**APPROVER QUICK START GUIDE**

Buy-to-Pay (B2P) Login  
huit.harvard.edu/apps/finance  
Training Resources and FAQs  
b2p.procurement.harvard.edu  
B2P Support Email  
ap_customerservice@harvard.edu  
B2P Support Phone  
617-495-8500 option 1

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**APPROVING OVERVIEW**

Once a requisition is submitted by a Requestor, the request must be reviewed and approved by one or more Approvers before it can be processed. Approvers are responsible for evaluating submitted orders for compliance, accuracy, completion, appropriateness, and consistency with University and TUB-specific policies and guidelines.

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**APPROVER BASICS**

**APPROVER NOTIFICATIONS**

- Approvers will receive an email and/or system notification when it is time to approve a request
- Users will need to log in to Buy-to-Pay to approve the request

Note: To modify email notifications click the User icon ➔ View My Profile ➔ Notification Preferences.

**ACCESS PENDING AND PRIOR APPROVALS**

There are multiple ways to access the approval queue.

**OPTION 1:**

Click Orders ➔ Approvals  
Select from the menu at right to view pending or prior approvals

**OPTION 2:**

Click the Action Items icon, and select My Assigned Approvals or Unassigned Approvals

**OPTION 3:**

In the Action Items section of the dashboard, click the links under My Assigned Approvals or Unassigned Approvals
REVIEWING A REQUEST

Under My Assigned Approvals, click the Requisitions to Approve folder to view details of requisitions assigned to you. You can also click the other approval folders to access unassigned requisitions that reside in your department queue.

Refer to the Approving Requisitions quick reference guide for more detail.

APPROVAL ACTIONS

Approvers access and take action on requisitions from a shared queue by:

- Assigning a requisition to themselves from the shared queue
- Approving a requisition, moving it through workflow

Approvers have several options for actions that can be taken when reviewing a document:

- Adding comments to clarify, provide context, or otherwise weigh in on a requisition
- Returning a requisition for edits
- Canceling a requisition
- Marking a requisition on hold while waiting for further information or follow up
- Adding another approver when required
- Forwarding to a different approver when required

QUICK REFERENCE GUIDE LINKS

Click the QRG links to access associate quick reference guides. Visit the B2P website for more quick reference guides and training resources.

1. Returning and Rejecting Requisitions
2. Setting up a Substitute Approver
3. Checkout Process
4. Receiving
5. Viewing Invoice and Payment Information
6. Creating a Change Order
7. Amount Based and Standing Order Guidance
8. Creating Chart of Account Favorites
9. Managing Notifications