

QUICK REFERENCE GUIDE

February 20, 2024

Approve Purchase Orders in SWIFT

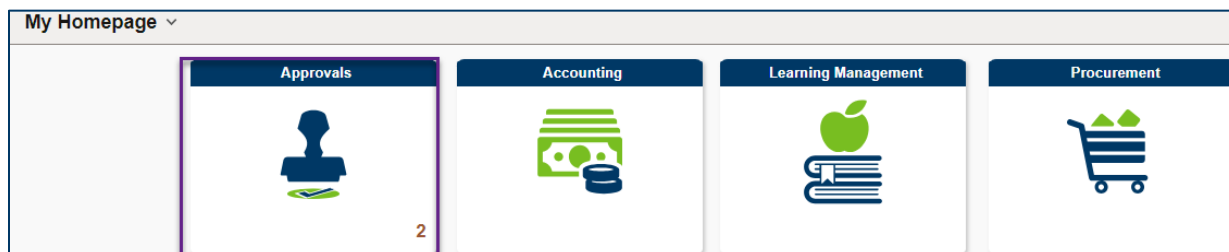
This guide helps approvers to find and review purchase orders in SWIFT. It provides the steps to review and approve, deny or request information about a purchase order.

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 the Administrative Portal.

1. On the Administrative Portal, select the **Approvals** tile.

You can see how many items are ready for review and approval. In the example below, there are two items for review and approval.



2. SWIFT displays the Pending Approvals page. There are two purchase orders for review. The approver can select the **Purchase Order** line to access an individual purchase order. Some approvers may be responsible for reviewing and approving other SWIFT documents.

Pending Approvals			
Welcome to the Administrative Portal, Sign Out			
View By	Type		
	All	2	
	Purchase Order	2	
All 2 rows			
Purchase Order	Online Src From Req 1000000144 - G1001 / 3000007649 /	Routed	>
256.13 USD	⚠ Medium Priority	07/25/2023	
Purchase Order	Online Src From Req 1000000145 - G1001 / 3000007650 /	Routed	>
73.35 USD	⚠ Medium Priority	07/26/2023	

Step 2. Review the purchase order

1. SWIFT displays the Pending Approvals page for that individual purchase order.
 - a. You can see how many lines that are pending review.
 - b. If you open up the **More Information** section, you can a printable version of the purchase order.
 - c. Review the purchase order details on this page.

INNOVATIVE OFFICE SOLUTIONS LLC
256.13 USD

4 line(s) are pending your approval

Summary

Supplier	INNOVATIVE OFFICE SOLUTIONS LLC	PO Total	256.13 USD
PO Reference	Online Src From Req 1000000144	Status	Pend Appr
PO ID	3000007649	Business Unit	G1001
PO Date	07/25/23	Routed Date	07/25/23
Buyer		Budget Status	Not Chk'd

[Edit Purchase Order](#)

more information

[View Printable Version](#)

2. As an option, the approver can view a printable version of the purchase order. Select the **View Printable Version** button. SWIFT opens a new window with the print version. After your review, return to the Pending Approvals page for the purchase order.
3. Review the lines on the Pending Approvals page.
 - a. On the Lines section, SWIFT provides the information in a table format for each line.
 - b. The approver can approve, deny or request information for all lines, only one line or a few lines.
 - c. 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.
 - d. Add any Approver Comments as needed.

Line 4	Fund 1000	Agency Cost 1
Sched 1	Dept ID G1039000	Agency Cost 2
Dist 1	Appropriation ID G100009	PC BU
Qty 1.00 CT	Account 413001	Project
Price 83.13	Statewide Cost	Activity
Merch Amt 83.13	AM Business Unit	Source Type
Descr PAPER,XERO/DUP,11X17,92WE	Profile ID	

☐

Approver Comments

Approval Chain

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.

INNOVATIVE OFFICE SOLUTIONS LLC
256.13 USD
4 line(s) are pending your approval

Approve Deny Request Information

Option 1. Approve the purchase order

1. When you press the **Approve** button, SWIFT opens up a message.
2. Add a comment if desired.
3. Select **Submit**.

Cancel Approve Submit

You are about to approve this request.

Approver Comments

4. SWIFT returns the approver to the Pending Approvals page to review other purchase orders and documents.
 - a. If this is the final approval needed, SWIFT updates the PO Status to “Approved.”
 - b. Otherwise, SWIFT notifies the next approver and updates the approval box Status to “Pending.”

Option 2. Deny the purchase order

1. When you select the **Deny** button, SWIFT opens the Deny window. Add **Approver Comments** and select Submit.

IMPORTANT! Approval Comments are required when an approver denies a purchase order.

Cancel Deny Submit

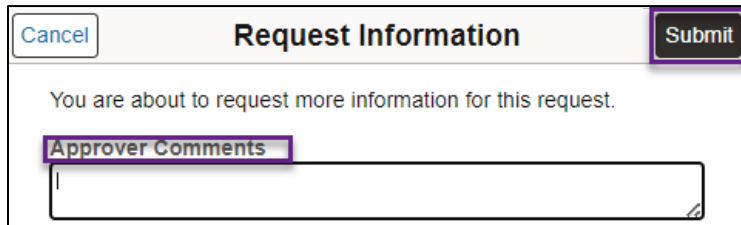
You are about to deny this request.

Approver Comments

2. After you submit the transaction, SWIFT will set the PO Status and the Approval Box Status to “Denied” and “Terminated” Status for any remaining approvals.
3. SWIFT sends an alert to the buyer that the approver denied the purchase order.
4. The buyer needs to respond to the issue and reroute the approval processes.
5. SWIFT sends an alert to the approver when the purchase order is ready for another review.

Option 3. Request for information

1. When you select the Request Information button, SWIFT 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**.



The dialog box titled "Request Information" has a "Cancel" button on the top left and a "Submit" button on the top right. Below the title bar, it says "You are about to request more information for this request." There is a text input field labeled "Approver Comments" with a small icon in the bottom right corner.

2. SWIFT keeps the PO Status to "Pend Appr." The approver can leave the Purchase Order Approval page.
3. The buyer for the purchase order receives an alert to review the purchase order.
 - a. When the buyer checks the **View Approvals** link on the bottom of the purchase order, SWIFT displays the Review/Edit Approvers window.
 - b. It shows a hold. The buyer can select the **View/Hide Comments** link to view the approver's comments.
 - c. The buyer can add comments and save it. It will remain on hold until the approver approves it.
4. 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.
5. 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.

Depending on the option you select, SWIFT updates the PO Approval section of the purchase order. The buyer can select the **View/Hide Comments** link to view the approver's comments.

