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.

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.
• 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.
  o When the approver returns to the purchase order, the approver can select the Approval Chain link, which is located below the Lines section.

  o SWIFT displays the Approval Chain window, which includes the buyer’s comments.

  o 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.