Instructions for Approving a Travel Expense Report

Approvers will receive an email from Key Bank that there are transactions requiring their attention. The email will include a link to the Key2Purchase system. Click on the link to log into Key2Purchase.com. The ORG code for Hamilton College should be THC.

Once logged in, the Home screen will display number in red in the top right corner of the screen as shown below. The number indicates the number of envelopes to approve or complete.

Click on the number shown and then select Workflow Items from the drop down box. The following screen will be displayed across the top and the expense reports to be approved or completed will be shown below this.

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.

In order to view the envelope, click the box to the left of the envelope name and then select "Respond and History". The system will display the full name of the expense report and total dollar amount. Click on the name of the report and the individual lines within the expense report will be displayed.

Scroll down the screen to review the expense lines in the report and the associated accounts codes and notes which have been entered.

You may review the pdf files attached containing substantiating receipts by selecting Receipts. If you click on the uploaded receipt file, the option to Download or Delete will be provided. 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.

At the bottom of the transaction screen, you will see the following options.
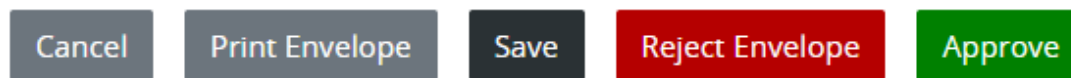
If "Print Envelope" is selected, you will be provided the option to print with or without receipts. The information will be downloaded and may be saved as pdf files or printed.

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.