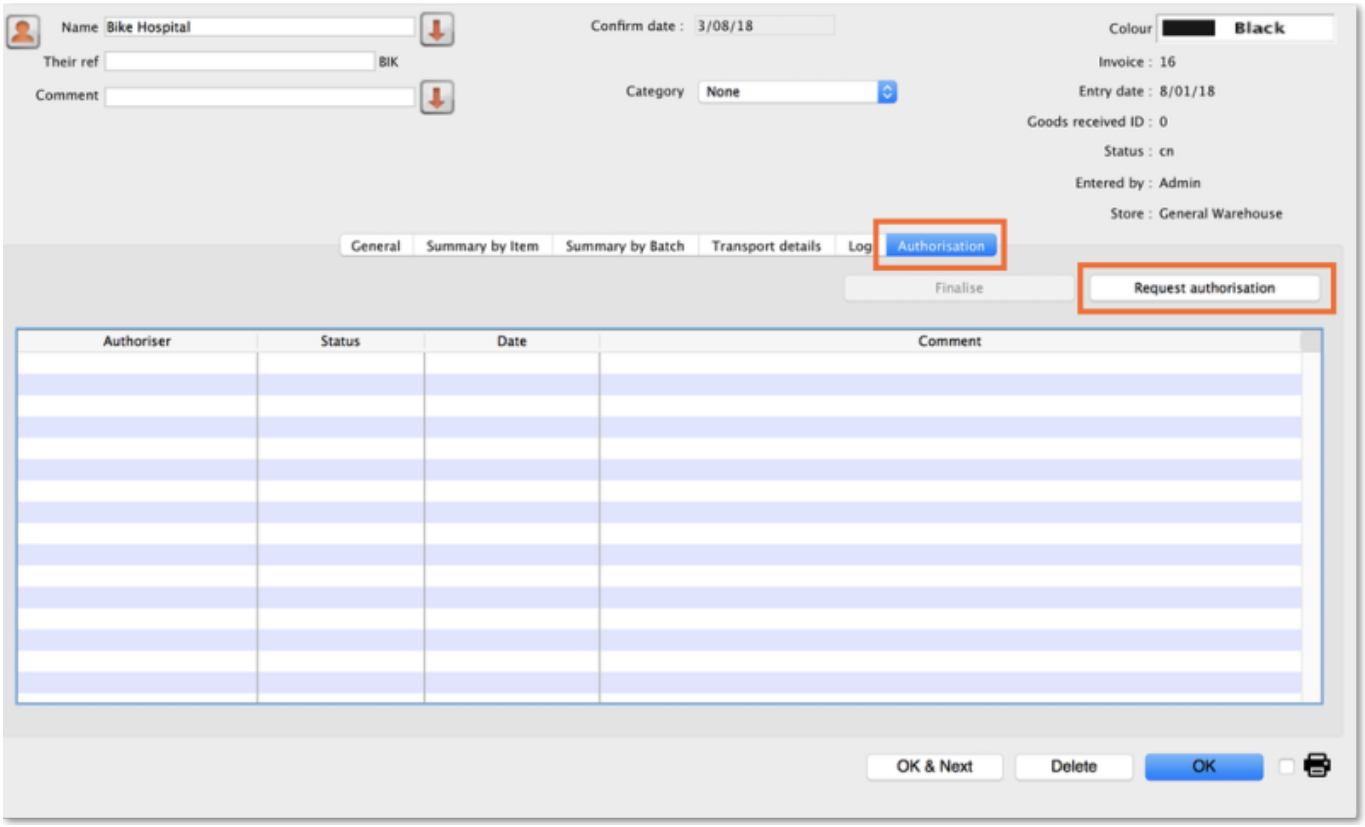


Requesting authorisation

Turning on the remote authorisation preference adds a new **Authorisation tab** to the transaction window, which allows users to:

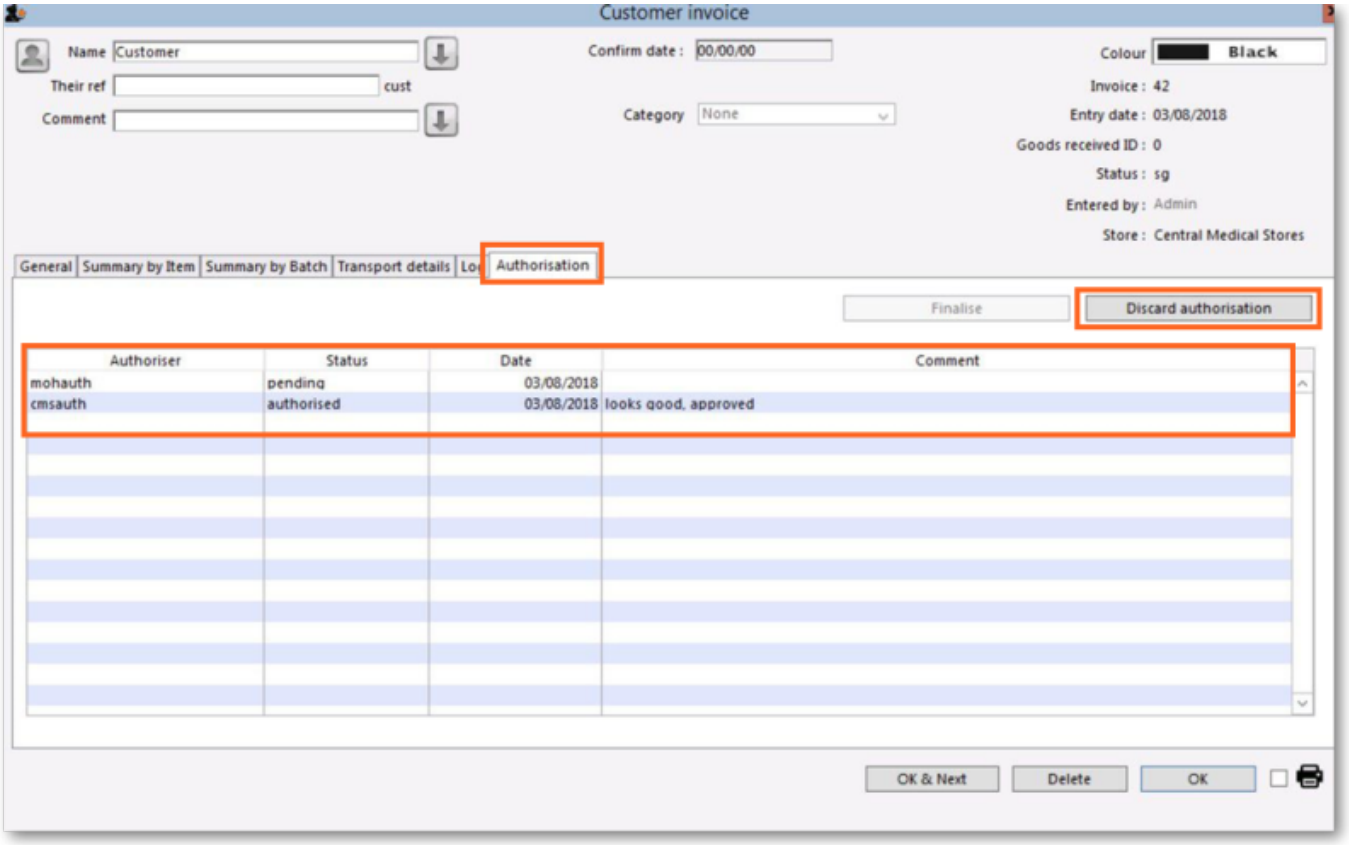
- Request authorisation
- Discard authorisation
- View a list of pending authorisation requests

To send an authorisation request, click the **Request Authorisation** button. Note: this button will only be enabled when there is at least one item in the transaction.



Once authorisation is requested:

- The transaction will be locked and cannot be edited.
- Users can view all pending authorisation requests in the listbox.
- The **Request Authorisation** button will change to the **Discard Authorisation** button. If the transaction needs to be edited, click the **Discard Authorisation** button to remove all authorisation requests and unlock the transaction for editing.



Discarding authorisation will remove all previous approvals. If you request authorisation again, authorisers will have to re-approve the transaction.

Once authorisers approve or deny the transaction through the authorisation web app, the status of the transaction will be updated in the listbox.

Once the transaction has been **approved** by all authorisers, the *user* must:

- Click the **Finalise** button to finalise the transaction. Note: the Finalise button is only enabled when all authorisers have approved the transaction.

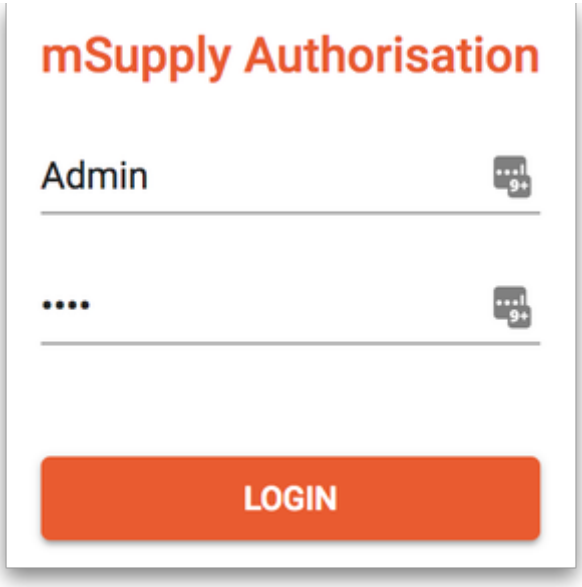
If the transaction is **denied** (by one or more authorisers), the *user* must:

- Click **Discard Authorisation** and return to the **General** tab to make changes. Note that the **Finalise** button will remain disabled.
- Go to the **Authorisation** tab and click **Request Authorisation** to start the request process again.

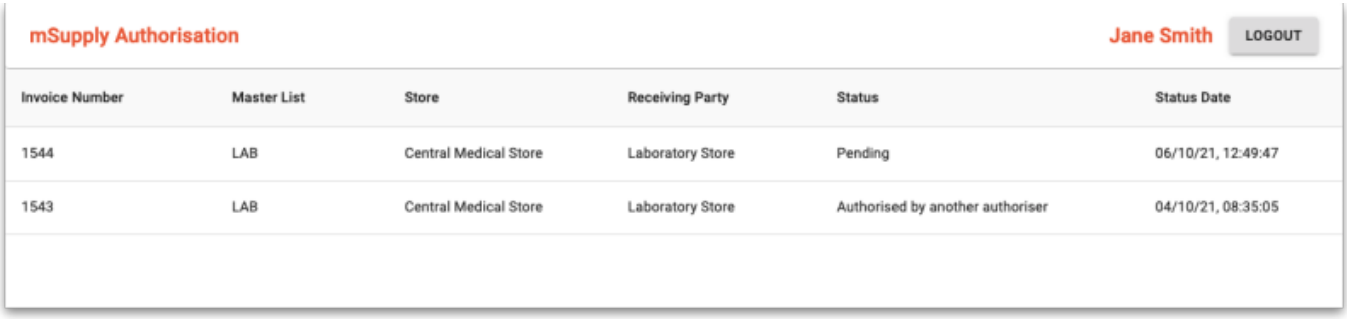
Authorising a transaction

When an authorisation request is made, authorisers receive an email containing a link to the web app. The URL is in the format **server:port/authorisation**, for example, https://demo.msupply.org:2048/authorisation.

Authorisers can log in using their mSupply username and password.



Once logged in, the authoriser can see all pending (and previous) authorisation requests.



- To **view** a transaction, click the icon in the **Download** column. A PDF will open in a new tab.
- To **comment** on a transaction, click the icon in the **Comment** column.
    - The comment you enter will be shown on the **Authorisation tab** of the transaction window in mSupply.
- To **approve** transactions, check the box(es) in the **Selected** column then click the **Approve Selected** button.
- To **deny** transactions, check the box(es) in the **Selected** column then click the **Deny Selected** button.
    - You must enter a comment explaining why the transaction has been denied.
- If you will be unable to authorise transactions (e.g. going on leave), click the **Active Authoriser** button to change yourself to an **Inactive Authoriser**. Click again to change yourself back to an **active** authoriser when you resume your regular duties.

Previous: ***26.14. Authorisation*** | | *Next:* ***26.16. Misc labels***