

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':

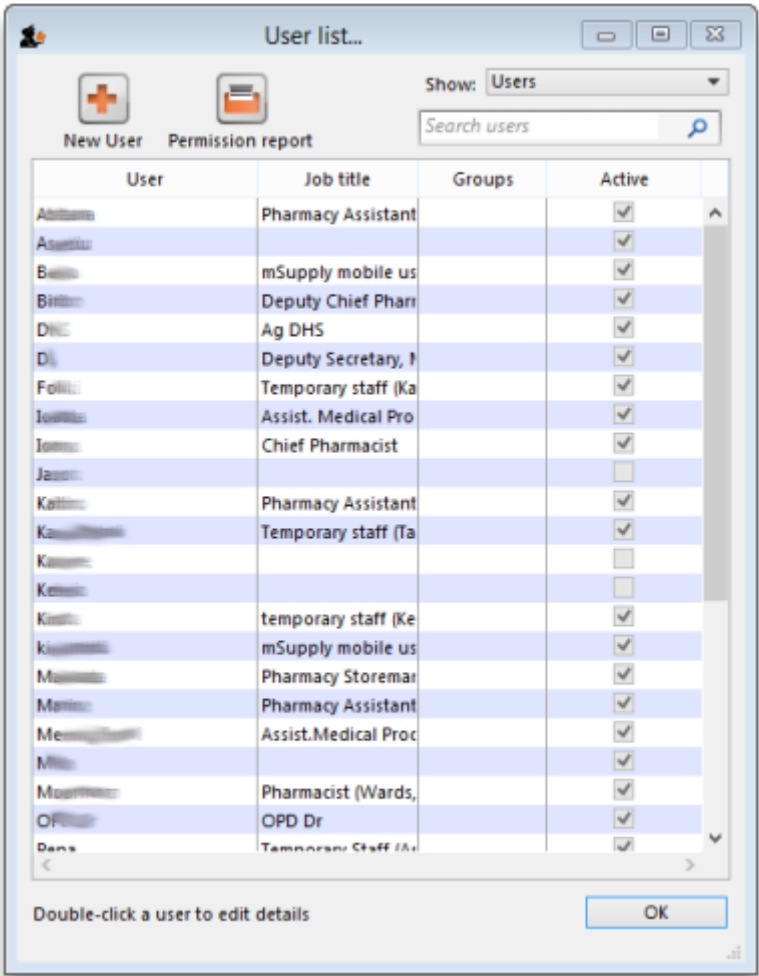
- Edit the user, change the **Is a member of** to None
- Edit the user, uncheck the **Active** checkbox, click **OK**.

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:

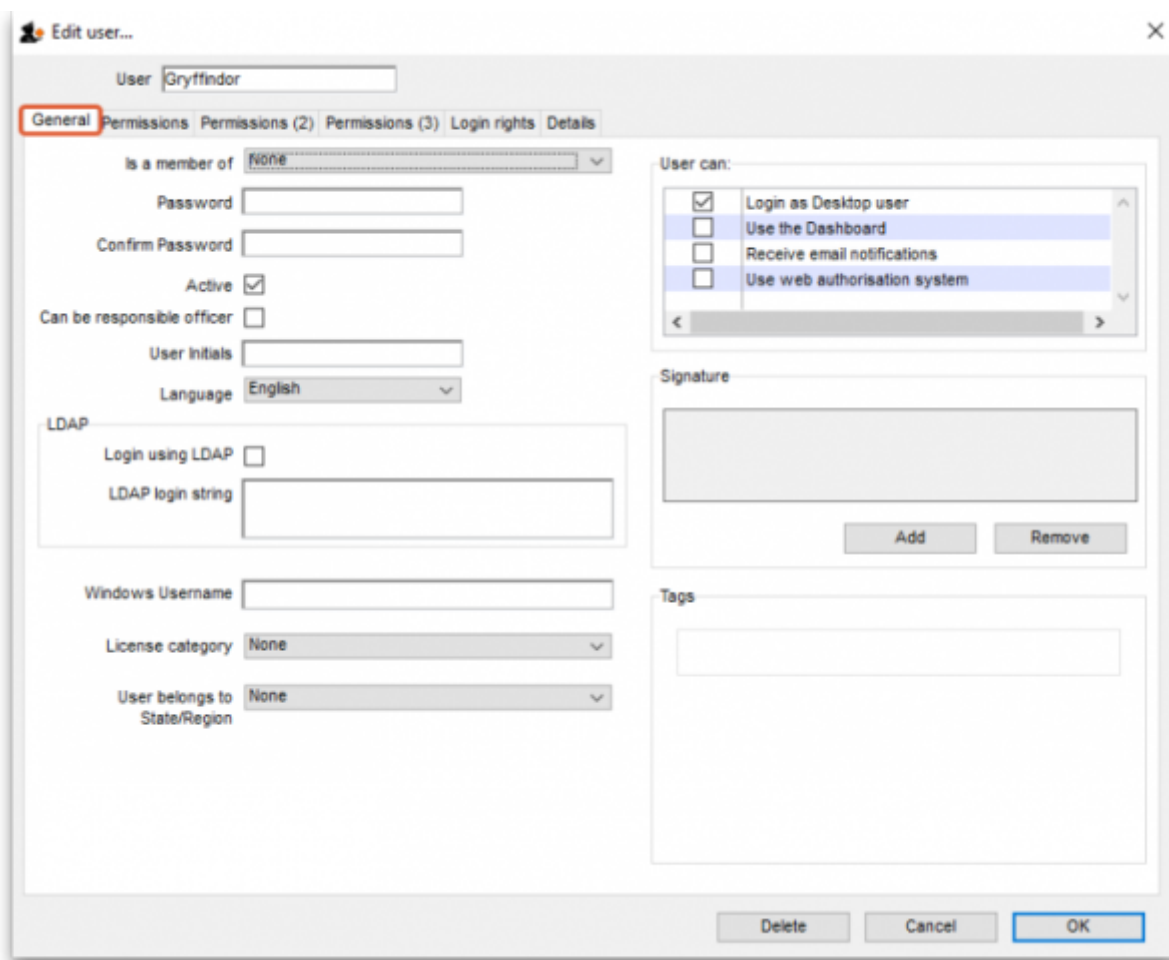
- **Group** The name of the group
- **Active** Checked if the group is active. If the group is active then all users in the group are allowed to login to the system. If the group is inactive (checkbox unchecked), all users in the group are inactive and are not allowed to login to the system.

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



The screenshot shows the 'Edit user...' window with the 'General' tab selected. The window has a title bar with a close button. Below the title bar is a 'User' field containing 'Gryffindor'. A tab bar at the top includes 'General' (highlighted with a red box), 'Permissions', 'Permissions (2)', 'Permissions (3)', 'Login rights', and 'Details'. The 'General' tab contains several sections: 'Is a member of' with a dropdown set to 'None'; 'Password' and 'Confirm Password' text boxes; 'Active' checked checkbox; 'Can be responsible officer' unchecked checkbox; 'User Initials' text box; 'Language' dropdown set to 'English'; an 'LDAP' section with 'Login using LDAP' unchecked and an empty 'LDAP login string' text box; 'Windows Username' text box; 'License category' dropdown set to 'None'; and 'User belongs to State/Region' dropdown set to 'None'. On the right, 'User can:' has a list with checkboxes for 'Login as Desktop user' (checked), 'Use the Dashboard', 'Receive email notifications', and 'Use web authorisation system'. Below this is a 'Signature' section with a large text area and 'Add'/'Remove' buttons. At the bottom right is a 'Tags' section with an empty text box. At the very bottom are 'Delete', 'Cancel', and 'OK' buttons.

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: Store:

General **Permissions** Permissions (2) Permissions (3) Notifications Login rights Details Dashboard

Ordering <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View purchase orders <input checked="" type="checkbox"/> Delete purchase orders <input checked="" type="checkbox"/> Edit purchase orders <input checked="" type="checkbox"/> Edit purchase order pricing <input checked="" type="checkbox"/> Manage tenders <input checked="" type="checkbox"/> Finalise purchase orders <input checked="" type="checkbox"/> Authorise purchase orders Items <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create new items <input checked="" type="checkbox"/> View items <input checked="" type="checkbox"/> Edit items <input checked="" type="checkbox"/> Delete items <input checked="" type="checkbox"/> Duplicate items <input checked="" type="checkbox"/> Create repacks or split stock <input checked="" type="checkbox"/> Edit repacks <input checked="" type="checkbox"/> View pricing information for items <input checked="" type="checkbox"/> Edit item units list <input checked="" type="checkbox"/> Merge two items... <input checked="" type="checkbox"/> Add / edit departments <input checked="" type="checkbox"/> Add / edit master list <input checked="" type="checkbox"/> Consolidate stock <input checked="" type="checkbox"/> View stock <input checked="" type="checkbox"/> Edit stock 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create purchase orders <input checked="" type="checkbox"/> Confirm purchase orders <input checked="" type="checkbox"/> Create & edit backorders <input checked="" type="checkbox"/> Create new quotes <input checked="" type="checkbox"/> Edit & delete quotes <input checked="" type="checkbox"/> Duplicate purchase orders <input checked="" type="checkbox"/> Print purchase orders <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View inventory adjustments <input checked="" type="checkbox"/> Enter inventory adjustments <input checked="" type="checkbox"/> Edit inventory adjustments <input checked="" type="checkbox"/> View cost prices of stock <input checked="" type="checkbox"/> Edit item names, codes and units <input checked="" type="checkbox"/> View DDD information for items <input checked="" type="checkbox"/> Manage item access <input checked="" type="checkbox"/> Manage locations <input checked="" type="checkbox"/> Make item inactive <input checked="" type="checkbox"/> Edit item default price <input checked="" type="checkbox"/> Modify sell and cost prices of existing stock <input checked="" type="checkbox"/> Create and edit custom stock field value lists <input checked="" type="checkbox"/> Modify donor on stock and transaction lines <input checked="" type="checkbox"/> Manage drug interaction groups 	Admin <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Add / edit users <input checked="" type="checkbox"/> Access server administration <input type="checkbox"/> Edit authorisers <input type="checkbox"/> Clone database <input type="checkbox"/> Edit periods and period schedules <input type="checkbox"/> Add/edit sync sites <input type="checkbox"/> Edit insurance providers Goods receiving <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View goods received <input checked="" type="checkbox"/> Add/edit goods received <input checked="" type="checkbox"/> Authorise goods received <input checked="" type="checkbox"/> Finalise goods received <input type="checkbox"/> Disallow adding an unordered item to a Goods Received note Special <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Add / edit currencies <input checked="" type="checkbox"/> Add / edit reminders <input checked="" type="checkbox"/> View and print labels <input checked="" type="checkbox"/> Add / edit misc labels <input checked="" type="checkbox"/> Add / edit abbreviations <input checked="" type="checkbox"/> Add / edit warnings <input checked="" type="checkbox"/> Add / edit prescribers <input checked="" type="checkbox"/> Add / edit transaction categories <input checked="" type="checkbox"/> Add / edit contacts <input checked="" type="checkbox"/> Merge prescribers <input type="checkbox"/> Add and edit options <input type="checkbox"/> Add / edit vaccinators
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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: Store:

General **Permissions** **Permissions (2)** **Permissions (3)** **Open mSupply permissions** Notifications Login rights Details Dashboard

Names <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create customer, supplier & manufacturer names <input checked="" type="checkbox"/> View customer, supplier & manufacturer names <input checked="" type="checkbox"/> Edit customer, supplier & manufacturer names <input checked="" type="checkbox"/> Delete names <input checked="" type="checkbox"/> Edit name codes <input checked="" type="checkbox"/> Edit name charge code <input checked="" type="checkbox"/> Merge names <input checked="" type="checkbox"/> Edit name categories <input checked="" type="checkbox"/> Create & edit patient events <input checked="" type="checkbox"/> Add patients <input checked="" type="checkbox"/> Edit patient details <input checked="" type="checkbox"/> View patients <input checked="" type="checkbox"/> Add and edit insurance policies <input checked="" type="checkbox"/> Add / edit name groups <input checked="" type="checkbox"/> Update master code Web interface <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Edit web passwords <input checked="" type="checkbox"/> Edit and create web messages Reports <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Manage reports <input checked="" type="checkbox"/> Revert reports to original <input checked="" type="checkbox"/> View reports 	Invoices <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create customer invoices <input checked="" type="checkbox"/> View customer invoices <input checked="" type="checkbox"/> Edit customer invoices <input checked="" type="checkbox"/> Create supplier invoices <input checked="" type="checkbox"/> View supplier invoices <input checked="" type="checkbox"/> Edit supplier invoices <input checked="" type="checkbox"/> Edit comments on finalised invoices <input checked="" type="checkbox"/> Import supplier invoices <input checked="" type="checkbox"/> Duplicate supplier & customer invoices <input checked="" type="checkbox"/> Finalise multiple invoices <input checked="" type="checkbox"/> Finalise customer invoices <input checked="" type="checkbox"/> Finalise supplier invoices <input checked="" type="checkbox"/> Finalise repacks <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 stocktakes: show internal analysis columns by default <input checked="" type="checkbox"/> Change invoice category on finalised invoice <input checked="" type="checkbox"/> Return stock from customer invoices <input checked="" type="checkbox"/> Return stock from supplier invoices <input checked="" type="checkbox"/> Overwrite total amount in prescriptions 	Invoices <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Authorise customer invoices <input checked="" type="checkbox"/> Authorise supplier invoices <input checked="" type="checkbox"/> Create cash transactions <input checked="" type="checkbox"/> Pack boxes <input checked="" type="checkbox"/> Create supplier credits Builds and bill of materials <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View cost prices on builds <input checked="" type="checkbox"/> Finalise builds <input checked="" type="checkbox"/> View bill of materials <input checked="" type="checkbox"/> Edit bill of materials <input checked="" type="checkbox"/> Build items <input checked="" type="checkbox"/> Edit build items Cash transactions <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Make cash payments <input checked="" type="checkbox"/> Receive cash <input checked="" type="checkbox"/> Edit payment note field Transfers <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Transfer goods between stores <input checked="" type="checkbox"/> Finalise stock transfers Printing <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Print duplicate packing slips <input checked="" type="checkbox"/> Print duplicate customer invoices
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All on **Copy** **Delete** **Cancel** **OK**

Edit user

User: Store:

General | Permissions | Permissions (2) | **Permissions (3)** | Notifications | Login rights | Details | Dashboard

Document management

Tenders

- ☒ Upload tender document
- ☒ Download tender document
- ☒ Delete tender document

Quotes

- ☒ Upload quote document
- ☒ Download quote document
- ☒ Delete quote document
- ☒ Modify quotes entered by the supplier (via the website)

Items Lines (Batches of Stock)

- ☒ Upload batch document
- ☒ Download batch document
- ☒ Delete batch document

Stocktakes

- ☒ Create stocktake
- ☒ Delete stocktake
- ☒ Add stocktake lines
- ☒ View stocktake lines
- ☒ Edit stocktake lines
- ☒ Delete stocktake lines
- ☒ Edit stocktake dates

Virtual Stores

- ☒ Create new stores
- ☒ Edit store details
- ☒ Edit visibility in stores
- ☒ Edit store credentials

Reminders

- ☒ Edit and delete reminders assigned to me

Admin

- ☒ Send email
- ☒ Purge old records
- ☒ View log
- ☒ Set start of year stock
- ☒ View/edit preferences
- ☒ Export & import
- ☒ Backup data file

Vaccines

- ☒ View temperature breach configuration
- ☒ View and edit vaccine vial monitor status
- ☒ View sensor details
- ☒ Edit sensor location

Replenishments

- ☒ Can be a worker
- ☒ Can authorise replenishments
- ☒ Can finalise replenishments

Customer budgets

- ☒ Add/import customer budgets
- ☒ Edit/delete customer budgets

Registration

- ☒ Add/edit registrations
- ☒ Change registration status

Requisitions

- ☒ View requisitions
- ☒ Create and edit requisitions
- ☒ Administer finalised report type requisitions
- ☒ Create customer invoices from requisitions

Supplier Hub

- ☒ View and edit supplier hub details

Assets

- ☒ View assets
- ☒ Add/edit assets
- ☒ Setup assets
- ☒ Change asset status

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:

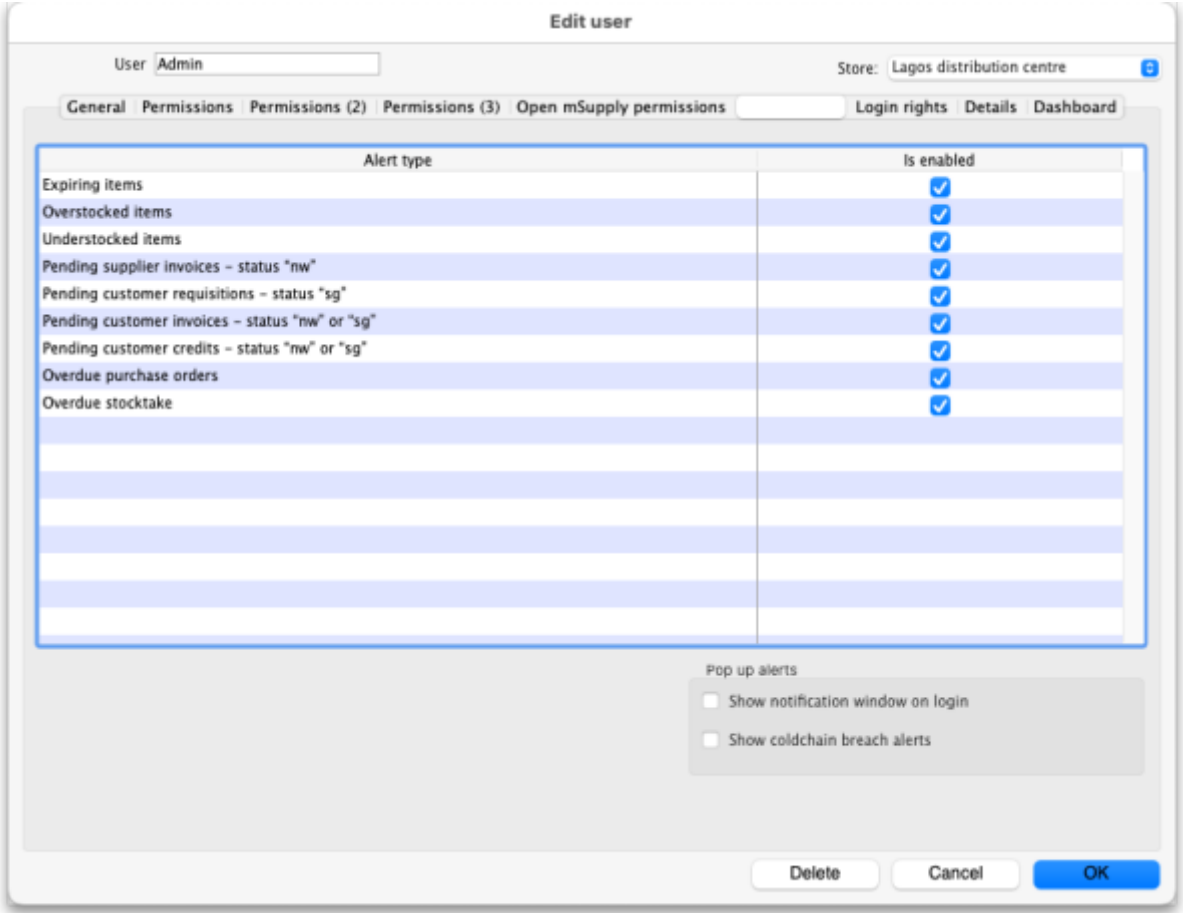
Permission	Details
Permissions Tab	
View stock	If not checked the user is not able to view the current stock list (see the 4.15. Show items with stock page), view the Stock tab of an item's details window (see the 4.01.05. Items - Stock tab page), not able to view stocktakes (see the 4.17. Stocktakes page) or view any reports in the <i>Stock and items</i> section on the <i>Reports</i> 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 <i>View stocktakes</i> 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, <i>provided that the SI has not been finalised</i> . 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	
Add patients	If checked, the user can add new patients into the system
Edit patient details	If checked, the user can edit the details of patients already entered into the system. Of course, this means they can also view the details of patients in the system
View patients	If checked, the user can view patients' details in the system. If not checked then the user will not be able to see any patient details.
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 <i>Transport details</i> 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 <i>Return selected lines</i> 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 <i>Return selected lines</i> 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 <i>Edit customer invoices</i> permission. See the 8.06. Box management page for details
Permissions (3) Tab	
Edit stocktake dates	If checked the user can edit the <i>Stock take date</i> 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

Permission	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 <i>Store</i> tab of a name or item's details window or the <i>Visibility</i> tab of a store's details window (in fact, the <i>Visibility</i> tab won't even be visible for them)
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 <i>Create customer invoice</i> button on requisitions. You can use this in conjunction with the <i>Create customer invoices</i> 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.

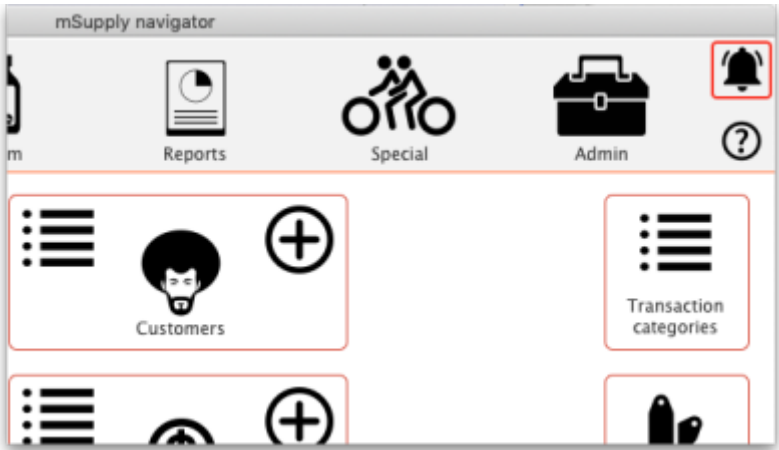
Notifications tab

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



To enable a particular 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 clicks on the notifications icon on the Navigator:



Please note that the notifications displayed realte only to the store that the user is logged in to.

Show cold chain breach alerts*: If this is checked the user will see temperature breach alerts in the store in the Store drop down list above the table passed to mSupply by the cold chain app (see <https://docs.msupply.foundation/coldchain/introduction/> for details). If this is not checked then a user will not see temperature breach alerts that occur in this

store. Please note that a user must have login rights to a store to be able to see breach alerts, whether this permission is turned on or not. ==== Open mSupply permissions tab ====

Edit user

User: Store:

General Permissions Permissions (2) Permissions (3) **Open mSupply permissions** Notifications Login rights Details Dashboard

Internal Order

☒ Can confirm Internal Order as Sent

API Access

☒ Cold chain API access

Admin

☒ Can modify central data

Program permission

Program	View	Edit

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 username and password of this user can be used to access the cold chain REST API built into Open mSupply. | Can modify central data | If checked then the user can edit settings that are counted as central data in Open mSupply e.g. demographics indicators. | Program permissions | This section is used to define which programs this user is allowed to view or edit data for. The table will contain a list of all the Open mSupply programs that have been setup in the datafile and there will be checkboxes for each in the *View* and *Edit* columns.

Click on the appropriate checkboxes to check them and give the user the appropriate permissions.

The **Toggle view** and **Toggle edit** buttons check or uncheck all the checkboxes in the *View* and *Edit* columns respectively.

If the list of programs is long you can type something in the *Search programs* box to make the list display programs that contain what you typed only. | ==== Login rights tab ====

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

[illegible]

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):**

Normal ☐ Fuzzy

Name filter

Name contains

and Category 1 is

and Customer group is Don't Care

Search...

☒ All names ☐ Manufacturers

☐ Selection ☐ Donors

☐ Customers ☒ Exclude patients

☐ Suppliers ☒ Only stores

☒ Exclude hidden names

Complex Find Cancel Find

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

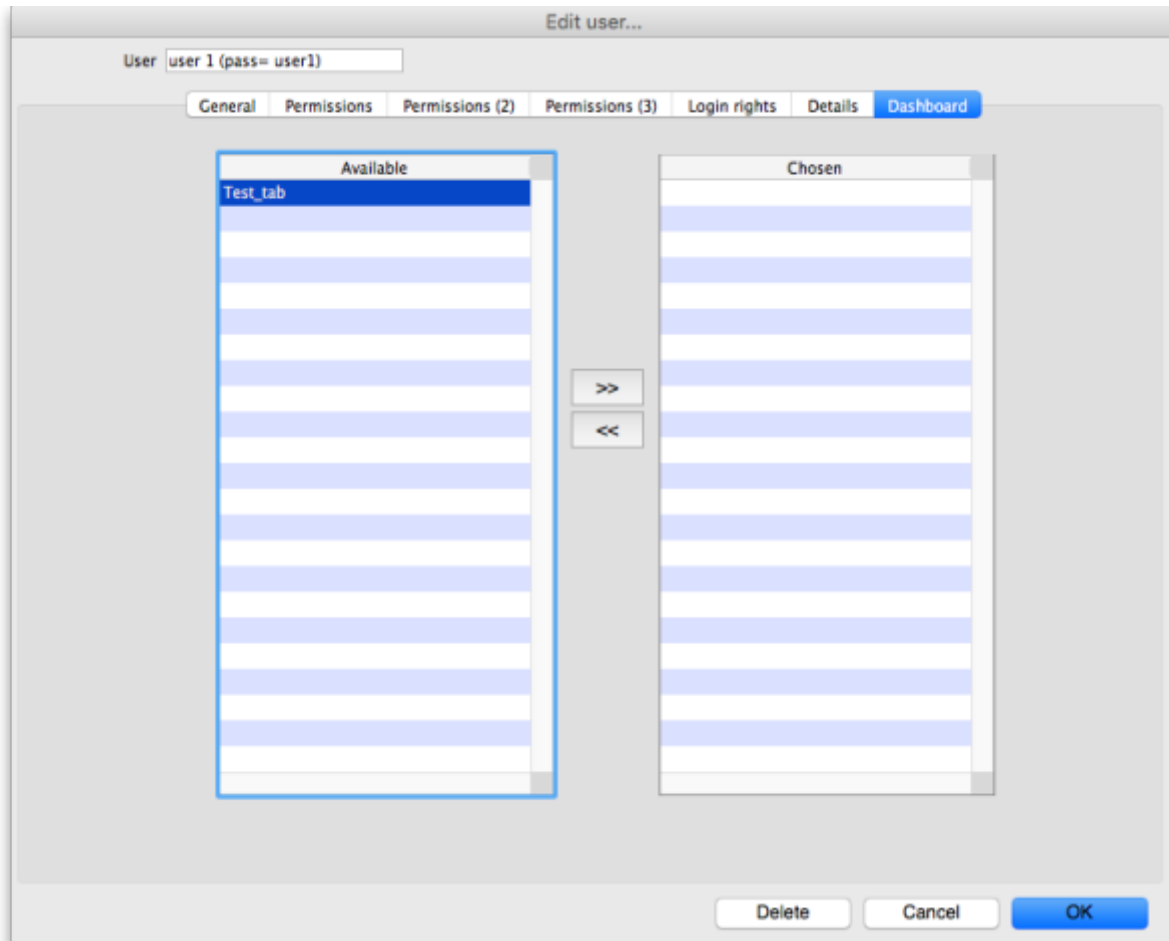
stores in your mSupply datafile are displayed here in alphabetical order. Please note: *

- 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.

Sync user across all login stores: This checkbox is only displayed if the currently logged in user is designated as a “special user” and they are logged into the primary server in a synchronisation system (the server where the system data is edited). If this checkbox is checked, when the OK button is clicked the user's details are synchronised with all the stores they are allowed to login to. In this way, an administrator in a synchronisation system is able to edit user permissions and settings and have them automatically synchronised to all relevant sites. ===== Details tab =====

The screenshot shows the 'Edit user...' window with the 'Details' tab active. The user name 'Kekela' is entered at the top. The form contains several sections: 'Full name' with fields for 'First name', 'Last name', and 'Date of birth' (set to 00/00/00); 'Dates' with 'Date created' (10/11/2008) and 'Date left' (00/00/00); 'Contact details' with fields for 'Address 1', 'Address 2', 'Phone 1', 'Phone 2', 'E-mail', and 'Job title'; and a checkbox for 'Can update pack size, cost and sell price' under the heading 'Supplier invoices with issued stock'. At the bottom are 'Delete', 'Cancel', and 'OK' buttons.

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: - Go to **File > Edit users...** and click on the **New user** button - Enter the user name - Assign a password - Enter the password again in the **Confirm password** text box - 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!) - Go to the **Login rights** tab and set the stores the user can login to. - Click **OK** when you're done. - The user should now be able to log in. - After the user logs in, they may want to [change their password](#). ===== Delete a user or group ===== To delete a user do this: - Go to **File > Edit users...** - Double-click the name of the user or group you want to delete in the list - 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

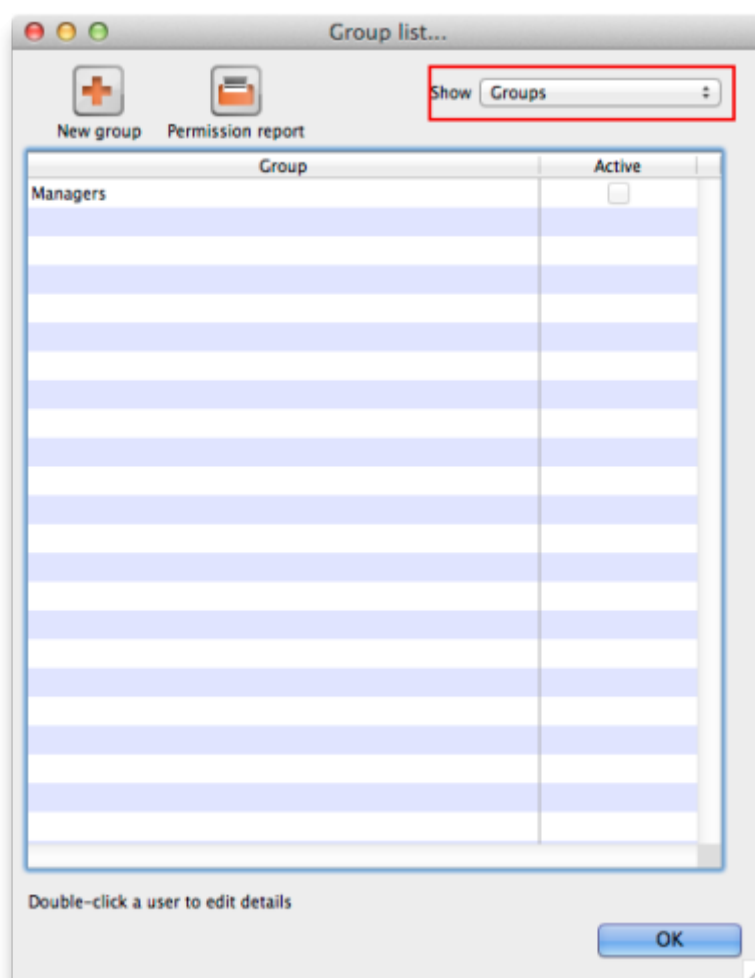
to have permission to view or edit data while logged in to particular stores. * If users are a member of a group, then permission to view or edit data while logged in to particular stores is governed by the group membership.



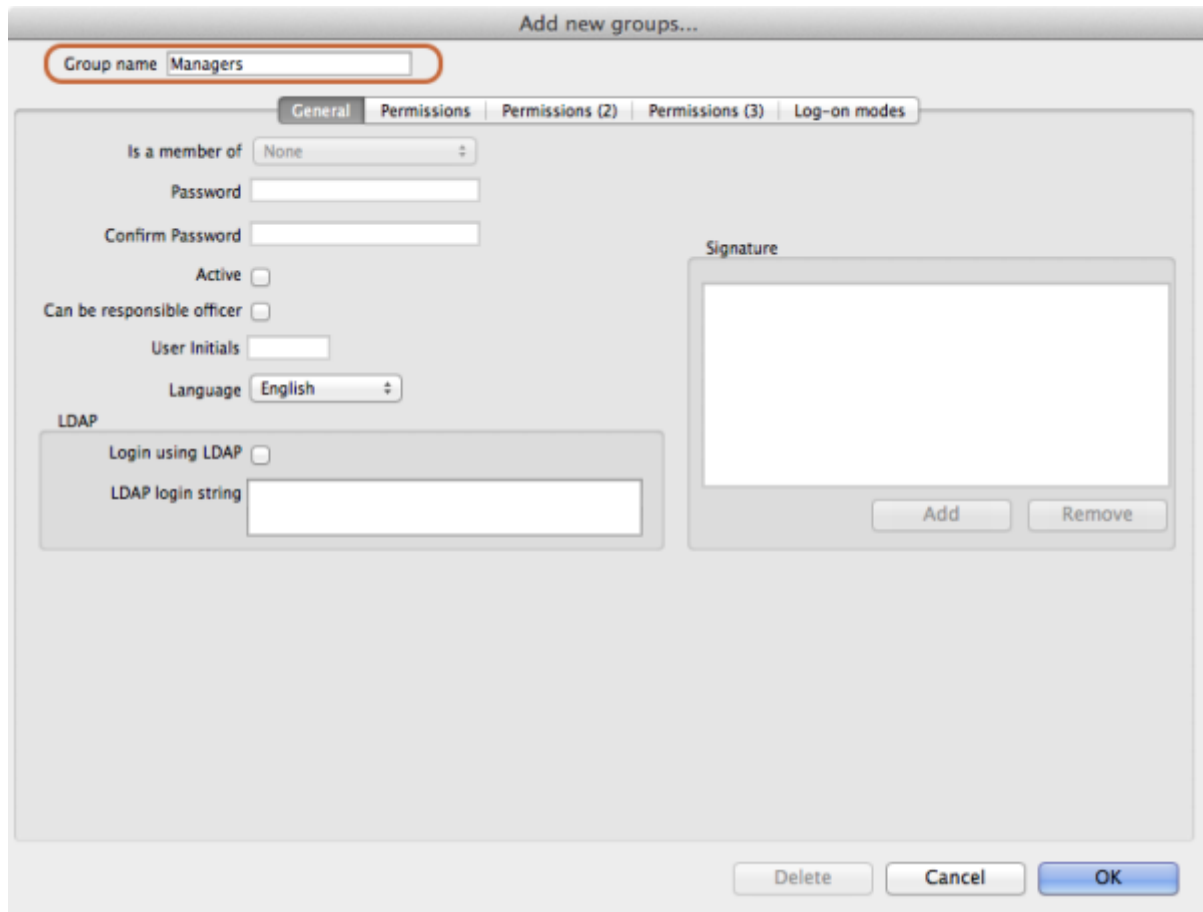
A user can have permission to view or edit data while logged in to a particular store, either directly or through membership of a group. If you want the user to *exercise* these permissions then they will also need to have

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

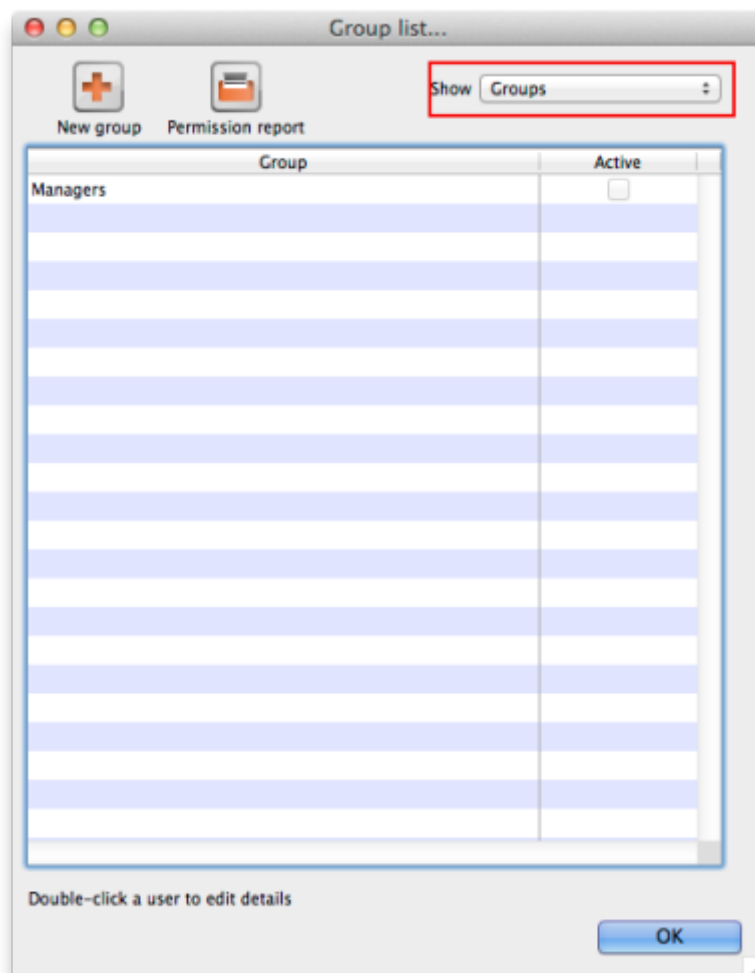


To add a group, click the Add Group button. You will be shown a window where you add the group name. You then set permissions for the group in the same way as you set permissions for a user (above):



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:

Group name: Administrators

Permissions: Permissions (2) Permissions (3) Open mSupply permissions Notifications

Is a member of: None

Password:

Confirm Password:

Active: ☒ **Update status for all members**

Can be responsible officer: ☐

User Initials:

Language: English

LDAP

Login using LDAP: ☐

LDAP login string:

License category: None

User belongs to State/Region: None

User can:

<input checked="" type="checkbox"/>	Login as Desktop user
<input checked="" type="checkbox"/>	Use the Dashboard
<input type="checkbox"/>	Receive email notifications
<input type="checkbox"/>	Use web authorisation system

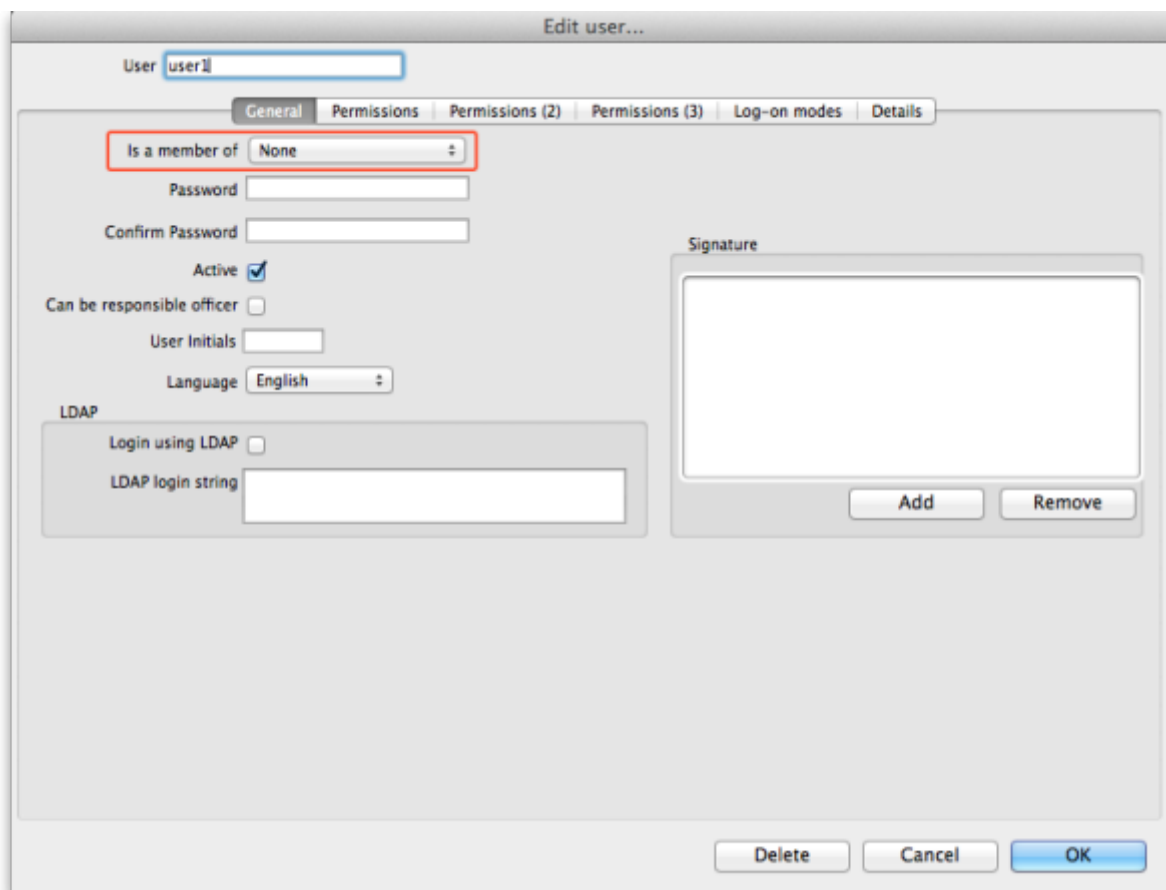
Signature:

Add Remove

Tags:

Delete Cancel OK

When you click on the Active checkbox for a group it does nothing except change 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: - Go to **File > Edit users** - Double click on the user you want to edit - 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:



- 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.

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