

## Set Up Temporary Approvers for Purchase Orders

There may be times when a buyer is absent and the approval of a purchase order cannot wait for the buyer's return.

- If the buyer has not assigned an alternative approver, SWIFT requires a change order on a dispatched purchase order to create a temporary approval reassignment.
- **IMPORTANT:** Since SWIFT allows only one buyer on a purchase order, the new buyer must change the Buyer field to his or her Employee ID to get it approved.

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.

Steps to complete

- Step 1: Find the name and/or User ID of the temporary approver
- Step 2: Access the Purchase Order page in SWIFT
- Step 3: Update the Buyer on the purchase order

### Steps to temporarily assign an approver for purchase orders

#### 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.

#### Step 2: Access the Purchase Order page in SWIFT

1. Navigate to the **Purchase Order** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Purchasing, Purchase Order, Purchase Order page defaults.
WorkCenter	Procurement, Purchasing, Buyer WorkCenter. Left menu Links, Add/Update POs, Purchase Order page.

2. On the **Purchase Order** page, select the **Find an Existing Value** tab.

SWIFT opens up the **Search Criteria** section of the **Find an Existing Value** page.

- Enter search items such the *PO ID*. Press the **Search** button.

**Purchase Order**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** Keyword Search Add a New Value

▼ Search Criteria

Business Unit = G1001

PO ID contains 4374

Origin begins with

Purchase Order Date =

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

Buyer Name contains

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

Case Sensitive

**Search** Clear Basic Search Save Search Criteria

- SWIFT opens up the **Search Results**. Press the **PO ID** link for the purchase order to update.

**Search Results**

View All

Business Unit	PO ID	Origin	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name
G1001	<a href="#">3000004374</a>	511	11/01/2017	Dispatched	WORKING CO-001	0000833498	WORKING CONVERSATIONS LLC

### Step 3: Update the Buyer on the purchase order

1. If the purchase order has a *PO Status* of "Dispatched", select the **Change Order** icon on the header of the purchase order. It is not required for "Open" *PO Status*.

**Purchase Order**


Business Unit: G1001 Origin: 511 Human Res Mgmt&Insurance

PO ID: 3000004374 Approval Exception

Change Order icon

PO Status: Dispatched

Budget Status: Valid



2. Update the *Buyer* field.
  - **IMPORTANT:** Change the *Buyer* field and then save the purchase order before updating any other fields.
  - 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: 11/01/2017 [Response Documentation](#)

Expiration Date: 12/29/2017 [Supplier Search](#)

\*Supplier: WORKING CO-001 [Supplier Details](#)

\*Supplier ID: 0000833496 [WORKING CONVERSATIONS LLC](#)

\*Buyer: [ ] x [\[ \]](#)

- Depending upon the permissions for the new buyer, SWIFT may display a message about changing the default *Ship To* and other values.
  - Press **OK** to change the *Buyer*. You will also be changing the *Location*, if different than your default, which affects the tax rate.
  - Press **Cancel** to update the buyer, but leave the defaults and *Location* as previously set up.

Changing Buyer will change the default values ShipTo ID to G104THFL00 Location to G104THFL00 , continue to retrofit the default values? (10200,290)

Changing Buyer will change the default values. Press OK to continue retrofit all new default values to schedules and distributions. Press Cancel to retain the original ShipTo, Department ID, Location and Origin.

- **IMPORTANT:** After changing the buyer, save it. Then, make any additional changes to the purchase order.
3. Press the **View Approvals** link to see the updated *Buyer*.

**Lines** ?

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line	Item	Description	PO Qty	*UOM
1		"Generations in the Workplace" class- \$ 2,000.00	1.0000	EA

[View Printable Version](#)

[View Approvals](#)

- On the **Review/Edit Approvers** section on the **View Approvals** page, the *Buyer* approval should now have the updated *Buyer* as the approver.

**Review / Edit Approvers**

**PO Approval**

Line 1 Schedule 1 Distrib 1 :Pending [View/Hide Comments](#)

"Generations In the Workplace" class- \$ 2,000.00 [Start New Path](#)

First Path

Pending [Multiple Approvers PO Approver](#) → [Not Routed New Buyer's Name Buyer](#)

[Comment History](#)

[Return to Purchase Order](#)

- Select the **Return to Purchase Order** link.

You have successfully temporarily assigned approvers for a purchase order.