Approving Vouchers Overview

This Job Aid provides step-by-step instructions for approvers to review and then take action on Vouchers in Cardinal Financials. After a Voucher has successfully passed edit check and then budget check, it will route for review based on approval routing for the Agency.

Approvers review Vouchers by accessing the Approvals tile or through the AP WorkCenter.

Approvers should always review information before taking action on the Voucher. After reviewing a Voucher, approvers can take one of the following actions:

- **Approve** – approves the Voucher so it can be processed in the nightly post process to await due date for payment.
- **Deny** – denying the Voucher will return it to the Voucher Processor who keyed it for update or deletion. A comment must be added to provide instructions on the desired action for the Voucher.
- **Pushback -** sends the Voucher back to the previous approver and is only enabled for Agencies with multiple levels of approval. A comment must be entered providing the reason for the pushback so the previous approver can take the applicable action on the Voucher.
- **Hold** – places a hold on the Voucher. When an approver places the Voucher “On Hold” no other approver will be able to access or take action on the Voucher. Only the approver that placed it on hold and go back and take additional approval actions on the Voucher.

Vouchers for Capital Outlay and Legal Services will automatically route to the Department of Accounts (DOA) for approval as appropriate once the Voucher has completed required Agency approvals.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

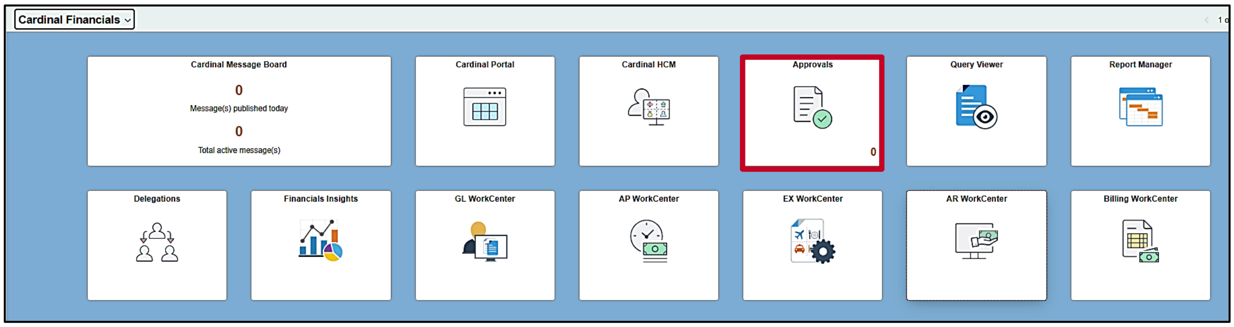
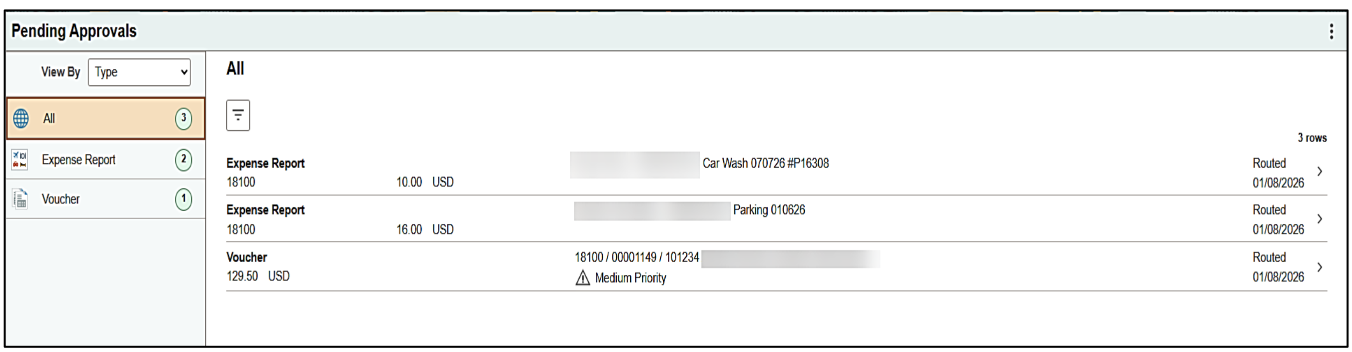
Table of Contents

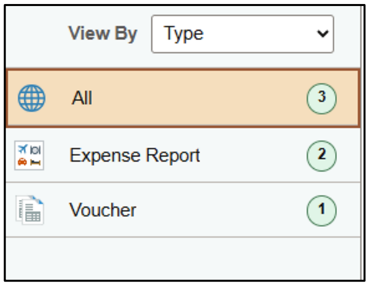
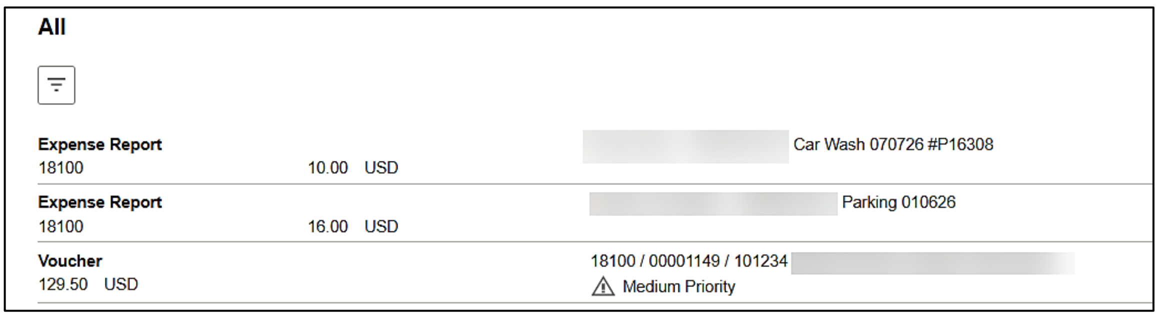
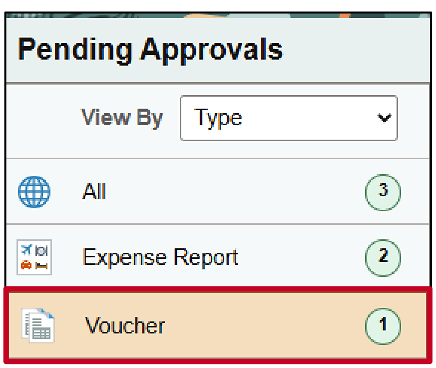
Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
1/9/2026	Baseline.

Approving Vouchers Using the Approvals Tile

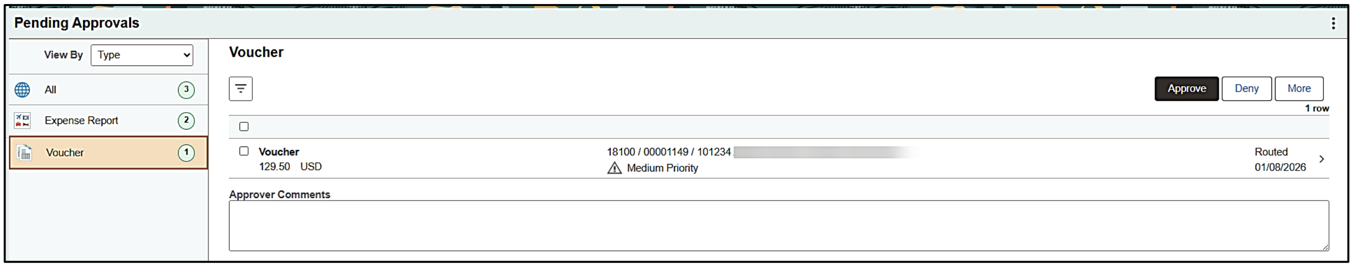
Approvers can access all approvals from the **Approvals** tile located on the Cardinal Financials Homepage. This section of the Job Aid will walk through the steps using this approach.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click the Approvals tile on the Cardinal Financials Homepage.

</td></tr>
<tr><td>(i)</td><td>The number that displays indicates the number of items that require approval across all Functional areas based on the user’s security roles.</td></tr>
<tr><td colspan="2">The Pending Approvals page displays.

</td></tr>
</table>

Step	Action
	The left menu displays a listing of the types of items pending approvals for the user and defaults to **All**. The user can select a specific item for review or choose from the Transaction panel.  The Transaction panel displays the details for all items that require approval based on the default of Type **All** in the menu.  For this scenario, the user has two Expense Reports and one Voucher that require review and approval.
2.	Click the **Voucher** option on the menu. 

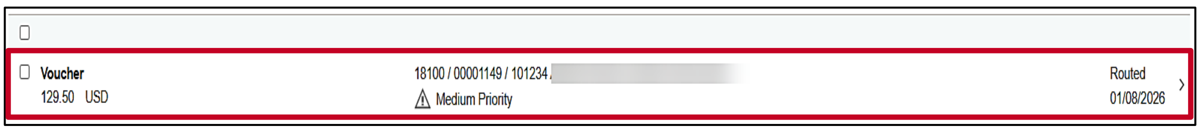
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Pending Approvals** page refreshes and only the Voucher(s) that require approval display.



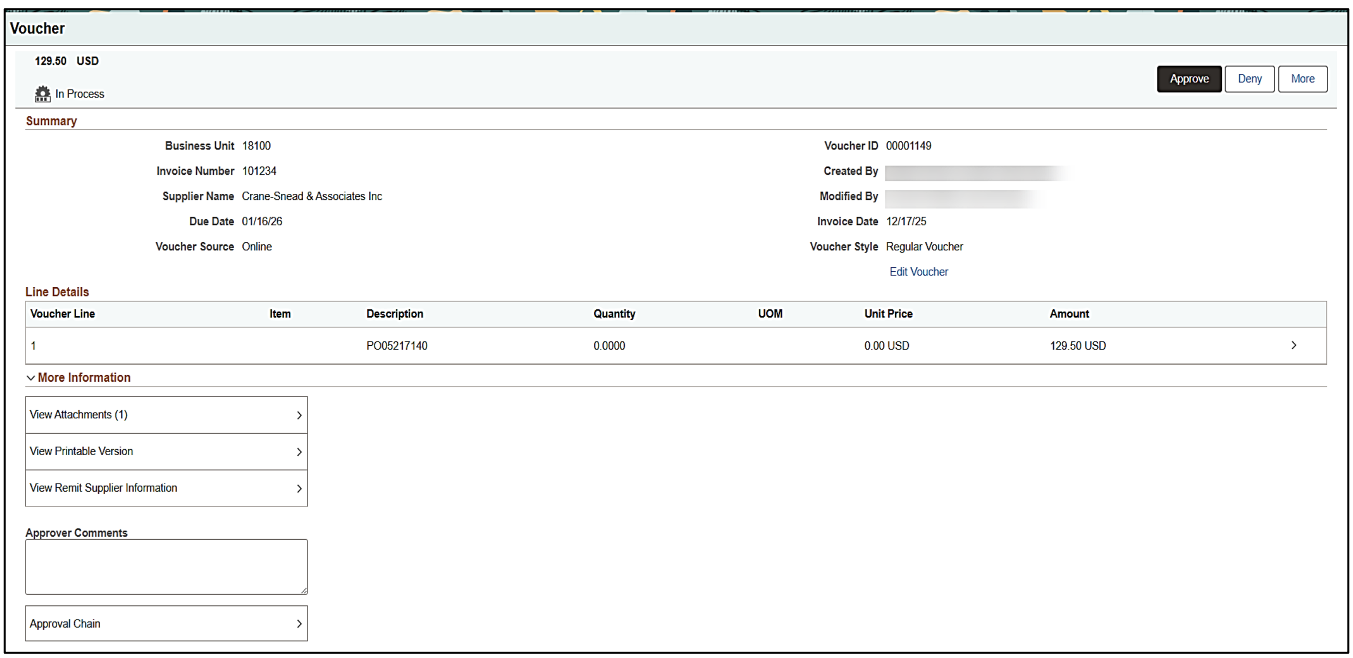
</td></tr>
<tr><td>3.</td><td>

Click the line for the applicable Voucher.

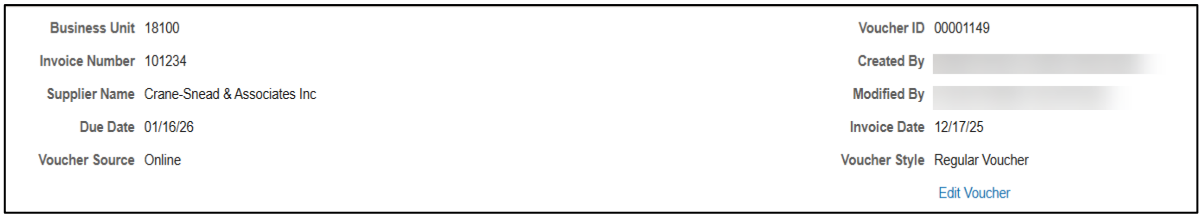


</td></tr>
<tr><td colspan="2">

The **Voucher** page displays for the selected Voucher.

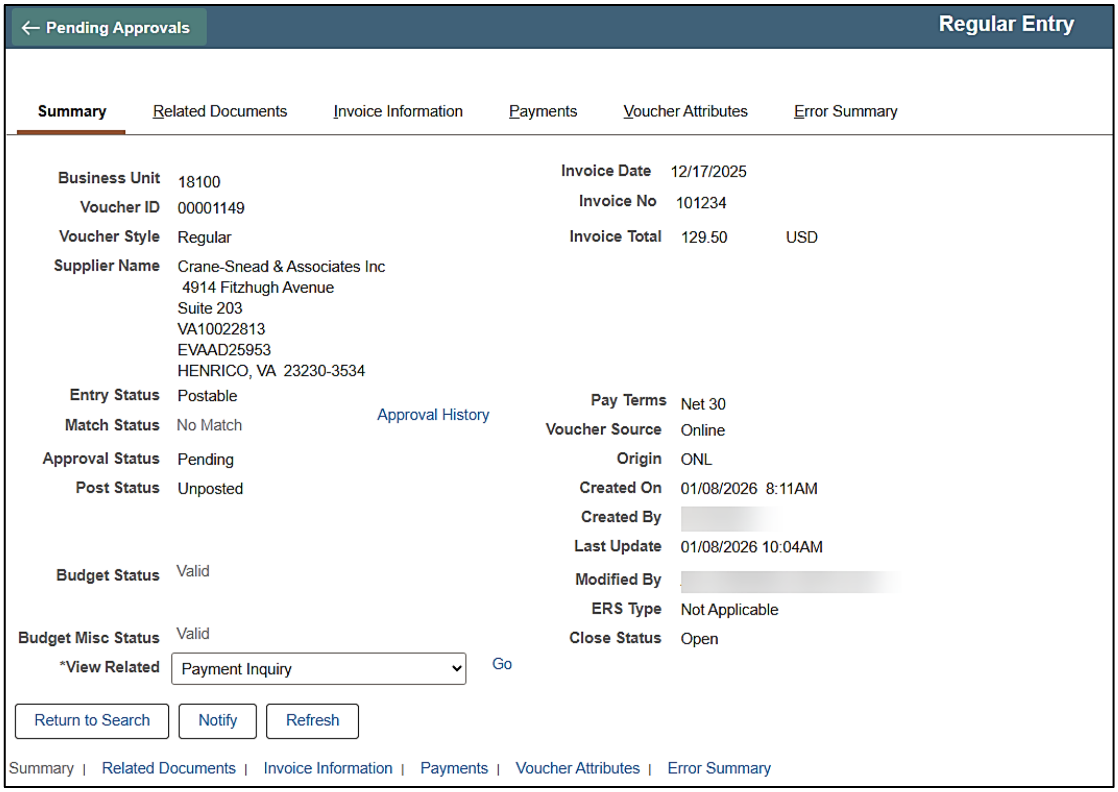


</td></tr>
</table>

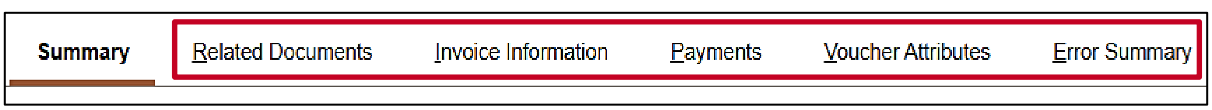
Step	Action
4.	Review the information in the **Header** section as needed.  This section displays the following key fields: • **Business Unit** - the business unit for the Voucher • **Invoice Number** - the number displayed on the supplier’s invoice • **Supplier Name** - the name of the supplier for the Voucher • **Due Date** - date the Voucher is scheduled to be paid • **Voucher Source** - displays how the Voucher was entered (e.g., Online or Retail Interface Voucher) • **Voucher ID** - the Cardinal assigned Voucher ID • **Created By** - name of the Voucher Processor that created the Voucher • **Modified By** - name of the user or process that last modified the Voucher • **Invoice Date** - the date from the supplier’s invoice • **Voucher Style** - displays the type of Voucher (Regular or Adjustment)
5.	Click the **Edit Voucher** link to view the Voucher Entry pages. 

Step	Action

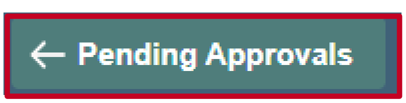
The **Regular Entry** page opens with the **Summary** tab displayed by default.



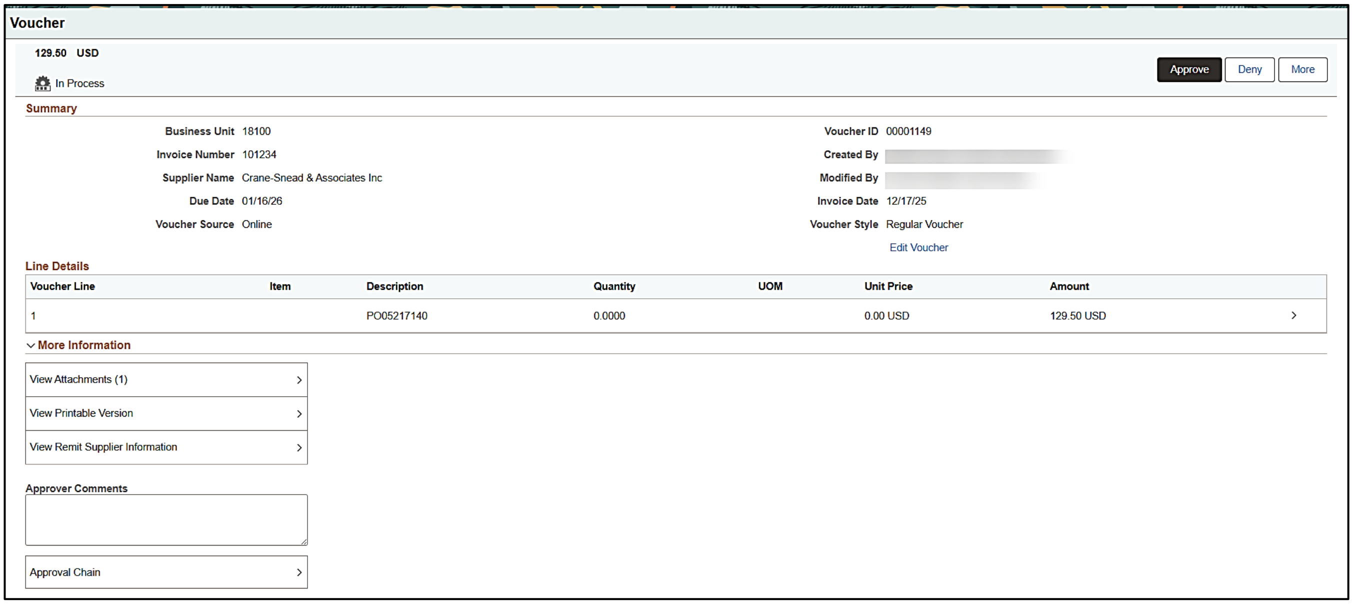
Step	Action
6.	Review the **Regular Voucher** pages to see the details for the Voucher by clicking the applicable tabs.



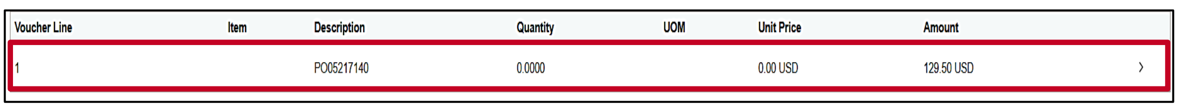
Step	Action
7.	Click the **Pending Approvals** link at the top of the page.



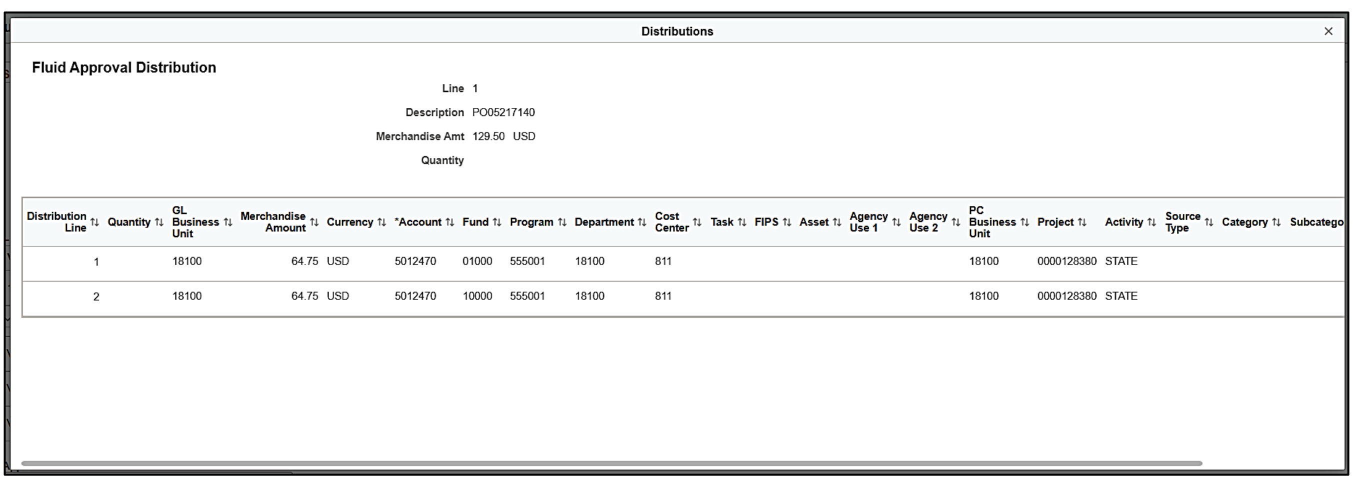
Step	Action
	The **Voucher** page redisplays.

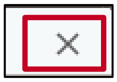
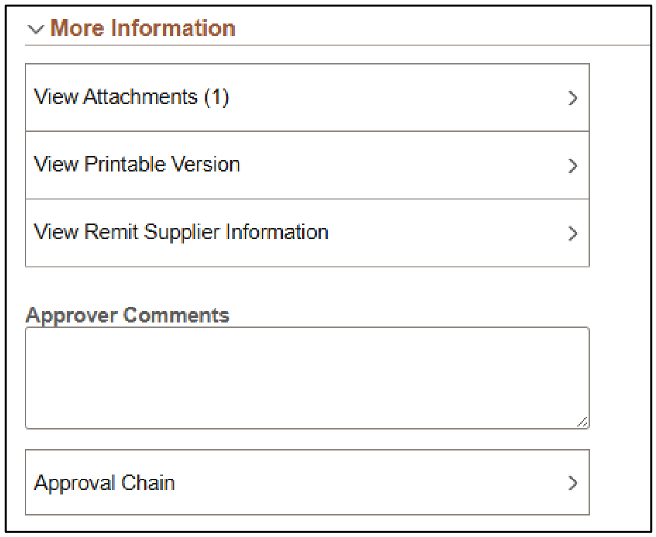
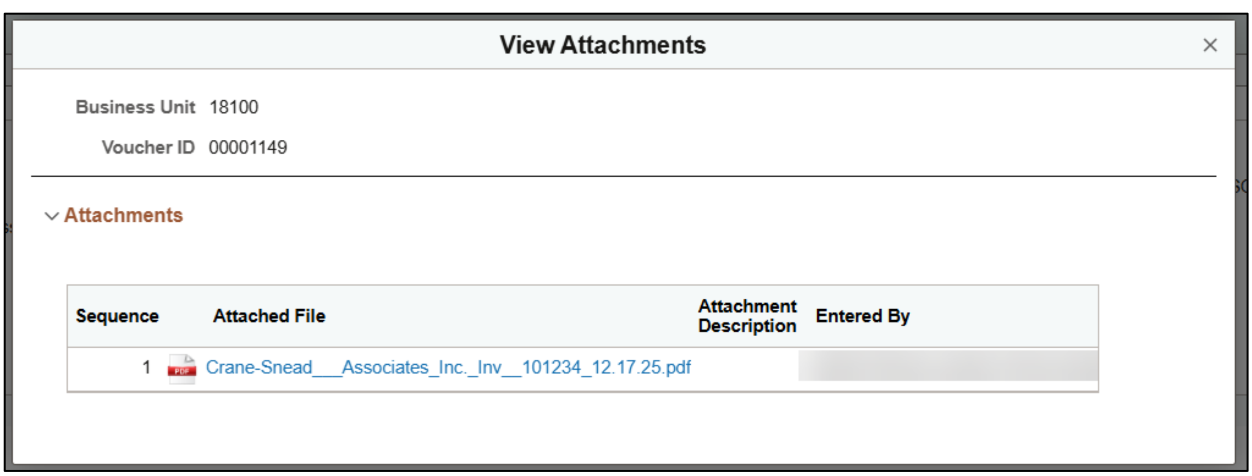


Step	Action
8.	If the approver is ready to take approval action on the Voucher, proceed to **Step 22**. If the approver wants to review other sections on this page, proceed to **Step 9**.
9.	Click the row under the **Line Details** section.

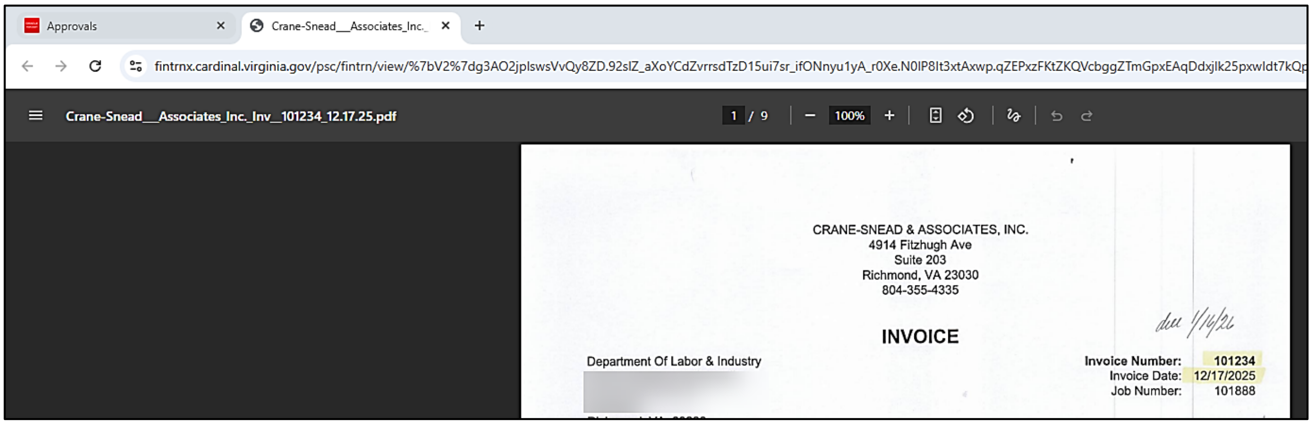
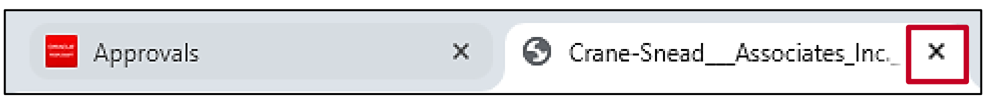
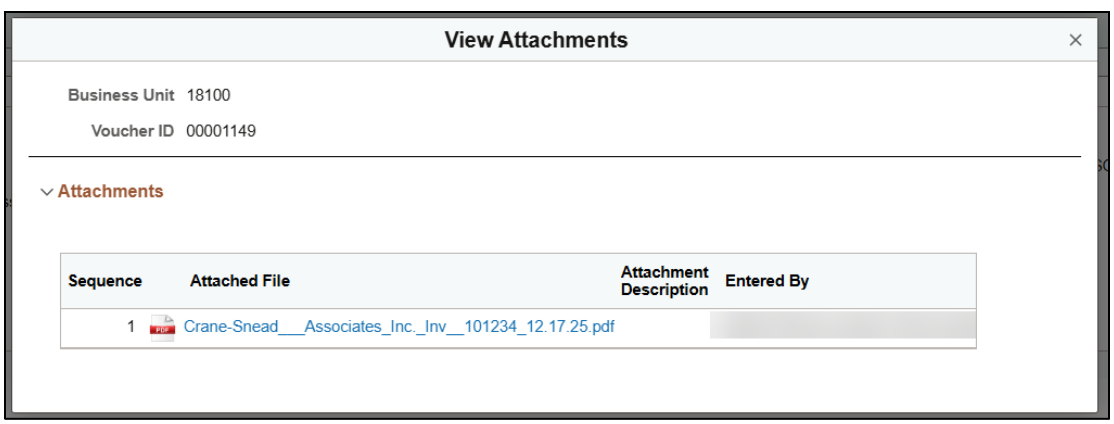


The **Distributions** page displays in a pop-up window.



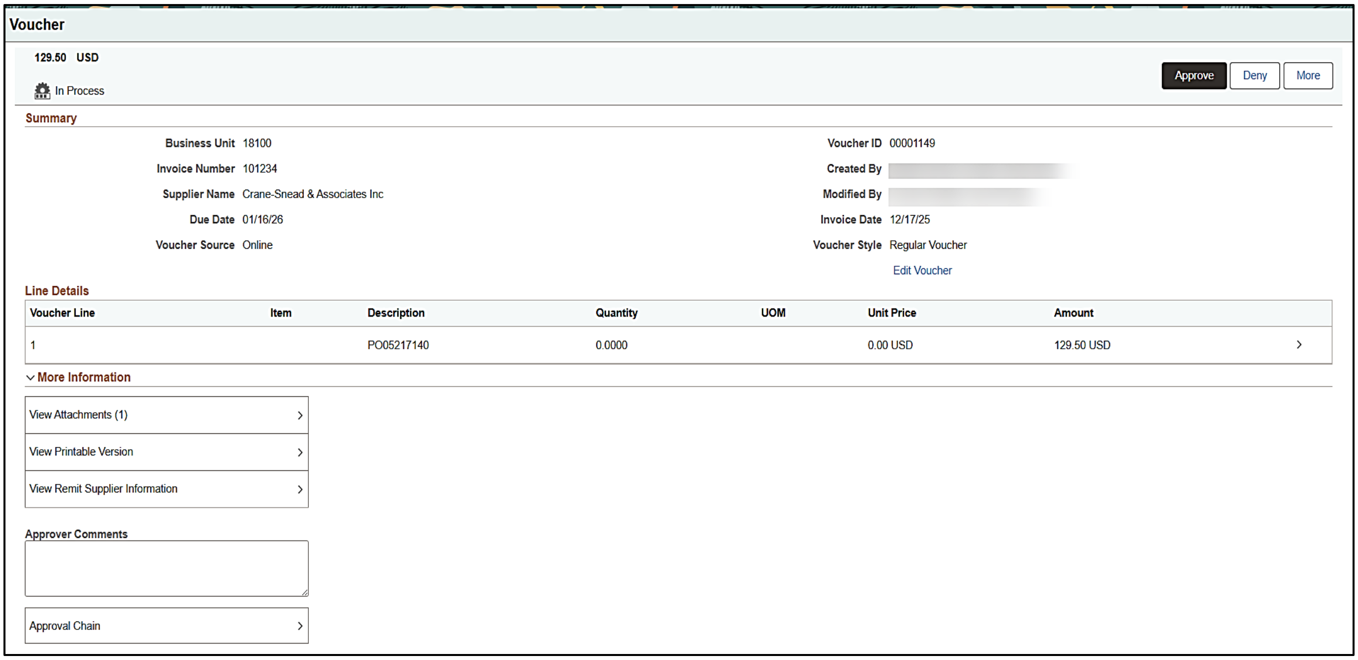
Step	Action
10.	Review the distribution and click the "**x**" at the top right to close the window. 
	The bottom section of the page contains the **More Information** section. 
11.	Click **View Attachments** to see any documents attached to the Voucher. **Note**: A number displays to indicate if the Voucher has an attachment. If there are no attachments, proceed to **Step 15**. 
	The **View Attachments** page displays in a pop-up window. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>12.</td><td>Click the attachment(s) to view them.

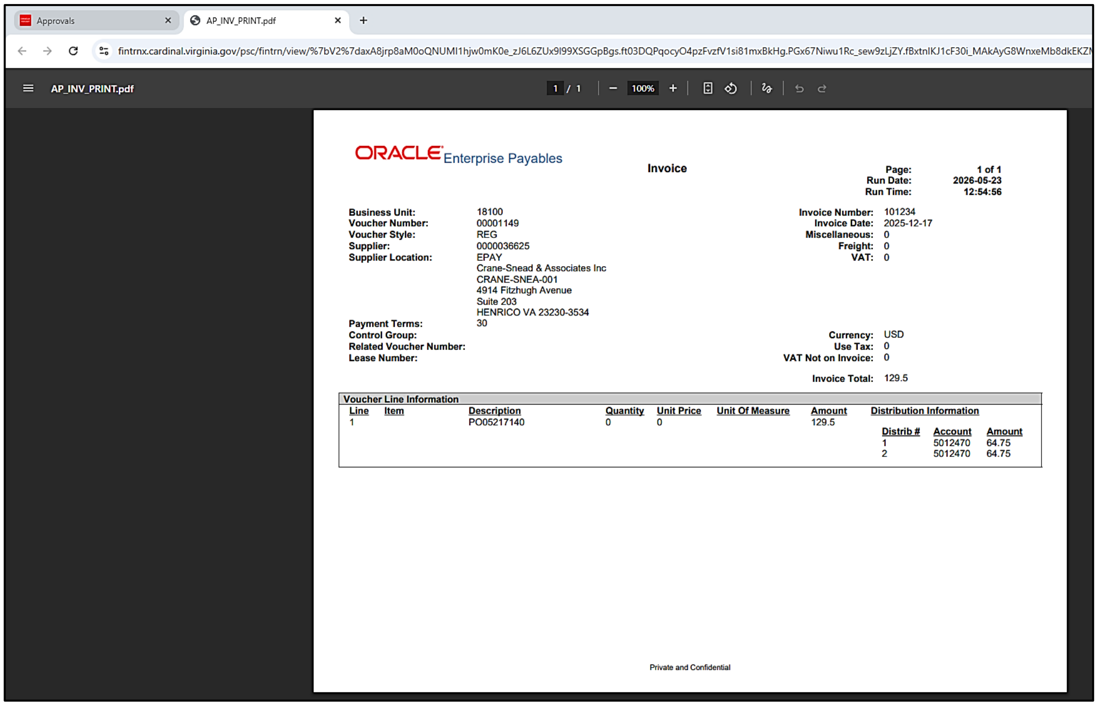
</td></tr>
<tr><td colspan="2">Cardinal opens the attachment in a new browser tab.

</td></tr>
<tr><td>13.</td><td>Click the “x” at the top of the new browser tab to close it and return to the Voucher page.

</td></tr>
<tr><td colspan="2">The View Attachments page displays.

</td></tr>
<tr><td>14.</td><td>Click the “x” to close the View Attachments page.

</td></tr>
</table>

Step	Action
	The **Voucher** page redisplays.

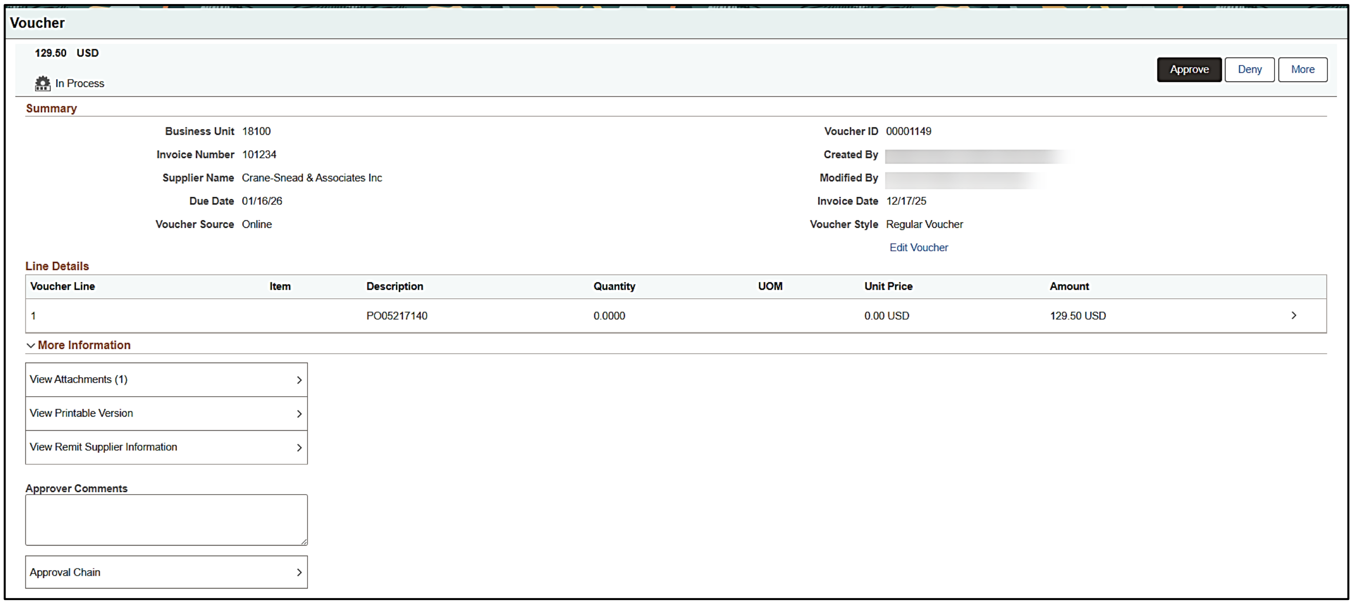


15.	Click **View Printable Version** to get a printable version of the Voucher.

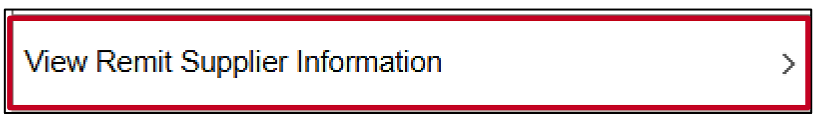
Step	Action
The **Printable version** displays in a new browser tab.	
	
16.	Click the "**x**" at the top of the new browser tab to close the Printable version. 

Step	Action
	The **Voucher** page redisplays.
17.	Click **View Remit Supplier Information** to see supplier details.
	The **Remit Supplier Information** page displays in a pop-up window.
18.	Click the "**x**" to close the window.

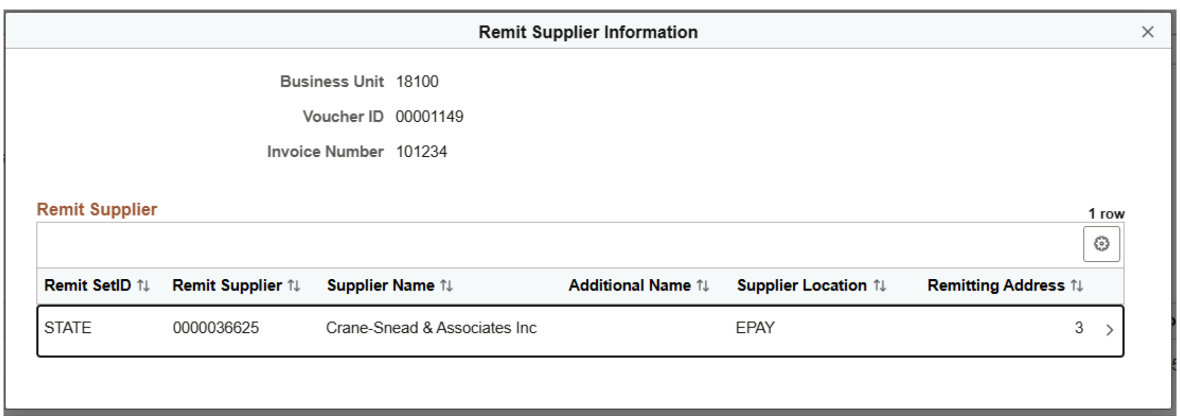
The **Voucher** page redisplays.



17. Click **View Remit Supplier Information** to see supplier details.



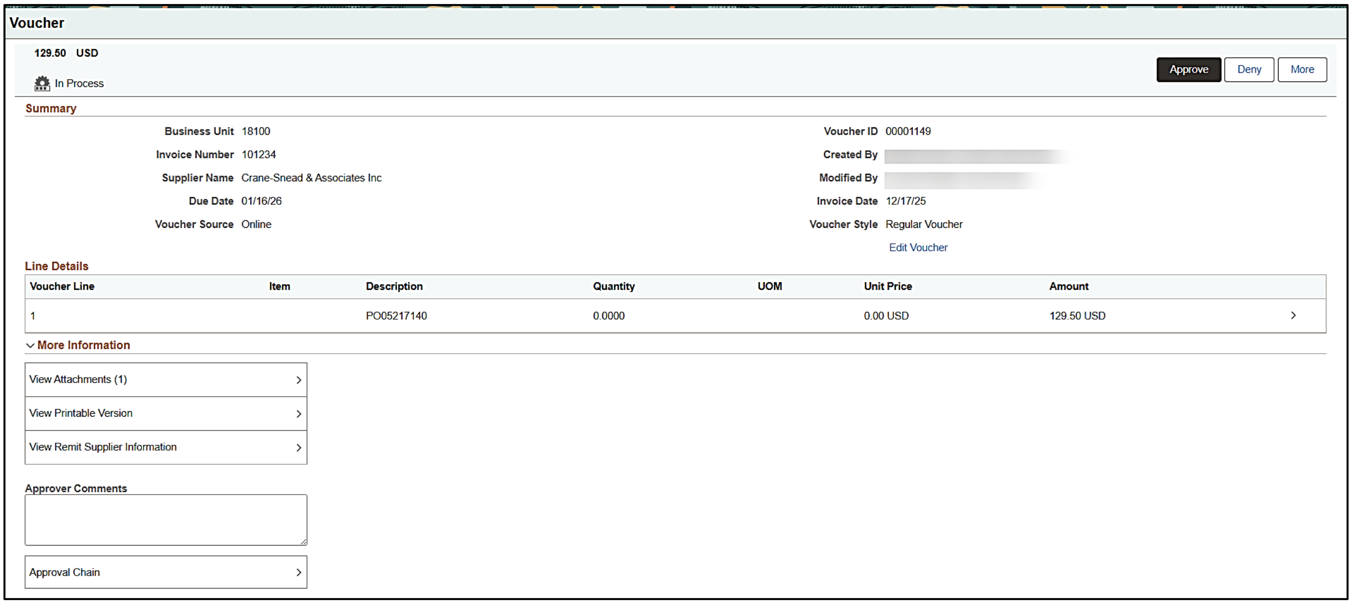
The **Remit Supplier Information** page displays in a pop-up window.



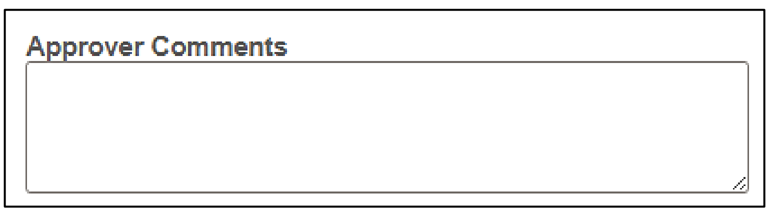
18. Click the "**x**" to close the window.

Step	Action

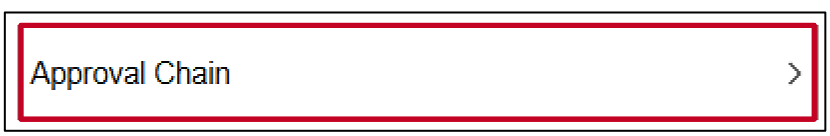
The **Voucher** page redisplays.



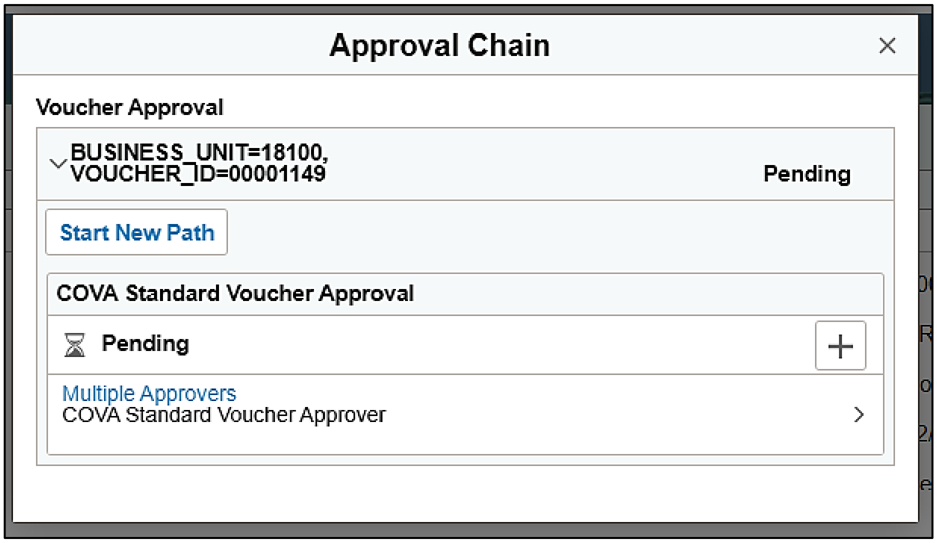
The **Approver Comments** field allows the approver to add comments, if applicable, for the Voucher approval action.



19. Click **Approval Chain** to see the approval flow for the Voucher.

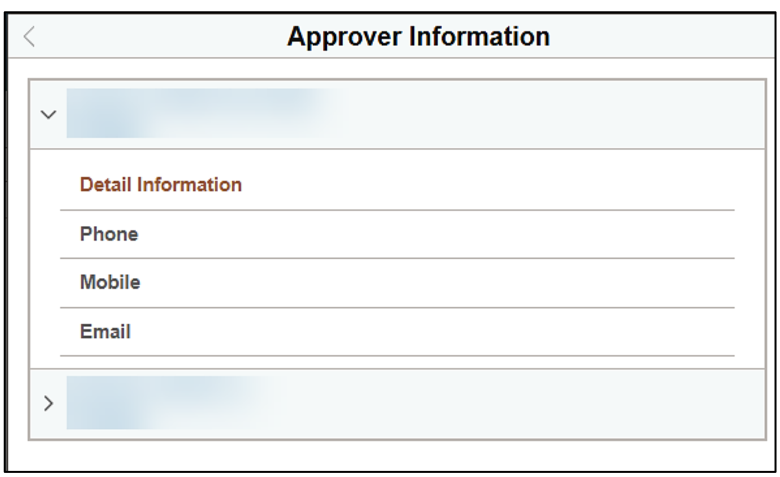


<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Approval Chain page displays in a pop-up window.

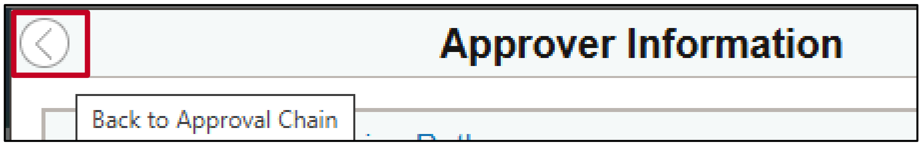
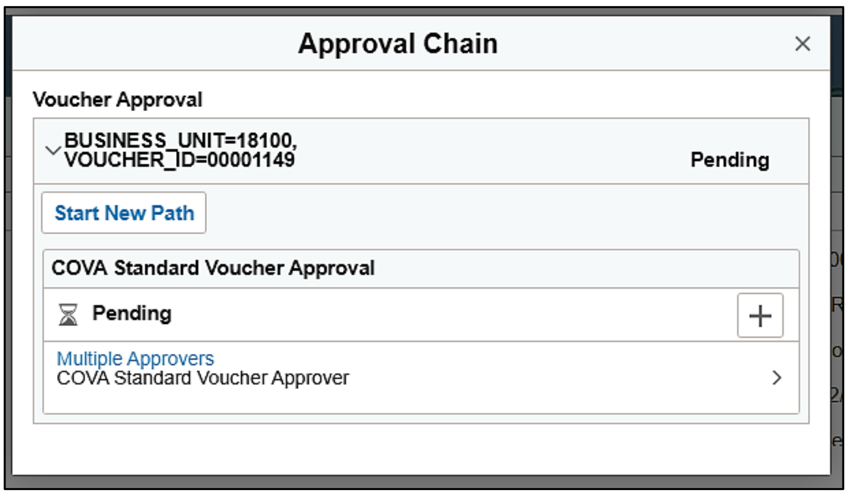
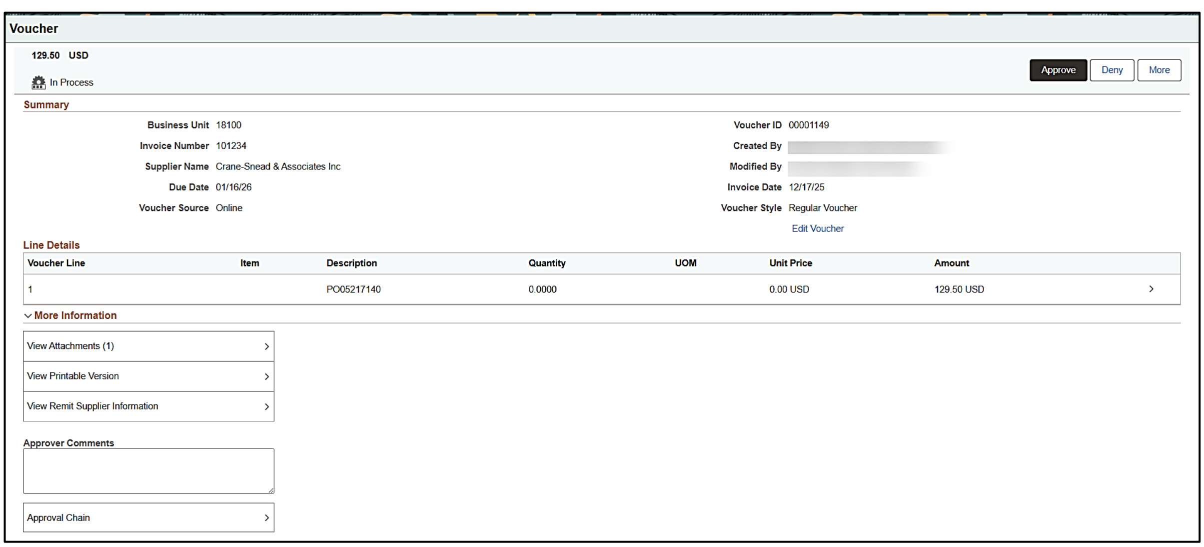


</td></tr>
<tr><td>ℹ</td><td>The Multiple Approvers link displays when it is a pooled approval.</td></tr>
<tr><td>20.</td><td>Click the Multiple Approvers link if desired, to see all approvers in the pool otherwise proceed to Step 23.

</td></tr>
<tr><td colspan="2">The Approver Information page displays.

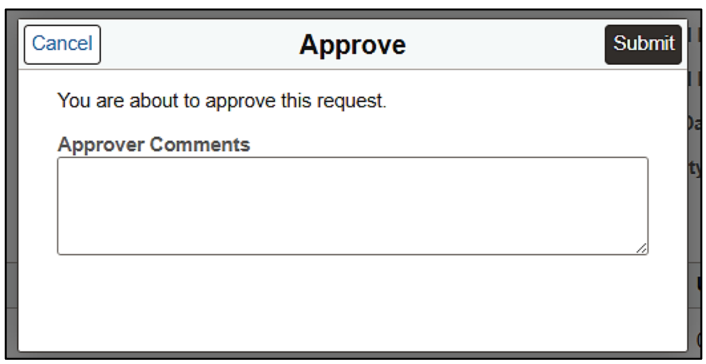


</td></tr>
</table>

Step	Action
21.	Review the information as applicable and click the **Back to Approval Chain** icon. 
The **Approval Chain** page redisplays. 	
22.	Click the “**x**” to close the window and return to the **Voucher** page. 
The **Voucher** page redisplays. 	

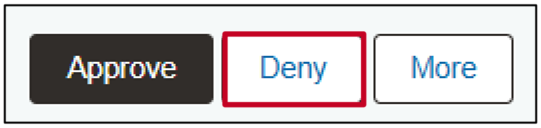
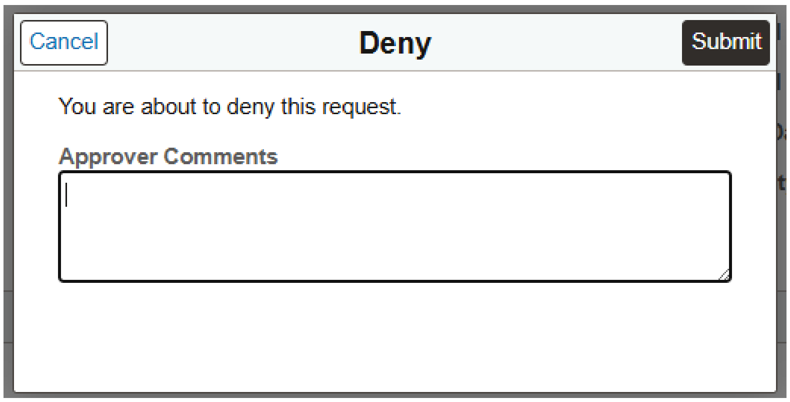
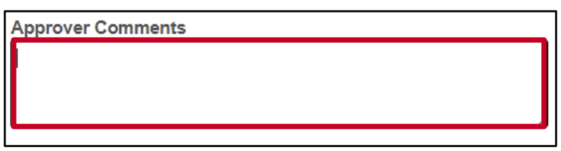
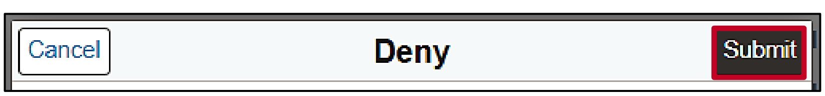
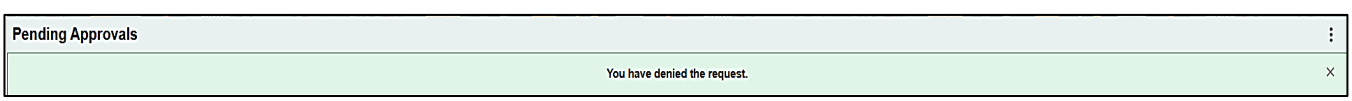
Step	Action
23.	Take the applicable approval action. Proceed to the applicable step based on the approval action sections. • **Approve** – Proceed to the next step • **Deny** – Proceed to **Step 26** • **Pushback** – Proceed to **Step 29** • **Hold –** Proceed to **Step 33**
24.	**Approving the Voucher** Click the **Approve** button. 

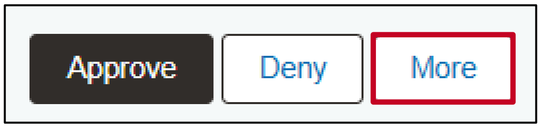
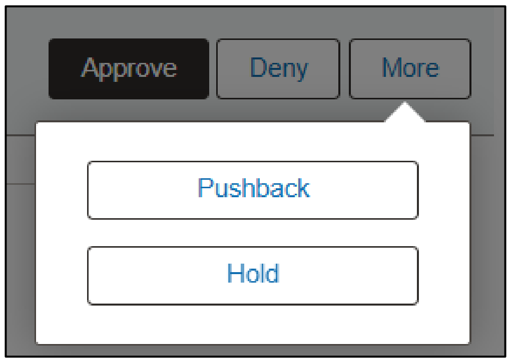
The **Approve** page displays in a pop-up window.

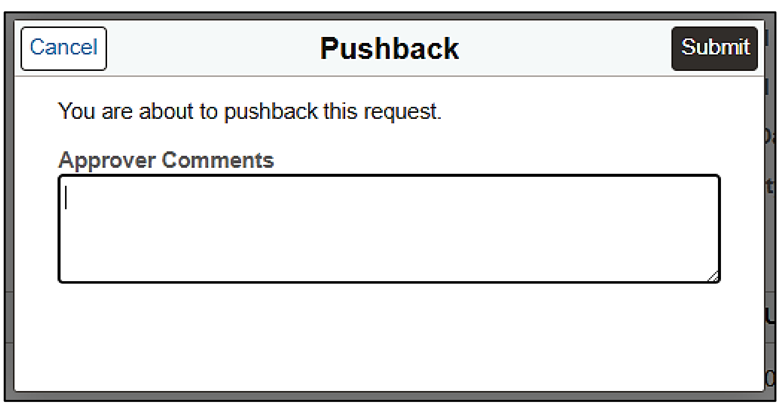


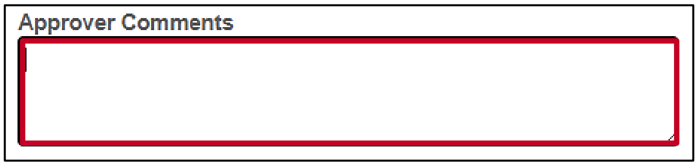
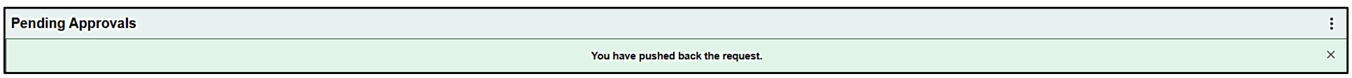
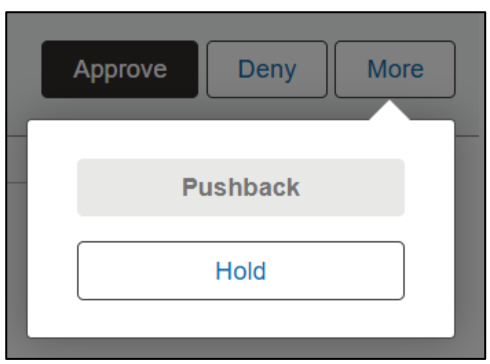
(i)	The **Approver Comments** field is not required when approving a Voucher. However, the approver can still enter comments if applicable.
25.	Click the **Submit** button. 

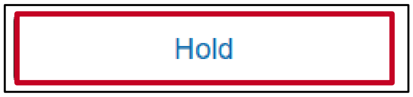
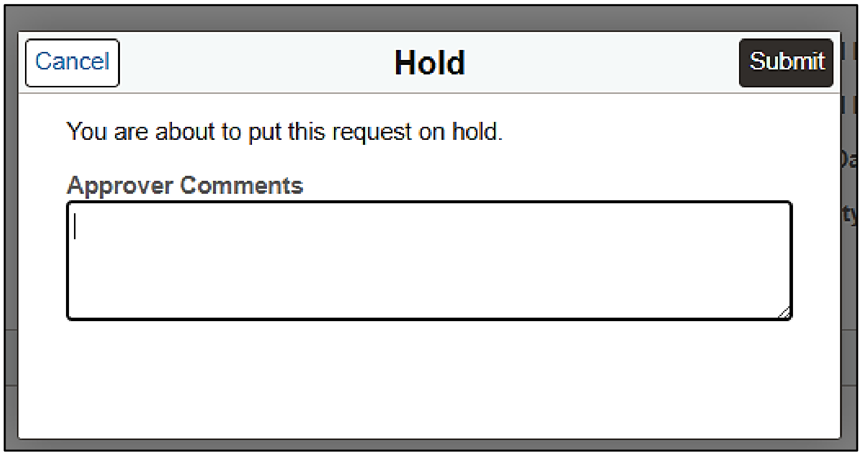
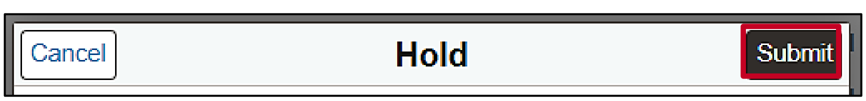
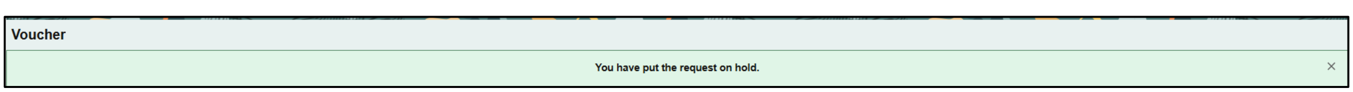
The **Pending Approvals** page displays with a confirmation message that the Voucher was approved.

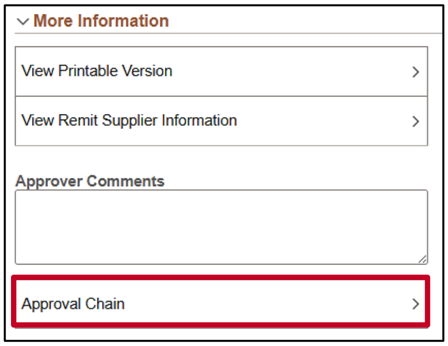
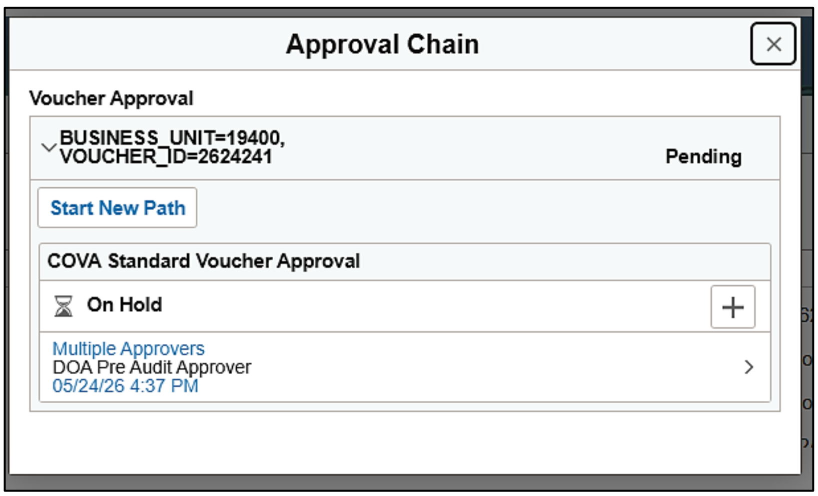
Step	Action
26.	**Denying a Voucher** Click the **Deny** button. 
	The **Deny** page displays in a pop-up window. 
27.	Enter comments in the **Approver Comments** field to indicate any required updates or if the Voucher needs to be deleted. **Note**: A comment must be entered when a Voucher is denied providing instructions on the desired action for the Voucher. 
28.	Click the **Submit** button. 
	The **Pending Approvals** page displays with a confirmation message that the Voucher was denied. 
	An email is triggered to the Voucher Processer who entered the Voucher so the applicable action can be completed for the Voucher.

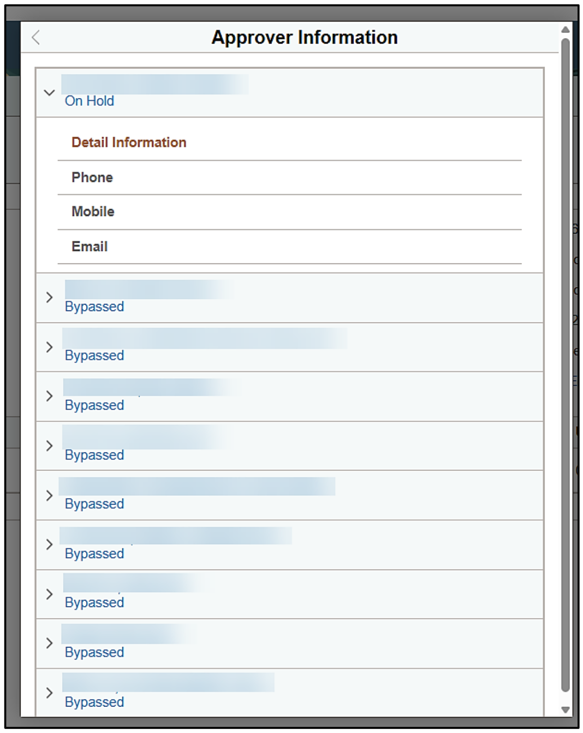
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>29.</td><td>Pushing Back a Voucher
Click the More Button.

</td></tr>
<tr><td colspan="2">The Pushback and Hold buttons display in a pop-up window.

</td></tr>
<tr><td></td><td>The Pushback button is only available for Agencies with multiple levels of approvals. The Pushback option routes the Voucher back to the previous approver for updates.</td></tr>
<tr><td>30.</td><td>Click the Pushback button.

</td></tr>
<tr><td colspan="2">The Pushback page displays in a pop-up window.

</td></tr>
</table>

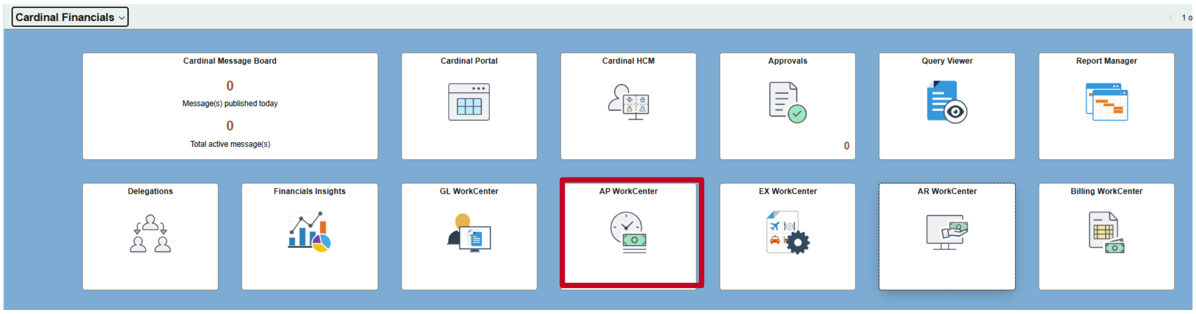
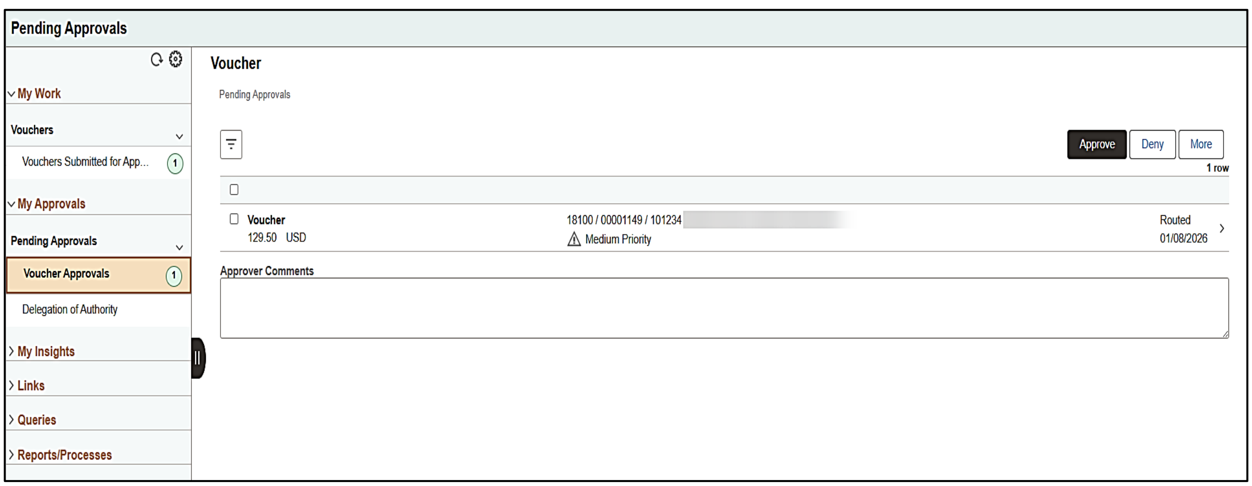
Step	Action
31.	Enter the applicable reason why the Voucher is being pushed back in the **Approver Comments** field. **Note**: A comment must be entered when a Voucher is pushed back providing the reason for the pushback so the previous approver can take the applicable action on the Voucher. 
32.	Click the **Submit** button. 
	The **Pending Approvals** page displays with a confirmation message that the Voucher was pushed back. 
33.	**Placing a Voucher on Hold** Click the **More** button. 
	The **Pushback** and **Hold** buttons display in a pop-up window. 
ℹ	The **Pushback** button is only enabled for Agencies with multiple levels of approvals.

Step	Action
34.	Click the **Hold** button. 
The **Hold** page displays in a pop-up window. 	
35.	Enter the applicable reason why the Voucher is being placed on hold in the **Approver Comments** field. **Note**: A comment must be entered when a Voucher is placed on hold. 
	When a Voucher is placed on hold, no other approver can take action on the Voucher. Only the approver that places the Voucher on hold can come back and approve, deny or pushback the Voucher. It is important not to leave a Voucher "On Hold" for a long period of time as it may impact the Agency's prompt pay statistics. Follow Agency guidelines regarding placing Vouchers on hold.
36.	Click the **Submit** button. 
A message displays at the top of the **Voucher** page indicating it has been placed on hold. 	

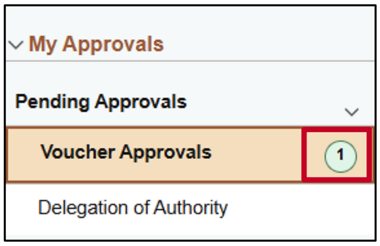
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>37.</td><td>Click Approval Chain option under the Voucher More Information section to confirm the “Hold”.
</td></tr>
<tr><td colspan="2">The Approval Chain page displays in a pop-up window.
</td></tr>
<tr><td>ℹ</td><td>The Voucher displays an “On Hold” message under the COVA Standard Voucher Approval section of the page.</td></tr>
<tr><td>38.</td><td>Click the Multiple Approvers section.
</td></tr>
</table>

Step	Action
The **Approver Information** page displays with the name of the person that placed the Voucher “On Hold” at the top. 	
	All other approvers are noted as “Bypassed”. Only the approver that placed the hold can take any additional action on the Voucher.

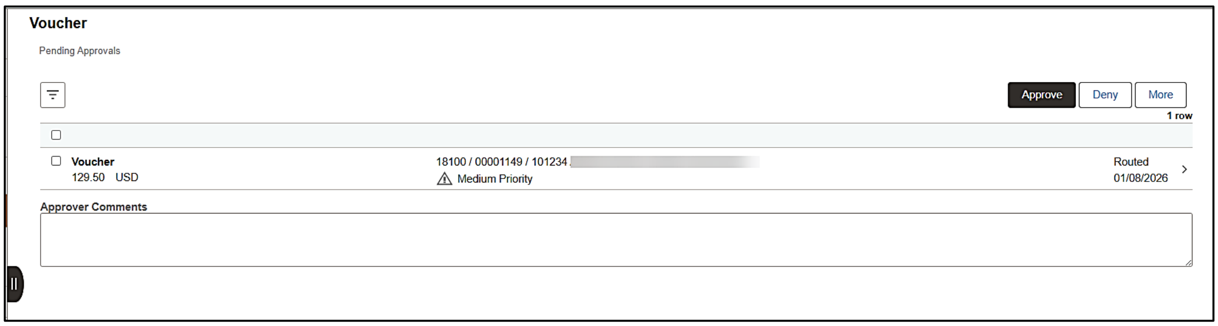
Approving Vouchers Using the AP WorkCenter

Step	Action
1.	Navigate to the **Voucher** page by clicking the **AP WorkCenter** tile. 
	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation path in the WorkCenter: **My Approvals > Pending Approvals > Voucher Approvals** **Note**: WorkCenter sections, folders, and pages may vary based on the user’s Security roles. 

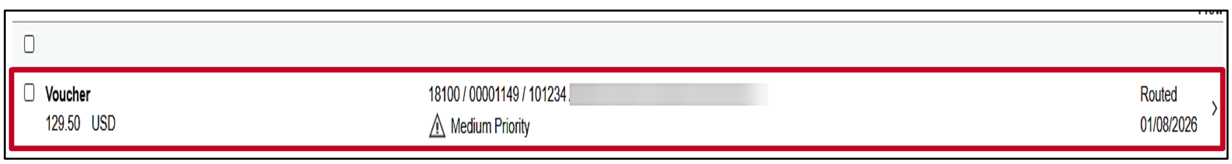
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>
The number of Vouchers that require approval displays next to Voucher Approvals in the Transaction panel.



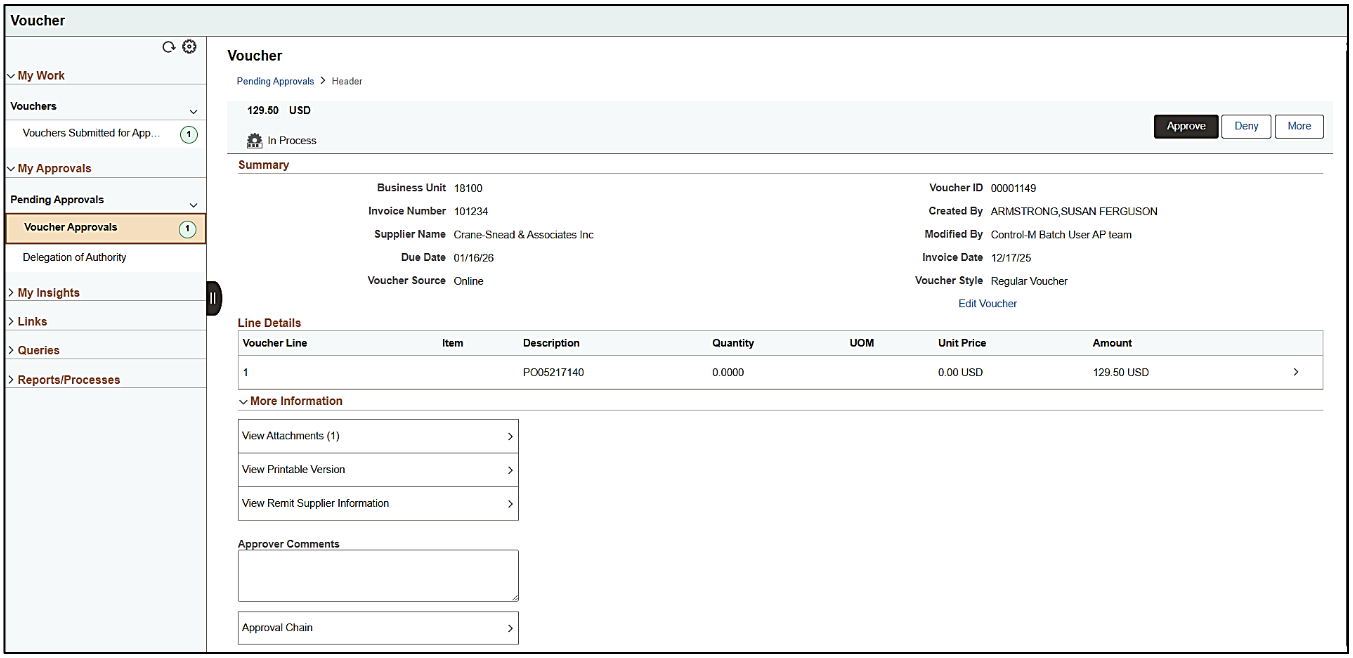
The Voucher(s) display in the Transaction panel.



</td></tr>
<tr><td>3.</td><td>
Click the row for the Voucher to be reviewed for approval.



</td></tr>
</table>

Step	Action
The **Voucher** page displays. 	
4.	Go to the Approving Vouchers Using the Approval Tile section of this job aid and follow **Steps 4-38** to review and take approval action on the Voucher.