

26.15. Remote authorisation

Function added in version 4.01, overhauled to current form in version 5.05

mSupply has features to allow various types of transactions to be authorised within the application before they affect stock so that supervisors can make sure the transactions are correct (see the [26.14. Authorisation](#) page for details).

Remote authorisation allows supervisors to authorise **Response requisitions** *via a web app*, so that they can participate in the authorisation process without having to login to mSupply.



Only response requisitions (those made in response to request requisitions (called internal orders - see the [6.04. Ordering from one store to another](#) page for details) that can be remotely authorised. Other requisition types or response requisitions made manually can **not** be remotely authorised.

When an authorisation request is made, authorisers receive an email containing a link to the web app. When the authoriser logs in, they are shown all pending authorisations which they can then do any of:

- Approve
- Edit and approve
- Deny

Authorisation by masterlist/vertical program

In the remote authorisation module authorisers can only authorise the requisition lines which belong to items on the master list they are able to authorise for.

A masterlist can be used to represent a vertical program so this method can also be thought of as authorisation by vertical program.

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

Setup

Turn on remote authorisation

For the store receiving requisitions that must be authorised

Remote authorisation must be turned on for **each store separately**. This means that, in the same

datafile, some stores can use it while others do not. You turn it on for a store in the store's preferences:

1. Choose *Special > Show stores* from the menus.
2. Double click the store to edit.
3. Click on the **Preferences** tab.
4. Check the *Use remote authorisation for response requisitions* checkboxe to turn remote authorisaiton on for that store.

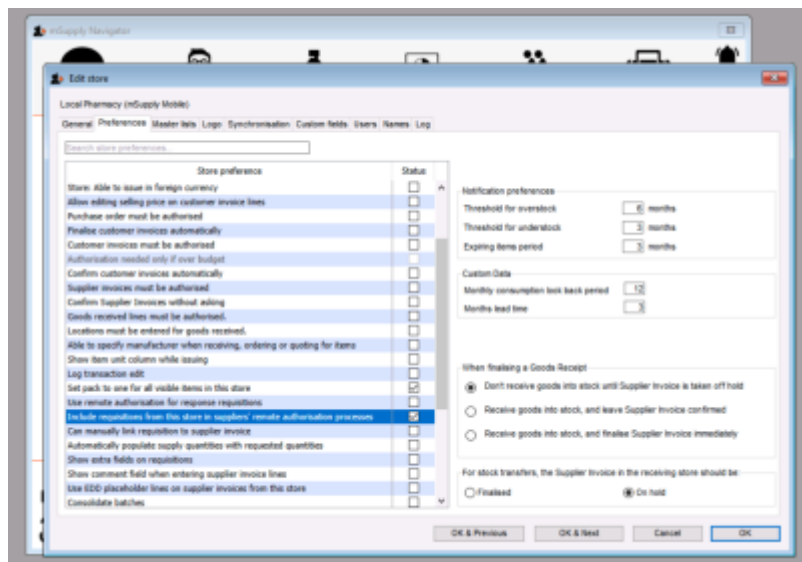
The screenshot shows the 'Edit store' window for 'Central Medical Store'. The 'Preferences' tab is selected. A table of store preferences is visible, with the checkbox for 'Use remote authorisation for response requisitions' checked and highlighted by a red rectangle. Other preferences include 'Sort available batches by VVM Status rather than Expiry', 'Patients created in other stores not visible in this store', and 'Allow users to enter total quantities to distribute'. To the right of the table, there are sections for 'Custom Data' (Monthly consumption look back period, Months lead time) and 'When finalising a Goods Receipt' (Don't receive goods into stock until Supplier Invoice is taken off hold, Receive goods into stock, and leave Supplier Invoice confirmed, Receive goods into stock, and finalise Supplier Invoice immediately). At the bottom, there are buttons for 'OK & Previous', 'OK & Next', 'Cancel', and 'OK'.

| Store preference | Status |
|--|-------------------------------------|
| Sort available batches by VVM Status rather than Expiry | <input type="checkbox"/> |
| Patients created in other stores not visible in this store | <input type="checkbox"/> |
| Names created in other stores not visible in this store | <input type="checkbox"/> |
| Allow users to enter total quantities to distribute | <input type="checkbox"/> |
| Round up the distributed quantity | <input type="checkbox"/> |
| Able to pack items into multiple boxes | <input type="checkbox"/> |
| Store : Able to issue in foreign currency | <input type="checkbox"/> |
| Allow editing selling price on customer invoice lines | <input type="checkbox"/> |
| Purchase order must be authorised | <input type="checkbox"/> |
| Finalise customer invoices automatically | <input type="checkbox"/> |
| Customer invoices must be authorised | <input type="checkbox"/> |
| Authorisation needed only if over budget | <input type="checkbox"/> |
| Confirm customer invoices automatically | <input type="checkbox"/> |
| Supplier invoices must be authorised | <input type="checkbox"/> |
| Confirm Supplier Invoices without asking | <input type="checkbox"/> |
| Goods received lines must be authorised. | <input type="checkbox"/> |
| Locations must be entered for goods received. | <input type="checkbox"/> |
| Able to specify manufacturer when receiving, ordering or quoting for items | <input type="checkbox"/> |
| Show item unit column while issuing | <input type="checkbox"/> |
| Log transaction edit | <input type="checkbox"/> |
| Set pack to one for all visible items in this store | <input type="checkbox"/> |
| Use remote authorisation for response requisitions | <input checked="" type="checkbox"/> |
| Can manually link requisition to supplier invoice | <input type="checkbox"/> |

5. Click the **OK** button to save the changes.

For the store placing a requisitions that must be authorised

1. Choose *Special > Show stores* from the menus.
2. Double click the store to edit.
3. Click on the **Preferences** tab.
4. Check the *Include requisitions from this store in supplier's remote authorisation processes* checkboxe to turn remote authorisation on for that store.



5. Click the **OK** button to save the changes.

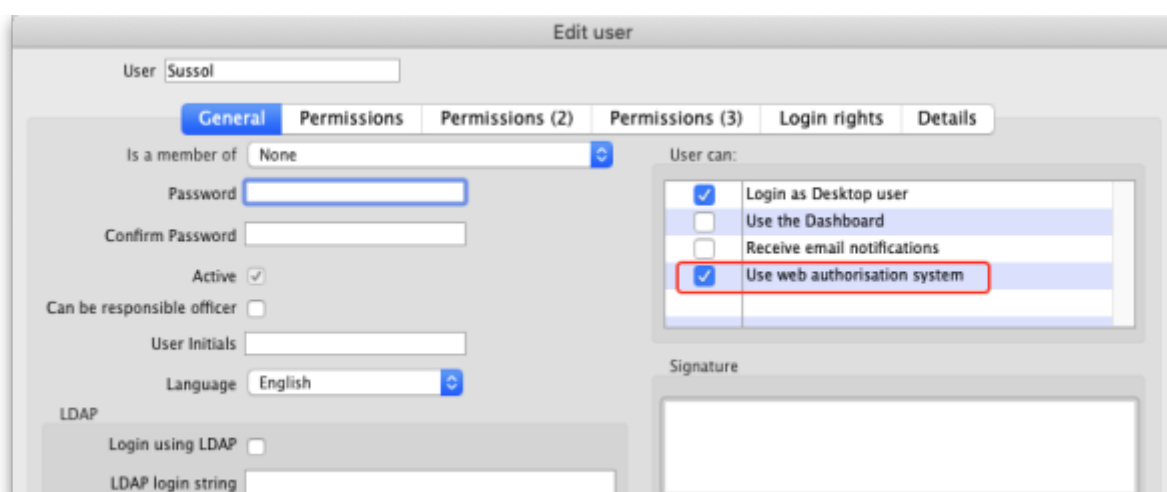
From now on, response requisitions produced from internal orders from this store must be authorised before being confirmed.

Set up authorisers

Set up the user accounts and details

All authorisers must have an account in mSupply. See the [25.15. Managing users](#) page for details about adding and editing users.

To allow a user to login to the remote authorisation web app as an authoriser you must check their *Use web authorisation system* checkbox on the *General* tab of their details window:



You must also enter their email address on the *Details* tab of their details window:

This will enable them to receive emails when a requisition is awaiting their approval.

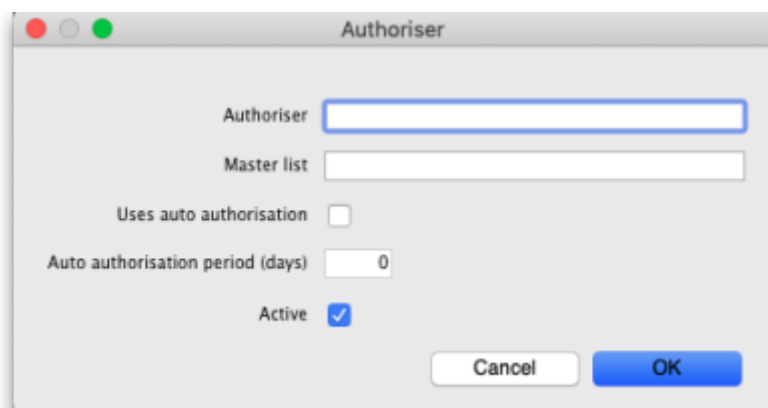
After the user accounts have been setup, you can assign them as authorisers. To do this choose *Special > Show authorisers* from the menus. This window will open:

The window shows a list of the users who are currently setup as authorisers in the system; if none have been set up then the list will be empty.

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authoriser. This does not remove or disable their user account or prevent the user from logging into the authorisation web app, it only removes their ability to act as an authoriser.

New button: Click on the New button to assign a user as an authoriser. This window will open:



- **Authoriser:** Enter the name of the user here. Type the first few characters of their username and press the Tab key on the keyboard to select the user from a list of users with usernames that start with what you have typed.
- **Master list:** Enter the name of the master list containing the items that the user can authorise. The user will only be able to authorise lines on requisitions for items that appear on the list you select here.
- **Uses auto-authorisation:** If this is checked then, after the number of days set in the **Auto-authorisation period (days)** field, any requisition lines that are waiting for authorisation by this user will be automatically authorised.
 - **Auto-authorisation period (days):** The number of days after which any requisition lines waiting for authorisation by this user will be automatically authorised by the system.
- **Active:** This is checked by default. If this is checked then the user's assignment is active and they can act as an authoriser. If it is not checked then the user cannot act as an authoriser. This is useful when an authoriser is to be removed as an authoriser for a period of time and then added back in again e.g. when they go away on holiday.

Click on the **OK** button to save the new assignment or the **Cancel** button to cancel it.

Editing an authoriser assignment: Double-clicking one of the users in the list will allow you to edit the assignment; the 'Add assignment' window shown above will open, populated with the current settings for the user. Edit the settings to be what you wish and click on the **OK** button to save your changes..

Enable emailing of authorisers

When a requisition is created that requires one or more lines to be authorised, the appropriate authorisers are emailed to tell them that a requisition requires their attention in the authorisation web app.

To set up the emailing:

- Set up the email server in the preferences. This is done on the *Email* tab of *File > Preferences*. See the [15.01. General preferences](#) page for details on that.

- Tell mSupply what the URL of the remote authorisation web app is. You do that on the *Server* tab of *File > Preferences*. See the [15.01. General preferences](#) page for details.

The email address to send the emails to is taken from that given in the *Details* tab of the user's details page (see the [Setup the user accounts and details](#) section above).

Using the remote authorisation system

Requesting authorisation

You do **not** need to request the authorisation of a requisition. When the remote authorisation system is turned on as described above, when a requisition that requires authorisation is **confirmed**, an authorisation request is automatically emailed to all active authorisers who are assigned to authorise a master list containing any of the items on the requisition.

The only types of requisition that can be authorised using remote authorisation are response requisitions created automatically in the supplying store in response to an internal order (internal orders are also called request requisitions). See the [6.04. Ordering from one store to another](#) page for details on internal orders.

To action an authorisation request they have received by email, an authoriser logs into the remote authorisation web app.

The authorisation statuses of requisitions

When the remote authorisation system is turned on, the list of customer requisitions, displayed by choosing *Customer > Show requisitions* from the menus, has an extra *Authorisation status* column and some additional filter options:

The screenshot shows a window titled 'Requisition list'. At the top, there are four buttons: 'New customer requisition', 'New customer imprest', 'New customer stock history', and 'Delete'. To the right of these buttons is a 'Show:' dropdown menu. The table below has columns: ID, Name, Date entered, Requisition date, Status, Type, Authorisation status, and Comment. The 'Authorisation status' column contains values like 'authorised', 'none', and 'basic health care'. The 'Show:' dropdown menu is open, showing options: 'All', 'Approved - ready to process', 'Unapproved - do not process', 'Confirmed', 'Finalised', 'Completed', 'Web entries - to be processed', 'Entered today', and 'Suggested'. A red box highlights the 'Authorisation status' column and the dropdown menu.

| ID | Name | Date entered | Requisition date | Status | Type | Authorisation status | Comment |
|------|---|--------------|------------------|--------|----------|----------------------|----------------------------|
| 1543 | Laboratory Store | 28/09/2021 | 28/09/2021 | sg | response | authorised | |
| 1542 | Laboratory Store | 28/09/2021 | 28/09/2021 | sg | response | authorised | |
| 1541 | Laboratory Store | 28/09/2021 | 28/09/2021 | sg | response | authorised | |
| 1540 | Laboratory Store | 28/09/2021 | 28/09/2021 | sg | response | authorised | |
| 1539 | Ahmadu Bello University Teaching Hospital | 28/09/2021 | 28/09/2021 | sg | response | none | from request requisition 1 |
| 1538 | Barau Dikko Teaching Hospital kaduna | 17/09/2021 | 17/09/2021 | sg | response | none | |
| 1537 | Barau Dikko Teaching Hospital kaduna | 17/09/2021 | 17/09/2021 | sg | response | none | |
| 1536 | Barau Dikko Teaching Hospital kaduna | 09/09/2021 | 09/09/2021 | sg | response | none | |
| 1535 | Primary Health Centre, Sakadadi | 03/09/2021 | 03/09/2021 | cn | response | none | |
| 1534 | Primary Health Centre, Kwata | 02/09/2021 | 02/09/2021 | cn | response | none | basic health care |
| 1532 | Rural hospital hunkuyi | 02/09/2021 | 02/09/2021 | cn | response | none | |
| 1531 | Primary Health Centre, Jere | 02/09/2021 | 02/09/2021 | cn | response | none | PHCS |
| 1529 | Primary Health Centre, Ramin Kura | 02/09/2021 | 02/09/2021 | cn | response | none | |
| 1527 | General Hospital Sabon Tasha | 02/09/2021 | 02/09/2021 | cn | response | none | |
| 1526 | Barau Dikko Teaching Hospital kaduna | 02/09/2021 | 02/09/2021 | sg | response | none | |
| 1525 | General Hospital Kawa | 01/09/2021 | 01/09/2021 | cn | response | none | |
| 1522 | Kaduna State Primary...care Development Board | 30/08/2021 | 30/08/2021 | cn | response | none | |
| 1521 | Health Clinic, Lazuru | 27/08/2021 | 27/08/2021 | cn | response | none | |
| 1520 | Primary Health Centre, Garu | 27/08/2021 | 27/08/2021 | cn | response | none | |
| 1519 | Primary Health Centre, Dan Alhaji 1 | 27/08/2021 | 27/08/2021 | cn | response | none | |

If you open a response requisition when the remote authorisation system is turned on, you will see the requisition's authorisation status and two additional columns:

- **Approved quantity:** the quantity that was approved by the authoriser. The authoriser can change the quantity allowed on the requisition so the approved quantity might be different from the requested or calculated quantites.
- **Authoriser comment:** any comment that the authoriser added to the requisition line.

This screenshot shows where you can find them:

The screenshot shows the 'Edit requisition...' window with the 'Authorisation' tab selected. The 'Approved quantity' and 'Authoriser' columns are highlighted with red boxes. The 'Authorisation status' is 'pending'.

| LI | Item code | Item name | Unit | Our stock on hand | Customer current stock on hand | Customer monthly usage | Customer requested | Approved quantity | Already issued | Remaining to supply | Supply this invoice | Comment | Authoriser |
|----|-----------|---|------|-------------------|--------------------------------|------------------------|--------------------|-------------------|----------------|---------------------|---------------------|---------|------------|
| 1 | aci200t | Aciclovir 200mg tab | ea | 0 | 5000 | 0 | 110 | 110 | 0 | 110 | 0 | | |
| 2 | alb400t | Albendazole tab 400mg | ea | 0 | 3800 | 0 | 112 | 112 | 0 | 112 | 0 | | |
| 3 | ali100t | Allopurinol 100mg tab | ea | 0 | 3000 | 0 | 401 | 401 | 0 | 401 | 0 | | |
| 4 | amo125tab | Amoxicillin 125mg Tab | ea | 0 | 78 | 0 | 14 | 14 | 0 | 14 | 0 | | |
| 5 | amo250t | Amoxicillin 250mg tab/cap | ea | 0 | 20000 | 0 | 115 | 115 | 0 | 115 | 0 | | |
| 6 | amo500t | Amoxicillin 500mg tab/cap | ea | 0 | 4000 | 0 | 301 | 301 | 0 | 301 | 0 | | |
| 7 | cli150c | Clindamycin 150mg cap | ea | 0 | 1900 | 0 | 500 | 500 | 0 | 500 | 0 | | |
| 8 | pen250t | penicillin VK (Phen...methyl) 250mg tab | ea | 0 | 20000 | 0 | 118 | 118 | 0 | 118 | 0 | | |
| 9 | hepbv | Hepatitis b vaccine inj | ea | 0 | 24 | 0 | 20 | 20 | 0 | 20 | 0 | | |
| 10 | gri125t | Griseofulvin 125mg tab/cap | ea | 0 | 2000 | 0 | 120 | 120 | 0 | 120 | 0 | | |
| 11 | erye250t | Erythromycin ethyl...ate 250mg tab/cap | ea | 0 | 10000 | 0 | 202 | 202 | 0 | 202 | 0 | | |

There is also an additional Authorisation tab on these requisitions, which shows the authorisation history of the requisition:

The screenshot shows the 'Edit requisition...' window with the 'Authorisation' tab selected. The 'Authorisation history' table is visible.

| Date created | Authoriser | Master list | Status | Status date | Comment |
|--------------|------------|-------------|---------|-------------|---------|
| 06/10/2021 | Sussol | LAB | pending | 06/10/2021 | |
| 06/10/2021 | Jane Smith | LAB | pending | 06/10/2021 | |
| | | | | | |
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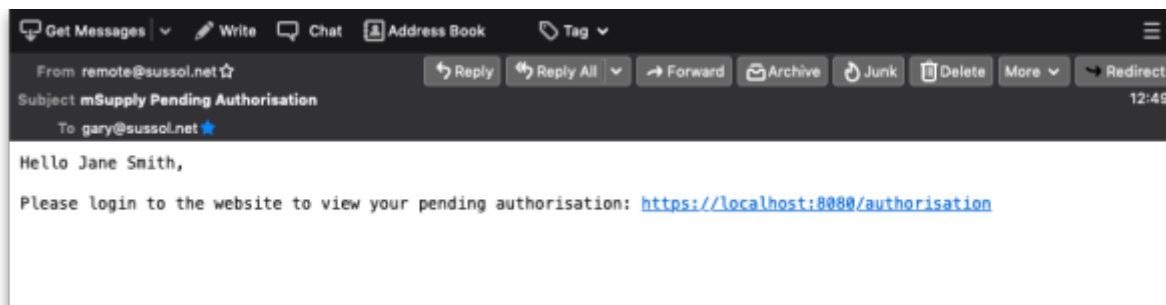
This particular screenshot shows that two authorisers have been requested to authorise lines on this requisition.

The authorisation status can have a few different values:

- **None:** the requisition does not need authorisation and is not subject to the remote authorisation system. This is true for all manually created response requisitions and any requisitions of other types (customer stock history, imprest or request). All requisitions with this status can be edited normally and customer invoices can be created from them as normal.
- **Pending:** the requisition is awaiting authorisation of one or more of its lines. A requisition with this status cannot be edited and you cannot create customer invoices from it.
- **Authorised:** all lines that were waiting for authorisation have been authorised (with or without adjustments). The comments and quantity to supply can be edited and customer invoices can be created from requisitions that are authorised.
- **Denied:** the authoriser has reviewed the requisition and the lines have all been denied. Like the *Pending* status, a requisition with this status cannot be edited and you cannot create customer invoices from it.

Authorising using the web app

When an internal order is finalised and contains items in master lists that are assigned to users for authorisation then an email is sent to all the users who are set as authorisers for those items. The email looks like this:



The link in the email is to the web app they need to log in to action the authorisation request. The URL is in the format **server:port/authorisation**; for example, <https://demo.msupply.org:2048/authorisation>.

When they click on the link (or paste it into their browser), authorisers are shown the login page where they login using their mSupply username and password:

mSupply Authorisation

Admin

.....

LOGIN

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

mSupply Authorisation

Jane Smith

LOGOUT

| Invoice Number | Master List | Store | Receiving Party | Status | Status Date |
|----------------|-------------|-----------------------|------------------|----------------------------------|--------------------|
| 1544 | LAB | Central Medical Store | Laboratory Store | Pending | 06/10/21, 12:49:47 |
| 1543 | LAB | Central Medical Store | Laboratory Store | Authorised by another authoriser | 04/10/21, 08:35:05 |

Note that only requisitions with a status of *Pending* are editable in the web app. Any other status means that the requisition has already been processed, either by you, another authoriser or automatically by the system if the auto-authorise period for an authoriser has passed, and it is no longer editable.

To finish the authorising session and logout, click on the **Logout** button. This will log the user out and return them to the login window.

To view a requisition, click on it in the list. The requisition details window will open:

mSupply Authorisation
Jane Smith
 LOGOUT

← 1
 Invoice Number: 1544
 Status: Pending
 Store: Central Medical Store
 Receiving Party: Laboratory Store
 Master List: LAB
 Status Date: 2021-10-06
 Comment: From request requisition 5

Authorisation Comment 2

| Line Number | Item Code | Item Name | Unit | Supplier Stock On Hand | Customer Stock On Hand | Customer AMC | Customer Requested | Request Comment | Authoriser Quantity | Authoriser Comment |
|-------------|-----------|---------------------------|------|------------------------|------------------------|--------------|--------------------|-----------------------------------|---------------------|--------------------|
| 1 | bdvn21g | BD Vacutainer needles 21g | pack | 10 | 0 | 0 | 15 | Very important, please supply all | 3 15 | 4 |
| 3 | bb250 | Blood bags 250ml | pack | 0 | 0 | 0 | 16 | | 16 | |

5 DENY APPROVE WITH CHANGES 6

1. Click on this arrow to go back to the list of requisitions.
2. Enter any authorisation comment for the whole transaction. When saved, this comment will appear in the *Comment* column of the *Authorisation* tab on the requisition in mSupply.
3. Edit the quantities for each line that you are able to authorise in these cells. Note that not all lines of the requisition are displayed in this window. Only the lines that the user can authorise are shown (i.e. those that are for items that appear in the master list the user can authorise for).
4. Click on this icon to view, add or edit the line authorisation comment. When you click on it, this window will open:

View/Edit Comment

CANCEL SAVE COMMENT

If there is a comment for the line already, it will be populated for you. You can edit the comment (or add one) and click on the **Save comment** button to save your changes. Click on the **Cancel** button to close this small window without saving any changes. Any comment that is saved here will appear in the *Authoriser comment* column on the requisition details window in mSupply.

5. Click on this button to deny approval of all the requisition lines shown. This will deny the whole requisition and will mean that it cannot be processed in mSupply. This and the **Approve with changes** button will be disabled when the changes have been saved.
6. Click on this button to approve all the requisition lines shown. This will save any changes you have made to the approved quantities. This and the **Deny** button will be disabled when the changes have been saved.



If a requisition is open in mSupply, it is locked and changes cannot be saved. If you click on the **Approve with changes** or **Deny** buttons and the buttons do not become disabled then the changes were **NOT** saved. You will need to wait until the requisitions have been closed in mSupply before you can save your changes.

When a requisition has been approved or denied by an authoriser, its details and authorisation status will be updated in mSupply. If all the lines awaiting authorisation have been authorised then the requisitions's status will be updated to *Authorised* and the requisition will be able to be processed as normal.

Previous: [26.14. Authorisation](#) | | Next: [26.16. Misc labels](#)

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