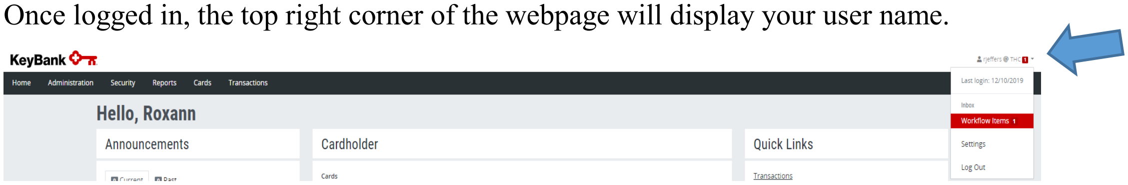
How to Approve a Transaction Envelope for Corporate Key2Purchase Card Holders

Step 1: Log into Key2Purchase.com

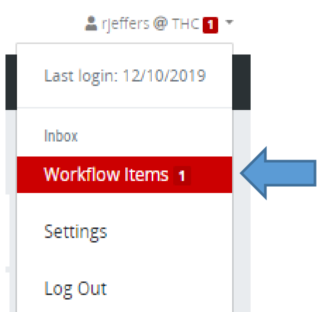
- Approvers will receive an email to their Hamilton email account from Key Bank that there are transactions requiring their attention.
- The email will include a link to the Key2Purchase system.
    - Click on the link or navigate to Key2Purchase.com.
- Login using your Key2Purchase credentials.
- The Organization ID for Hamilton College is THC.

Step 2: Navigate to your workflow items

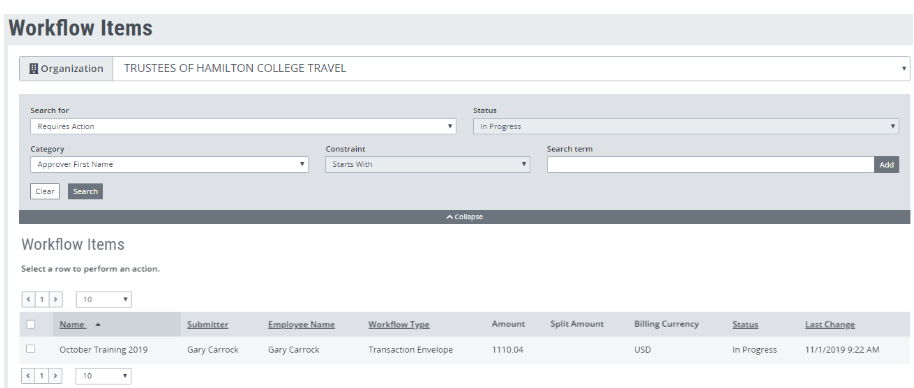
- Once logged in, the top right corner of the webpage will display your user name.



    - You will access your workflow items by selecting the down caret.

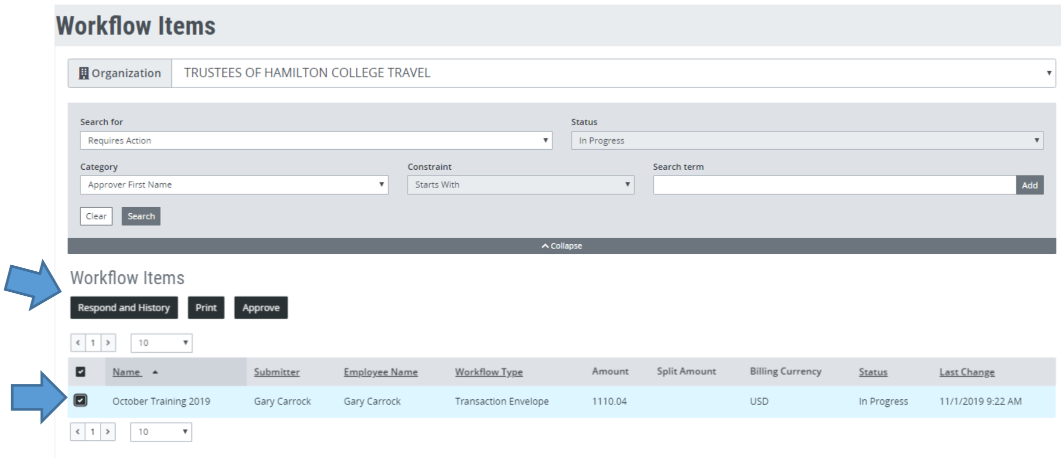


    - The red number next to your name will indicate how many transaction envelopes are waiting your approval.
- Click on **Workflow Items** from the drop down box to display all envelopes pending approval, as seen in the image below.

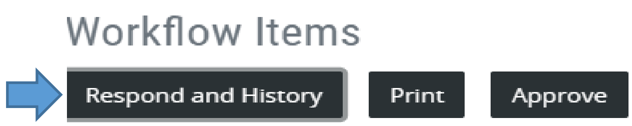


Step 3: Open Transaction Envelope

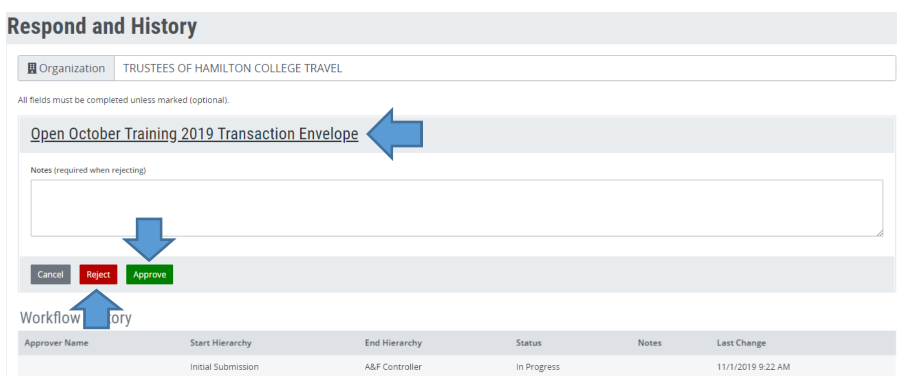
- The name of the envelope, submitter, and amount will be listed for each expense report.
- Click on the name of the envelope to be reviewed/approved and the screen will display the following options, as shown below.



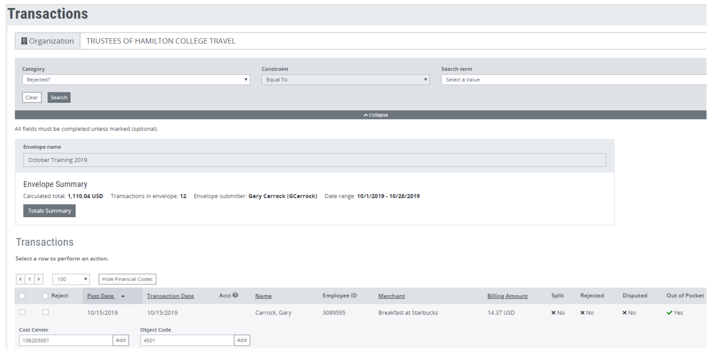
- In order to view the envelope in detail, click the box to the left of the envelope name and then select **Respond and History**.



- The Respond and History screen allows you to complete three different actions: Open the Transaction Envelope, Approve, or Reject.



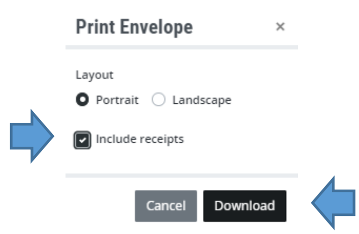
- Click on the Transaction Envelope link to view the envelope details. You will be navigated to the transactions page.



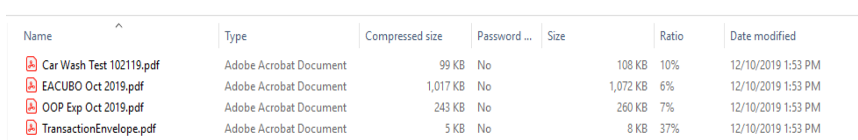
Step 4: Open Receipts

- At the bottom of the transaction screen, you will see the following options.

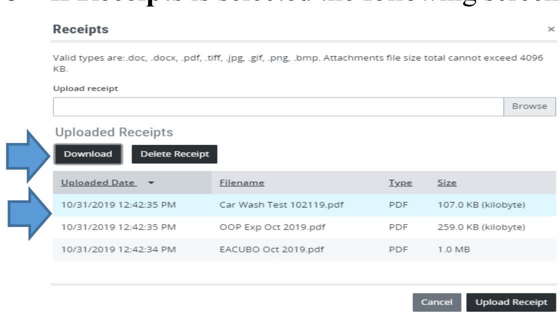
- You may review the files attached containing substantiating receipts by selecting **Print Envelope** or by selecting **Receipts**.
  - If **Print Envelope** is selected you will be provided the option to print with or without receipts.



  - Select **Include Receipts** then **Download**. A zip file will be downloaded which will include all the uploaded receipts as well as a summary of the transactions.



  - If **Receipts** is selected the following screen will pop up.



- The option to **Download** or **Delete** will be provided.
- Highlight the receipt you wish to view and select **Download** and you will be able view the receipt on your screen.
- After reviewing, you may close the Receipts box by clicking the X in the right hand corner.
- Then select Cancel to return to viewing the transactions in the expense report.

Step 5: Review transaction envelope and receipts

At this point, you are ready to begin your review of the envelope. Each supervisor may differ in the method of how they use the data to review the transaction envelope. Any review method you choose is acceptable as long as you are reviewing at least the following items.

Please ensure that:

- All cost center and object codes are correct and correspond to the appropriate budget line.
- Notes clearly describe the transaction.
- All personal charges are identified and payment is coordinated with Roxann Jeffers.
- A receipt is uploaded to substantiate each transaction.

Step 6: Approve or Reject Transaction Envelope

- If **Approve** is selected, the envelope will be marked as approved and the screen will display that the workflow has been approved and completed.
    - You may select Cancel at the bottom of the screen to return to Respond and History Screen and then select Back to return to list of any other Workflow Items.
    - If no other items to approve, you may log out.
- If **Reject** is selected, you will need to provide the reason for the rejection in the description section.
    - The cardholder will received and email letting them know the envelope has been "denied" and the reason (your description) will be listed in the email. The cardholder will have to correct their envelope and resubmit for approval.