

## 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 authorising 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.

To do this, choose *Special > Show stores* from the menus, double-click on the store you are logged into and click on the *Preferences* tab. Now turn on the authorisation preferences for the transactions you want to be authorised. See the [26.08. Virtual stores](#) page for details on which preferences do what. Click the **Special** tab, then click **Stores**.

### Setting up authorisers

To use the authorisation module, certain users must be designated as **Authorisers** for each store and

**Give the user permission to be an authoriser:**

- 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

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

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
- All on

Copy

Paste

Delete

Cancel

OK

Edit user

User
Alba
Store:
General Warehouse

General

Permissions

Permissions (2)

Permissions (3)

Login rights

Details

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

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.

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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 three columns: 'Store', 'Record Type', and 'Sub Type'. The 'Store' column has a list of stores, with 'Central Medical Store' selected and highlighted in blue. The 'Record Type' and 'Sub Type' columns are empty. The 'Authorisers' table on the right has columns: Authoriser, Priority, Primary, Active, Auto Authorisation Period (days), Uses Auto Authorisation, and Report Name.

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 three columns: 'Store', 'Record Type', and 'Sub Type'. The 'Store' column has 'Central Medical Store' selected. The 'Record Type' column has 'Customer Invoice' selected and highlighted in blue. The 'Sub Type' column has 'default' selected and highlighted in blue. The 'Authorisers' table on the right is empty.

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).

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## 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 : <b>Black</b>
Their ref: SNG102	Confirm date : 22/05/2013	Invoice number : 2,010
Comment:	Status : cn	Goods receive ID : 0
Category: None	Purchase Order ID : 0	Entered by : Sussol
Default Donor:	Store : General	

New line      Delete line

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

Items(s):		Subtotal:	200.00000
Amount:	0.00000	% tax:	0.00000
		Total:	200.00000

Export batch: 0  
Margin: 2.00

Hold      Finalize      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.

Customer invoice

Name: Acumao/Remexio CHC Confirm date: 23/05/2013 Colour: Black

Their ref: AIL-403-2 Invoice: 9,252

Comment: Category: None Entry date: 23/05/2013

Goods receive ID: 0

Status: cn

Entered by: Sussol

Store: General

New line Delete line(s) Backorders History

General Summary by Item Summary by Batch Transport details Log

L	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten
1		Acces Pin With Stopper for use IV.inj. site	2	1			0.61148	1.22296

Other charges Item:

Amount: 0.00000

Subtotal: 1.22296

0 % tax: 0.00000

Total: 1.22000

Hold

Finalize

☒ Authorised

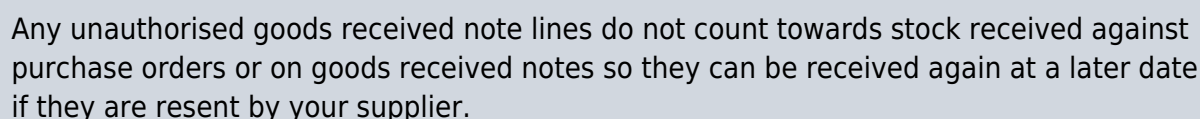
Export batch: 0

OK & Next Delete OK

## 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:

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.



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**  
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Supplied to :  
Nitibe/Ustaco  
Nitibe, OECUSI

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	
						<b>Total: 647.68000</b>		

Prepared By :  
Checked By :  
Authorised By :

Signature :  
Signature :  
Signature :

Delivered By :  
Received By :  
Signature :

Signature:  
Signature:  
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.

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Advanced users can also view all logs by going to **Special** > [View log...](#)

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