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 authroisation 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* checkbox to turn remote authorisaiton on for that store.

0		Ed	lit store				
ntral Medical Store							
	General Preferences M	Aaster lists	Logo	Visibility	Custom fields	Log	
earch store preferences							
Stor	e preference	Status					
Sort available batches by VVM Stat	us rather than Expiry						
Patients created in other stores no	t visible in this store						
Names created in other stores not	visible in this store						
Allow users to enter total quantitie	s to distribute						
Round up the distributed quantity							
Able to pack items into multiple be	Dixes						
Store : Able to issue in foreign cun	rency						
Allow editing selling price on custo	omer invoice lines			Custom Data			
Purchase order must be authorised	i			Monthly consu	mption look back p	eriod	0
Finalise customer involces automa	tically			Months lead tir	me		0
Customer invoices must be author	ised					_	
Authorisation needed only if over I	budget						
Confirm customer invoices automa	tically						
Supplier invoices must be authoris	ed			When Realizin	g a Goods Receipt		
Confirm Supplier Invoices without	asking			WHEN INALGED	g a doous neceipt		
Goods received lines must be auth	orised.			Don't rece	eive goods into stoo	k until Sup	plier Invoice is taken off hold
Locations must be entered for goo	ds received.			O Persion o	ands into stack and	I lance Four	oplier Invoice confirmed
Able to specify manufacturer when	receiving, ordering or quoting for ite	ms 🗌					
Show item unit column while issuit	en e			Receive 9	oods into stock, an	d finalise S	upplier Invoice immediately
Log transaction edit							
Set pack to one for all visible items	in this store		_	For stock tran	sfers, the Supplier I	nvoice in t	he receiving store should be:
Use remote authorisation for respo	onse requisitions	2				_	
Can manually link requisition to su	pplier invoice			Finalised		0	On hold
				OK & Previr	OUS OK /	Next	Cancel

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

For the store placing a requisition 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 suppliers*' *remote authorisation processes* checkbox to turn remote authorisation on for that store.

General Preferences Master lists	Logo Visibility	Custom fields Users Names Log Notification preferences Threshold for overstock 6 months
Store preference	Status	
Sort available batches by VVM Status rather than Expiry		Threshold for understock 3 months
Patients created in other stores not visible in this store		Expiring items period 3 months
Names created in other stores not visible in this store		
Now users to enter total quantities to distribute	- O II	Custom Data
lound up the distributed quantity		Monthly consumption look back period 0
Able to pack items into multiple boxes		Months lead time 0
Store: Able to issue in foreign currency	Ō	
Allow editing selling price on customer invoice lines	Ö	Suggested packing in boxes
Purchase order must be authorised		Prefix for generated boxes
Finalise customer invoices automatically		Percentage space to leave empty
Customer invoices must be authorised		
Authorisation needed only if over budget	Ō	
Confirm customer invoices automatically		
Supplier invoices must be authorised		When finalising a Goods Receipt
Confirm Supplier Invoices without asking	Ō	O Don't receive goods into stock until Supplier Invoice is taken off hold
Goods received lines must be authorised.		
locations must be entered for goods received.	0	 Receive goods into stock, and leave Supplier Invoice confirmed
Able to specify manufacturer when receiving, ordering or quoting for items		 Reaction model into stands and finalling from the tension immediately.
Show item unit column while issuing		 Receive goods into stock, and finalise Supplier Invoice immediately
Log transaction edit		
Set pack to one for all visible items in this store		For stock transfers, the Supplier Invoice in the receiving store should be:
Use remote authorisation for response requisitions		
include requisitions from this store in suppliers' remote authorisation processes		 Finalised On hold

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:

		Edit	tuser			
User Sussol						
Gene	eral Permissions	Permissions (2)	Permissions (3)	Login rights	Details	
Is a member of	None		User can:			
Password				Login as Desktop use	er	
Confirm Password				Use the Dashboard		
Active	A			Receive email notifica Use web authorisatio		
Can be responsible officer				ose neo autorisatio	in system	
User Initials						
Language	English	0	Signature			
LDAP	(mgmm	-				
Login using LDAP	· 🗆					
LDAP login string	1					

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

	General	Permissions	Permissions (2)	Permissions (3)	Login rights	Details
Full name						
First name			Last name		Date of birth	00/00/00
Dates						
Date created	00/00/00		Date left 00/00/00			
Contact details						
Address 1			Phone 1		Email here@the	re.com
Address 2			Phone 2		Job title	

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

Assign the users as authorisers

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:

New Delete	Authorise	er list	Type here to se	arch
Name	Master list	Uses auto authorisation	Auto authorisation period (days)	Active
lane Smith	LAB	Image: A start of the start	10	1
Sussol	LAB	 Image: A start of the start of	5	1
ouble-click an item to e	dit details			OK

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.

Delete button: Select an authoriser in the list and click the **Delete** button to remove the user as an 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
Authoriser	
Master list	
Uses auto authorisation	
Auto authorisation period (days)	0
Active	
	Cancel OK

- **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 Autoauthorisation 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:

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- 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 authoristion 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:

		v customer ck history	Delete			Show:	All Approved - ready to process Unapproved - do not process Confirmed	
ID	Name	Date entered	Requisition date	Status	Туре	Authorit	Finalised Completed	ment
1543	Laboratory Store	28/09/2021	28/09/2021	59	response	authorised	Web entries - to be processed	
1542	Laboratory Store	28/09/2021	28/09/2021	59	response	authorised	Entered today	
1541	Laboratory Store	28/09/2021	28/09/2021	sg	response	authorised	Suggested	
1540	Laboratory Store	28/09/2021	28/09/2021	sg	response	authorised	from request requisition 1	
1539	Ahmadu Bello University Teaching Hospital	28/09/2021	28/09/2021	59	response	none		
1538	Barau Dikko Teaching Hospital kaduna	17/09/2021	17/09/2021	59	response			
1537	Barau Dikko Teaching Hospital kaduna	17/09/2021	17/09/2021	sg	response			
1536	Barau Dikko Teaching Hospital kaduna	09/09/2021	09/09/2021	sg	response			
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	SHCS	
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			
1525	General Hospital Kawo	01/09/2021	01/09/2021	cn	response	none		
1522	Kaduna State Primarycare Development Board	30/08/2021	30/08/2021	cn	response	none		
1521	Health Clinic, Lazuru	27/08/2021	27/08/2021	Cfi Cfi	response			
1520	Primary Health Centre, Garu	27/08/2021	27/08/2021	cn	response			
1519	Primary Health Centre, Dan Alhaji 1	27/08/2021	27/08/2021	cn	response			

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:

	uisition date	6/07/21 Order Received		items 🔝	Max N Threshold N by Rem nat	ne or code	Sa	ipply quantit		ate customer	invoice	Print Aut	Entry date : Entered by :	user 1 (pass= Hogwarts Disp
u	item code	item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Authorisat Approved quantity	Already issued	Remaining to supply	Supply this invoice		Comment	Authorise
1	aci200t	Aciclovir 200mg tab	ea	0	5000	0	11	110	0	110	(0		
2 :	alb400t	Albendazole tab 400mg	ea	0	3800	0	11	112	0	112	(0		
3 :	all100t	Allopurinol 100mg tab	ea	0	3000	0	40	401	0	401	(0		
4	amo125tab	Amexicillin 125mg Tab	62	0	78	0	1	14	0	14	(2		
5	amo250t	Amexicillin 250mg tab/cap	ea	0	20000	0	11	115	0	115	()		
6	amo500t	Amexicillin 500mg tab/cap	62	0	4000	0	30	301	0	301	(0		
7	di150c	Clindamycin 150mg cap	ea	0	1900	0	50	500	0	500	(0		
8 1	pen250t	penicillin VK (Phenmethyl) 250mg tab	ea	0	20000	0	11	118	0	118	(0		
91	hepbv	Hepatitis b vaccine inj	ea	0	24	0	2	20	0	20	(0		
10	gri125t	Griseofulvin 125mg tab/cap	62	0	2000	0	12	120	0	120	(0		
11	erye250t	Erythromycin ethylate 250mg tab/cap	ea	0	10000	0	20	202	0	202	(

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

• •	•			Edit requisition				
Re	quisition d	Laboratory Store ate 06/10/2021	LAD Order Received 06/10/2021	Their ref From request requis Commerni From request requis Max MOS 3.0 Threshold MOS 0.0		Black	Status : Type : Entry date : Entered by :	response 06/10/2021 Sussol Central Medical !
				Data entry Invoices created Log	Authorisation	ALCI	onsation status :	pending
06	te created 6/10/2021 6/10/2021	Authoriser Sussol Jane Smith	Master list	Status pending pending	Status date 06/10/2021 06/10/2021	Cottomer	1	
						Cancel	X & Next	ОК

This particular screenshot shows that two authorisers have been requested to authorise lines on this requisition.

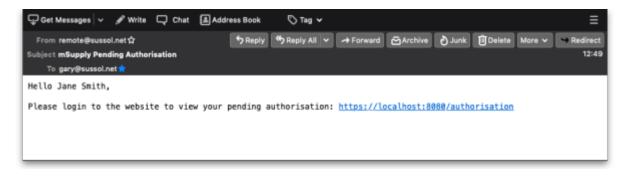
The authorisation status can have a few different values:

- 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:

12:30



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 Authoris	ation
Admin	I 9+
••••	•••1 9•
LOGIN	

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

mSupply Authoris	ation				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 staus 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:

nSupply /	Authorisat	ion							Jar	ne Smith	LOGOUT
(-)	Invoice	Number:					Authorisatio	on Comment (2)		
		Status:	Pending Central Medical Store								
	Beceivi		Laboratory Store								
		ster List:									
			2021-10-06								
	C	omment:	From request requisiti	on 5							
Line Number	ltem Code	Item Na	me	Unit	Supplier Stock On Hand	Customer Stock On Hand	Customer AMC	Customer Requested	Request Comment	Authoriser Quantity	Authoris Comme
1	bdvn21g	BD Vacu	utainer needles 21g	pack	10	0	0	15	Very important, please supply all	3 15	(4) ₽
3	bb250	Blood b	ags 250ml	pack	0	0	0	16		16	Đ
				(5 DENY	APPROVE WITH CH	ANGES 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.
- 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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