26.15. Authorisation

Sometimes it is important that certain critical processes are not carried out until they have been **authorised**. mSupply allows authorisation to be set according to local needs for:

- Purchase orders
- Goods receipt
- Supplier invoices
- Customer invoices

Authorisation can either occur within mSupply or externally using the mSupply web authorisation system (see **Remote authorisation**).

Invoices can be edited after authorisation but **goods receipt lines cannot be unauthorised** to fix mistakes! Any authorised errors can only be fixed using stock adjustments.

When invoices have to be authorised, they **cannot be confirmed until they are authorised**. Until then:

- Unauthorised invoices are held at suggested (sg) status
- The official invoice cannot be printed
- Goods are not removed from or received into stock

Configuring mSupply for authorisation

Turning on authorisation

Authorisation must be set up for **each store independently**. For each store, you can decide which transaction types require authorisation.

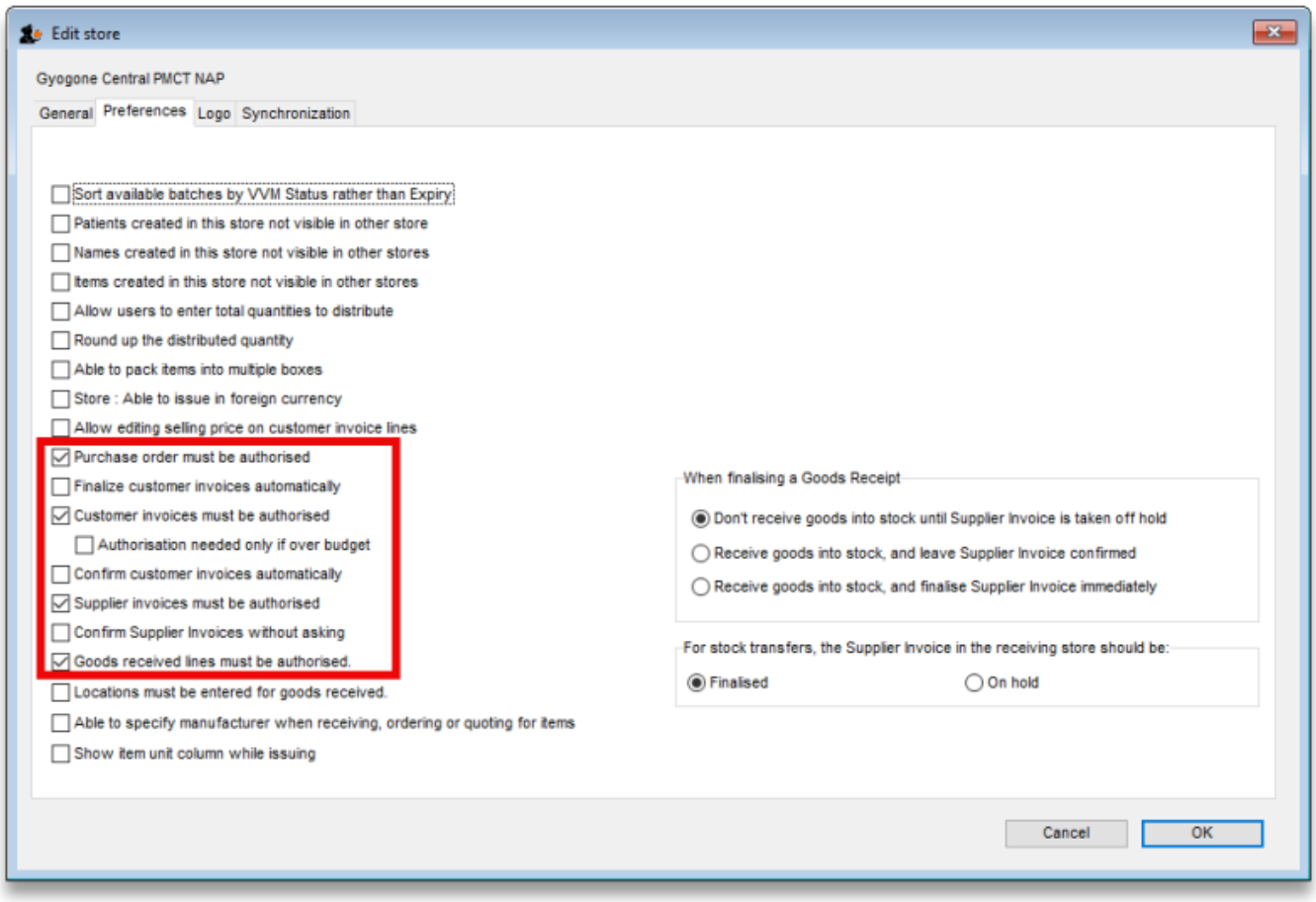
1. Click the **Special** tab, then click **Stores**.

2. Double click the store to edit.

3. Click the **Preferences** tab.

4. Check the boxes to set compulsory authorisation for specific transaction types at that store.

5. Click **OK**.



From now on, the transaction types you set the preferences for must be authorised before being confirmed.

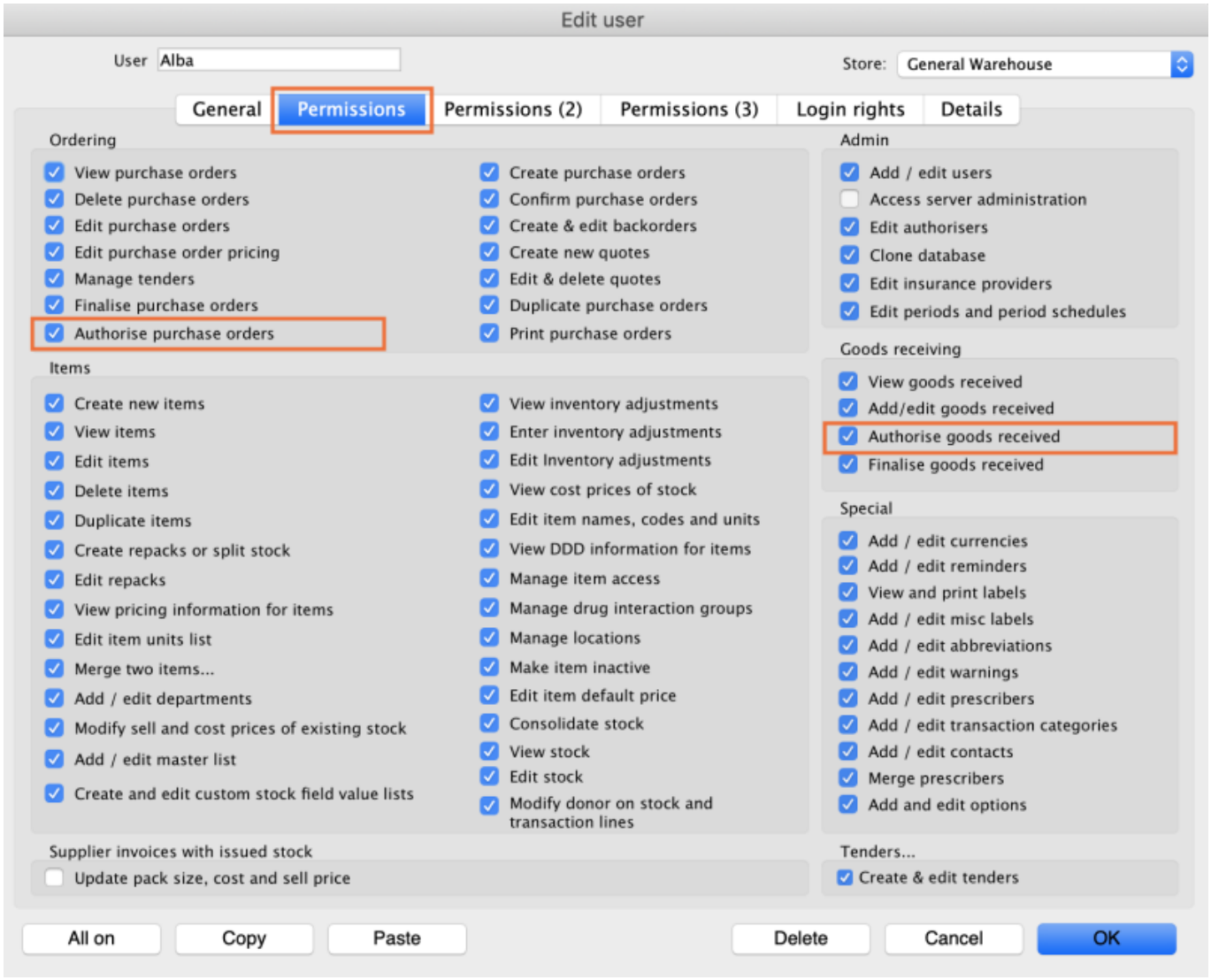
Setting up authorisers

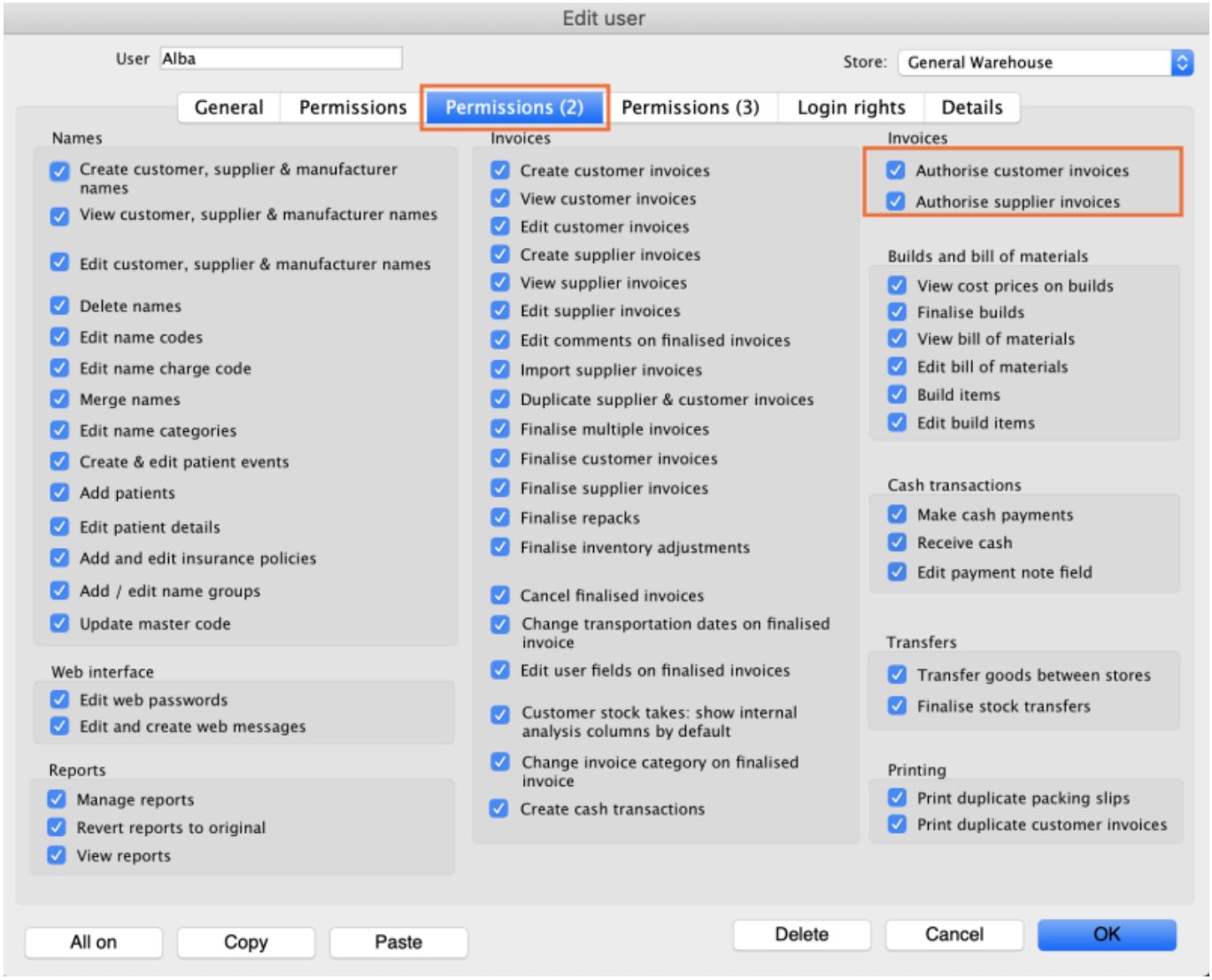
To use the authorisation module, certain users must be designated as **Authorisers** for each store and transaction type requiring authorisation.

Give the user permission to be an authoriser:

1. Click the **Admin** tab, then click **Edit Users**. Double click on the user to edit.

2. Go to the **Permissions** tab and the **Permissions (2)** tab and check the boxes that give the user permission to authorise specific transaction types.


Edit user
User Alba
Store: General Warehouse
General
Permissions
Permissions (2)
Permissions (3)
Login rights
Details
Ordering
View purchase orders
Delete purchase orders
Edit purchase orders
Edit purchase order pricing
Manage tenders
Finalise purchase orders
Authorise purchase orders
Create purchase orders
Confirm purchase orders
Create & edit backorders
Create new quotes
Edit & delete quotes
Duplicate purchase orders
Print purchase orders
Items
Create new items
View items
Edit items
Delete items
Duplicate items
Create repacks or split stock
Edit repacks
View pricing information for items
Edit item units list
Merge two items...
Add / edit departments
Modify sell and cost prices of existing stock
Add / edit master list
Create and edit custom stock field value lists
View inventory adjustments
Enter inventory adjustments
Edit Inventory adjustments
View cost prices of stock
Edit item names, codes and units
View DDD information for items
Manage item access
Manage drug interaction groups
Manage locations
Make item inactive
Edit item default price
Consolidate stock
View stock
Edit stock
Modify donor on stock and transaction lines
Supplier invoices with issued stock
Update pack size, cost and sell price
Admin
Add / edit users
Access server administration
Edit authorisers
Clone database
Edit insurance providers
Edit periods and period schedules
Goods receiving
View goods received
Add/edit goods received
Authorise goods received
Finalise goods received
Special
Add / edit currencies
Add / edit reminders
View and print labels
Add / edit misc labels
Add / edit abbreviations
Add / edit warnings
Add / edit prescribers
Add / edit transaction categories
Add / edit contacts
Merge prescribers
Add and edit options
Tenders...
Create & edit tenders
All on
Copy
Paste
Delete
Cancel
OK

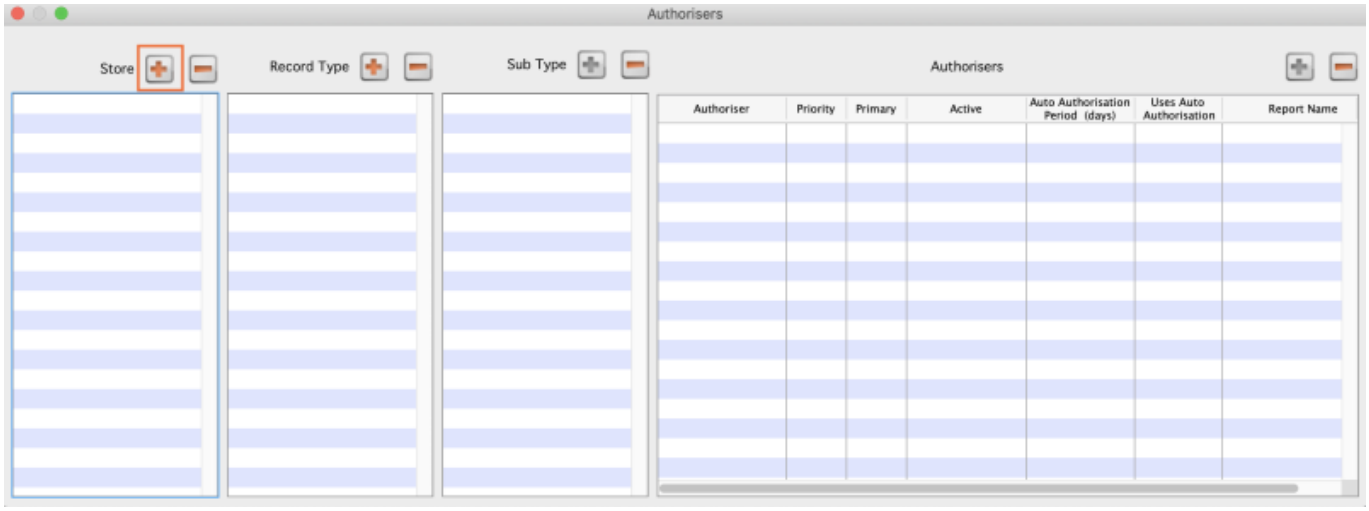


3. Click **OK** until you return to the navigator home page.

Allocate authorisers to tasks: (You only need to carry out these steps if you are using remote authorisation - see the 26.15. Remote authorisation section for details).

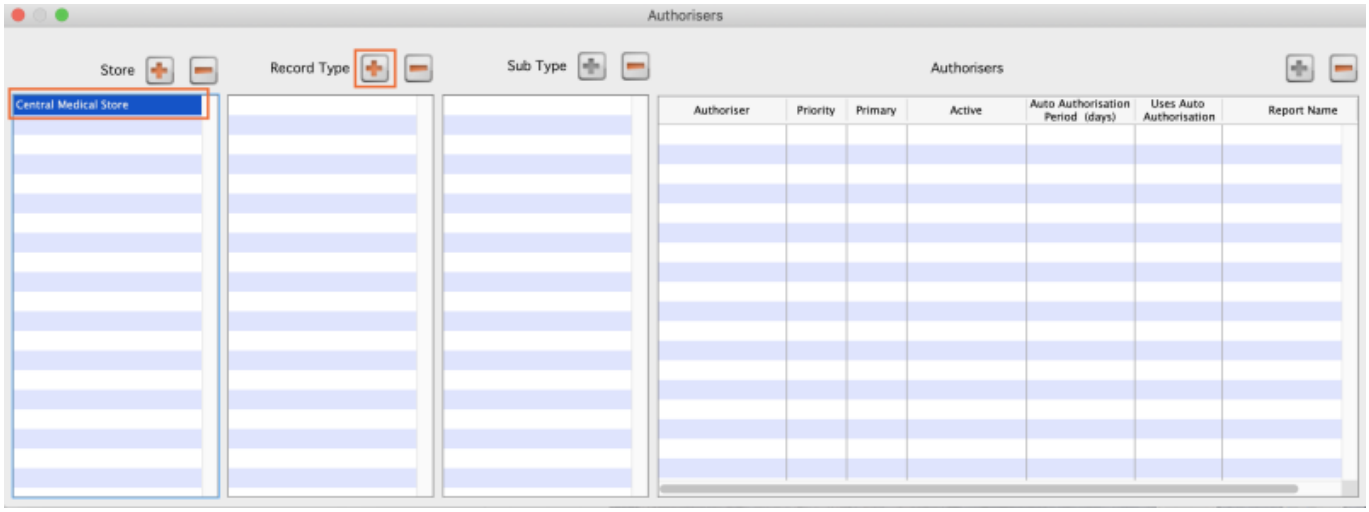
4. Click on **Special > Show Authorisers**.

5. Click the **Plus** button in the **Store** column.



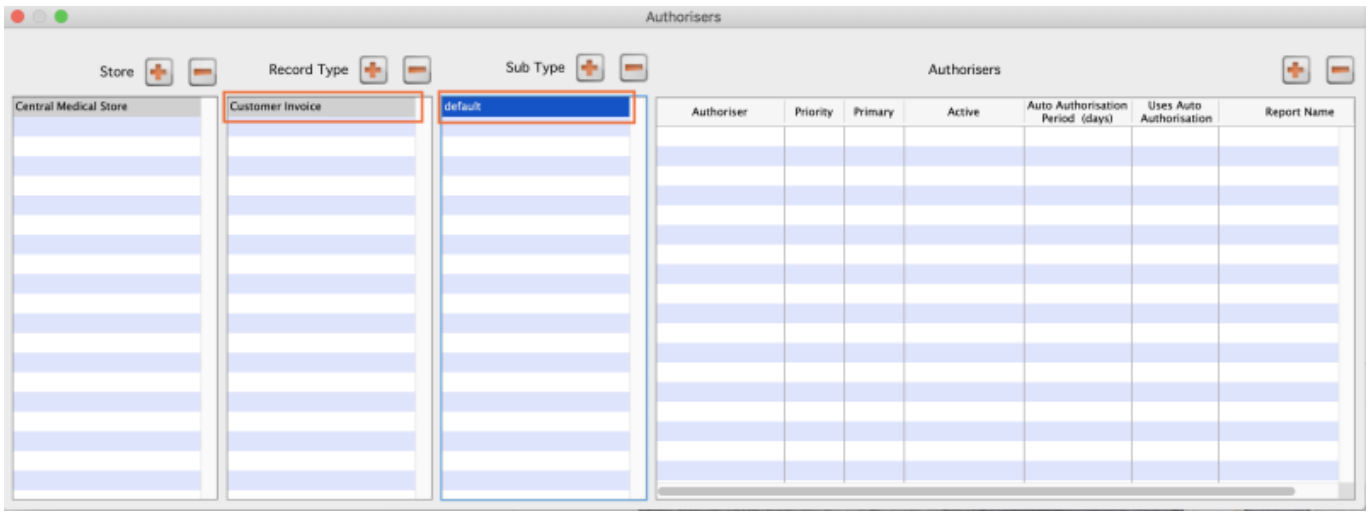
6. Choose the store to allocate authorisers to and click **OK**.

7. Select the store from the list, then click the **Plus** button in the **Record Type** column.

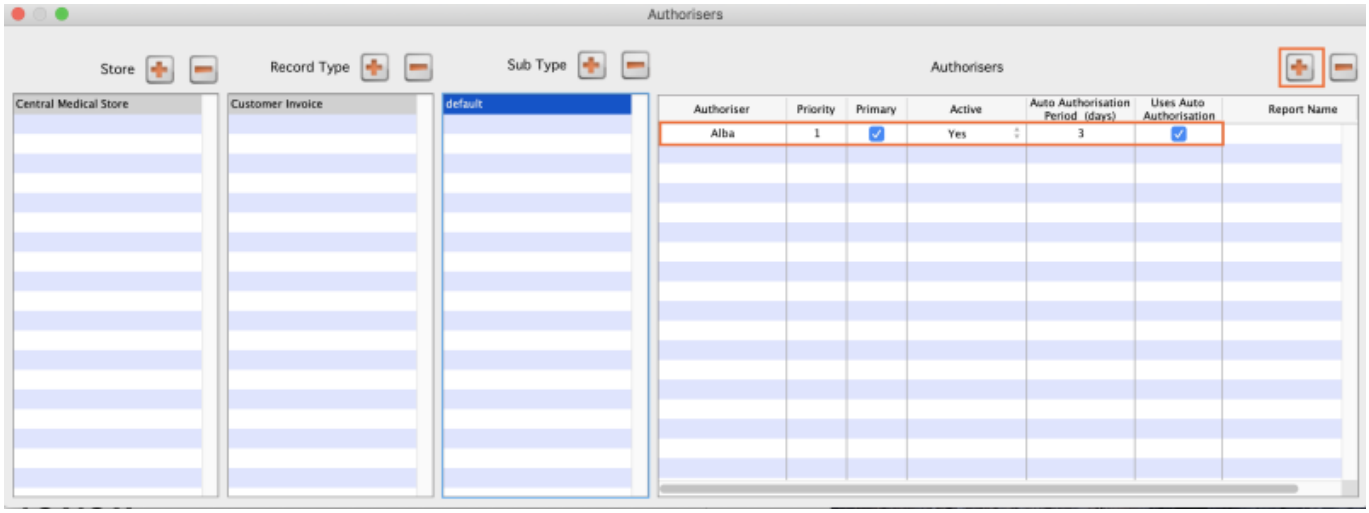


8. Choose the type of transaction to allocate authorisers. Select from Customer Invoices, Supplier Invoices, Request Requisitions or Response Requisitions and click **OK**.

9. Select the record type from the list, then click **Default** to allow authorisation for all sub types. Alternatively, click the **Plus** button in the **Sub Type** column to create further specifications (e.g. if certain users can authorise customer invoices for some facilities only).



10. In the **Authorisers** section, click the **Plus** button to add authorisers for that specific transaction type (and sub type) in that specific store. You will only be able to allocate users that have permission to be authorisers (steps 1 - 3).

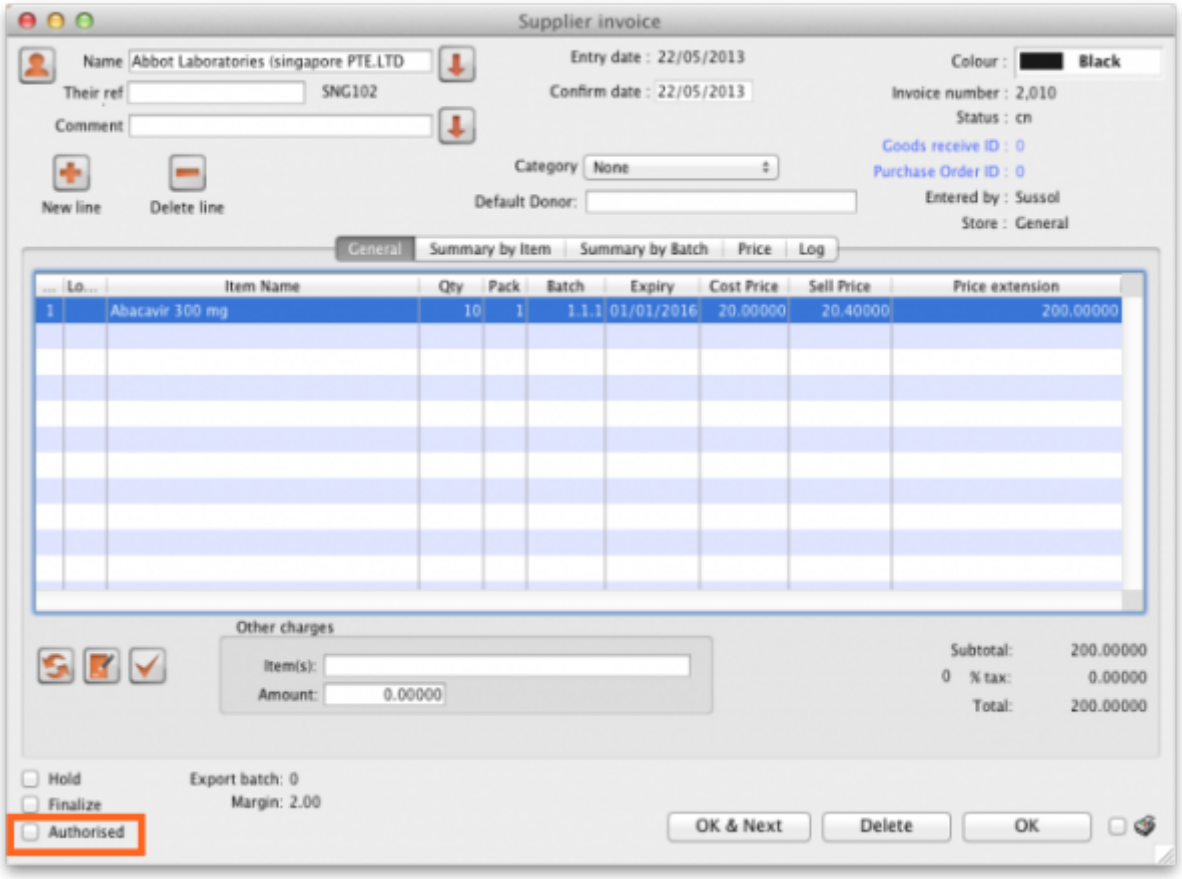


Supplier invoice authorisation

When the **Supplier invoices must be authorised** store preference is set, new supplier invoices will contain an **Authorised** checkbox.

An authoriser must check the **Authorised** box before the supplier invoice can be confirmed.

- The **Authorised** box will be disabled for users without permission to authorise.
- If the **OK** button is clicked while the **Authorised** box is *unchecked*, a warning message will appear stating that unauthorised invoices cannot be confirmed and nothing will happen.



If you have permission to authorise a supplier invoice, you can also **unauthorise** it.

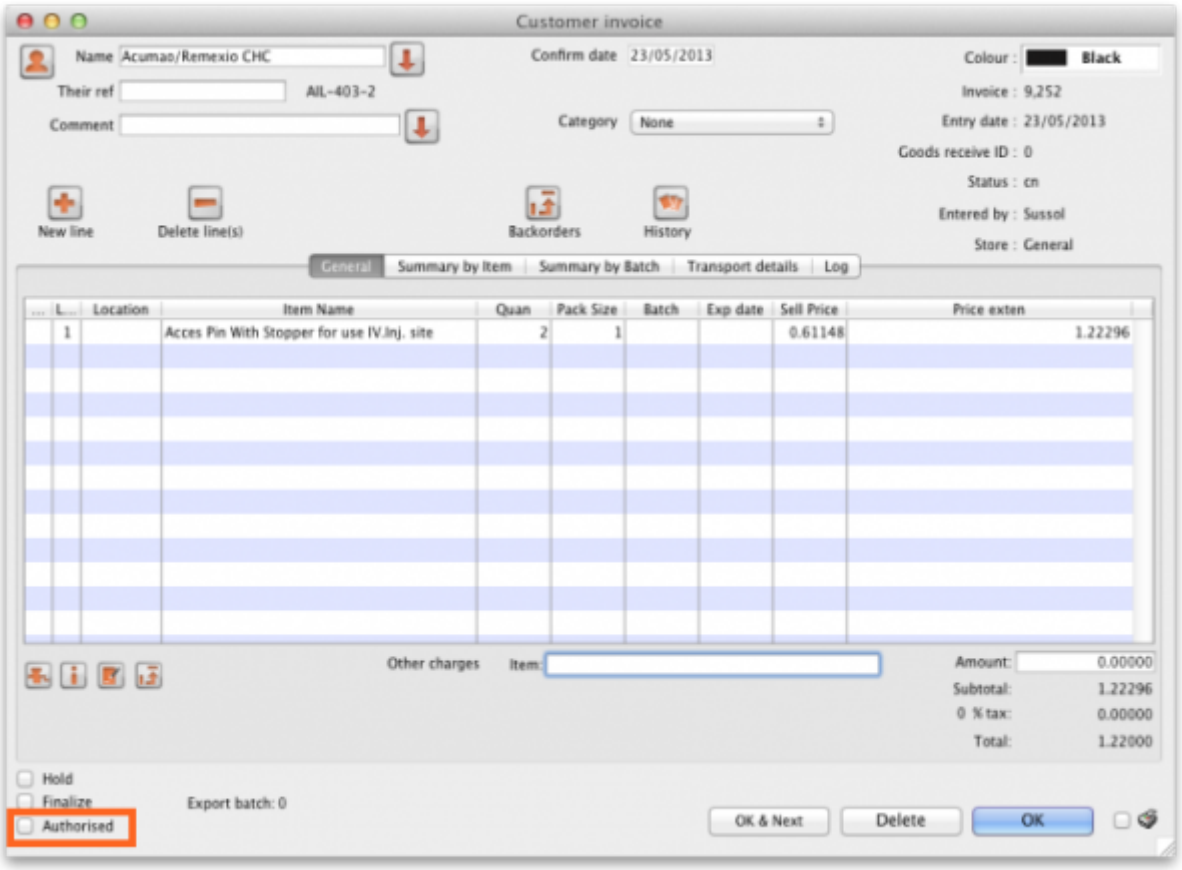
- If the invoice has a **new (nw)** status then it has not been entered into stock. If you unauthorise it, users can edit it and and you will still control the process of authorisation before the goods are entered into stock.
- However, if the invoice is **confirmed (cn)**, the goods have already been entered into stock. If you unauthorise it, any changes users make will affect stock levels **immediately**, even though the invoice is not authorised.
- Therefore, only unauthorise a confirmed invoice to make immediate changes yourself, then immediately reauthorise it.
- Alternatively, if goods have not been issued, you can delete the lines off the invoice (and optionally delete the whole invoice) and require users to enter a new invoice to receive the stock. The normal authorisation process will then apply to the new invoice.

Customer invoice authorisation

When the **Customer invoices must be authorised** is set, new customer invoices will contain an **Authorised** checkbox.

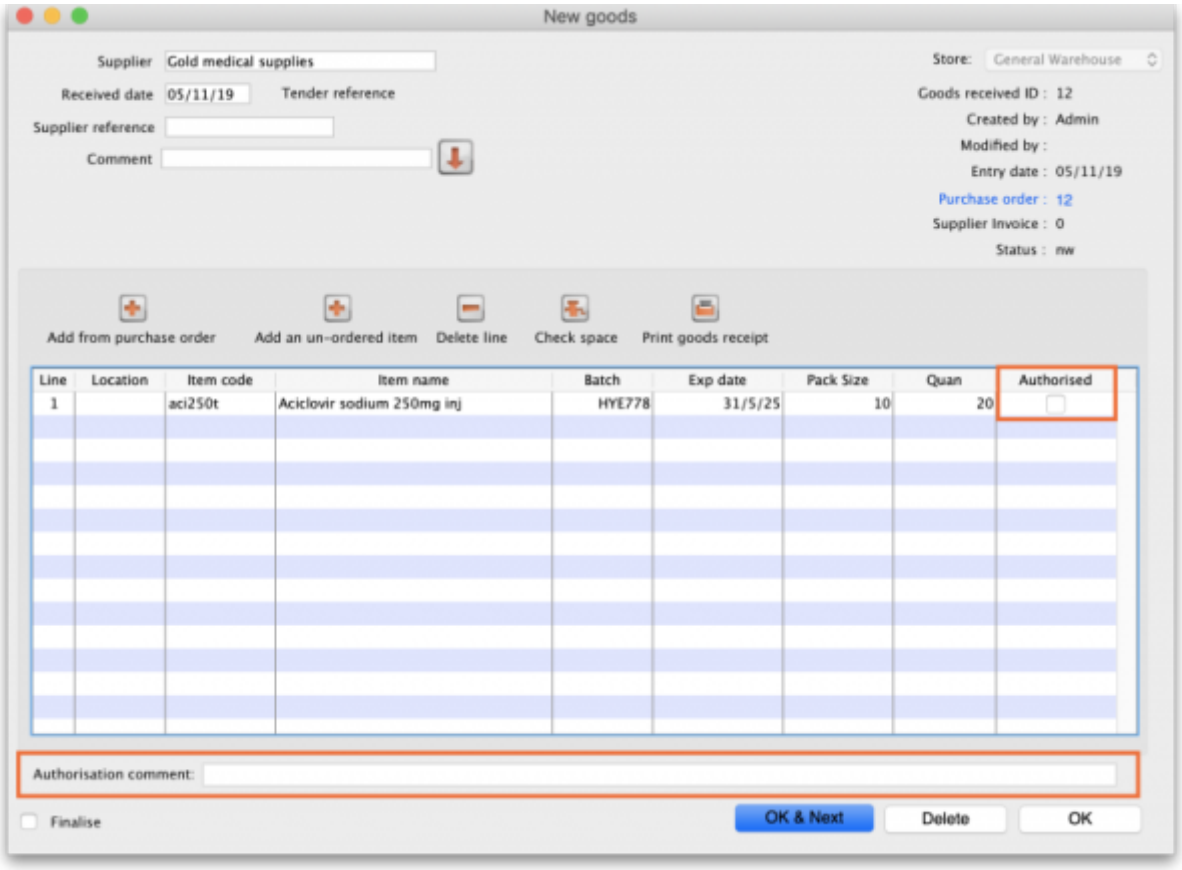
An authoriser must check the **Authorised** box before the customer invoice can be confirmed.

- The **Authorised** box will be disabled for users without permission to authorise.
- If the **OK** button is clicked while the **Authorised** box is *unchecked*, a warning message will appear stating that unauthorised invoices cannot be confirmed and nothing will happen.



Goods receipt authorisation

When the *Goods received lines must be authorised* store preference is set, a new Authorised column will be displayed and will contain a checkbox for each goods receipt line. It looks like this:



Users who have the *Authorise goods received* permission turned on can check the *Authorised* checkbox for each line that is authorised. When the goods received note is finalised, only lines that are authorised will be added to the supplier invoice to be received into stock. The unauthorised lines will remain on the finalised goods received note as a permanent record of what was actually received but not authorised.

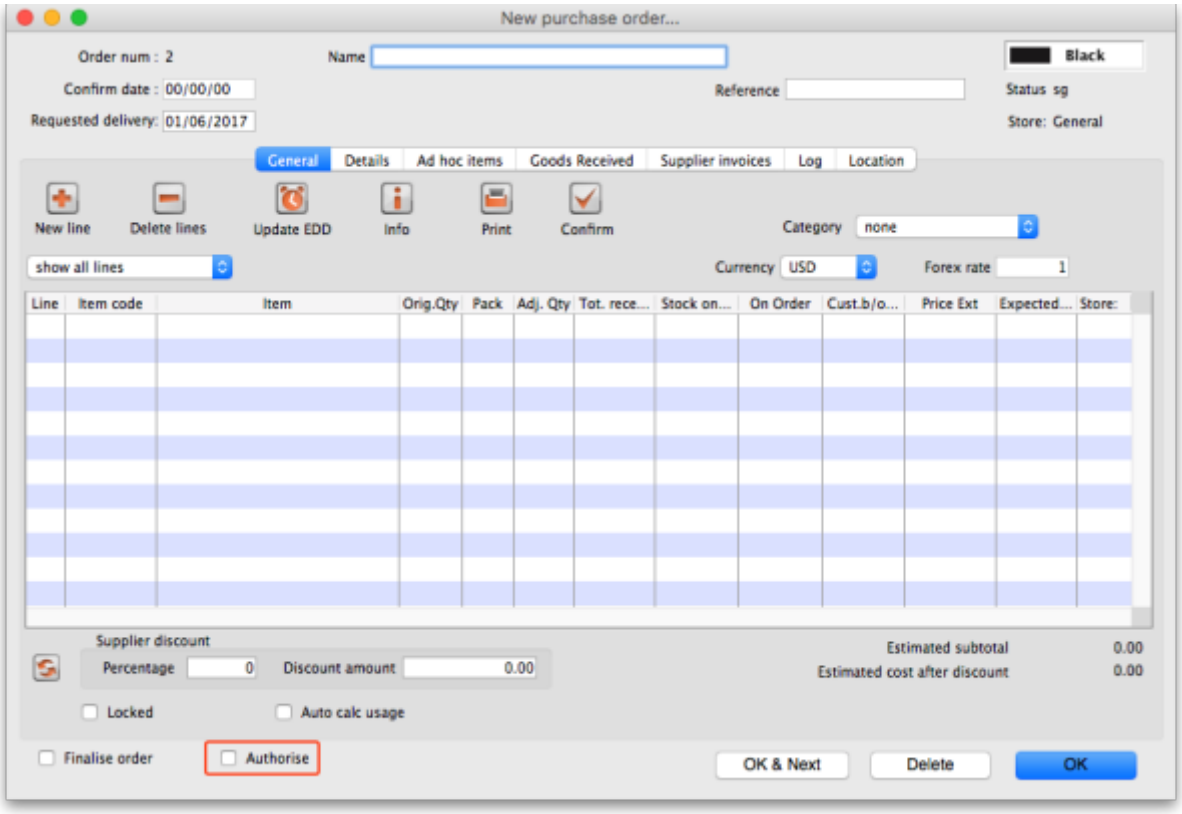
Any unauthorised goods received note lines do not count towards stock received against purchase orders or on goods received notes so they can be received again at a later date if they are resent by your supplier.

Users who have the *Authorise goods received* permission turned on may also leave a comment in the **Authorisation comment** field to record anything that needs to be noted.

Purchase order authorisation

When the **Purchase order must be authorised** store preference is set, new purchase orders will contain an **Authorised** checkbox.

An unauthorised purchase order **can** still be confirmed and have goods receipted against it so it is not as restrictive as, for example, a customer invoice or supplier invoice.

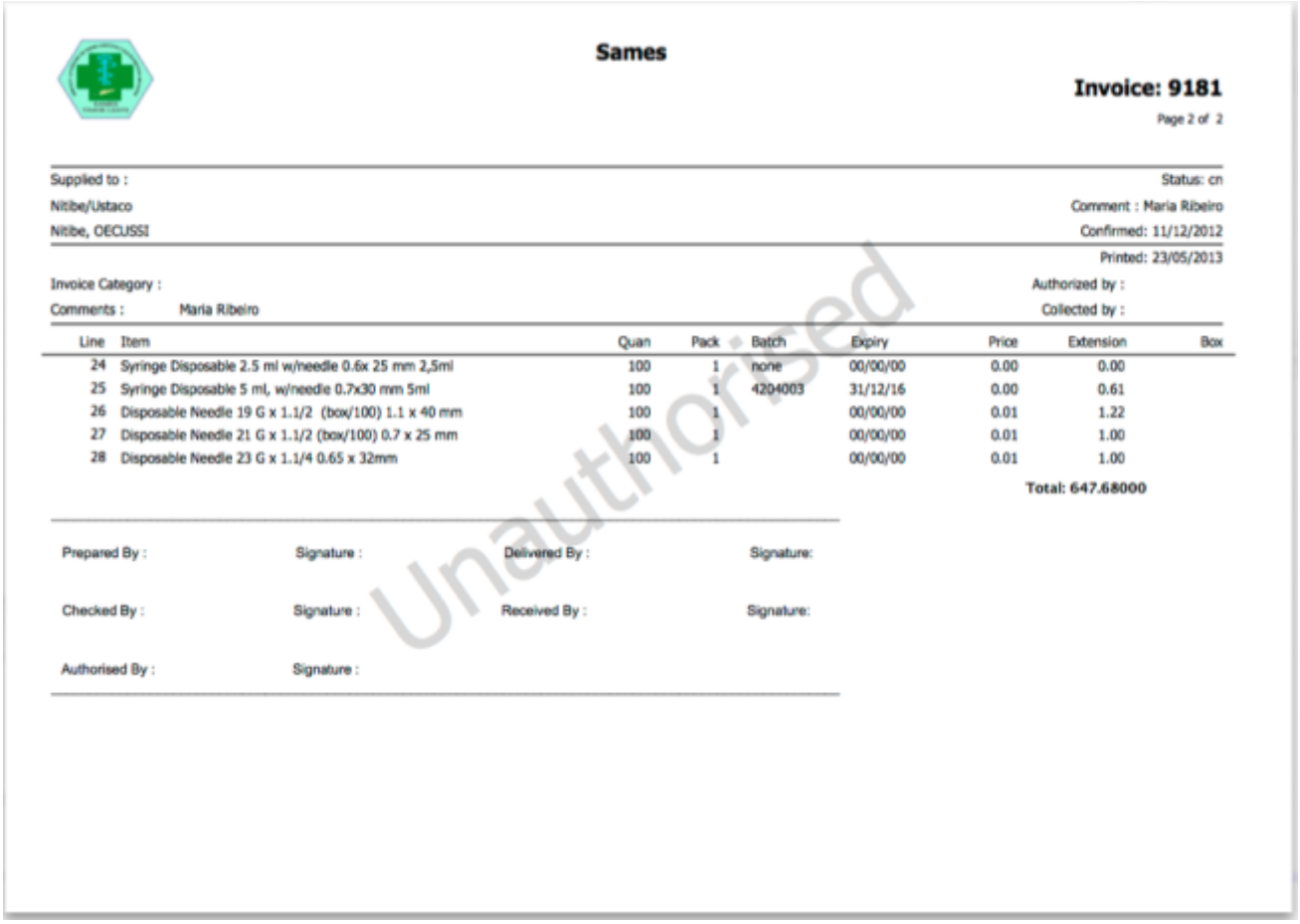


However, an unauthorised purchase order will print with an **Unauthorised** watermark across it. An authorised purchase order will print without the watermark.

Monitoring authorisations

Printing unauthorised invoices

When an invoice is **not** authorised, it will print with a clear **Unauthorised** watermark. Authorised invoices will print without the watermark.



Sames

Invoice: 9181

Page 2 of 2

Supplied to :
Nitibe/Ustaco
Nitibe, OECJSSI

Status: cn
Comment : Maria Ribeiro
Confirmed: 11/12/2012
Printed: 23/05/2013

Invoice Category :
Comments : Maria Ribeiro

Authorized by :
Collected by :

Line	Item	Quan	Pack	Batch	Expiry	Price	Extension	Box
24	Syringe Disposable 2.5 ml w/needle 0.6x 25 mm 2,5ml	100	1	none	00/00/00	0.00	0.00	
25	Syringe Disposable 5 ml, w/needle 0.7x30 mm 5ml	100	1	4204003	31/12/16	0.00	0.61	
26	Disposable Needle 19 G x 1.1/2 (box/100) 1.1 x 40 mm	100	1		00/00/00	0.01	1.22	
27	Disposable Needle 21 G x 1.1/2 (box/100) 0.7 x 25 mm	100	1		00/00/00	0.01	1.00	
28	Disposable Needle 23 G x 1.1/4 0.65 x 32mm	100	1		00/00/00	0.01	1.00	

Total: 647.68000

Prepared By : Signature : Delivered By : Signature:

Checked By : Signature : Received By : Signature:

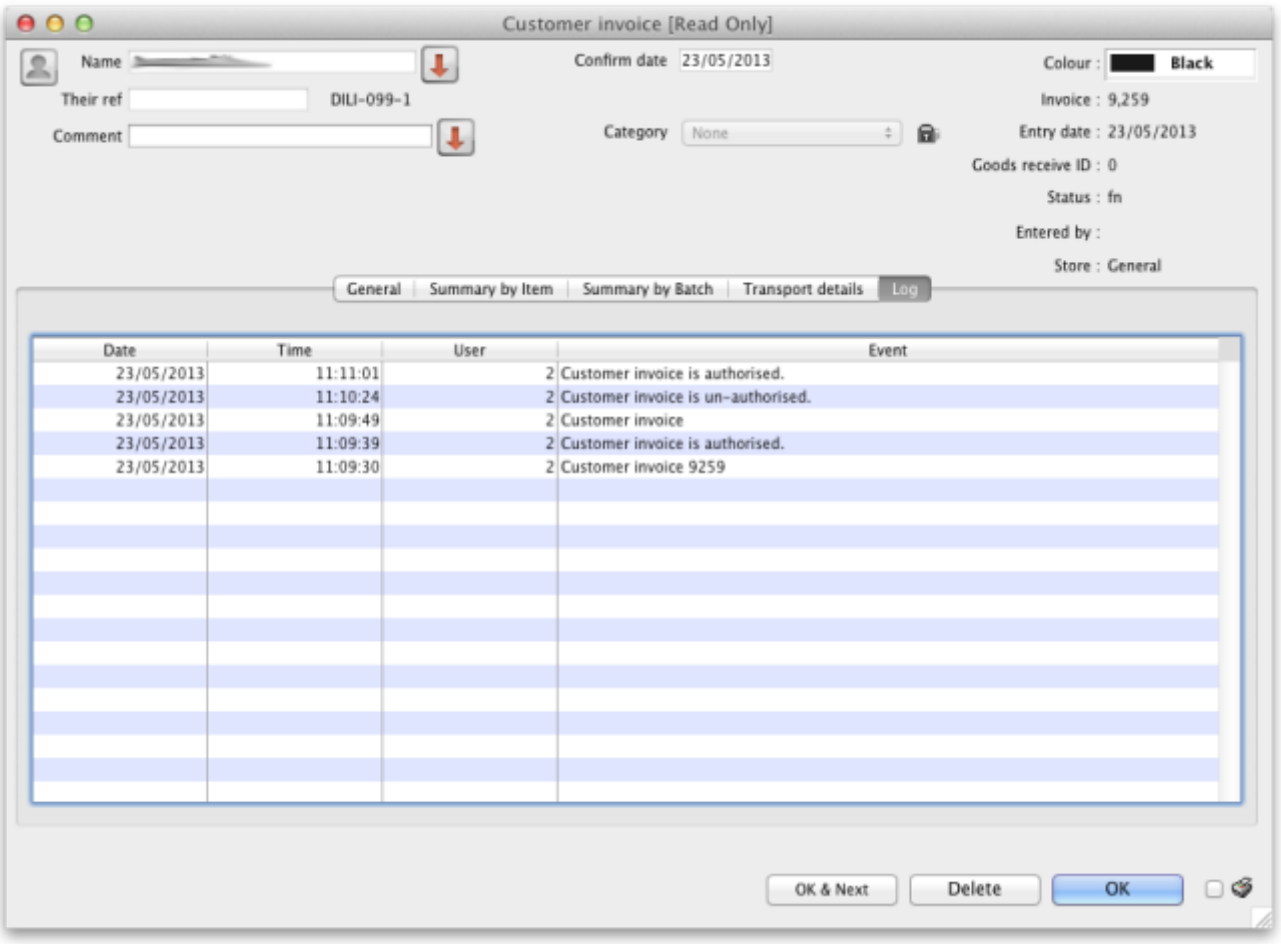
Authorised By : Signature :

Unauthorised

Viewing authorisation logs

mSupply records the authorisation and unauthorisation of invoices and creates a record every time the authorisation status of an invoice changes.

To view the records, click the **Log** tab of an invoice.



Advanced users can also view all logs by going to **Special > View log...**

*Previous: **26.13. Using the mSupply remote client*** | | *Next: **26.15. Remote authorisation***

From:
https://docs.msupply.org.nz/docs/ - **mSupply documentation wiki**

Permanent link:
https://docs.msupply.org.nz/docs/other_stuff:invoice_authorization?rev=1634299707

Last update: **2021/10/15 12:08**