25.15. Managing users

About users and groups

User permissions are per-store, so a user can have different permissions when logged into different stores.

If you have many users that need to have the same permissions (because they carry out the same role, for example), you can create a group and assign the users to the group. Once a group is set up and permissions for the group assigned, any users that are assigned to the group will inherit the group's permissions, rather than having to set permissions for each user individually. When you change a group's permissions, you change the permissions for all users who belong to that group.

If you want to change a user's permissions and find out that all their permissions are greyed out and uneditable then it means they are a member of a group. To edit their permissions separately from the group, they must first be removed from the group:

- Edit the user, change the **Is a member of** drop down list to None, click **OK** (see below for details).
- Open the user again and their permissions will be editable.

Refer to Using groups below for more details. If the user is to remain part of the group then you must change the group's permissions (see Editing a group below) but beware, this will change the permissions for all users who belong to the group, not just the user you're interested in.

If you want to disable a user, perhaps because the staff member has left the organisation, then they must be made 'inactive':

- Edit the user, uncheck the **Active** checkbox, click **OK**.

If the **Active** checkbox is greyed out, it is because they are a member of a group. You will need to first remove them from the group before you can make them 'inactive':

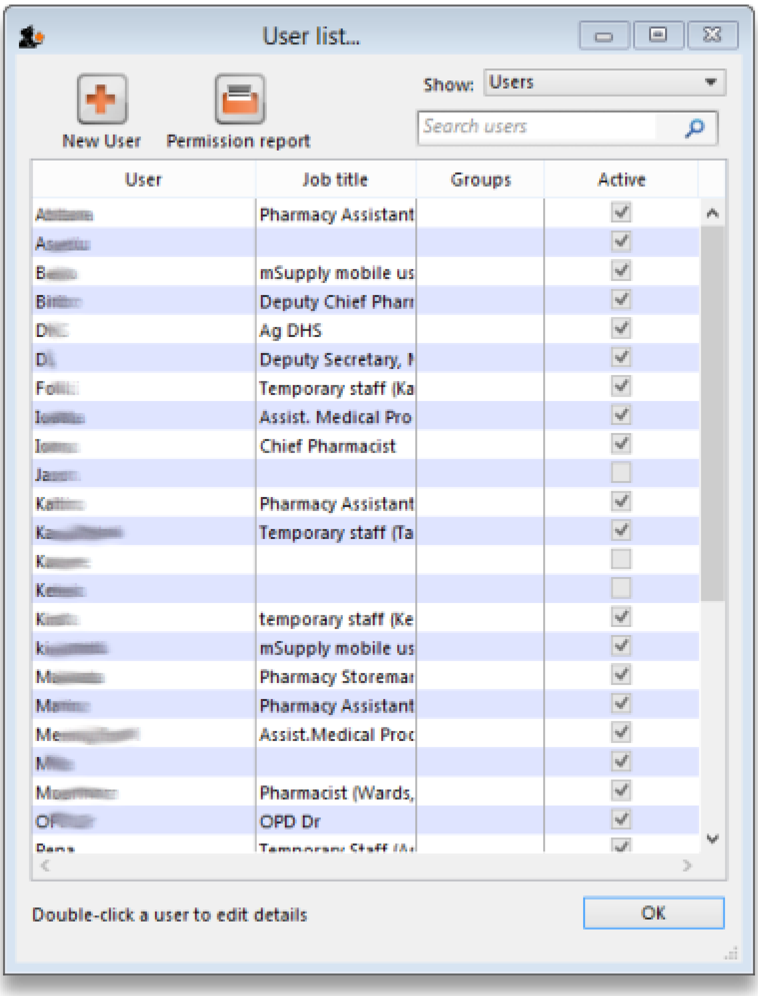
- Edit the user, change the **Is a member of** to None
- Edit the user, uncheck the **Active** checkbox, click **OK**.

Of course, if the whole group of users needs to be made inactive then you can just uncheck the **Active** checkbox for the group.

Adding and editing users and groups

mSupply has a comprehensive system of controlling user access, allowing you to manage in fine detail what each user can do and see in the system. You can manage users individually, in groups or a mixture of both - whichever is most suitable for your situation.

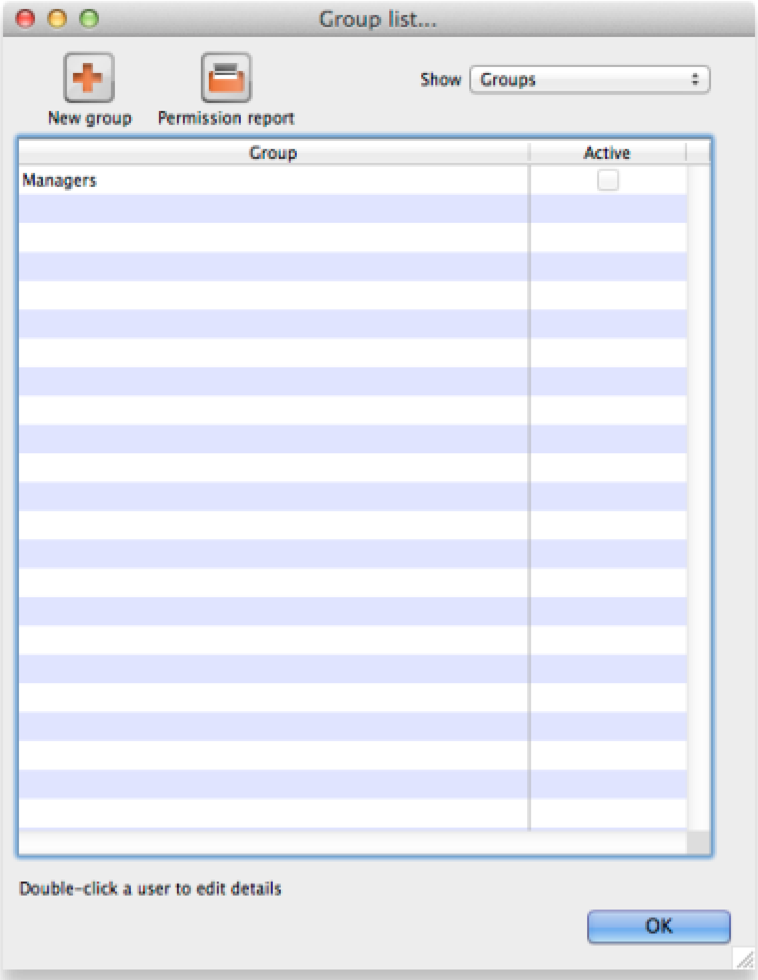
User access is managed by choosing **File > Edit users** from the menus, or by choosing **Admin > Edit users** in the Navigator. When clicking on this option you are presented with a list of current users:



The list shows you the following information:

- **User** The user's name.
- **Job title** The user's job title, as entered on the details tab of the user's details form.
- **Group** The group the user belongs to. Will be blank of the user does not belong to a group.
- **Active** Checked if the user is allowed to login to the system.

To view groups rather than users, choose **Groups** from the **Show** Drop-down list at the top-right of the window. The list changes slightly to look like this:



Now the list shows you slightly different information:

- **Group** The name of the group
- **Active** Checked if the group is active. If the group is active then all users in the group are allowed to login to the system. If the group is inactive (checkbox unchecked), all users in the group are inactive and are not allowed to login to the system.

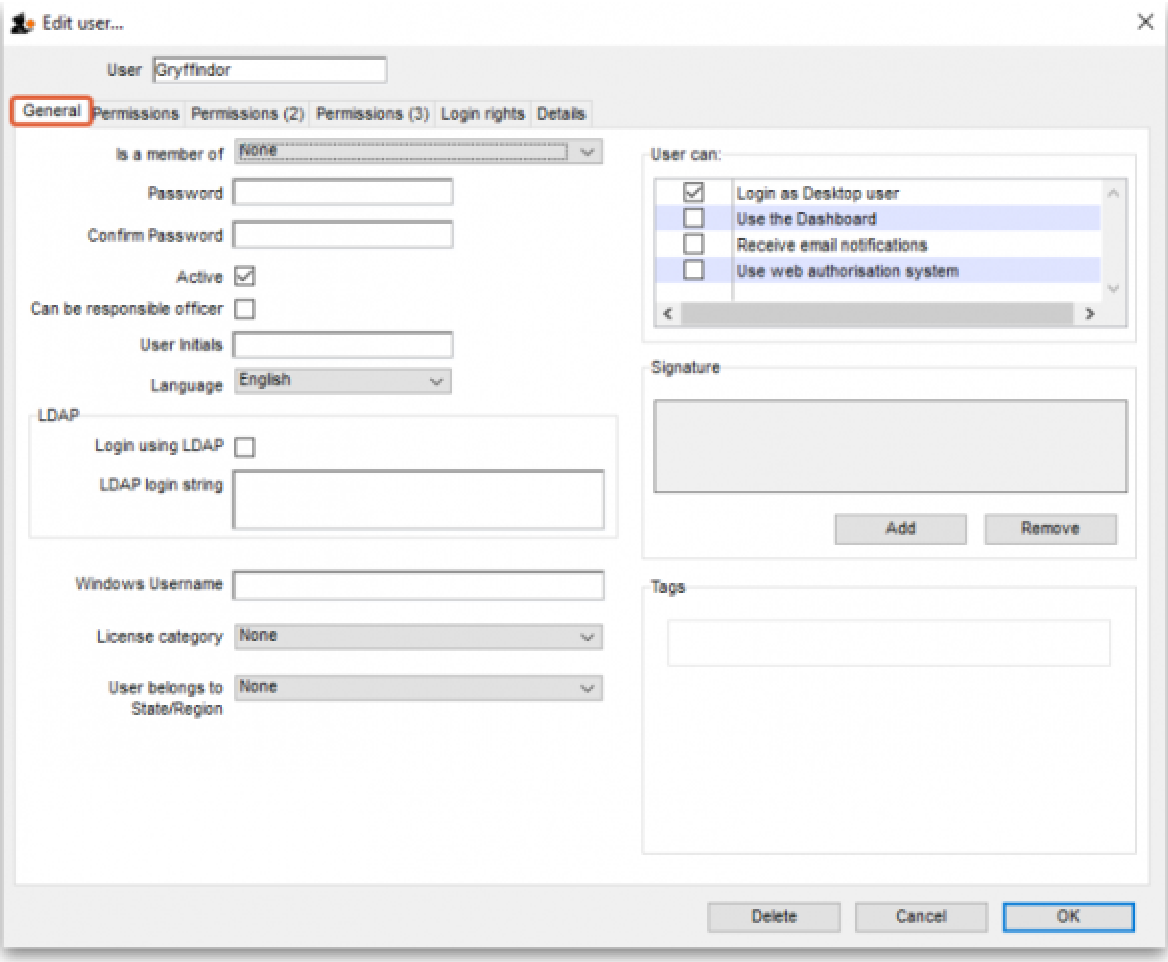
To get a list of all current user permissions, click the **Permission Report** button. An Excel spreadsheet will be generated (see

sample

); it will have one worksheet for each store showing all the users and groups and what permissions they have in that store.

Double-click a user (or group) to edit their details or delete them. Click the **New User** button to add a new user (or the **New group** button to add a new group). Doing either will open the user details window (described below - for a new user or group all the tabs are empty, for an existing user or group the tabs are filled with their current settings)

User details window



This window has several tabs, all described below.

General tab

Is a member of

Used to select the user group the user belongs to (see below). When the window loads, it displays the group the user currently belongs to. It will show “None” if they are not a member of any group.

Password

This text box will always appear empty when the window is loaded. It must be set for a new user. It can be used here to change the password of an existing user.

Confirm password

If something is entered in the *Password* textbox, then the same text must be entered in this textbox. This step makes sure you set the password to what you think you're setting it to!

Active

If this checkbox is checked, then that user has permission to use the system, and their name will appear in the login window. If this checkbox is unchecked the user will not be allowed to login to the system and their name will not appear in the login window.

Can be responsible officer

If this checkbox is checked, the name of that user will appear for selection in the Responsible Officer selector on the Transport Details tab of a Customer invoice.

User initials

User initials should be entered in this field.

Language

Allows you to select which language the user wants to use in mSupply. As of August 2020, supported languages are:

- English
- French
- Lao
- Spanish
- Khmer
- Portuguese (partially complete)

LDAP section

This section can be used to check a user's login credentials against an LDAP (Lightweight Directory Access Protocol) server. If you are going to use LDAP you must fill in the server details in the General Preferences, LDAP tab first.

- **Login using LDAP**: Check this if you want this user's login details to be checked against your LDAP server. Means that you can have some users logging in normally and some being checked against your LDAP server. Helpful if there's a delay in users being given LDAP credentials for any reason.
- **LDAP login string**: Enter any string which has to be used with the LDAP login. Will be provided by the LDAP administrator if required.

Windows username

The username the user logs into window systems with. Used to provide single-sign-on capability when the user is logging in remotely to an mSupply client running on a Windows server.

License category

Used to select which user license category the user belongs to. This will contain a list of all user categories currently set up in the datafile. See License management for details.

User belongs to State/Region

Used to select the name category 1 that the user belongs to. Only used in some customised versions of mSupply.

Signature

Use to add or remove an image of a user's scanned signature for displaying on invoices for example

Tags

Use to apply 'tags' to a user. These tags can then be used to control access to various features for users according to the tag.

User Can:

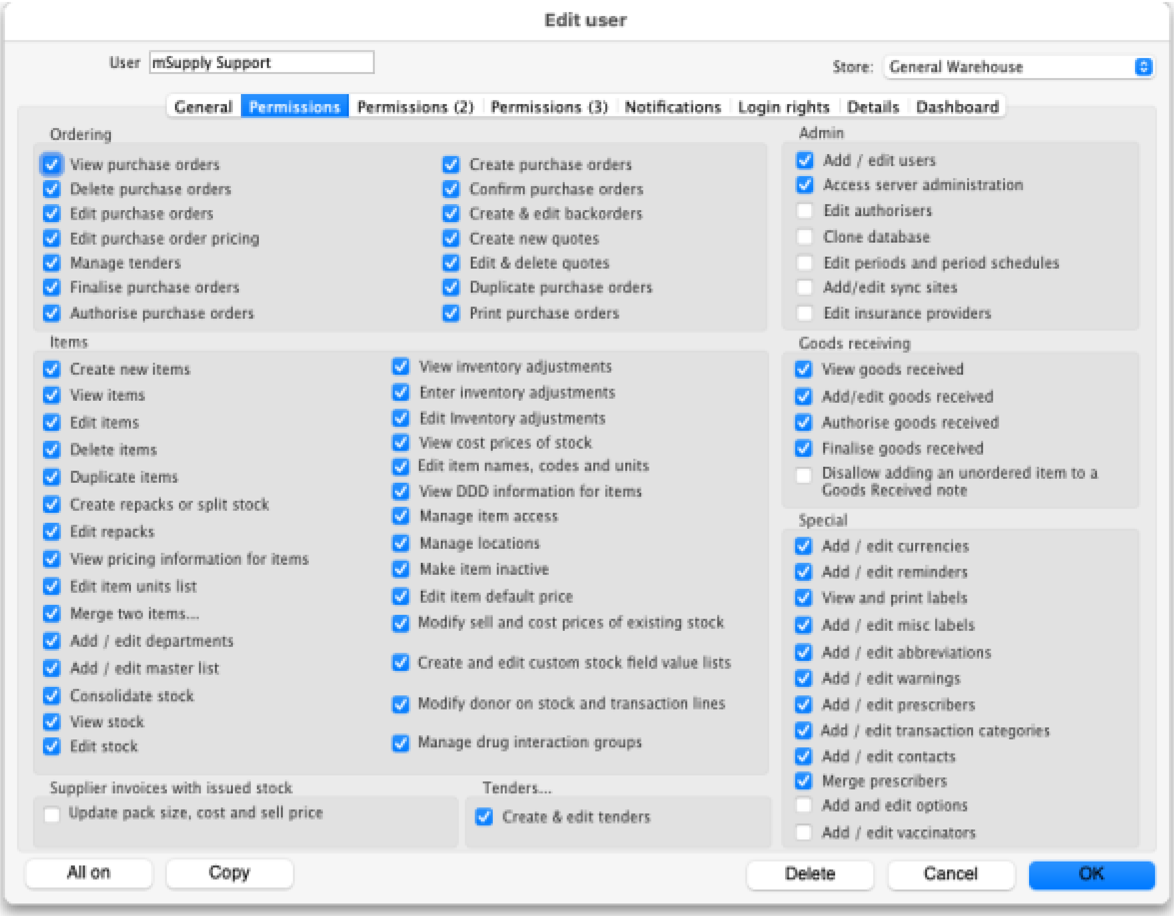
Used to give the following controls to users:

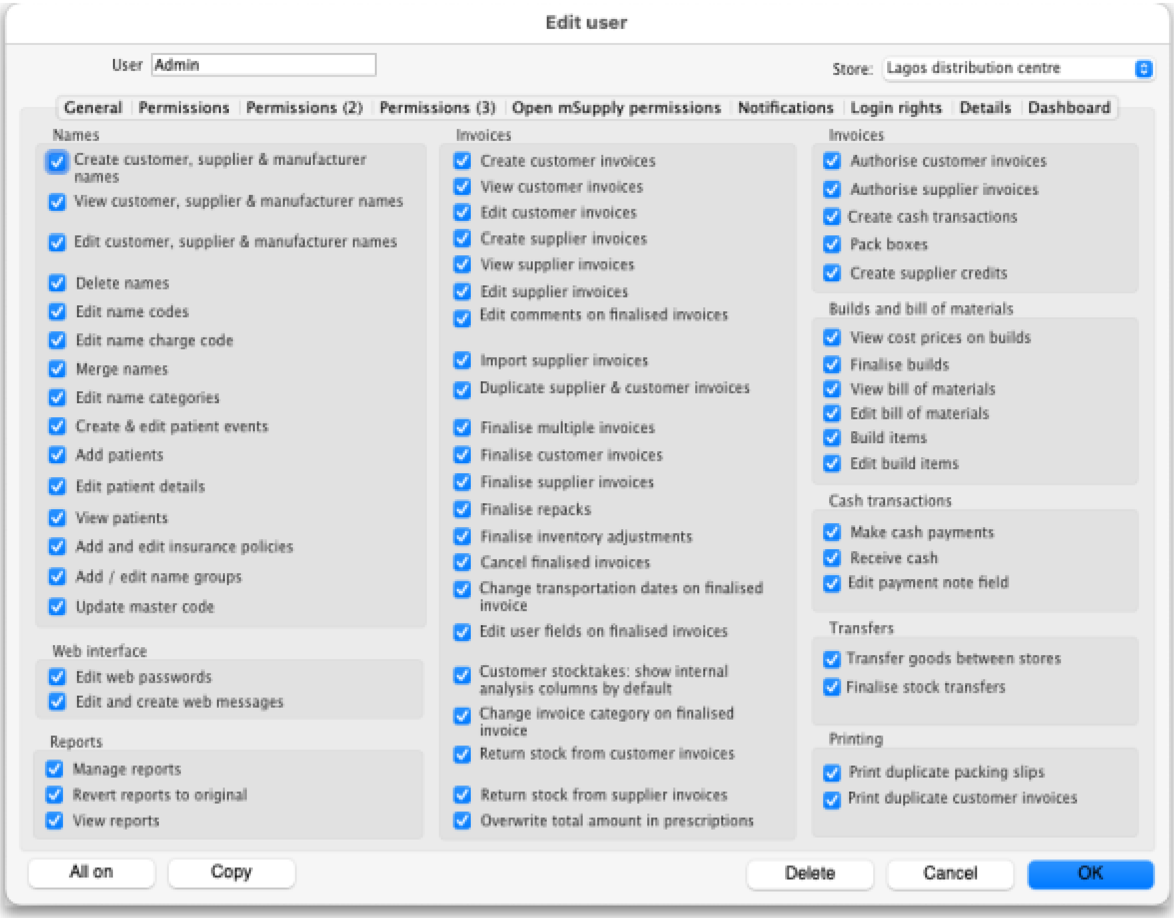
- Login as Desktop user
- Use the Dashboard - this is necessary if you want the user to be able to see dashboards
- Receive email notifications - this is necessary to enable reports to be emailed on a schedule to a user or group of users. Multiple reports for a User will appear on different tabs of an excel workbook. This needs to be configured by Sustainable Solutions, so get in touch if you're interested and we'll set this up for you.
- Use system - if checked the user can login to the remote authorisation web app as an authoriser. See the 26.15. Remote authorisation page for details.

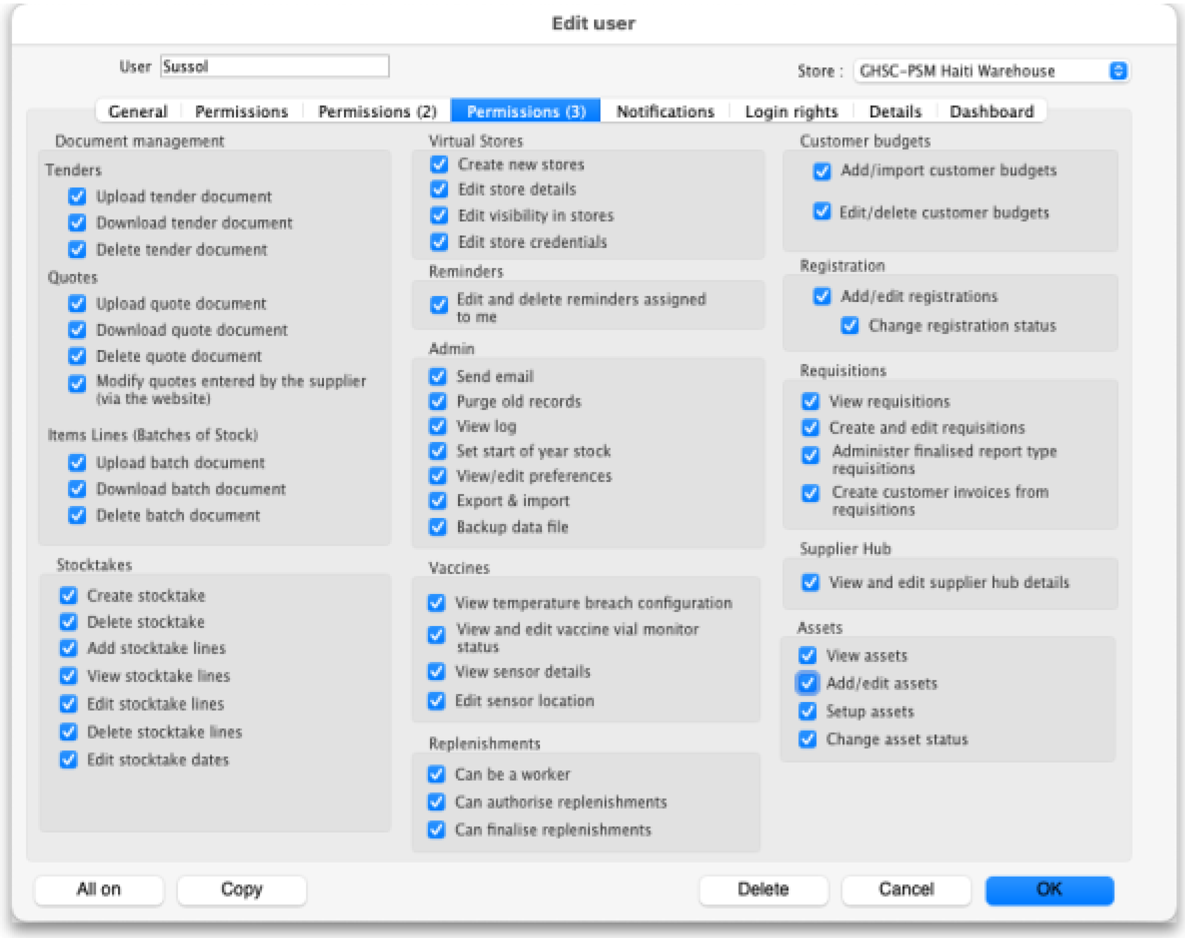
When a user is added to a group, the *User can* settings are set to those of the group i.e. they are inherited from the group. However, the *User can* section is still editable for an individual user - the settings are not controlled by the group after the user has been added to it.

Permissions tabs

These are where you can set access to the many features and functions on a store-by-store basis for each user or group. There are three Permissions tabs and each are shown in the screenshots below:

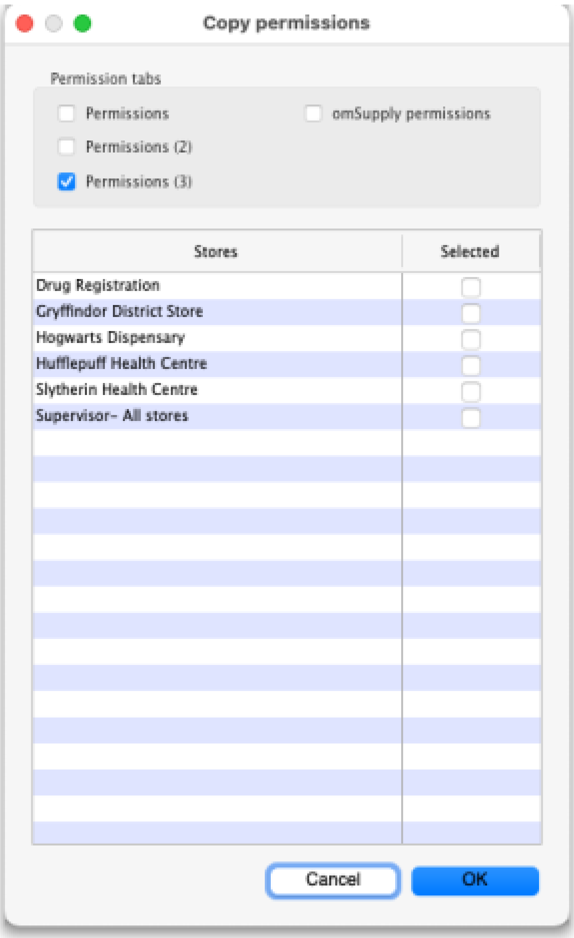

Edit user
User mSupply Support
Store: General Warehouse
General
Permissions
Permissions (2)
Permissions (3)
Notifications
Login rights
Details
Dashboard
Ordering
View purchase orders
Delete purchase orders
Edit purchase orders
Edit purchase order pricing
Manage tenders
Finalise purchase orders
Authorise purchase orders
Create purchase orders
Confirm purchase orders
Create & edit backorders
Create new quotes
Edit & delete quotes
Duplicate purchase orders
Print purchase orders
Admin
Add / edit users
Access server administration
Edit authorisers
Clone database
Edit periods and period schedules
Add/edit sync sites
Edit insurance providers
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
Add / edit master list
Consolidate stock
View stock
Edit stock
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 locations
Make item inactive
Edit item default price
Modify sell and cost prices of existing stock
Create and edit custom stock field value lists
Modify donor on stock and transaction lines
Manage drug interaction groups
Goods receiving
View goods received
Add/edit goods received
Authorise goods received
Finalise goods received
Disallow adding an unordered item to a Goods Received note
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
Add / edit vaccinators
Supplier invoices with issued stock
Update pack size, cost and sell price
Tenders...
Create & edit tenders
All on
Copy
Delete
Cancel
OK


Edit user
User Admin
Store: Lagos distribution centre
General
Permissions
Permissions (2)
Permissions (3)
Open mSupply permissions
Notifications
Login rights
Details
Dashboard
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
View patients
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 stocktakes: show internal analysis columns by default
Change invoice category on finalised invoice
Return stock from customer invoices
Return stock from supplier invoices
Overwrite total amount in prescriptions
Invoices
Authorise customer invoices
Authorise supplier invoices
Create cash transactions
Pack boxes
Create supplier credits
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
Delete
Cancel
OK



Buttons on the Permissions tabs

- The *Store* drop down list: Selects the store for which permissions are being displayed and set on the current tab. Select the store you want to see or set permissions for in this drop down list.
- The **All on** button: Checks all the permissions on the current tab i.e. turns them all on. There are exceptions to this for safety reasons; the *Update pack size, cost and sell price*, *Add/edit users* and *Access server administration* permissions on the **Permissions** tab are not turned on with the **All on** button.
- The **Copy** button: Copies the state of all the checkboxes on the tab for this store to an internal clipboard for that tab. From version 5.03 onwards, the button opens this window:



  - In the *Permission tabs* section, select which tabs you want to copy the permissions from by checking their checkboxes.
  - In the table, select the stores you want to copy the permissions of the current store to by checking them in the *Selected* column.
  - Click the **OK** button to copy the selected permissions tabs of the current store to the selected stores. Click the **Cancel** button to close the window without doing anything.

- The **Paste** button: Only exists for versions before 5.03. Pastes the checkbox settings saved to the clipboard for the current tab to the same tab for another store. In this way, the Copy and Paste buttons are a great way of copying permission settings for tabs between stores - really handy when users have similar permissions in different stores.

Most of the permissions are self explanatory. Those that need more explanation are given below:

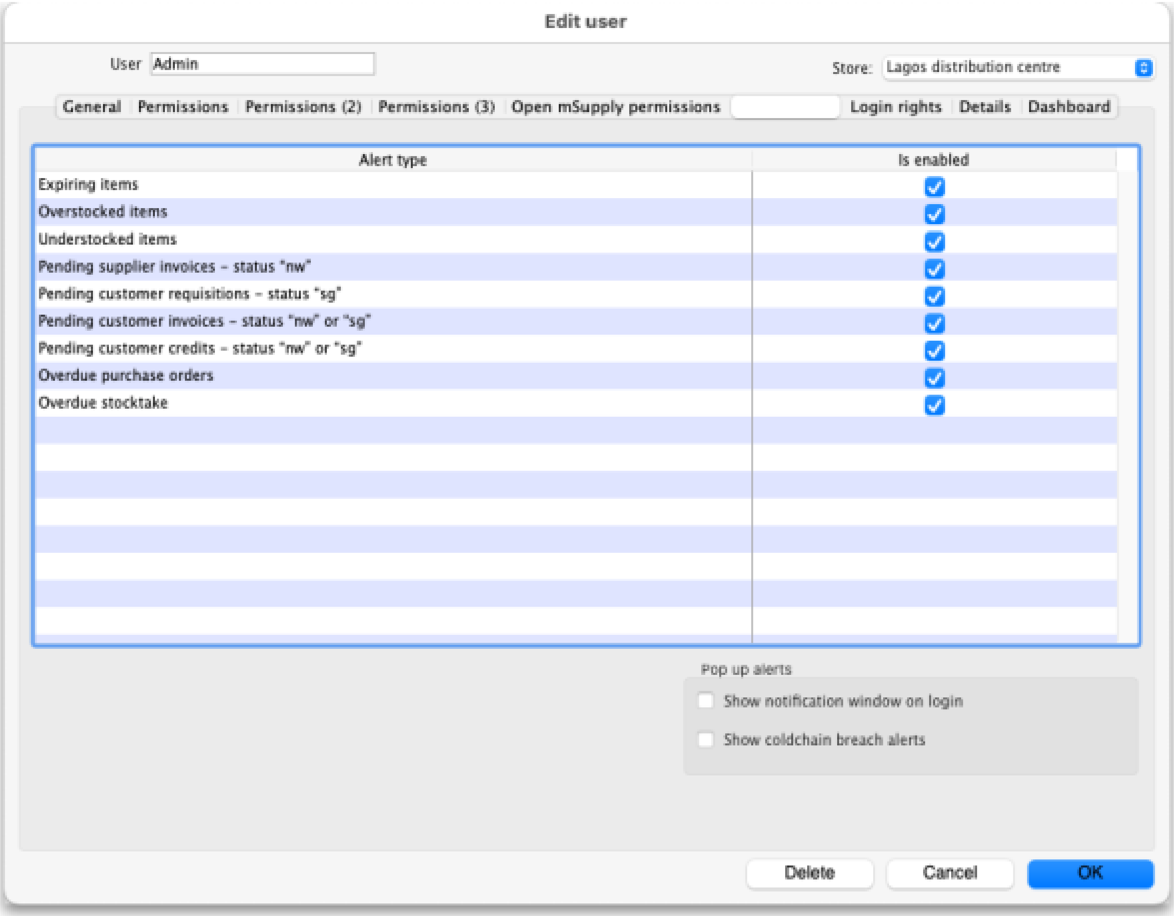
Permission	**Details**
Permissions Tab	
View stock	If not checked the user is not able to view the current stock list (see the 4.15. Show items with stock page), view the Stock tab of an item's details window (see the 4.01.05. Items - Stock tab page), not able to view stocktakes (see the 4.17. Stocktakes page) or view any reports in the *Stock and items* section on the *Reports* tab of the Navigator (see the 13.02. Stock and items reports page). If this permission is checked then they can do all these things unless they are prevented by not having other permissions e.g. if a user has this permission but they do not have the *View stocktakes* permission then they will still not be able to access Stocktakes.

Permission	Details
Update pack size, cost and sell price	If checked the user is able to edit the pack size, cost and sell price of supplier invoice lines that have already had stock issued from them, *provided that the SI has not been finalised*. See the 7.01. Supplier invoices page for details.
Add/edit users	To prevent you being locked out of your datafile permanently, mSupply will not allow you to turn off this preference for the first 2 users which already exist when you open mSupply for the first time. You should always treat these users as admin users.
Access server administration	If this is checked the user will be able to access the server administration windows, as described on the 25.13. mSupply server administration page. Only assign this permission to users who really know what they are doing!
Add/edit sync sites	If checked the user is able to edit site settings in a synchronisation system (see the 29.02. Synchronisation Sites page for details). This includes being able to use the sync site wizard (29.03. Sync Site Wizard (Superseded)).
Disallow adding an unordered item to a Goods Received note	If checked the user is **not** able to add items to a goods received note that are not included on a purchase order (see the 7.02. Goods receipts page for details).
Permissions (2) Tab	
Change transportation dates on finalised invoice	If checked, the user can edit the **Order written date**, **Order received date**, **Expected arrival date**, **Actual arrival date** and **Ship date** fields on the *Transport details* tab of finalised customer invoices
Edit user fields on finalised invoices	The user fields are the 4 custom transaction fields that can be enabled in the preferences - see Invoices Preferences for details. If this is enabled the user can edit the contents of these fields on transactions that have already been finalised
Change invoice category on finalised invoice	If checked the user can edit the transaction category of invoices (customer, supplier and inventory adjustments)
Transfer goods between stores	If checked the user can create a customer invoice with a store as the customer (i.e create a stock transfer)
Finalise stock transfers	If checked the user can finalise a customer invoice where the customer is another store (i.e. a stock transfer)
Return stock from supplier invoices	If checked a *Return selected lines* button will appear for the user on finalised supplier invoices, allowing them to return the goods on the invoice. See the 9.01. Returning goods section for details
Return stock from customer invoices	If checked a *Return selected lines* button will appear for the user on finalised customer invoices, allowing them to return the goods on the invoice. See the 9.02. Receiving goods back from a customer section for details
Pack boxes	If checked the user is allowed to manage boxes and assign stock to boxes on a customer invoice, even if the user does not have the *Edit customer invoices* permission. See the 8.06. Box management page for details
Permissions (3) Tab	
Edit stocktake dates	If checked the user can edit the *Stock take date* field at the top of a stocktake and the confirmed date of inventory adjustments created from the stocktake (see Creating a new stocktake) for details
Edit store details	If checked the user can edit the store details and preferences, including using the bulk store preferences editor.
Edit visibility in stores	If checked the user can edit the visibility of names and items in different stores. If it is unchecked they can't - either in the *Store* tab of a name or item's details window or the *Visibility* tab of a store's details window (in fact, the Visibility tab won't even be visible for them)

Permission	Details
Add/import customer budgets	If this is checked the user can import or add budgets for a customer, if unchecked they cannot
View temperature breach configurations	If checked, the user can view temperature breach configurations in the vaccine/cold chain module. See the 20.01. Vaccine Vial Monitoring (VVM) page for details. Temperature breach configurations can only be edited in the Cold chain app or in mSupply mobile.
View and edit vaccine vial monitor status	If checked, the user can view and edit the statuses that vaccine vial monitors have. See the 20.01. Vaccine Vial Monitoring (VVM) page for details.
View sensor details	If checked the user can view temperature sensor details. See the 20.03. Cold Chain App Notifications page for details.
Edit sensor location	If checked the user can edit the warehouse location attached to a sensor. See the 20.03. Cold Chain App Notifications page for details.
Edit/delete customer budgets	If this is checked the user can edit or delete budgets for a customer, if unchecked they cannot
Create customer invoices from requisitions	If this is checked the user can create customer invoice from the *Create customer invoice* button on requisitions. You can use this in conjunction with the *Create customer invoices* permission on the **Permissions (2)** tab to force all distribution to be carried out from requisitions.
View assets	If this is checked, the user is allowed to search the assets in the system and see their details
Add/edit assets	If this is checked, the user can also change the details of assets
Setup assets	If this is checked a user can manage the setup of assets e.g. add or edit asset statuses, conditions, properties etc. (see the assets setup page for details of the various setup options)
Change asset status	If checked, the user can make an asset's proposed status its current status.

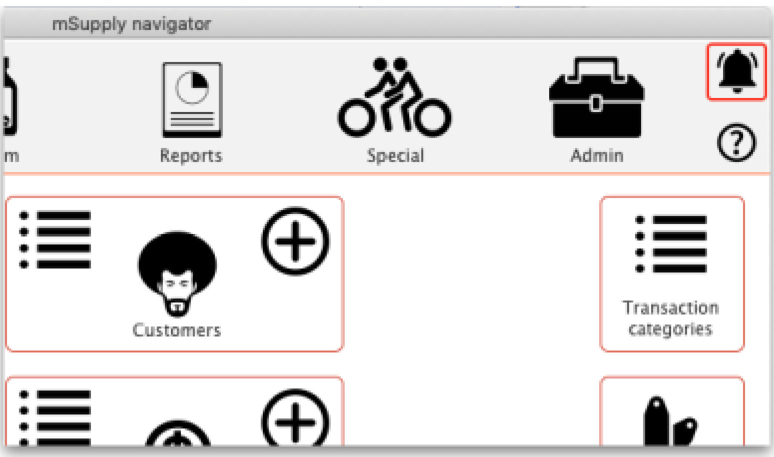
Notifications tab

On this tab, you determine what notifications (alerts) a user will see, and when they will see them:



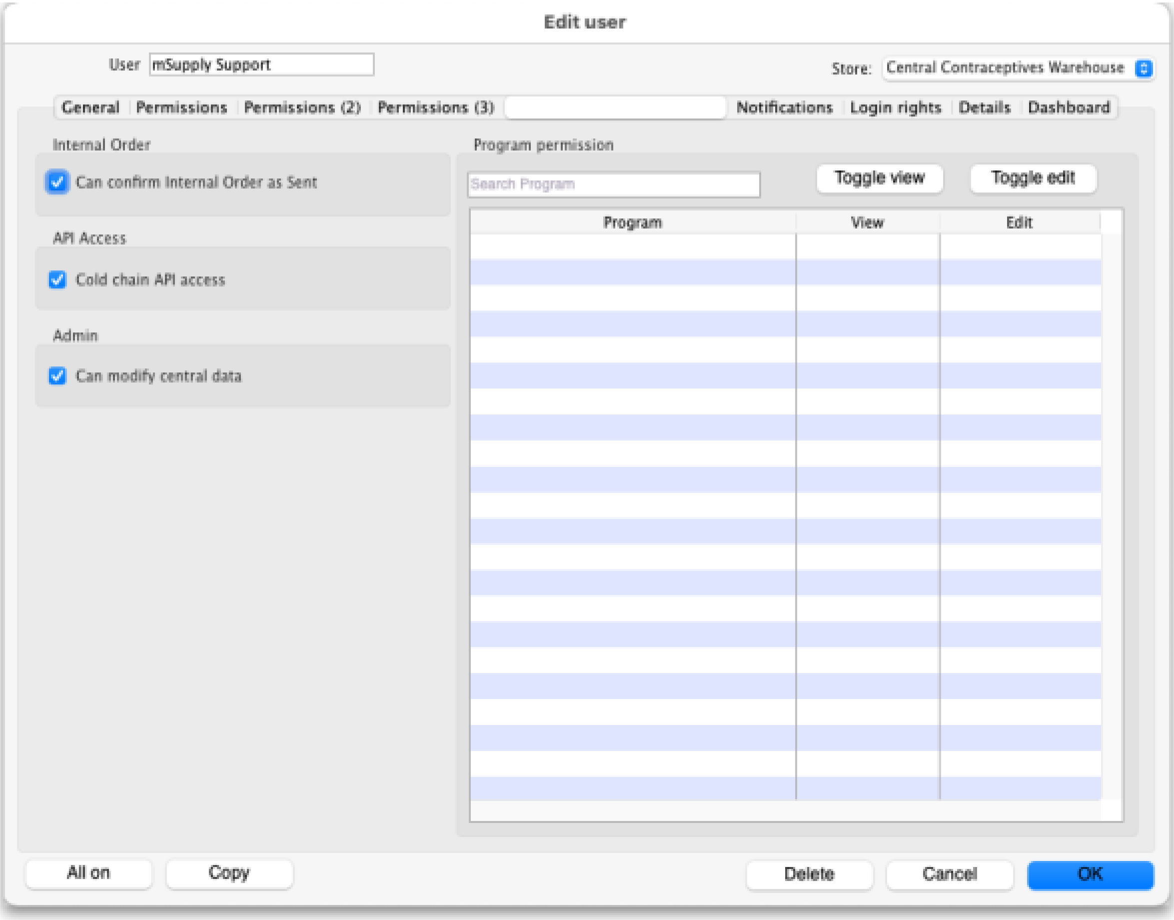
To enable a partuclar alert type for a user simply check the checkbox in the *Is enabled* column. Any alert type that has its *Is enabled* checkbox unchecked will not be displayed for a user.

Show notifications window on login: If this is checked, as soon as a user logs in, the notifications window (displaying all the notifications they have selected in the table above), will be displayed for them. If this is unchecked, the notifications window will only be shown when the user click on the notifications icon on the Navigator:



The notifications displayed in the desktop interface will only be for the store that the user has logged in to.

Open mSupply permissions tab



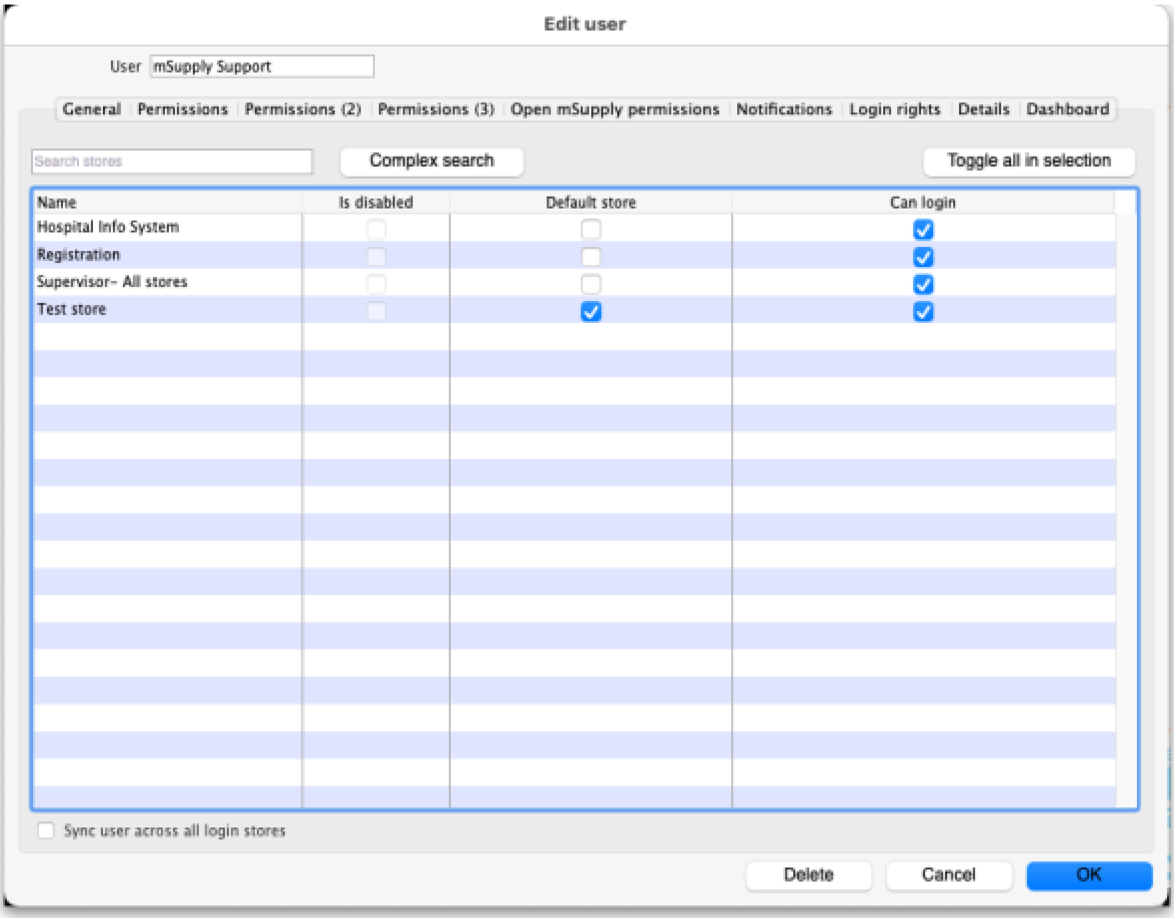
This tab contains permissions that only affect Open mSupply users. Currently Open mSupply must connect to an existing mSupply server, which takes care of the authentication and synchronisation. Soon, when we've re-written the central synchronisation server in Open mSupply, there will be no need for this tab. Until then, permissions that only apply to users of Open mSupply will appear on this tab.

This tab is included in the permissions copying functionality of the **Copy** button at the bottom of the window (see the Buttons on the permissions tabs section for details).

Permission	**Details**
Can confirm internal order as sent	If checked then the user can *Finalise* an internal order in mSupply terms or *Send* it in Open mSupply terminology.
Cold chain API access	If checked then the user can .
Can modify central data	If checked then the user can .
Program permissions	.

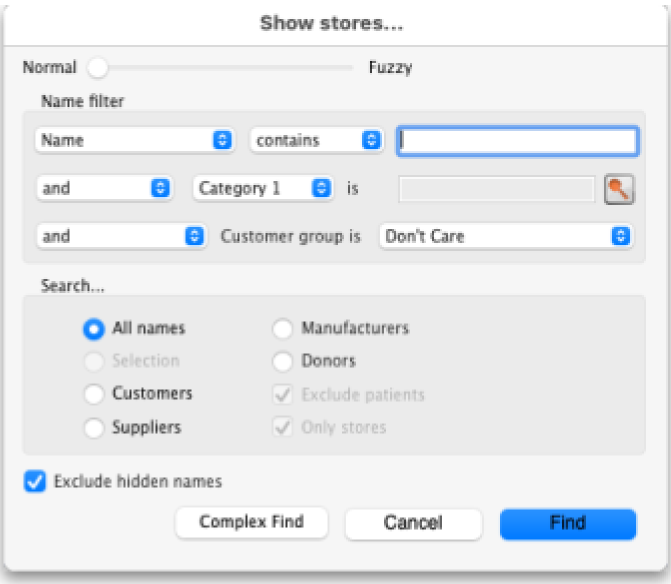
Login rights tab

On this tab you set which stores the user can login to:



If there are too many stores in the list, you can restrict the display by typing in the *Search stores* text box: only stores with names starting with what you type will be displayed.

If you need a more complex type of search then click on the **Complex search** button and this filter window will open (you will recognise it as very similar to the customer or supplier search window):



Make your filter selections as required, click on the **Find** button and only the stores which match the filters you have set will be displayed in the table.

The **Toggle all in selection** button turns on (checks) all the *Can login* checkboxes for all the stores shown in the list. Clicking it again will turn them off.

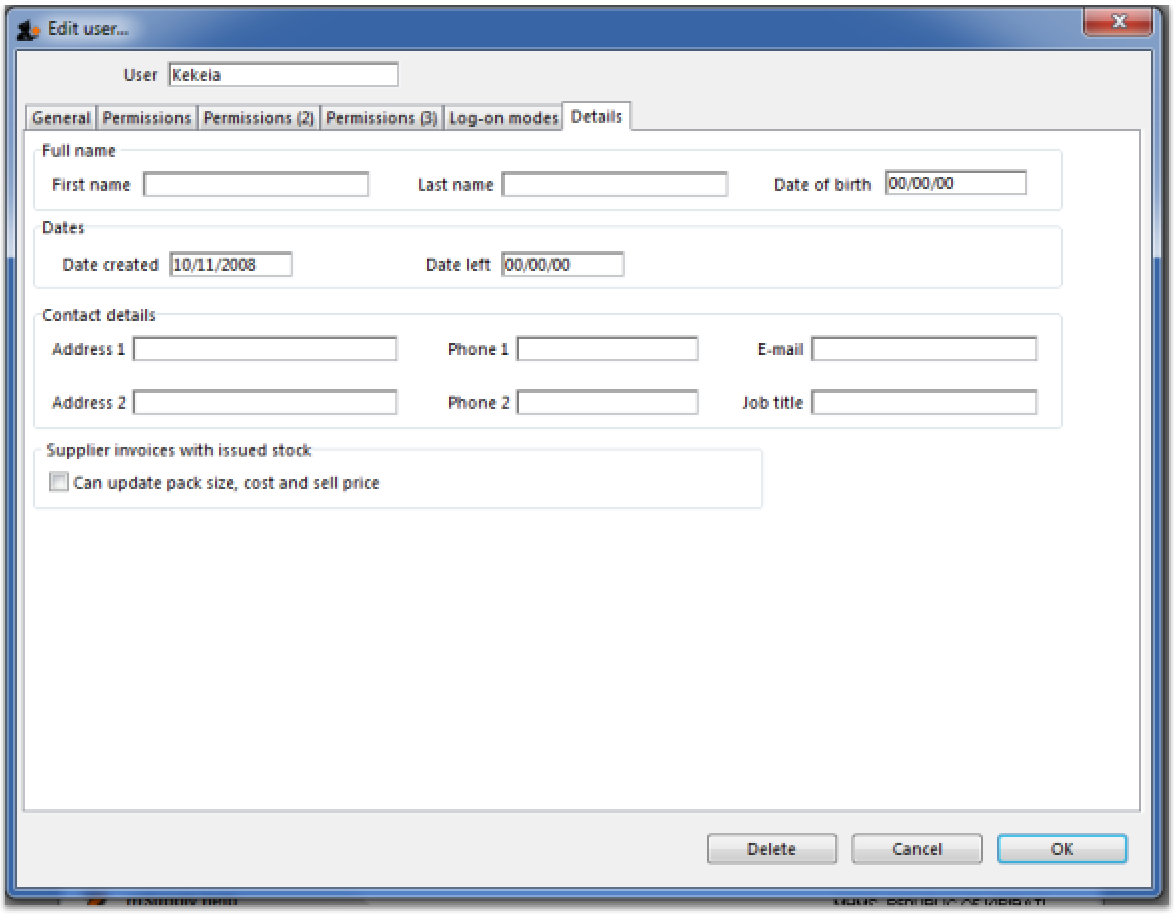
The *Is disabled* column indicates whether a store is disabled or not and can't be edited.

You can check one box in the *Default store* column - this will be the store the user is offered by default every time they login or switch stores.

In the *Can login* column you can check the box for each store the user is allowed to login to. All the stores in your mSupply datafile are displayed here in alphabetical order. Please note:

- The “Drug Registration” store is a special store used for the mSupply medicine registration functionality. See Registration for more details. Checking this box will allow the user to login to the Registration module.
- The “Hospital Info System” is another special store used for mSupply's built-in Hospital Information system. See here for more details. Checking this box will allow the user to login to the HIS module.
- “Supervisor - All stores” stores is a special mode to allow users to view information in and run reports over multiple stores. See here for more information.

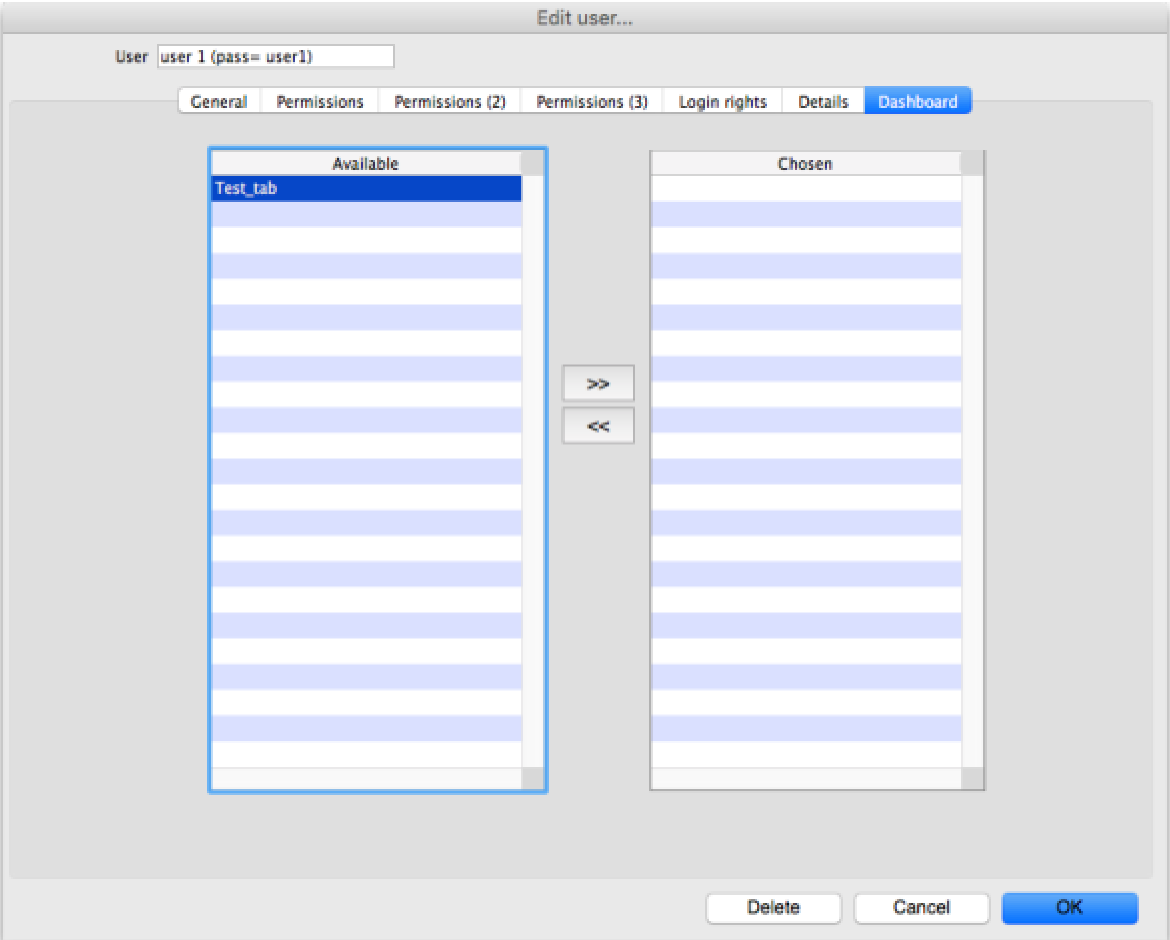
Details tab



Here some personal details including job title, address and email address of the user can be recorded. The job title will appear in the *Job title* column in the list of users and the email address is used when using email functionality or other special functions in mSupply.

Other than that, these fields are for reference only, providing a handy place to record information about your system users.

Dashboard tab



On this tab you set which dashboard tabs will appear on the dashboard when the user logs into it. Of course, you have to set up the dashboard tabs before you can assign them to a user's dashboard. See Dashboard for instructions on doing that.

Once the dashboard tabs have been setup, they will appear in the *Available* column of this tab. You can see the “Test_tab” in the screenshot above. Anything in the *Chosen* column will be displayed on the user's dashboard. So, to make a dashboard tab appear on the user's dashboard, select it in the *Available* column and click on the **>>** icon to move the tab into the *Chosen* column. And to remove a dashboard tab from the user's dashboard, simply select it in the *Chosen* column and click on the **<<** icon to move it back into the *Available* column.

Create a new user

To create a new user do this:

1. Go to *File* > *Edit users...* and click on the **New user** button
2. Enter the user name

3. Assign a password
4. Enter the password again in the *Confirm password* text box
5. Go to the permissions tabs and set up permissions (3 tabs) **OR** select which group the user is to belong to using the *Is a member of* drop down list on the General tab (you must do one of these because you'll have noticed that when you create a new user they have absolutely no permissions at all!)
6. Go to the Login rights tab and set the stores the user can login to.
7. Click **OK** when you're done.
8. The user should now be able to log in.
9. After the user logs in, they may want to change their password.

Delete a user or group

To delete a user do this:

1. Go to *File > Edit users...*
2. Double-click the name of the user or group you want to delete in the list
3. Click on the *Delete* button on the bottom of the edit user window that opens

Note that you won't be able to delete a group that has users belonging to it. If you really want to delete the group, remove all users from the group first by editing their *Is a member of* fields.

Managing and using groups

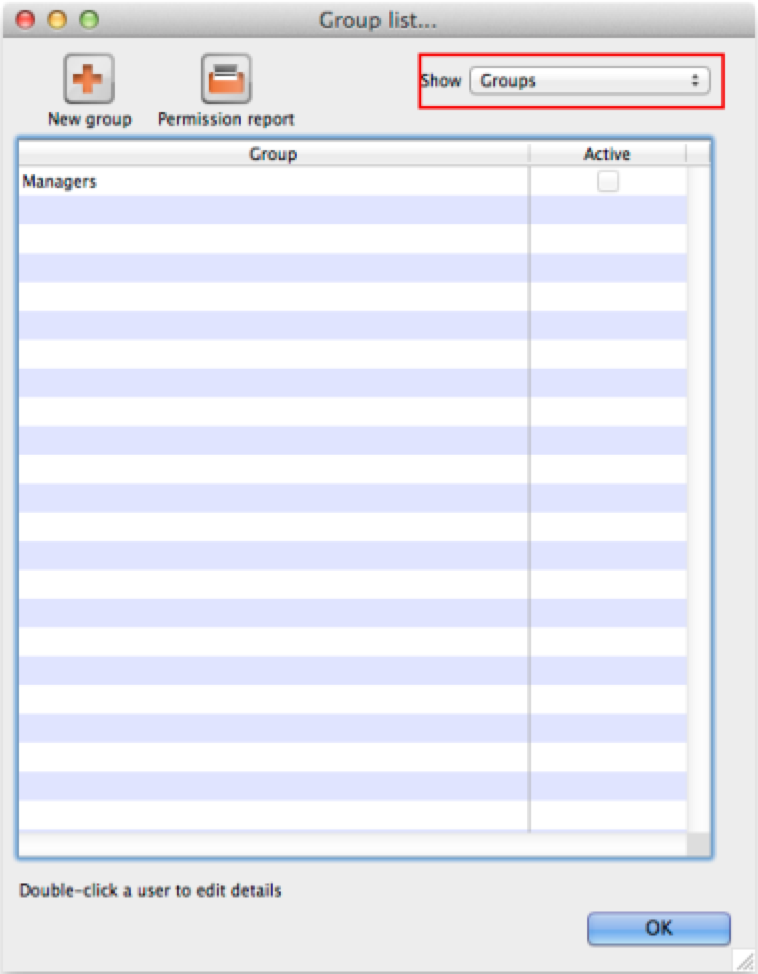
mSupply allows for a high granularity of user permission configuration. There are literally hundreds of user permissions possible for each store in an mSupply system. User groups assist with management of these user permissions.

- Users can be configured to:
  - Log in to particular stores
  - Have a range of general user permissions such as access to the dashboard
- Users can also be configured to have permission to view or edit data while logged in to particular stores.
- If users are a member of a group, then permission to view or edit data while logged in to particular stores is governed by the group membership.

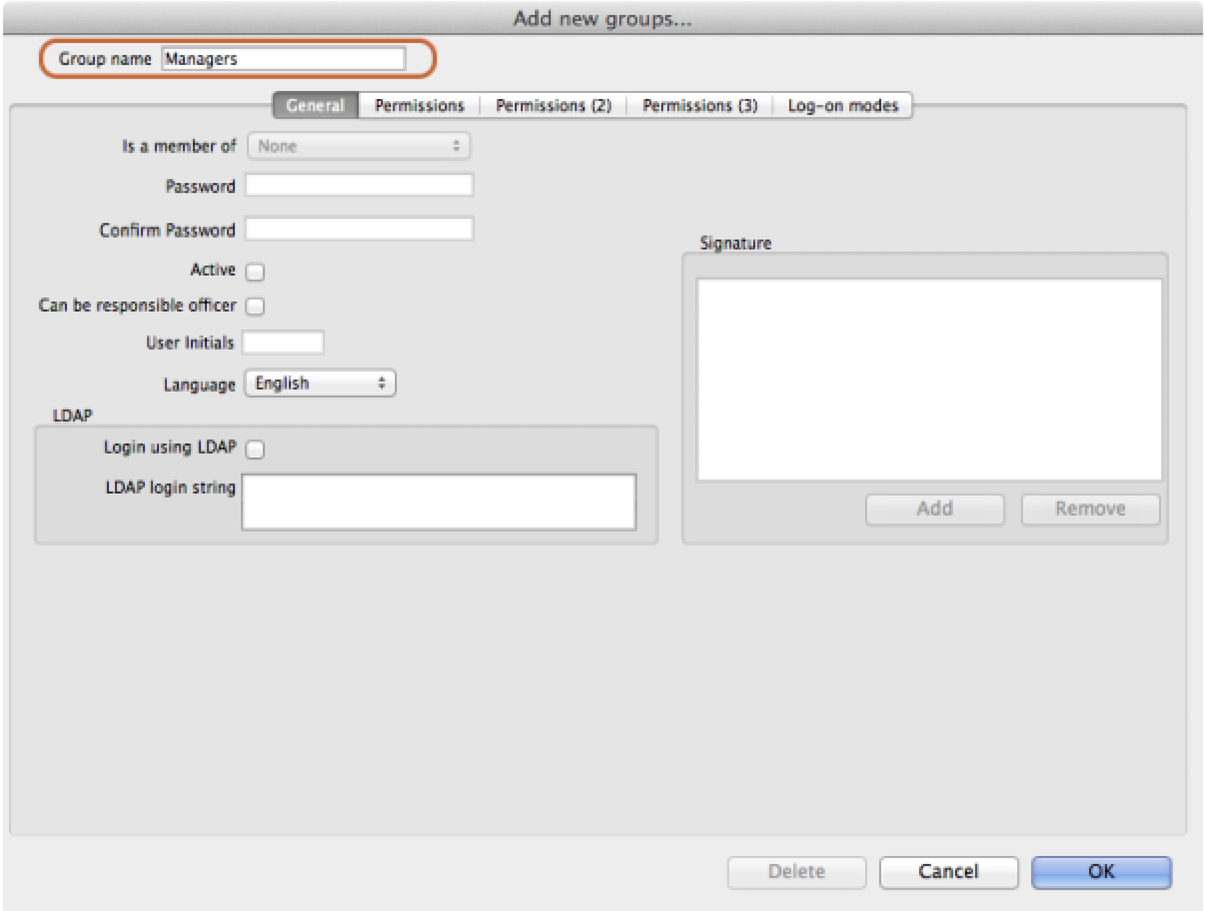
A user can have permission to view or edit data while logged in to a particular store, either directly or through membership of a group. If you want the user to *exercise* these permissions then they will also need to have permission to *log in* to the store.

Adding a group

Show the list of groups by opening the “Edit user” window and then choosing “Groups” from the “Show” Drop-down menu



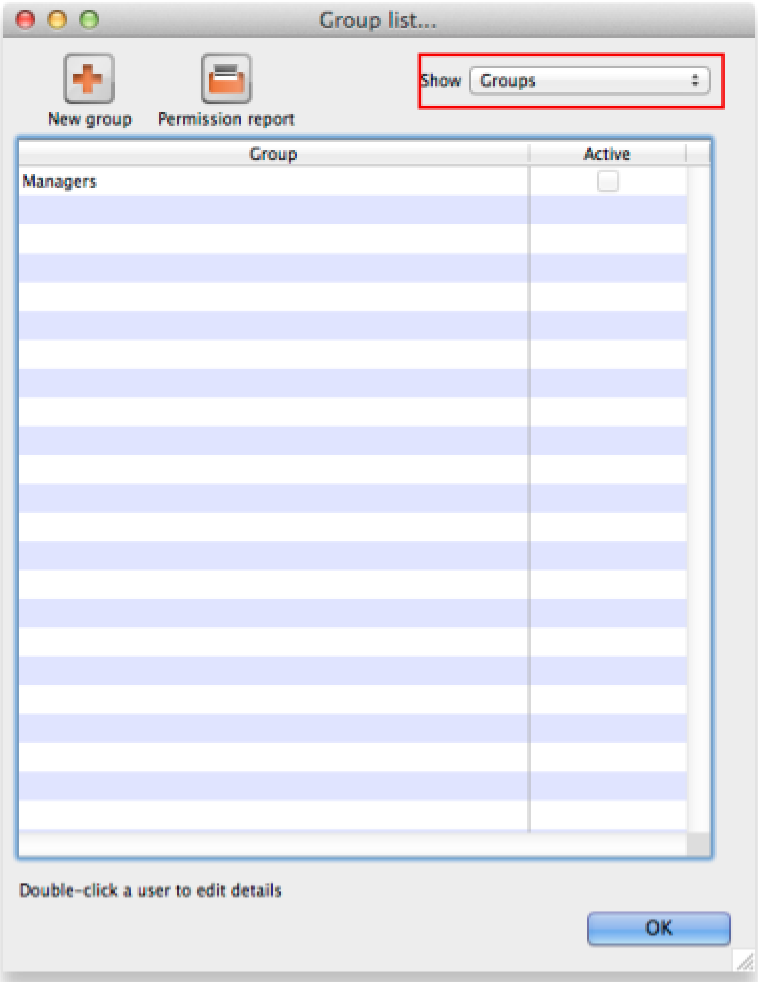
To add a group, click the **Add Group** button. You will be shown a window where you add the group name. You then set permissions for the group in the same way as you set permissions for a user (above):



You will only be able to set checkboxes which can have different settings in different stores. Anything that is not a checkbox and or any checkbox that applies across all stores cannot be set in a group's permissions (another way of saying this is that they cannot be controlled by a group). These items will all be disabled when creating or editing a group and are editable in the individual users' permissions only.

Editing a group

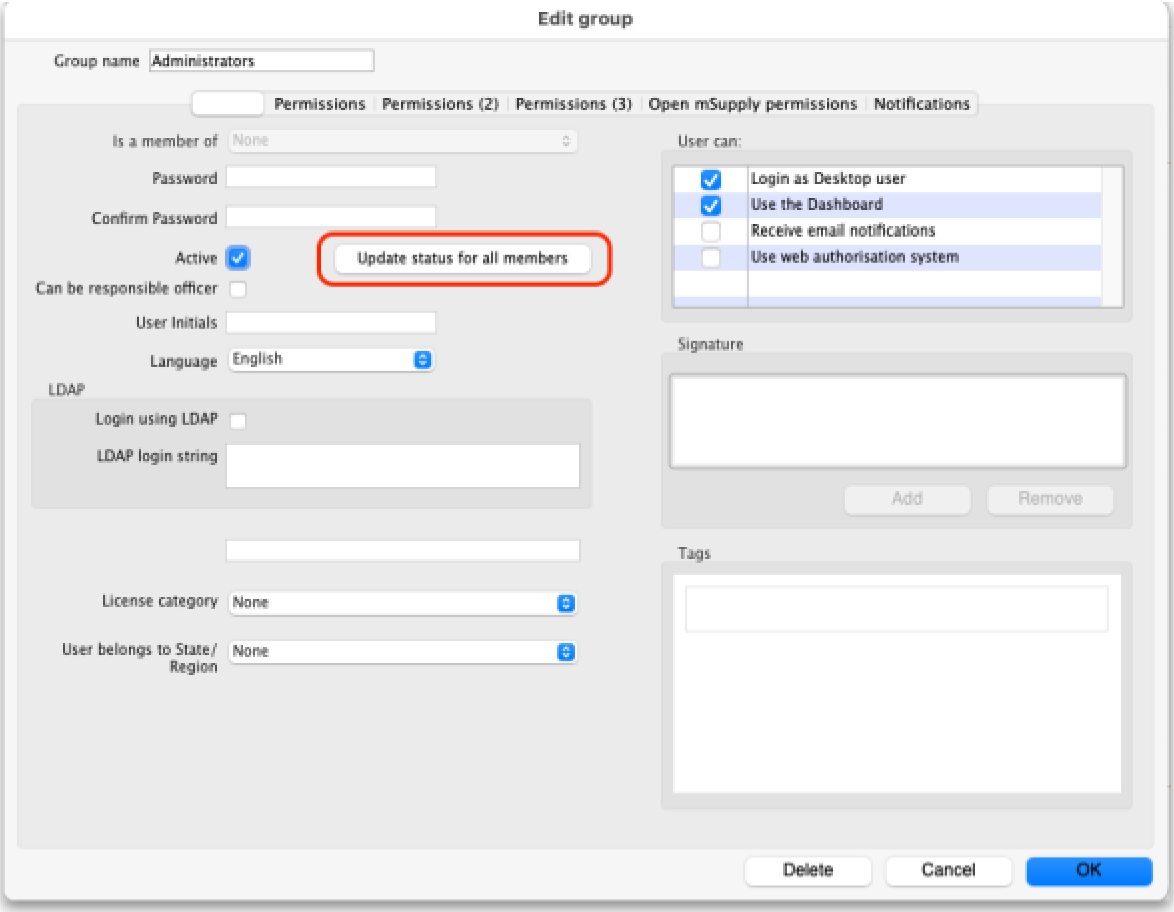
First, show the list of groups by opening the “Edit user” window and then choosing “Groups” from the “Show” Drop-down menu:



Then double click on a group in the list. The same window as for adding a group opens but it is populated with the group's current settings. Change these settings as described for a new group above and click on the **OK** button to save them.

Active users and groups

All permissions and most checkbox settings in a user settings are controlled by the group. One exception is login rights to different stores (managed for each user individually). Another exception is whether a user is active or not (active means that they are allowed to login to mSupply). By default, the active status of a group does not set the active status of all users in the group to match. However, you can make all users in a group inactive by editing the group and clicking on the **Update status for all members** button:

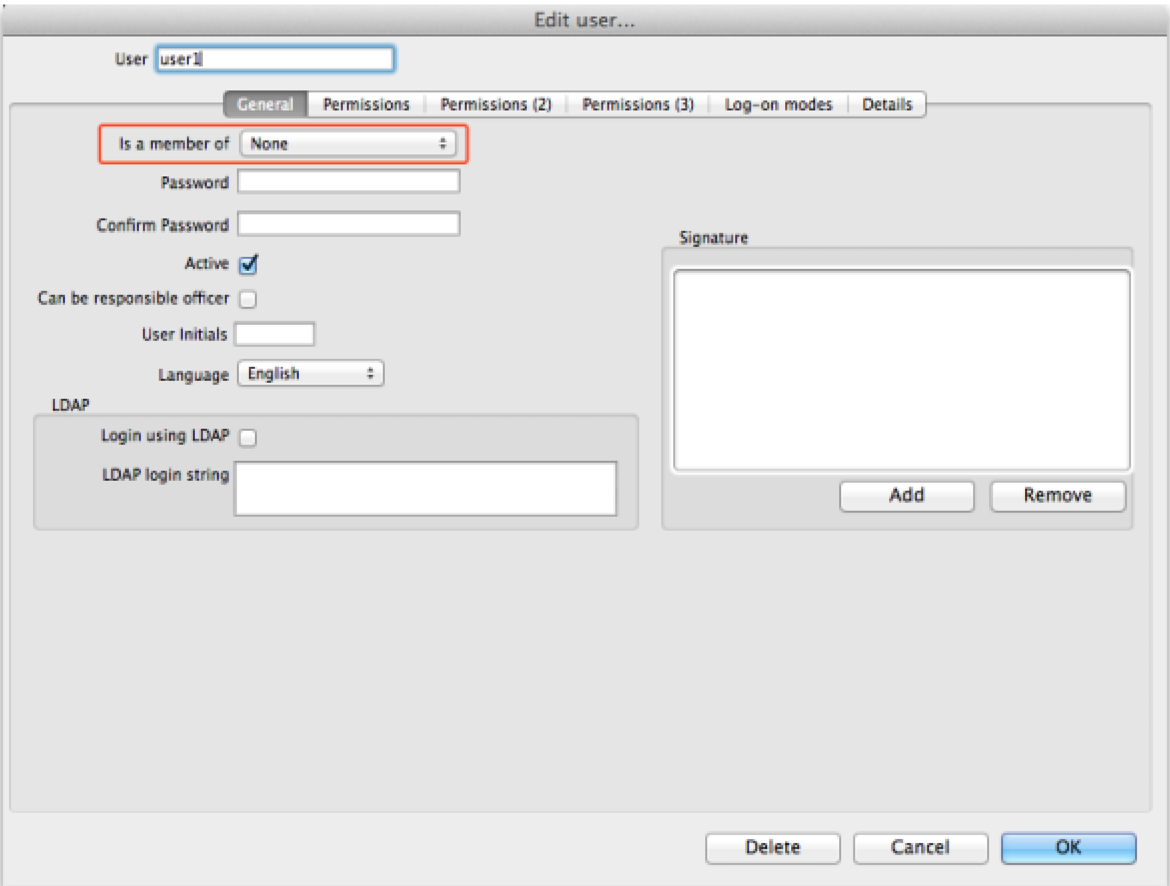


When you click on the **Active** checkbox for a group it does nothing except changee the state of the checkbox. However, when you click on the **Update status for all members** button, all members of the group have their *Active* status set to that of the checkbox in this group.

Using groups

Groups are a quick way of setting and managing permissions for many people at a time. Users belonging to a group take the permissions of that group: when a user is a member of a group you cannot edit their permissions directly, you must edit the group's permissions. And if you edit the group's permissions, you edit the permissions for every user in the group. To assign a user to a group, do the following:

1. Go to *File* > *Edit users*
2. Double click on the user you want to edit
3. On the general tab of the window which opens, use the *Is a member of* drop down list to select the group the user is to belong to:



4. Click on the OK button to save you changes.

User license categories

A menu item on the Special menu of the navigator gives access to a form to view and edit user license categories, including the number of users belonging to them that can be logged in at any one time. A DDL on the user input form allows a user to be assigned to a category and a new permission covers the ability to edit these license categories and membership of them. Finally, a check on the OK button of the login form will check that there are less than the maximum users belonging to the license category the user belongs to already logged in.

*Previous: **25.14. mSupply deployment** | | Next: **25.16. Show connected users***