

Order Authorisation Set up and How To

V1.0

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Introduction

It may be allowable for referrers to request equipment outside of their ordering rights that then goes for authorisation. Authorisation may be provided by store-based personnel or by other referrers. If done by other referrers the authorising referrer must be able to order the item and must be allowed to authorise orders. There must be one authorising referrer at the same base, budgetholder or division as the users' current referrer (depending on how the system is set up) for them to be allowed to order the item.

Overview

When a referrer logs in they may opt to have their Event viewer pop up; if there are orders that have been placed and require this referrer to authorise these will show as outstanding events and thus be brought to their attention. The actual authorisation is done using the Authorisation Pending report; this will allocate stock if it is possible, and may prompt for a journey to be chosen if this is part of the referrer's usual workflow. If the order is not approved, the referrer can send an event back to the original referrer or can simply cancel the order giving a cancellation reason.

Referrer Set Up

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The authorise setting for a particular referrer can be found on the Referrer Details screen. (Reference Data> Referrers> Referrers). This should be set to Can Authorise Orders for those referrers who should be able to authorise orders. Note that the referrer must also be able to order the item themselves, so check the item is in their list of can-order items by clicking on the items tab on this screen. To change the Can Auth field, choose Update from the list to the left of the referrer details.

i. Referrer Category

Max spend, or spending limit, must be set on the referrer category if appropriate.

e/ms ⁻ web	Active User: ALISON COOPER	Site: Ethitec Development View Referrer Category Details [dev	trackino]
Search Add Aud	dit		
			Referer Category Details
		Code	BASIC
		Active	: yes
		Subcode	80
		Desc	extended basic
		Max Value	: 0
			Referrer Category can order:
Item Code		Description	Category
CHG2		another emergency charge	
QA0-15X17		Barrettk10 15 X 17 - GAA2	bat
Q0-15X17		Barrettk10 15 X 17 - GAA2	bat
Q80-15X17		Barrettk10 15 X 17 - GAA2	bet
8001		bath board	BAT
BMCP2		bath board ident	bat
8003		bath board ident	BAT

This controls the maximum value of a single item that can be ordered by a referrer in this category. Any more expensive than their max spend level and the order must be authorised.

Items can be set specifically as requiring authorisation. This is done by using Update on the referrer category screen, by selecting the items row and ticking the "NeedsAuth" box or to give rights to authorise all items client on the header row.

Code: Active: Subcode: Desct Max Value:	5ASIC Yuru V extended besic U	1		
Rem Code From Rem Code Tu Rem Category Ref Lat Gapy From Authorisation Regulated	Add Item / Item Catego	#¥		仑
Description		Category	Remove	Needs Auth?
another emergency charge			C	
Barrettk10 15 X 17 - GAA		bet		
Darrettki0 15 X 12 - GAA2		bet	0	
Barrottk10 15 X 17 - GAA2		bat		20
bath heard		RAT	0	9
hath board ident		het	31 <u>0</u>	

Rows highlighted in red require authorisation.

ii. Availability

On the occasion where your authorising member of staff is on annual leave, a replacement can be nominated for a designated length of time.

From the authorisers referrer screen, go to the Web Setup. Enter the inclusive start and end dates into the Not AvailableFfrom and Not Available Until fields. To nominate a replacement who will only be able to authorise for the specified length of time, enter their staff code in the highlighted setting, OAM:Can authorise if unavail, below:

arch Referrers Add Referrer Referrer Details Budget Spend Canorder Web Setup Audit	
Referrer Detail	
Referrer Code amb600	Name 54
User ID amb600	Email ki
Active yes	Access To Stores G
Failed Logins 0	Last Web Login 25
Not Available From 31/10/2015	Not Available Until 19
Configuration Opt	ions
Description Value	
Alias User Domain	
Alias User ID	_
OAM: Can authorise if unavail (Commis Sep User List)	2
OAM: Can Change Priorities un	
OAM: Can Do Immediate Issues no	

The availability dates can also be changed through OOM, in the Authorisation Pending report. See point 5 below.

Adding an Order (requiring authorisation)

When adding an order for an item which required authorisation in GUI, the user will be presented with this message box.

Questi	on (Press HELP to view stack	trace) 🛛 🔀					
Referrer is in category 'TEST REFERRER CATEGORY' and has no permission to order this item Do you wish to continue and order it anyway?							
	Yes No	Help					

If they wish to continue ordering, they must confirm they have read the message and add their userid in the authorised box:



The order will then be added to the waitlist, and submitted for approval.

In OOM if the order requires authorisation, referrers will still be able to add it to the basket, but it will let them know that authorisation is required. Hovering over the tooltip icon with the mouse pointer will display the reason why.

Add to Bashet	
Authorisation required 🖽	and the second second
This itsett is dufferent it is taken	SOCOWATIONAL THERAPEST ASET
This item is out of stock.	
This item is not of stock	

Pre-Authorisation Review

Should a site wish to review orders before they are notified to the authorisers, a system flag WAuthPreCheck can be used. This will hold the code of a user-defined field for the order screen, followed by | and a comma-separated list of userids who may review the orders. This pre-authorisation review is done using the following screen from the web –



This allows the user to search for orders added between specified dates where they are still pending review, review has been completed, or all orders where authorisation is required. The user can review the orders/document details then use the Submit for Authorisation option if the order passes this review process. This will send out the notifications (emails and/or events) to the authorisers. The user-defined field on the order as per the system flag will be set to yes to show it has passed the review process.

Review St	atus Pend	Search	
Discharge Date	Has Docs	Review	Option
	No	Pending	View Details
	No	Pending	
31/01/2017	No	Pending	View Details Submit For Authorisation

The authorisers may notice the order in the authorisation pending report before it has been notified to them but it will show as still awaiting review.

Authorising an Order

From GUI:

Use the authorisation pending report, Orders > Orders Reports > Interactive > Orders Pending Authorisation. From here you can authorise the order, add authorisation text, allocate or deallocate stock, book onto journeys etc.

caused from	Client Code:	OrdNo Itam	Description	OpPleg RepOate	Does Paterer A
GLENDUP.	TAYOODE .	134,4803	ident wheelchait 50	124/05/11	AMB600
GLENDUP	TAYDOOB	133 9LNP	SLNON POWERED WH	1.24/05/11	AMBEDD
MEAN	WX4FI0116	235 HD001	Hoist additional	1 23/06/10	AMBEDD
MEAN	WAR0032	345 H0001	Host additional	1.25/01/11	B.4K.0003
MAINSTO	WAF0032	225 BW	0" Wheeli	1.05/09/09	W1_00
MANSTO	W4F0012	234 (KNP	18. NON POWERED WI	112/02/07	B4K0000
MAINSTO	TAYODDU	46,863121	Test Identifiable frem	112/06/08	W1_ED
MAINSTO	C0000029	90 BW	B" Wheels	1 27/01/09	ABC
MAINSTIT	TAY0008	53 999119	St. Adult H/B Wheelchai	1 25/02/09	123ABC
MAINSTO	TAY0008	51 APPOLLO	Appollo Wheelchae	1 25/02/09	112
MAINSTO	C000029	117 BW	8" Wheels	114/07/09	ARC
MAINSTO	HIL0002	4 Bu/	B" Wheels	1.20/08/09	BAK0003
MAINSTO	C000025	178 ft.	Hoist 20	1 20/12/10	000184
MAINSTIT	TAY0021	1.4803	ident wheelchail 50	1/26/01/11	B4K0003
MAINSTO	C000029	103.0L	Host 20	1.04/02/11	ABC
5.00		-			2

From Web/OOM:

Use the Authorisation Pending Report, under Reports>Authorisation Pending.

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			Show: Unauth	onsed	1	Search				
lient	Order	tem	Description	Qt	y Statu	s Booking Status	Referrer	Assess Date	Options	
AY0908 MISS LAURAV TAYLOR	113	8W	8" Wheels	1	wist	BK00008759 held 11/01/12	AMB600 ambler, susanna	17/04/12 (29/03/11)		9
IL0002 MR HARRY HEE	4	8W	8" Wheels	1	witst	BK00007997 on yv 06/09/09(PM)	BAK0003 BAKER A,	17/04/12 (20/08/09)		-
AY0008 MISS LAURAV TAYLOR	112	ABC1	Abc Wheel chairs	1	witst	BK00008759 held 11/01/12	AMB600 ambler, susanna	17/04/12 (29/03/11)		8
AY0008 MISS LAURAV TAYLOR	111	12345678	alan test number	1	wist	EK00006759 held 11/01/12	AMB600 ambler, susanna	17/04/12 (29/03/11)		
VAR0116 MR DAVID WARF	235	H0001	Hoist additional	1	witst	7	AMB600 ambler, susanne	29/06/10	To Be Authonised	
AB0002 MR TEST GABE	26	8001	bath "board"	1	whist	EH00006873 waiths	AMB600 ambler, sasanna	26/10/11	To Be Authorised	
AY0043 MISS LAURA TAYLOR	55	N1	NAPPY EASY TO DISPOSE OF	1	wiist	BK00006859 waites	I AMB600 ambler, susanna	17/04/12 (20/10/11)		*
AY0043 MISS LAURA TAYLOR	54	INCO	Incontinence Products	1	wilst	BK00006859 waitist	t AMB600 ambler, susanna	17/04/12		2
NAR0030 MR ABC1 WARAICH	1264	BL	Hoist 20	2	witst	EK00008778 waitis	AMB600 ambler; susanna	17/04/12		
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4/1 1. Date 1416 (1. 61/24)						19995		Card me part	1.00	-

Use the options in the drop down list on the right hand side to authorise orders, book onto journeys, send emails, cancel etc.

OR use the Order Administration if you are a store user who can authorise orders (perhaps on behalf of line managers). Search using order status Pending Auth; the drop down on the right hand side will have an authorise option.

Save/	Rena	ime S	earch:			Load Search:	~	Delete	
		Cli	ent Code					D	eceas
		D	ate From		To			De	te Ty
		Ord	er Status	Pending A	uth 🗸			lte	em Fr
	10	Booki	ng Status	All	~			Serial	io/As
		Requi	sition No						Ager
		Se	ort Order	Order No /	Asc	~		Sto	re Co
	Sta	ndaro	l/Special	All	~			c	atego
			Area			~		Service Due Da	te Fr
	No	Тур	e Client		Item)	Desc	Serial	Booking	Qty
ABE	6	D	[JAM00 ANT	08] JAMES,	B003	bath board ident		BK0001133	31.1
ABSE	6	D	[WAROO	062] Ward,	013-18MS	ac41		BK0001062	241
ABE	12	D	[TAY00 Evelyn	45] Taylor,	B003	bath board ident		BK0000977	741

Related System Settings

TELL SOLE: WHEN IN THE COMPLETE STORE

		March		
Filter	SI	ore [MAINSTO] Main Community Store V	Code	Description with
10	Description			Value
ALAUTH	Alternative message/label for Authority Regula	M		This is an alternate messa
MithAssester	Update Assess date on authorisation - 0: No, 1;	Update, 2: Update default today		1
AUTHEnninesEvel	Authorisation contact back - actionby/userial RE	FER or blank), evrittype, completed eg AUTIKOWT, REFER, yes		ethitec, authcont, yes
AuthenidOnkers	Enable monual diversion of held-orders back to	autipend lite?		
Anthroidlesson	Default hold reason to set when authorising an	order		testing flag AuthHoldReas
AuthLettersTals	Ask for certain letters rather than the whole as	over when using two factor authentication		yes.
Carifindet	Can order restrictions: yes-Restricted, I-Auth Re	rq,No-Relaxed		3
TemEarthatte	Tartup two factor authentication			yes.
WeathCanOrd	WWW/Authorhie does NOT allow list as per auth	oriser (comma sep list of ref(ats)		ccare
TAuthCatch40	WWNELUst of catch-all referrers who can author	'be web orders (comma seperated)		mit\$7,amb700,ethitec
WAIthEmail	WWW?:Type of authorisation alert to send: leave	blask for both or ernall or event or none		both
Whatthis area	WWW:Authoritas web uniters across div,bodg,bar	er any budg,div eny hudg(1,2,3,4)?		.0
WhithPostheat	WWW: Allows-orders going for authorisation to	be reviewed by named users first. Format - CheckFlag: Users:	. E.G.: CheckFlag: ORD_SCRUTINY Users: UsersA,Userf	5,UserC. Check/Flag: AuthReview 1
willog million the	Show email button on OOM booking screen for a	inders pending authorisation?		yes
WEmailReplyTo	Ernall eddress for authpend ernall responses, in	ave blank for referrer email		
STPrior Howath Tend	WWW: List the priorities that will need to fill in	an authormation beathos before continuing. E.g. p1,p7,p3		p1,p2

AltAuth: Item specific text can be added for an item in its reference data to show on authorisation. The entry in this flag will precede all messages.

AuthAssessDt: Indicates whether the assess date on the order should be updated at time of order authorisation. 0 indicates No, 1 indicates yes (user enters), 2 indicates yes (default to today).

AuthHeldOrders: Set to yes to to turn on the following functionality. If order is allocated, not pending authorisation, and on a held booking, a button labelled "Set AuthPend" appears next to the auth text in update mode on the clients order detail screen. This will set the order status back to waiting list (pending authorisation), set order_authpending to yes, and it will then appear on the heldlist and auth pending interactive reports.

CanOrder: Indicates the level of restrictions put on referrers. Yes indicates full restrictions, ? indicates authorisation required, no indicates relaxed restrictions.

Wauthcanord: A comma separated list of referrer categories who cannot order/authorise even if individual referrers given access.

WAuthCatchAll: A comma separated list of staff codes for referrers who can authorise all web orders.

ITMAuth: A user-defined field with this code against an item can hold a comma-separated list of userids for staff or store users who can authorise web orders. At an item by item level. See supervisor guide to setting up user-defined fields.

WAuthLevel: Indicates the level to which a referrer's authorisation status applies. 1 = Division – for any referrers working under the same division (group of bases) 2 = budgetholder – for any referrers working under the same budgetholder (group of divisions or bases)

3 = base any budgetholder - for any referrers working from the same base, regardless of budgetholder.

4 = division any budgetholder - for any referrers working from the same division (group of bases), regardless of budgetholder.

WbkgemailbtnAuth: set to yes to show an email button on the booking screen in OOM, for orders pending authorisation. Used to email stores people after adding an order that requires authorisation. Any EPR documents can be attached to the email such that authorisation request forms could be created for certain items and submitted to the store along with the order.

WEmailReplyTo: When the system sends its automatic authorisation emails, the reply-to address can be changed. For example, they may come from <u>elms2@yourcouncil.co.uk</u> but you may want the replies to go to <u>authorisation@yourcouncil.co.uk</u>. If left blank, it is set to the email address held for each referrer.

User Security Settings:

OAM:Can authorise if unavail(comma sep user list): A comma separated list of "nominated" people who can authorise if you are unavailable.

OAM:Alert on order authorisation: May be turned on for one or more users of the Elms2 system. This will indicate additional Elms2 users who should receive events or emails when an order is raised which requires authorisation, is authorised, or has authorisation removed. The referrer who raised the original order is always included in the event/email process, as are all referrers from that base who may authorise that order.