

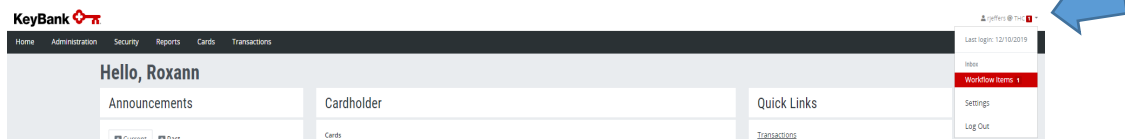
How to Approve a Transaction Envelope for Corporate Key2Purchase Card Holders

Step 1: Log into Key2Purchase.com

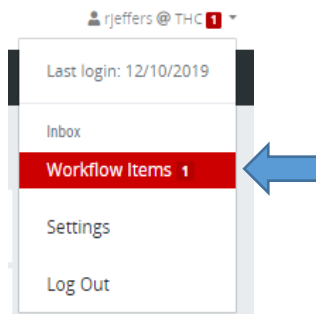
- Approvers will receive an email to their Hamilton email account from Key Bank that there are transactions requiring their attention.
- The email will include a link to the Key2Purchase system.
 - Click on the link or navigate to Key2Purchase.com.
- Login using your Key2Purchase credentials.
- The Organization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

The screenshot shows the 'Workflow Items' page. At the top, there is a search bar with 'Organization' set to 'TRUSTEES OF HAMILTON COLLEGE TRAVEL'. Below the search bar, there are filters for 'Search for' (Requires Action), 'Status' (In Progress), 'Category' (Approver First Name), and 'Constraint' (Starts With). There is also a 'Search term' field and an 'Add' button. Below the search filters, there is a table of workflow items. The table has columns for Name, Submitter, Employee Name, Workflow Type, Amount, Split Amount, Billing Currency, Status, and Last Change. One item is listed: 'October Training 2019' submitted by Gary Carrock, with an amount of 1110.04 USD, in 'In Progress' status, last changed on 11/1/2019 9:22 AM.

Name	Submitter	Employee Name	Workflow Type	Amount	Split Amount	Billing Currency	Status	Last Change
October Training 2019	Gary Carrock	Gary Carrock	Transaction Envelope	1110.04		USD	In Progress	11/1/2019 9:22 AM

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.

The screenshot shows the 'Workflow Items' interface. At the top, there is a search bar with 'Organization' set to 'TRUSTEES OF HAMILTON COLLEGE TRAVEL'. Below this are search filters for 'Requires Action' (set to 'In Progress'), 'Category' (set to 'Approver First Name'), and 'Constraint' (set to 'Starts With'). A 'Search' button is present. Below the search filters, there are three buttons: 'Respond and History', 'Print', and 'Approve'. A table of workflow items is displayed below, with the first item selected. The table has columns for Name, Submitter, Employee Name, Workflow Type, Amount, Split Amount, Billing Currency, Status, and Last Change.

Name	Submitter	Employee Name	Workflow Type	Amount	Split Amount	Billing Currency	Status	Last Change
October Training 2019	Gary Carrock	Gary Carrock	Transaction Envelope	1110.04		USD	In Progress	11/1/2019 9:22 AM

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

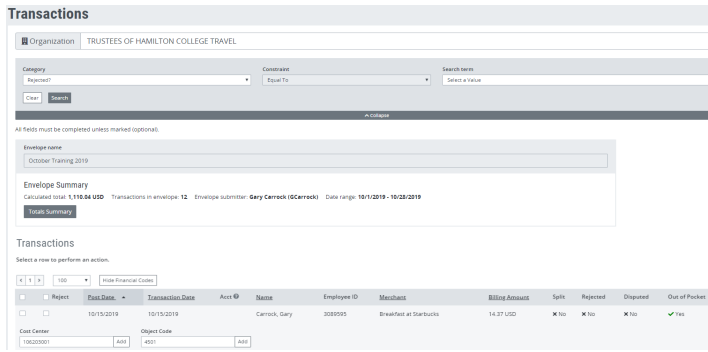
A close-up of the 'Workflow Items' section, showing the 'Respond and History', 'Print', and 'Approve' buttons. A blue arrow points to the 'Respond and History' button.

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

The screenshot shows the 'Respond and History' screen. At the top, there is a search bar with 'Organization' set to 'TRUSTEES OF HAMILTON COLLEGE TRAVEL'. Below this is a link to 'Open October Training 2019 Transaction Envelope'. Below the link is a text area for 'Notes (required when rejecting)'. Below the text area are three buttons: 'Cancel', 'Reject', and 'Approve'. Below the buttons is a 'Workflow History' table.

Approver Name	Start Hierarchy	End Hierarchy	Status	Notes	Last Change
	Initial Submission	A&F Controller	In Progress		11/1/2019 9:22 AM

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

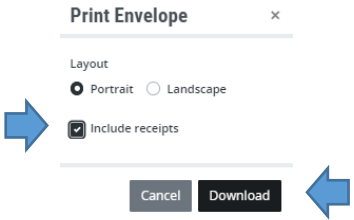


Step 4: Open Receipts

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



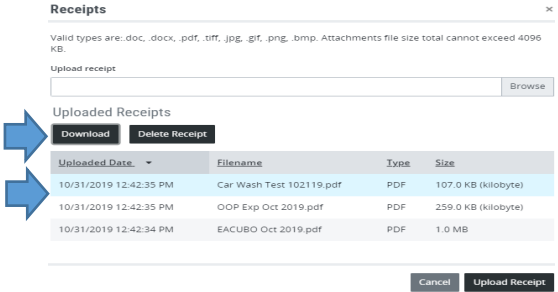
- You may review the files attached containing substantiating receipts by selecting **Print Envelope** or by selecting **Receipts**.
 - If **Print Envelope** is selected you will be provided the option to print with or without receipts.



- 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.

Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
Car Wash Test 102119.pdf	Adobe Acrobat Document	99 KB	No	108 KB	10%	12/10/2019 1:53 PM
EACUBO Oct 2019.pdf	Adobe Acrobat Document	1,017 KB	No	1,072 KB	6%	12/10/2019 1:53 PM
OOP Exp Oct 2019.pdf	Adobe Acrobat Document	243 KB	No	260 KB	7%	12/10/2019 1:53 PM
TransactionEnvelope.pdf	Adobe Acrobat Document	5 KB	No	8 KB	37%	12/10/2019 1:53 PM

- 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.