

QUICK REFERENCE GUIDE

Set up Temporary Approvers for Purchase Orders

Updated October 31, 2015

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This reference guide is for purchase order approvers to temporarily assign another approver in their absence. It can be for approvers or buyers in their approval roles. This guide describes process steps for two scenarios:

- If the approver has planned a temporary approval reassignment.
- If the approver has not planned a temporary approval assignment.

Levels of Approval for each Purchase Order:

1. **PO Approver Level:** An approver with authority to approve purchase orders for the FinDept ID.
2. **Buyer Approver Level:** A buyer with the final approval to encumber the funds and dispatch the purchase order.

Ideally there are at least two SWIFT approvers with authority to approve purchasing transactions for each FinDept ID used. If an approver needs to be out of the office, he/she needs to inform the other assigned approvers and buyers assigned to the FinDept ID so that they can approve transactions. Once purchase orders have been approved by another assigned approver, the worklist notification is removed from all other approvers' worklists.

If there are no approvers available, an approver may be able to set up a temporary approver to review and approve purchase orders for them. The temporary reassignment is done via the Self-Service pages.

A temporary approver must already have the same SWIFT approver roles.

Steps to Temporarily Assign Approvers for Purchase Orders – if Planned

Step 1: Find the Name and/or User ID of the Temporary Approver.

In order to review and approve or deny a purchase order transaction, the temporary user you assign must have:

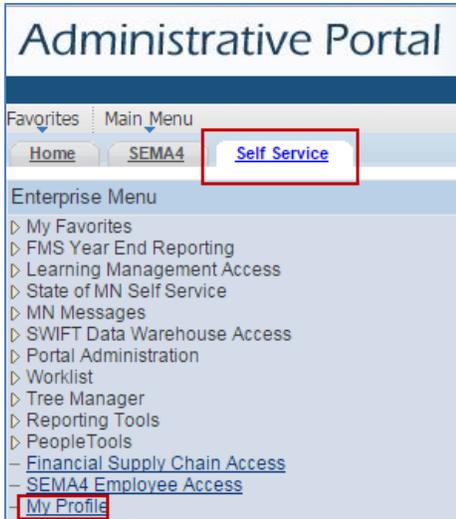
1. The PO Approver role and/or Buyer Approver role for approvals depending upon the level of approval required.
2. The authorization for the FinDept ID on the purchase order distributions.

If you are not sure who to assign, talk with your agency's SWIFT Security team. You can find out who else has the correct roles for purchase order approvals.

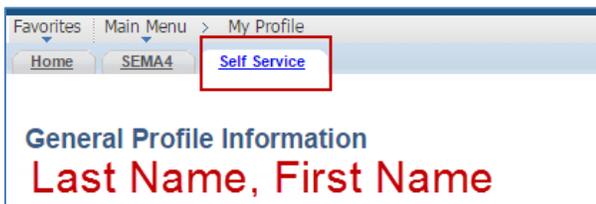
If you do not know who your Agency's SWIFT Security team is, contact the SWIFT Help Desk's email: swifthelpdesk.mmb@state.mn.us

Step 2: Login to Self-Service.

Access **Self-Service** either from the **Administrative** or **Self-Service Portals**. Click on the **My profile** link.



Step 3: Update the Alternative User Section on the General Profile Information Page.



Update the *Alternative User* section of the **General Profile Information** page.

- *Alternative User ID*: Enter the User ID of the staff person who will approve purchasing transactions in your absence. **Note**: you can use the magnifying glass to search by *User ID* or *Description* (Name).
- Enter a *From Date* and *To Date*. Both of these date fields are **required**.
- Click the **Save** button.

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID:

From Date: (example: 12/31/2000)

To Date: (example: 12/31/2000)

Workflow Attributes

Email User Worklist User

Email

Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Business	<input type="text" value="}@state.mn.us"/>

Activate changes to this page by pressing Save.

Save

The person entered in the *Alternate User ID* field will be notified of a purchase order waiting for their approval for the date range selected. The notification method is dependent upon their preferences in Self-Service.

IMPORTANT: Only the alternate approver receives the notification and must approve or deny the transaction. The original approver is no longer notified or able to approve it.

Example of a Planned Reassignment for a Second Level of Approver (Buyer Approver)

In the example below, the person entering the purchase order self-approved the first approval level (PO Approver Level). The Buyer approval level was built for the alternate approver.

View Approvals

Business Unit: G1701 Document Type: DPO

PO ID: 3000000217 [View Printable Version](#)

PO Total: 1,203.00 USD PO Status: Pend Appr

Vendor ID: 0000218973 ENTERPRISE LEASING CO OF MN PO Date: 01/26/2013

Buyer: FINOR02 Budget Status: Not Chk'd

PO Reference: Justification: No justification entered by buyer.

Edit PO

Review Lines

Review / Edit Approvers

PO Approval

Line 1 Schedule 1 Distrib 1 :Pending + Start New Path

AUTO RENTAL

First Path

Self Approved

Erik Fernstrom
PO Approver
01/26/13 - 7:27 AM

→

Pending

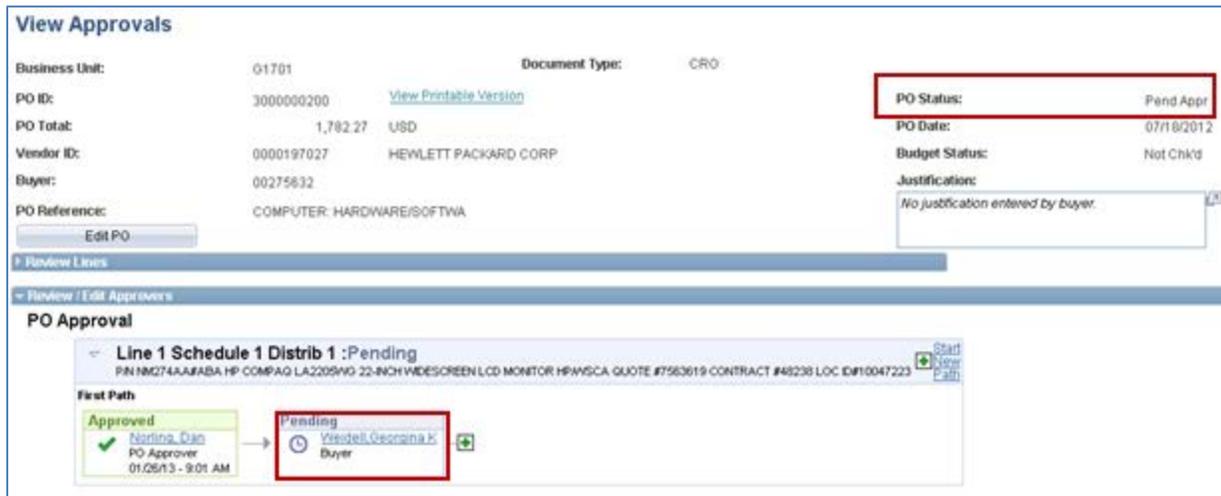
Smith, Dave for Norling, Dan
Buyer

Steps to Temporarily Assign Approvers for Purchase Orders – if Not Planned

There may be times when a buyer is absent, a purchase order needs this level of approval and the approval cannot wait for the buyer's return. ***If the buyer has not assigned an alternative approver, a change order in SWIFT is required to create a temporary approval reassignment.***

Since SWIFT allows only one buyer on a purchase order, the new buyer must change the buyer to his or her Employee ID to get it approved.

This example illustrates how to update the buyer on a purchase order that is waiting for buyer approval but the buyer is absent.



Step 1: Find the Name and/or User ID of the Temporary Approver.

The updated buyer must have the PO Approver role and FinDept ID assigned to him or her.

- If you are not sure who to assign, talk with your agency's SWIFT security administrator(s). The administrator can determine who else has the correct roles for purchase order approvals.
- If you do not know who your Agency's SWIFT Security administrator is, contact the SWIFT Help Desk's email: swifthelpdesk.mmb@state.mn.us

Step 2: Access the Purchase Order in SWIFT.

- **Navigation:** Purchasing, Purchase Order, Add/Update Purchase Order, Find an Existing Value
- Enter the *Business Unit* and *PO ID*. Click **Search**.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: = G1001

PO ID: contains 3000003246

Origin: begins with

Purchase Order Date: =

PO Status: =

Short Vendor Name: begins with

Vendor ID: begins with

Vendor Name: begins with

Buyer: begins with

Buyer Name: begins with

PO Type: =

Purchase Order Reference: begins with

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Step 3: Update the Buyer on the Purchase Order.

1. Click the **Change Order** icon on the **PO Header**.

Purchase Order

Business Unit: G1001 | Origin: 511 | Human Res Mgmt&Insurance | PO Status: Dispatched | Budget Status: Valid

PO ID: 3000003246 | [Approval Exception](#)

Change Order: 2

2. Update the *Buyer* field.

The Change Order opens up the purchase order. You can change the buyer. Use the magnifying glass to find and enter the appropriate alternative buyer.

Header

*PO Date: 07/01/2015 | Vendor Search | [Response Documentation](#)

Expiration Date: 06/30/2016

*Vendor ID: H550000000 | HUMAN SERVICES DEPT

*Vendor: HUMAN SERV-001 | [Vendor Details](#)

*Buyer: 01136301 | Last Name, First Name

IMPORTANT: Make all needed changes to the purchase order before saving it.

- Changing only the buyer value will not re-initiate approvals.
 - Changes to existing purchase orders are initiated at **Save**. Making sure you have the final changes prior to saving will avoid sending out multiple emails.
3. Save the Purchase Order.
 - After changing the buyer and making all needed changes, click on **Save**.
 - You may get a message that the defaults will switch to those of the updated buyer.
 - Click **OK** to change the buyer. You will also be changing the Location, if different than your default, which affects the tax rate.
 - Click **Cancel** to update the buyer, but leave the defaults and Location as previously set up.
 4. Click the **View Approvals** link to see the updated Buyer.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Leap Chairs for James & Kristina	1.0000	EA	56101500	1,419.71000	1,419.71	Approved

[View Printable Version](#)
[View Approvals](#)

- On the **View Approvals** page, the buyer approval should now have the updated buyer as the approver.

View Approvals

Business Unit: 01701 Document Type: CRO

PO ID: 3000000200 [View Printable Version](#) PO Status: Pend Appr

PO Total: 1,782.27 USD PO Date: 07/18/2012

Vendor ID: 0000197027 HEWLETT PACKARD CORP Budget Status: Not Chk'd

Buyer: FISM102 Justification: No justification entered by buyer.

PO Reference: COMPUTER: HARDWARE/SOFTWA

[Edit PO](#)

[Review Lines](#)

[Review / Edit Approvers](#)

PO Approval

Line 1 Schedule 1 Distrib 1 : Pending [View/Hide Comments](#)
 PAI NMZ74AAAFABA HP COMPAG LA2205WG 22-INCH WIDESCREEN LCD MONITOR HP/MSCA QUOTE #7563619 CONTRACT #46238 LOC ID#10047223 [Start New Path](#)

First Path

Pending [Not Routed](#)

Norling, Dan PO Approver [Smith, Dave Buyer](#)

Comment History

[Return to Purchase Order](#) [Approval History](#)

If the buyer approval does not reflect the updated buyer, the approvals must be reinitiated.

You will need to change a value that will retrigger the approval process.

- Change the *Quantity* or *Amount* to a lower value. Then, save the purchase order. Then change the value back to what it was. Decreasing these values will not trigger the approval process. Increasing the value back to what it was will retrigger this process.
- Click the **View Approvals** link to verify the approval is built for the updated buyer.

Step 4: (Optional) Change the Buyer Back to the Original Buyer on the Purchase Order.

- Change the buyer back to the original buyer if desired. Changing only the buyer will not reinitiate the approval process.
- The buyer printed on the dispatched purchase order is the buyer currently entered in the *Buyer* field. To dispatch the PO with the original buyer, update the buyer value before dispatching the change order.