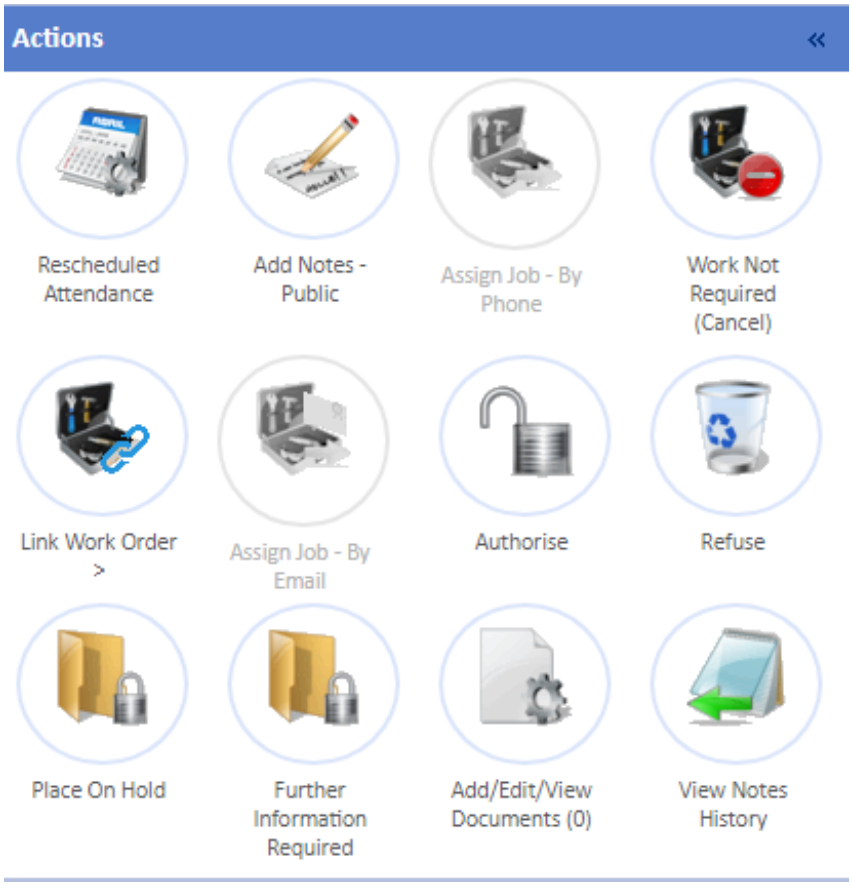
Authorise

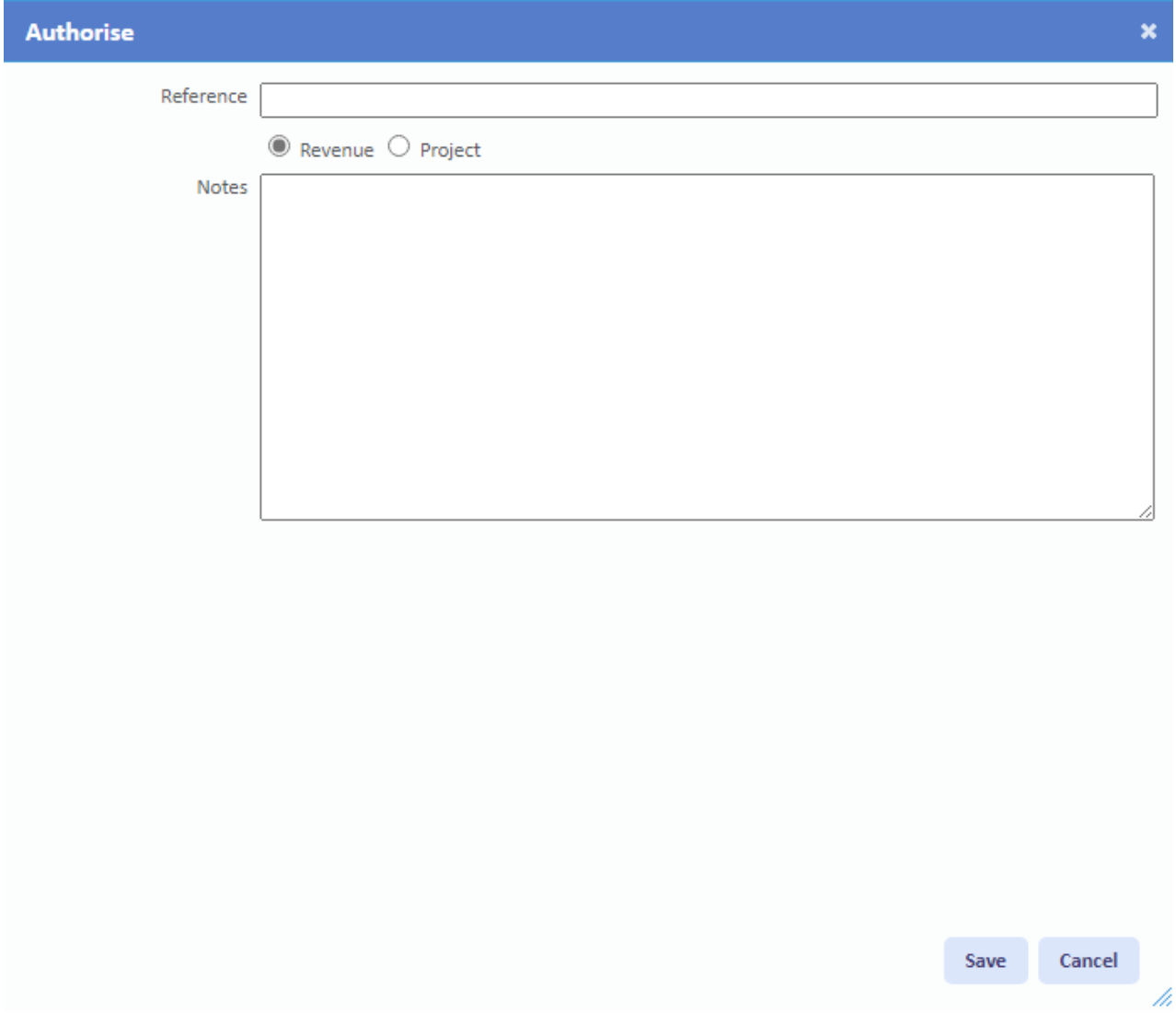
Fri, Jan 19, 2024 Authorisation Jobs

If a job is required and the everything is in order, then the authoriser will want to authorise the job so it can be carried out by the Resource. This can be done using the "Authorise" button.

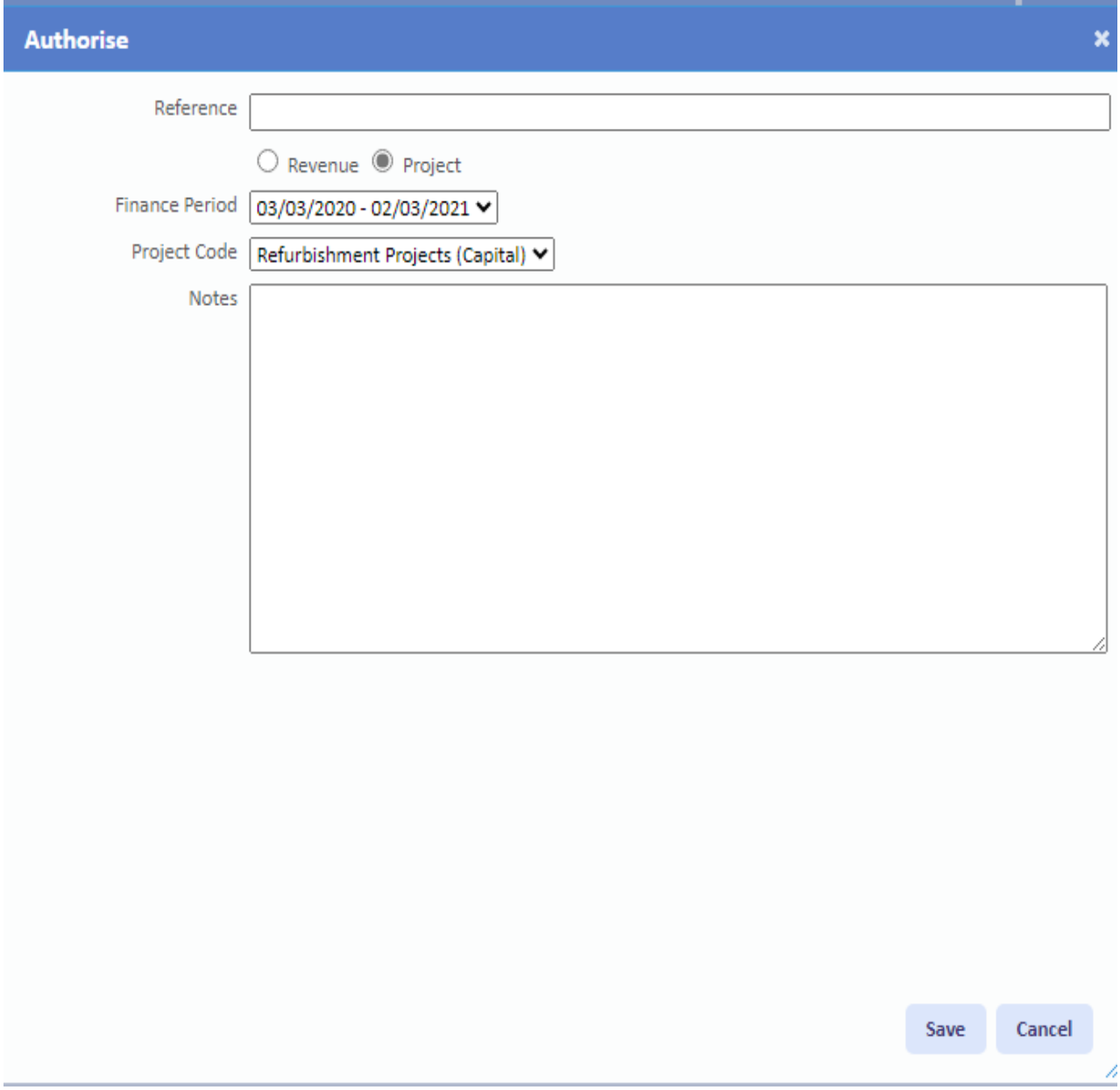
1. On the Job Detail screen, select the "Authorise" button to display the Authorise pop up.



2. This is the Authorise screen. Here, the User is required to provide information about the authorisation. As most of the fields in this screen are permission based, each field is explained below:



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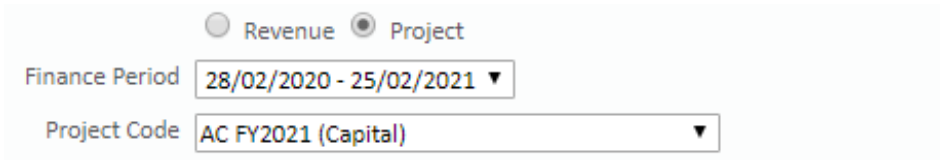
Reason is a drop down list that contains all the Authorisation Reasons stored within the system (see the <add in link to Adding Reasons> page in the Core Data section for more information). If this is present, a reason must be selected.

Reference is a freeform field where the User needs to input a reference for the authorisation. This is a mandatory field.

Revenue/Capital is a radio button field, meaning either Revenue or Capital can be selected but not both. This is to determine the cost of the job and which budget it relates to: Capital or Revenue. Revenue is selected by default.

Notes is a freeform field where the User enters any notes relating to the authorisation. This is an optional field.

If "Capital" was selected then two other fields appear:



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Finance Period is a drop down list that contains the Clients Finance Periods. The Finance Periods returned depend on the Client that the job is for. Selecting a period determines what is shown in the Capital Code field. The current Finance Period is selected by default.

Capital Code is a drop down list that contains the Capital Codes for the selected Finance Period. This determines the Capital Code this job will apply to.

Once the above has been filled in, click "Save" to authorise and update the job. To stop the authorisation, click the "Cancel" button.

3. After the job is authorised it will progress in one of two ways. It will either have reached the final stage of authorisation and be fully authorised or it will progress onto the next stage of authorisation in which the net authoriser will need to perform the same process.

Note: Depending on the system settings, it is possible to also see the Resource Rates when performing the authorisation.

