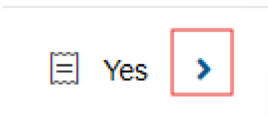
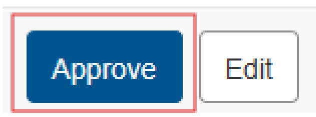
Approving Student Transactions

Student transactions are routed for approval to the financial manager and authorized signer of the index number used. It is the responsibility of the financial manager and authorized signers to determine what the approval process will be.

- In WellsOne, click the Approvals tab
- Transactions are listed by cardholder/user
- To view the transaction, click the > on the right side of the screen



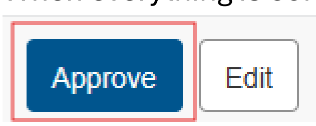
- View the details of the transaction and the receipt is applicable
- If everything is correct, click the Approve button



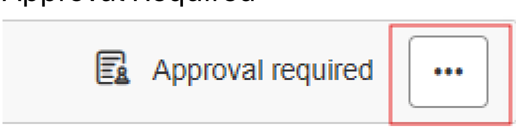
- If changes are needed, you can correct the transaction yourself by clicking the edit button

- Click Save and Close when complete

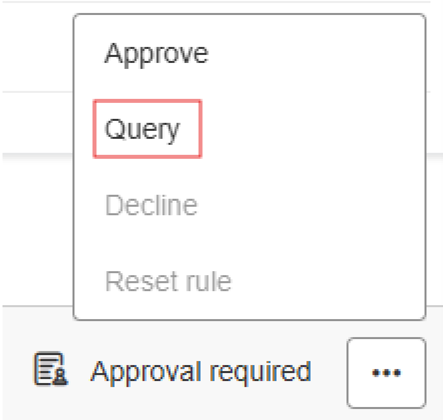
- When everything is correct, click the Approve button



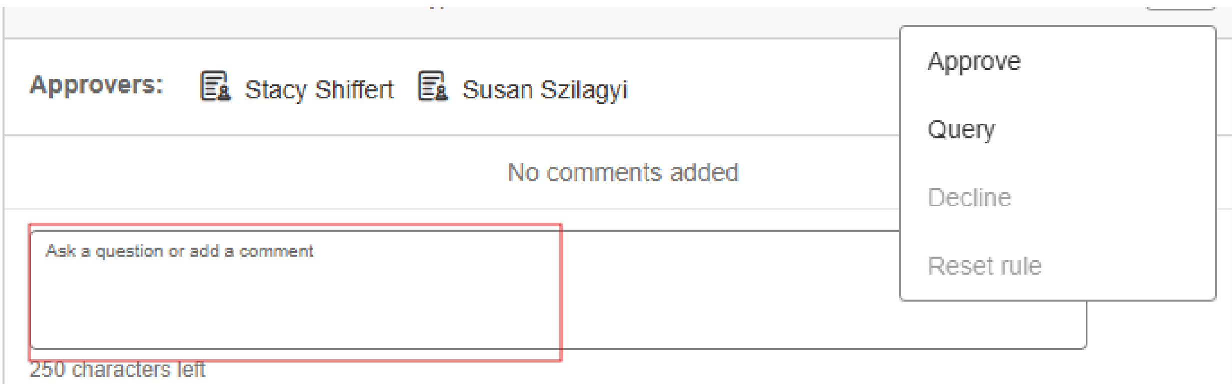
- If information is needed from the cardholder/user, click the three dots next to Approval Required



- Click Query



- Enter the information needed in the comments section. This sends the transaction back to the cardholder/user.



- The cardholder/user must correct or provide the information and add their own comment to send the transaction back to you for approval.