

QUICK REFERENCE GUIDE

February 20, 2023

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 first change the Buyer field to his or her Employee ID to get it approved and then save the purchase order.

This quick reference guide lists the steps to temporarily assign an approver for purchase orders in their absence. It can be for approvers or buyers in their approval roles.

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

Step 2. Access the Purchase Order page in SWIFT

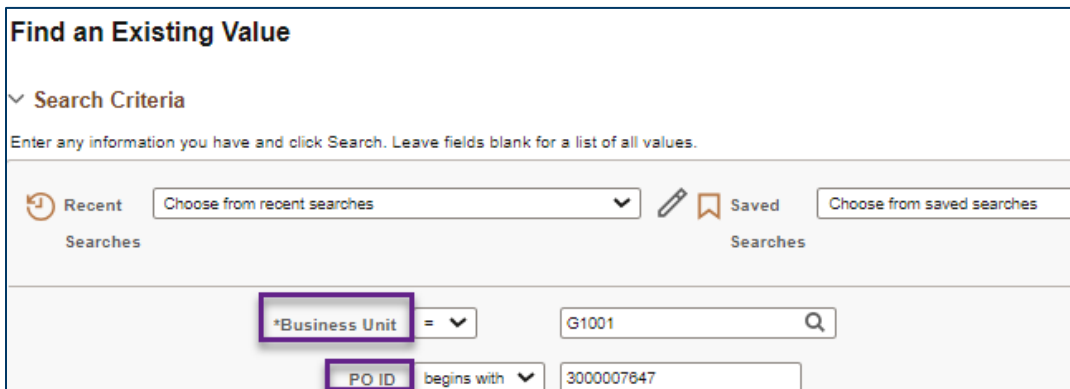
1. Navigate to the **Purchase Order** page.

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.

- On the Purchase Order page, select the **Find an Existing Value** button.



- SWIFT opens up the Search Criteria section of the Find an Existing Value page. Enter search items such as the PO ID. Press the **Search** button.



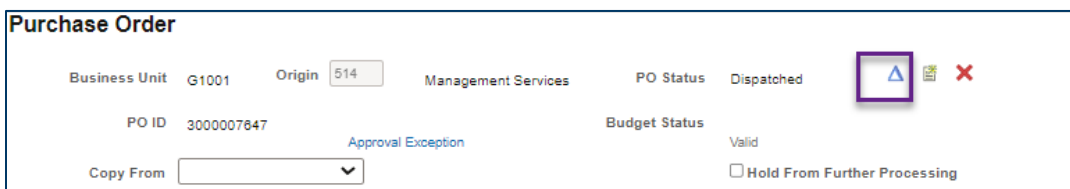
- SWIFT opens up the Search Results. Press the **PO ID** link for the purchase order to update.

The screenshot shows the 'Search Results' page with a table containing one row of results. The table has the following columns: Business Unit, PO ID, Origin, Purchase Order Date, PO Status, Short Supplier Name, Supplier ID, and Supplier Name. The PO ID '3000007647' is highlighted with a purple box.

Business Unit	PO ID	Origin	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name
G1001	3000007647	514	07/25/2023	Dispatched	VSI CONST -001	0000212046	VSI CONST INC

Step 3. Update the Buyer on the purchase order

- 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.
 - a. **IMPORTANT:** Change the Buyer field and then save the purchase order before updating any other fields.
 - b. 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.

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

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

5. On the Review/Edit Approvers section on the View Approvals page, the Buyer approval should now have the updated Buyer as the approver.
6. Select the **Return to Purchase Order** link.

Review / Edit Approvers

PO Approval

Line 1 Schedule 1 Distrib 1 :Pending
Reconfiguration/move four cube EAP space - labor

View/Hide Comments
Start New Path

First Path

Self Approved → Pending

PO Approver 12/28/23 - 2:21 PM → Buyer

Comments
Comment History

[Return to Purchase Order](#)

7. Save any changes and process the purchase order as needed.