CDR Instructions: Budget Managers & Authorized Signers

This page includes instructions for Budget Managers and Authorized Signers who are approving CDRs (Check Disbursement Requests).

Viewing CDRs in the Laserfiche Inbox

All CDRs requiring your attention will be available in your Laserfiche inbox. While it is not necessary to check the inbox as you will receive an email for each request, some users prefer to work out of the inbox for approvals.

To access the inbox:
- Sign into the VPN.
- Follow this link to Okta: https://login.uofoundation.org/.
- Log in with your credentials.
- Choose the **Laserfiche Forms** chicklet in Okta.
- The **Inbox** should open by default to **My Tasks**, which will display any **Open Tasks** that need your attention. You can also select the **Inbox** from the top navigation bar if it doesn't open by default.

To view a history of previous CDRs that you have interacted with, select **Completed Tasks** in the navigation bar on the left side of the screen.

CDR Review

When a Budget Manager or Authorized Signer's review is needed, the reviewer will receive an email from laserfiche@uofoundation.org entitled "**CDR Process – Review Requested – [Vendor Name] – [Reimbursement Amount]**". Click on the link to view the form and review the data entered by the preparer.

The bottom of the form contains a **comment box** to insert any noteworthy details.

Select one of the two options provided. The Budget Manager or Authorized Signer can either:
- **Approve**: This option passes the request along to the next approver.
- **Request Edits**: This option returns the CDR to the preparer who can edit the form before returning it for approval.

Reviewing the CDR Action History

To view the Action History for each CDR, including comments provided by each participant in the process, select the **Action History** tab on the right side of the screen.

▸ Preparer Make Requested Modifications - ...
CDR - TEST 7122:

Summary   **Action History**

3/13/2023 4:32 PM

✓ **Jane Submitter** completed task **Preparer Make** ⌄
Requested Modifications – 123456 – Joe
Vendor

✓ Submit for Approval

💬 *AP would like you to make some*
changes to the invoice number.