

QUICK REFERENCE GUIDE

November 1, 2019

Approve Purchase Orders in SWIFT

This guide helps approvers to find and review purchase orders in SWIFT. It provides the steps to review and approve, deny or request information about a purchase order.

Steps to complete

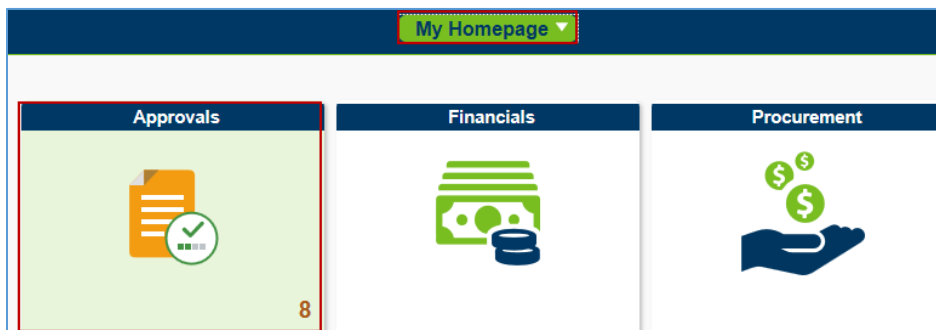
- Step 1: Use the Approvals tile to find purchase orders pending approval
- Step 2: Review the purchase order
- Step 3: Take action on the purchase order (approve, deny or request information)

Steps to review a purchase order to approve or deny

Step 1: Use the Approvals tile to find purchase orders pending approval

All SWIFT approvers can access documents such as purchase orders to review and take action on their **Approvals** tile. It is located on their **My Homepage**.

1. On the **My Homepage**, select the **Approvals** tile. You can see how many items are ready for review and approval. In the example below, there are eight items for review and approval.

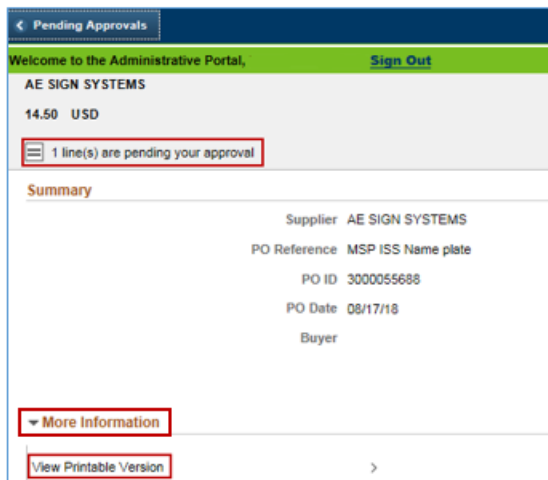


2. SWIFT displays the **Pending Approvals** page. The approver can select the title link (e.g., **Purchase Order**) to access individual purchase orders and other documents for their review and approval. For example, some approvers may be responsible for reviewing and approving events and purchase orders.



Step 2: Review the purchase order

1. SWIFT will display the **Pending Approvals** page for that individual purchase order. You can see how many lines that are pending review. If you open up the **More Information** section, you can see any comments or attachments. Review the purchase order details on this page.



2. As an option, the approver can view a printable version of the purchase order. Select the **View Printable Version** link. This version may be easier to review.

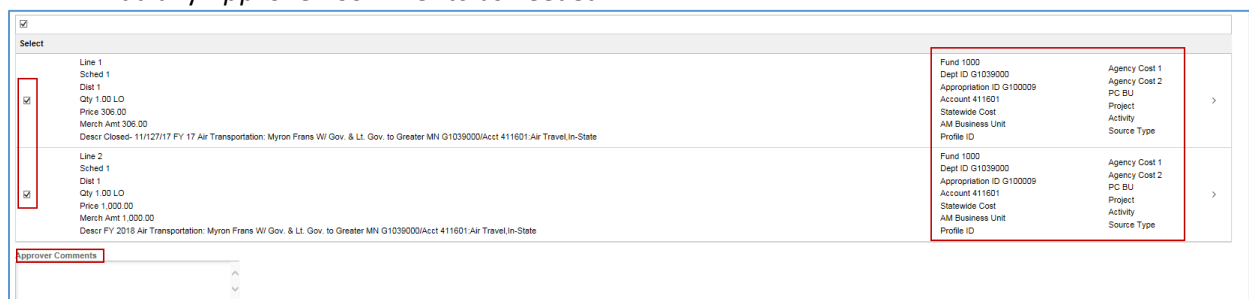
Public Safety Department Mn State Patrol	Pending Approval/Approved		Dispatch Via Email
	Purchase Order P0701-3000055688	Date 08/17/2018	Revision Page 1 of 2
	Payment Terms Net 30	Freight Terms FOB Destination, Prepd & Add	Ship Via See Detail Below
	Buyer <i>Buyer Name</i>	Phone <i>Buyer Phone Number</i>	Currency USD
		Agency Reference MSP ISS Name plate	

Supplier: _____ **Ship To:** _____ **Attention:** _____ **Bill To:** _____

- After your review, return to the **Pending Approvals** page for the purchase order.
3. Review the lines on the **Pending Approvals** page.

On the **Lines** section, SWIFT provides the information in a table format for each line. The approver can approve, deny or request information for all lines, only one line or a few lines.

- Check the box(es) of the line(s) to approve. If you check the box on the line, SWIFT brings you to the funding information.
- Add any *Approver Comments* as needed.

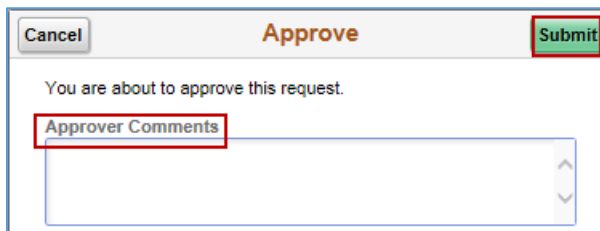


Step 3: Take action on the lines

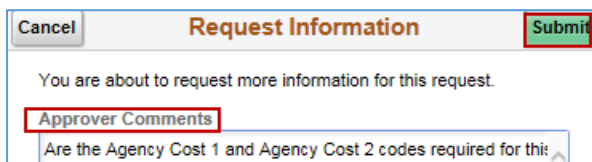
At the top of the **Pending Approvals** page, SWIFT provides the actions for the selected line(s): **Approve**, **Deny**, or **Request Information** on the lines. Press the appropriate button.



1. The **Approve** button will update the *Approval Box* status to “Approved”. If this is the final approval needed, the *PO Status* is updated to “Approved”. Otherwise, the next approver is notified and the approval box *Status* is updated to “Pending”.
 - When you press the **Approve** button, SWIFT opens up a message.
 - Add a comment if desired. Select **Submit**.



- SWIFT returns the approver to the **Pending Approvals** page to review other purchase orders and documents.
 - If this is the final approval needed, SWIFT updates the *PO Status* to “Approved”. Otherwise, SWIFT notifies the next approver and updates the approval box *Status* to “Pending”.
2. The **Deny** button will set the *PO Status* and the *Approval Box* Status to “Denied” and “Terminated” Status for any remaining approvals.
 - **IMPORTANT!** *Approval Comments* are required when an approver denies a purchase order.
 - SWIFT sends an alert to the buyer that the approver denied the purchase order. The buyer needs to respond to the issue and reroute the approval processes. SWIFT sends an alert to the approver when the purchase order is ready for another review.
 3. **Request information** opens up the **Request Information** message box for the approver to ask for further information. Enter information in the **Approver Comments** section and press **Submit**.

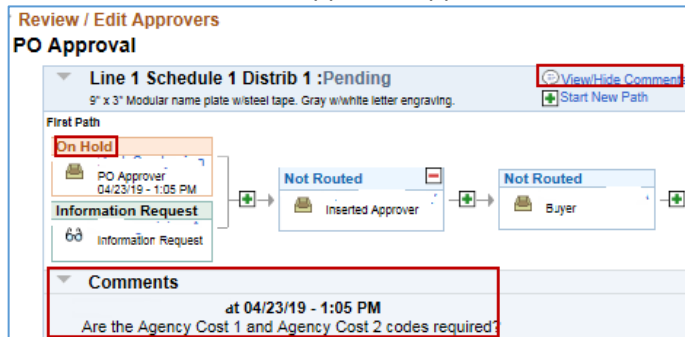


SWIFT keeps the *PO Status* to “Pend Appr”. The approver can leave the **Purchase Order Approval** page.

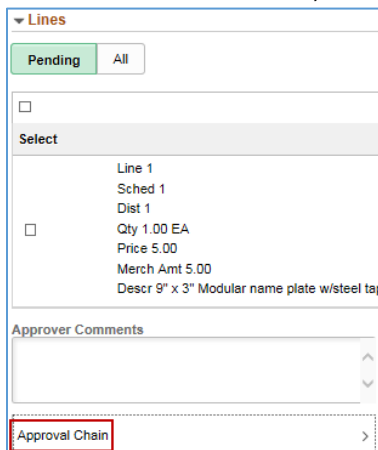
- The buyer for the purchase order receives an alert to review the purchase order.
 - When the buyer checks the **View Approvals** link on the bottom of the purchase order, SWIFT displays the **Review/Edit Approvers** window.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

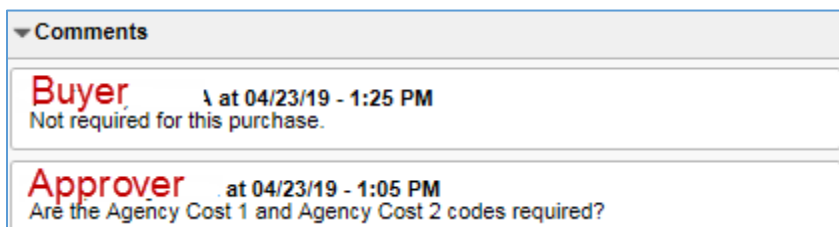
- It shows a hold. The buyer can select the **View/Hide Comments** link to view the approver's comments. The buyer can add comments and save it. It will remain on hold until the approver approves it.



- SWIFT sends an alert to the approver that there is a comment from the buyer.
 - When the approver returns to the purchase order, the approver can select the **Approval Chain** link, which is located below the **Lines** section.



- SWIFT displays the **Approval Chain** window, which includes the buyer's comments.



- The approver can now approve, deny or request information about the purchase order.

You have successfully reviewed and taken action on a purchase order from the Approvals tile.