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.

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<th>Navigation Options</th>
<th>Navigation Path</th>
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<td><strong>WorkCenter</strong></td>
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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.
SWIFT opens up the Search Results. Press the PO ID link for the purchase order to update.

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.

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

• 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.

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

• Select the Return to Purchase Order link.

You have successfully temporarily assigned approvers for a purchase order.