

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, 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* checkbox to turn remote authorisation on for that store.

The screenshot shows the 'Edit store' window for 'Central Medical Store'. The 'Preferences' tab is selected. A table lists various store preferences, with the 'Use remote authorisation for response requisitions' checkbox 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, 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 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.

The 'Edit store' window has tabs for General, Preferences, Master lists, Logo, Visibility, Custom fields, Users, Names, and Log. The 'Preferences' tab is active. On the left, a table lists store preferences with checkboxes for their status. The last item, 'Include requisitions from this store in suppliers' remote authorisation processes', is highlighted. On the right, there are sections for Notification preferences, Custom Data, Suggested packing in boxes, and options for finalising a Goods Receipt.

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 checked="" type="checkbox"/>
Names created in other stores not visible in this store	<input checked="" 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 checked="" 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 checked="" type="checkbox"/>
Finalise customer invoices automatically	<input type="checkbox"/>
Customer invoices must be authorised	<input checked="" type="checkbox"/>
Authorisation needed only if over budget	<input type="checkbox"/>
Confirm customer invoices automatically	<input type="checkbox"/>
Supplier invoices must be authorised	<input checked="" 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 type="checkbox"/>
Include requisitions from this store in suppliers' remote authorisation processes	<input checked="" type="checkbox"/>

Notification preferences:
Threshold for overstock: 6 months
Threshold for understock: 3 months
Expiring items period: 3 months

Custom Data:
Monthly consumption look back period: 0
Months lead time: 0

Suggested packing in boxes:
Prefix for generated boxes:
Percentage space to leave empty: 0

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

For stock transfers, the Supplier Invoice in the receiving store should be:
☐ Finalised
☒ On hold

Buttons: OK & Previous, OK & Next, Cancel, OK

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:

The 'Edit user' window has tabs for General, Permissions, Permissions (2), Permissions (3), Login rights, and Details. The 'General' tab is active. It shows fields for user name, password, confirm password, active status, responsible officer, initials, language, and LDAP settings. On the right, under 'User can:', there are checkboxes for various permissions. The 'Use web authorisation system' checkbox is highlighted with a red box.

User: Sussol

Is a member of: None

Password:
Confirm Password:

Active: ☒
Can be responsible officer: ☐
User Initials:
Language: English

LDAP:
Login using LDAP: ☐
LDAP login string:

User can:
☒ Login as Desktop user
☐ Use the Dashboard
☐ Receive email notifications
☒ Use web authorisation system

Signature:

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

Edit user

User

General

Permissions

Permissions (2)

Permissions (3)

Login rights

Details

Full name

First name

Last name

Date of birth

Dates

Date created

Date left

Contact details

Address 1

Phone 1

Email

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

Type here to search

Name	Master list	Uses auto authorisation	Auto authorisation period (days)	Active
Jane Smith	LAB	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>
Sussol	LAB	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>

Double-click an item to edit details

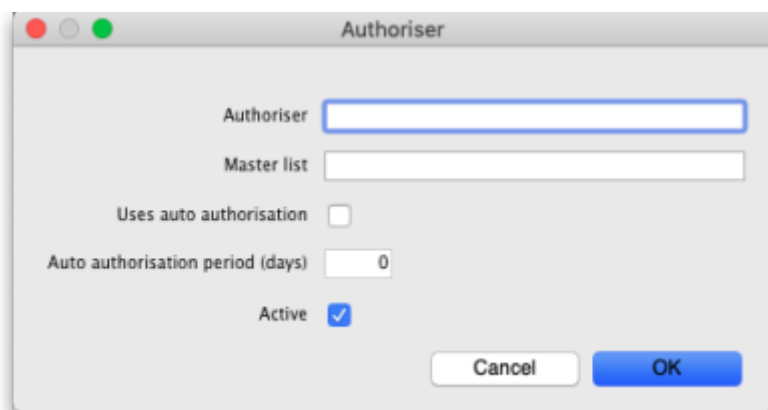
OK

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:** 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

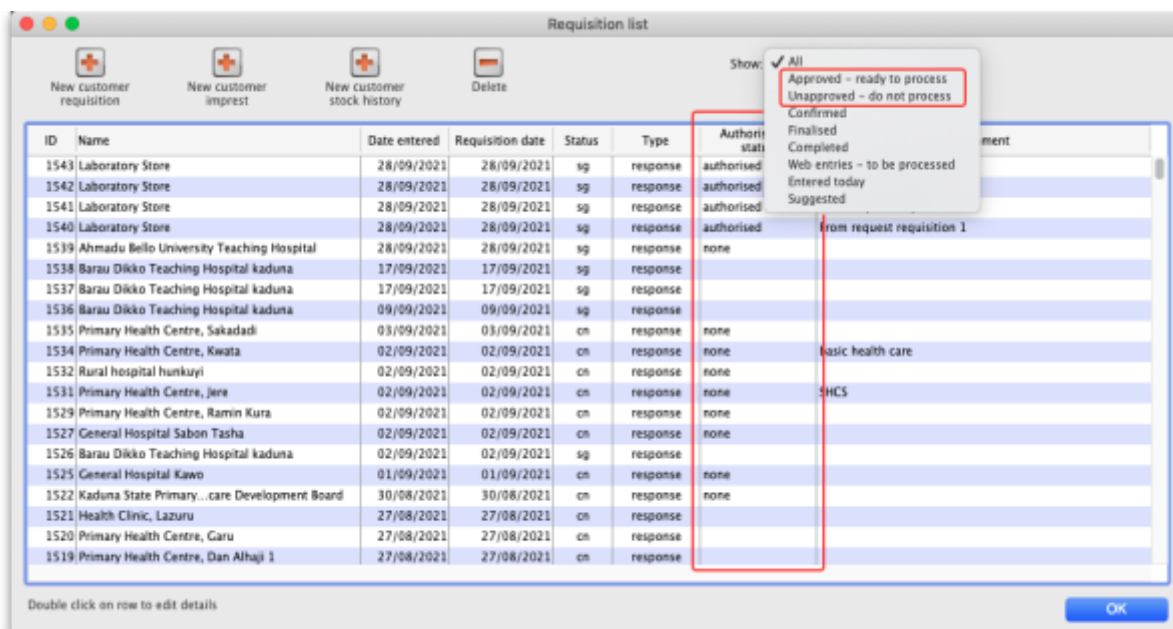
You do **not** need to request the authorisation of a requisition. When the remote authorisation system is turned on as described above, when a requisition that requires authorisation is **confirmed**, an authorisation request is automatically emailed to all active authorisers who are assigned to authorise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

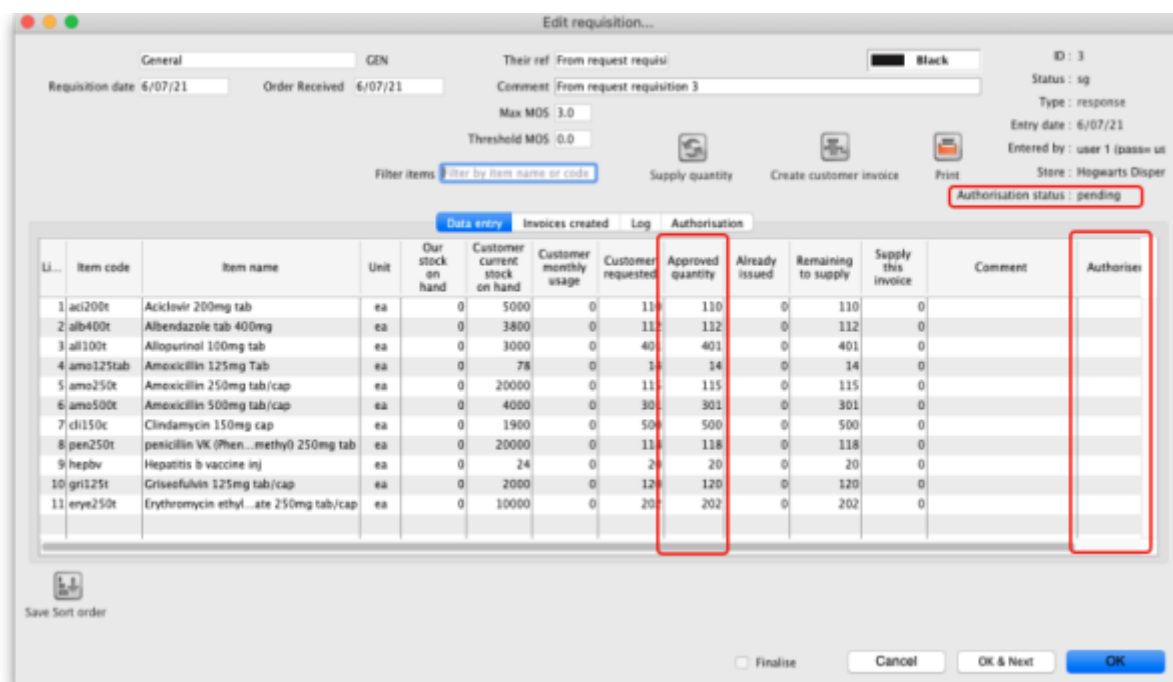
When the remote authorisation system is turned on, the list of customer requisitions, displayed by choosing *Customer > Show requisitions* from the menus, has an extra *Authorisation status* column and some additional filter options:



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 quantities.
- **Authoriser comment:** any comment that the authoriser added to the requisition line.

This screenshot shows where you can find them:



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

Lab requisition...

Laboratory Store: LAB Their ref: From request requisition 5 ID: 1544

Requisition date: 06/10/2021 Order Received: 06/10/2021 Comment: From request requisition 5 Status: 19

Max MOS: 3.0 Threshold MOS: 0.0 Type: response

Entry date: 06/10/2021

Entered by: Sussol

Store: Central Medical

Authorisation status: pending

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	

Buttons: Cancel OK & Next OK

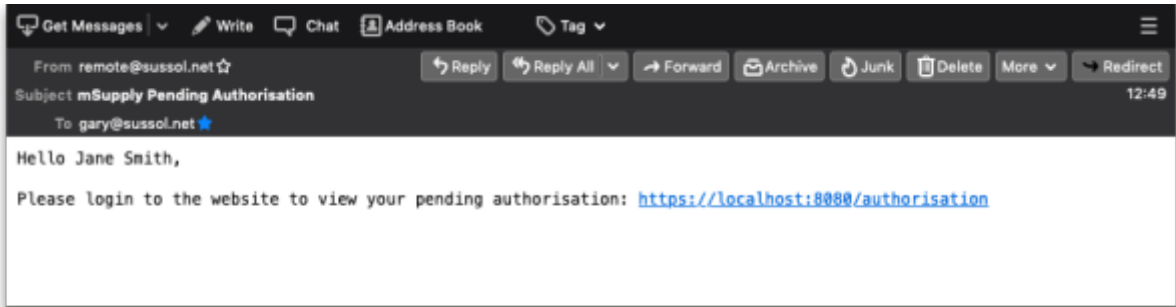
This particular screenshot shows that two authorisers have been requested to authorise lines on this requisition.

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.

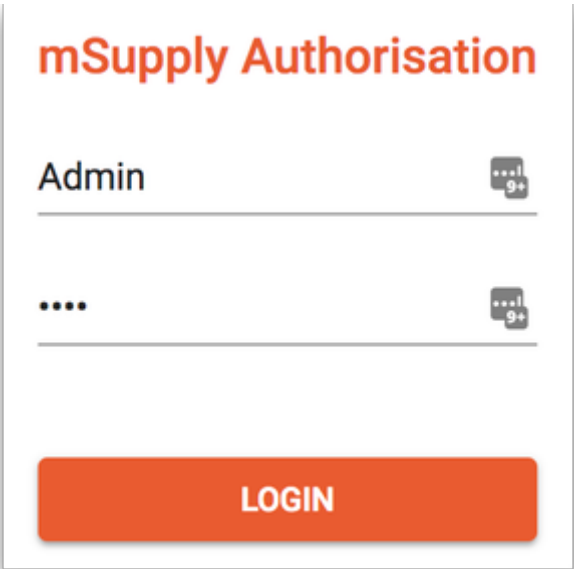
Authorising using the web app

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:



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	bdivn21g	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.

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