

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: 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

Edit user

User: Store:

Permissions (2)

| Names | Invoices | Invoices |
|--|---|---|
| <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"/> View customer, supplier & manufacturer names | <input checked="" type="checkbox"/> View customer invoices | <input checked="" type="checkbox"/> Authorise supplier invoices |
| <input checked="" type="checkbox"/> Edit customer, supplier & manufacturer names | <input checked="" type="checkbox"/> Edit customer invoices | |
| <input checked="" type="checkbox"/> Delete names | <input checked="" type="checkbox"/> Create supplier invoices | |
| <input checked="" type="checkbox"/> Edit name codes | <input checked="" type="checkbox"/> View supplier invoices | |
| <input checked="" type="checkbox"/> Edit name charge code | <input checked="" type="checkbox"/> Edit supplier invoices | |
| <input checked="" type="checkbox"/> Merge names | <input checked="" type="checkbox"/> Edit comments on finalised invoices | |
| <input checked="" type="checkbox"/> Edit name categories | <input checked="" type="checkbox"/> Import supplier invoices | |
| <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 | |

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.

[illegible]

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 with 'Central Medical Store' selected. The 'Record Type' and 'Sub Type' columns have plus buttons. The 'Authorisers' table on the right is empty with 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 'Customer Invoice' selected in the 'Record Type' column and 'default' selected in the 'Sub Type' column. The 'Authorisers' table on the right is empty with columns: Authoriser, Priority, Primary, Active, Auto Authorisation Period (days), Uses Auto Authorisation, and Report Name.

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 : **Black**

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

Status : cn

Comment:

Goods receive ID : 0

Purchase Order ID : 0

Category: None 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):

Amount: 0.00000

Subtotal: 200.00000

% 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.

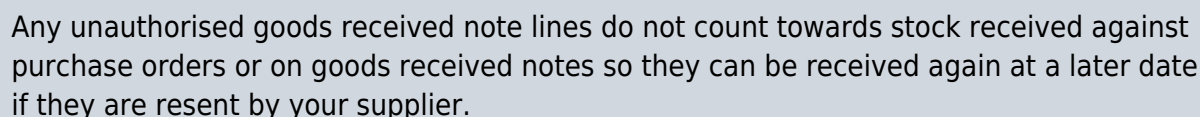
Customer invoice authorisation

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.

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.

New purchase order...

Order num : 2

Name

Black

Confirm date : 00/00/00

Reference

Status sg

Requested delivery: 01/06/2017

Store: General

General

Details

Ad hoc items

Goods Received

Supplier invoices

Log

Location

New line

Delete lines

Update EDD

Info

Print

Confirm

show all lines

Category none

Currency USD

Forex rate 1

| Line | Item code | Item | Orig.Qty | Pack | Adj. Qty | Tot. rece... | Stock on... | On Order | Cust.b/o... | Price Ext | Expected... | Store: |
|------|-----------|------|----------|------|----------|--------------|-------------|----------|-------------|-----------|-------------|--------|
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Supplier discount

Percentage 0

Discount amount 0.00

Estimated subtotal 0.00

Estimated cost after discount 0.00

Locked

Auto calc usage

Finalise order

Authorise

OK & Next

Delete


OK

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, 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 | |
| | | | | | | Total: 647.68000 | | |

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...](#)

Previous: [26.13. Using the mSupply remote client](#) | Next: [26.15. Remote authorisation](#)

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Last update: **2021/10/15 13:38**

