

TCDR Instructions: Authorized Signers

This page includes instructions for Authorized Signers who are approving TCDRs (Transfer Check Disbursement Requests).

Viewing TCDRs in the Laserfiche Inbox

All TCDRs 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 TCDRs that you have interacted with, select **Completed Tasks** in the navigation bar on the left side of the screen.

TCDR Review

When an Authorized Signer's review is needed, the reviewer will receive an email from laserfiche@uofoundation.org entitled "**TCDR Process – Review Requested – [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 Authorized Signer can either:

- **Approve:** This option passes the request along to the next approver.
- **Request Edits:** This option returns the TCDR to the preparer who can edit the form before returning it for approval.

Reviewing the TCDR Action History

To view the Action History for each TCDR, 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.*