

Authorization Script

Overview of script

1. Purchase department officer enters the Purchase Order in Moneyworks. They will get alert message for the monthly budget, total used and remaining budget for the expense head in that month but it won't restrict the user from accepting the PO.
2. Purchase officer will email the PO with budget info to authorise person for approval.
3. Authorise person need to approve the PO in Moneyworks.
4. Purchase officer or the person responsible will print the PO form with "Authorised" stamp from Moneyworks.
5. Accounting staff converts PO to Purchase Invoice and email it to authorised person for payment approval.
6. Accounts department make payment.

How to install scripts

1. Studio Manager Authorisation Script 170517.mwxml
 - Double click on the script file while Moneyworks data file is opened. It will install five scripts. They are
 - Pur_Invoice_Authorisation
 - Pur_Order_Authorisation
 - Budget_Alert
 - Send_email_PO
 - Send_email_PI
2. sendemail.sh
 - This script need to install in every user who sends an email.
 - The script should be in "/Users/mac/Library/Application Support/Cognito/MoneyWorks Gold/Externals". If there isn't already **Externals** folder create one. You should easily get into this by clicking on Std Plug-ins path in Housekeeping of Moneyworks Navigator and you will need to change the information on **sendemail.sh** file **#Change these variables section**
3. Studio Manager PO.invc
 - Place the Studio Manager PO.invc file inside Moneyworks Custom Plug-Ins>Forms folder

How it Works

Pur_Invoice_Authorisation and Pur_Order_Authorisation

It will be installed for the user with initials **jt** and **zt**. To use select Purchase Order or Purchase Invoice transaction and click on Pur_Order_Authorisation or Pur_Invoice_Authorisation icon in the transaction list toolbar.

Transactions for Studio Manager Authorisation Demo v7 *

List Related Details Sum Adjust AuthorisePurInvoice AuthorisePurOrder

From (Description)	Period	Date
Beetle Suppliers Limited	Jan	31/01/2016
Casbah Suppliers Int	Jan	31/01/2016
Beetle Suppliers Limited	Jan	31/01/2016

Budget_Alert

It will send a message when tabbing out of Item column in Purchase Order.



Send_email_PO

You need to update scripts before using from Moneyworks Menu Show > Scripts > Select Send_email_PO from the script list. Change the initials of two authorised person from purchase department on the top of the script (Line 12 and 13). See Screenshot below.

```

9  on Before:F_TransList(winref)
10  //*****user initial of 2 authorised users of concern
11  //**If there are two authorities who sends email, use ini
12  Let admin_user1="stm"
13  Let admin_user2="stm"
14  //*****

```

Send_email_PO will be installed for the users with the updated initials only. To use select Purchase Order and click on Send_email_PO icon in the transaction list toolbar.

s for Studio Manager Authorisation Demo v7 *

Details Sum Adjust Send Email PO

Description	Period
Suppliers Limited	Jan
Suppliers Int	Jan
Suppliers Limited	Jan
Photocopiers (Photocopier Usage)	Dec

Send_email_PI

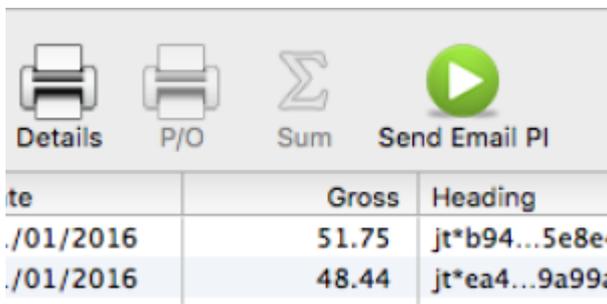
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```

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10 //*****user initial of 2 authorised users of concern
11 //If there are two authorities who sends email, use ini
12 Let admin_user1="stm"
13 Let admin_user2="stm"
14 //*****

```

Send_email_PI will installed for the users with the updated initials only.
 To use select Purchase Order and click on Send_email_PI icon in the transaction list toolbar.



Viewing authorisation in transaction list

You will see the initial of the authorised person and the authorised code separated by *

- Right click on transaction list > Customise List View...
- Select **Heading ["your calculation here"]** (at the bottom in Available Fields list) and click on >Move> button. Once it moved to the other section of the list, select and Click **Edit..**
- Replace "your calculation here" with the following formula

```
Slice(Lookup (NumtoText(SequenceNumber,0), "User.data"),1,"*")
```

From:
<http://docs.sussol.net/> - Sussol Docs

Permanent link:
http://docs.sussol.net/doku.php/moneyworks:studio_manager_authorisation_script

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