

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.

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Accounts Payable Job Aid

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Revision History

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

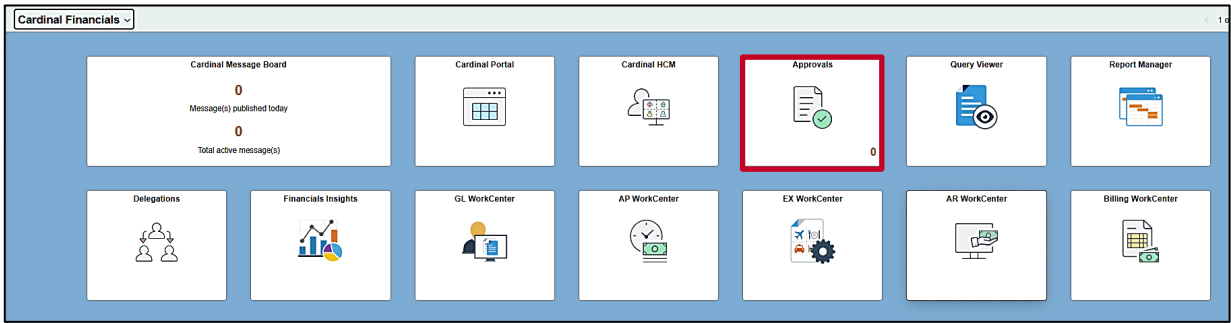
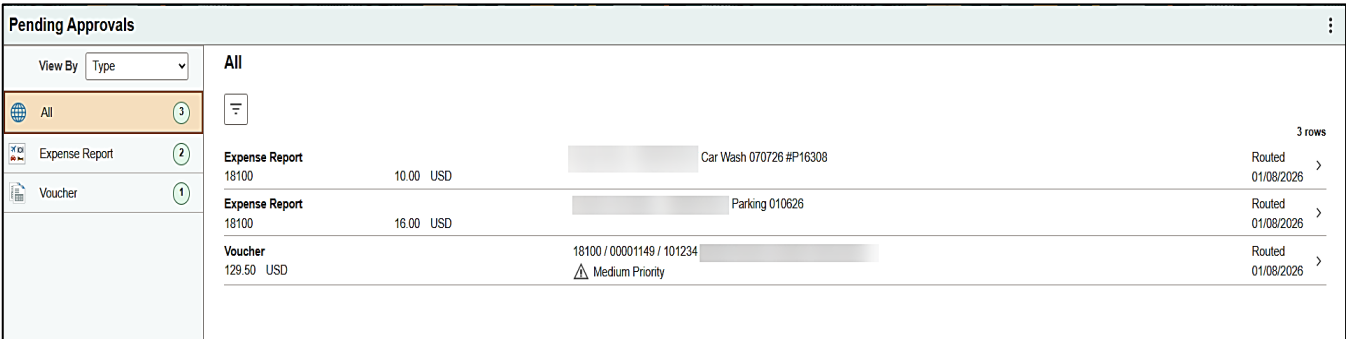


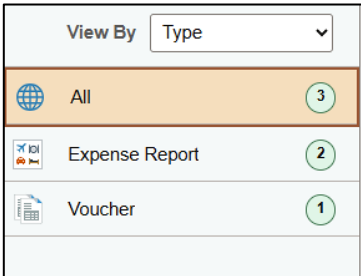
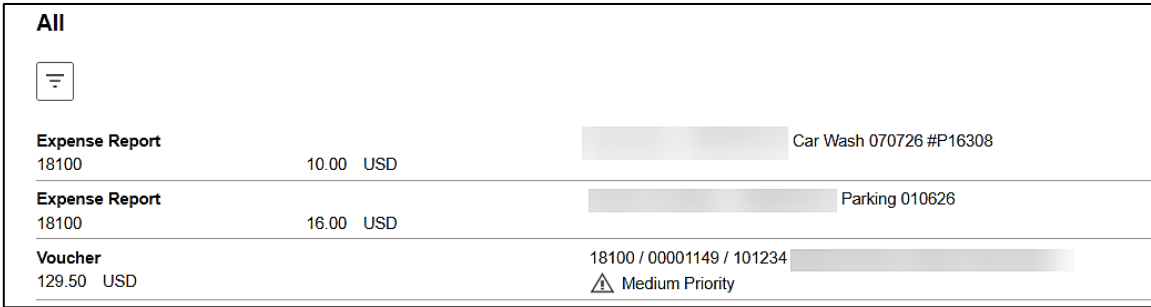
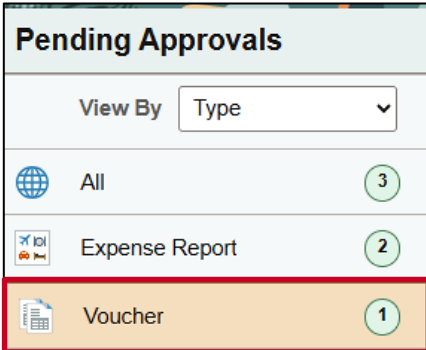
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Approving Vouchers Using the Approvals Tile

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.

Step	Action
1.	Click the Approvals tile on the Cardinal Financials Homepage. 
	The number that displays indicates the number of items that require approval across all Functional areas based on the user's security roles.
The Pending Approvals page displays. 	

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. 



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

Pending Approvals

View By: Type

All (3)

Expense Report (2)

Voucher (1)

Voucher

18100 / 00001149 / 101234

129.50 USD

Medium Priority

Routed 01/09/2026

Approver Comments

Approve Deny More

3. Click the line for the applicable Voucher.

Voucher

18100 / 00001149 / 101234

129.50 USD

Medium Priority

Routed 01/08/2026

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

Voucher

129.50 USD

In Process

Approve Deny More

Summary

Business Unit 18100

Invoice Number 101234

Supplier Name Crane-Snead & Associates Inc

Due Date 01/16/26

Voucher Source Online

Voucher ID 00001149

Created By

Modified By

Invoice Date 12/17/25

Voucher Style Regular Voucher

Edit Voucher

Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1		PO05217140	0.0000		0.00 USD	129.50 USD

More Information

View Attachments (1)

View Printable Version

View Remit Supplier Information

Approver Comments

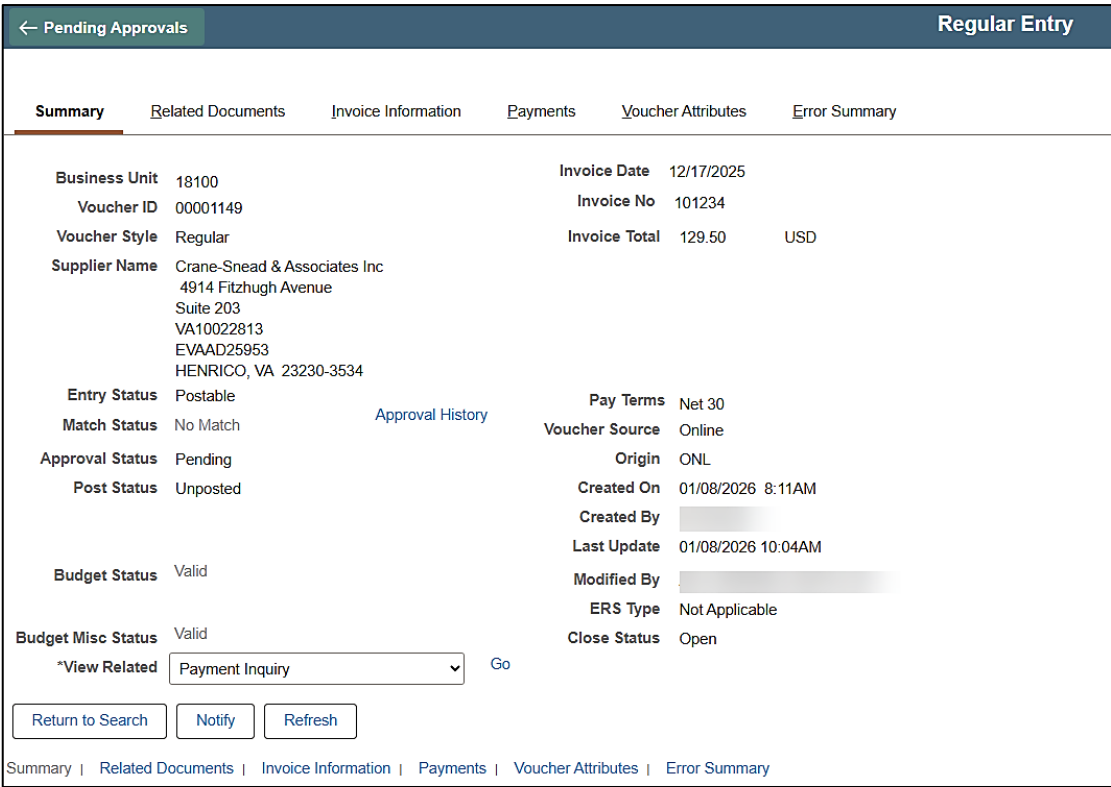
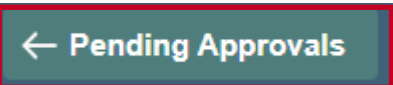
Approval Chain



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Step	Action
4.	Review the information in the Header section as needed. Business Unit 18100 Invoice Number 101234 Supplier Name Crane-Snead & Associates Inc Due Date 01/16/26 Voucher Source Online Voucher ID 00001149 Created By Modified By Invoice Date 12/17/25 Voucher Style Regular Voucher Edit Voucher 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. Edit Voucher

Step	Action
	The Regular Entry page opens with the Summary tab displayed by default. 
6.	Review the Regular Voucher pages to see the details for the Voucher by clicking the applicable tabs. 
7.	Click the Pending Approvals link at the top of the page. 



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Step	Action
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The **Voucher** page redisplay.

Voucher

129.50 USD

In Process

Approve

Deny

More

Summary

Business Unit 18100

Invoice Number 101234

Supplier Name Crane-Snead & Associates Inc

Due Date 01/16/26

Voucher Source Online

Voucher ID 00001149

Created By

Modified By

Invoice Date 12/17/25

Voucher Style Regular Voucher

Edit Voucher

Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1		PO05217140	0.0000		0.00 USD	129.50 USD

More Information

View Attachments (1)

View Printable Version

View Remit Supplier Information

Approver Comments

Approval Chain

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.

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1		PO05217140	0.0000		0.00 USD	129.50 USD

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

Distributions

Fluid Approval Distribution

Line 1

Description PO05217140

Merchandise Amt 129.50 USD

Quantity

Distribution Line	Quantity	GL Business Unit	Merchandise Amount	Currency	*Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
1		18100	64.75	USD	5012470	01000	555001	18100	811						18100	0000128380	STATE			
2		18100	64.75	USD	5012470	10000	555001	18100	811						18100	0000128380	STATE			

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.

More Information

View Attachments (1) >

View Printable Version >

View Remit Supplier Information >

Approver Comments

Approval Chain >

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 . View Attachments (1) >
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The **View Attachments** page displays in a pop-up window.

View Attachments

Business Unit 18100
Voucher ID 00001149

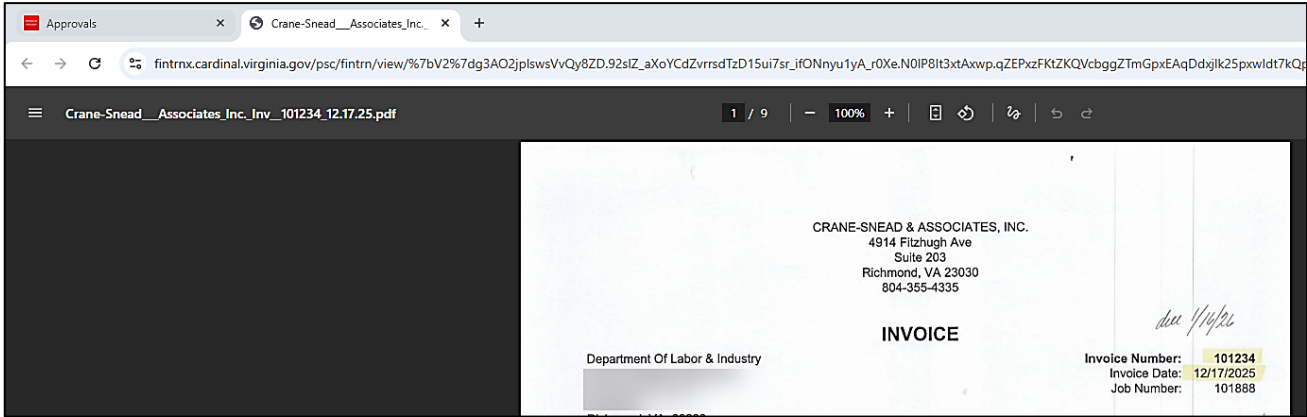
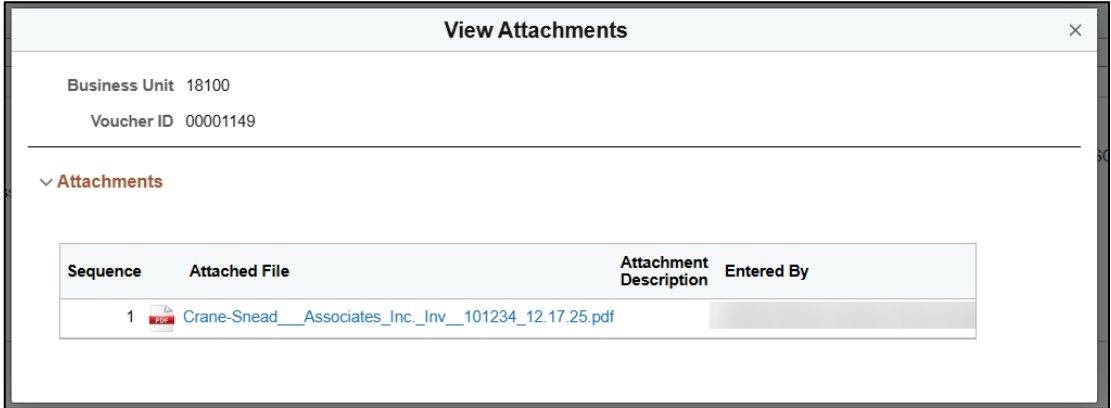
Attachments

Sequence	Attached File	Attachment Description	Entered By
1	 Crane-Snead__Associates_Inc__Inv__101234_12.17.25.pdf		



Accounts Payable Job Aid

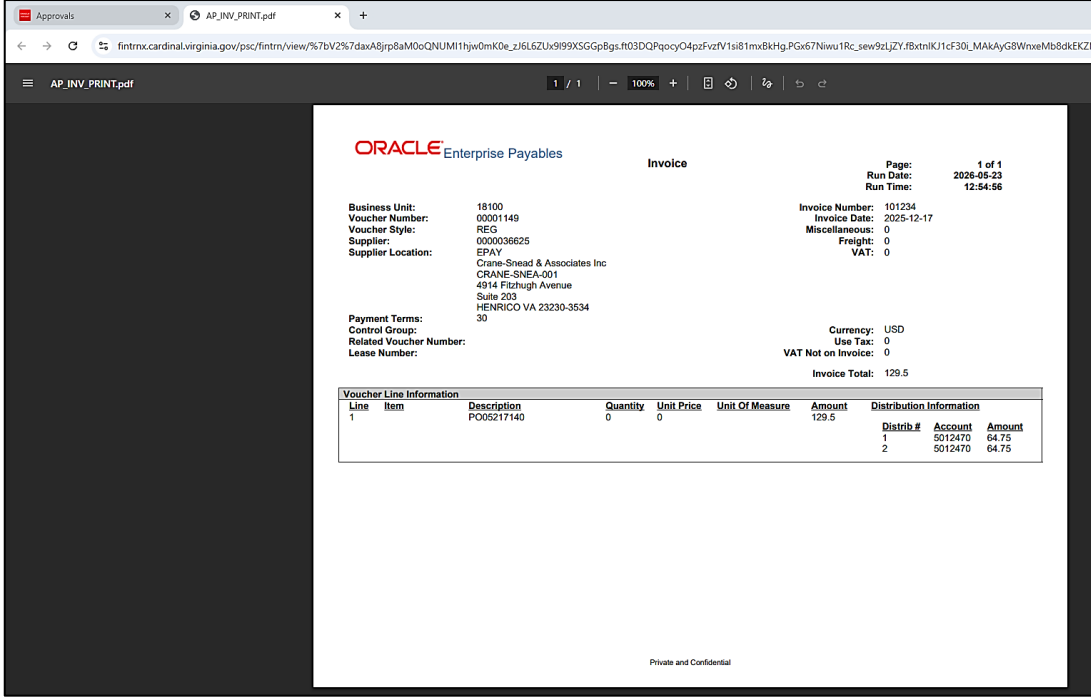
AP313 Approving Vouchers

Step	Action
12.	Click the attachment(s) to view them. 1  Crane-Snead__Associates_Inc._Inv__101234_12.17.25.pdf
Cardinal opens the attachment in a new browser tab. 	
13.	Click the “x” at the top of the new browser tab to close it and return to the Voucher page. Approvals Crane-Snead__Associates_Inc_ x
The View Attachments page displays. 	
14.	Click the “x” to close the View Attachments page. View Attachments x



Accounts Payable Job Aid

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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. 



Accounts Payable Job Aid

AP313 Approving Vouchers

Step	Action
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The **Voucher** page redisplay.

Voucher

129.50 USD

In Process

[Approve](#) [Deny](#) [More](#)

Summary

Business Unit	18100	Voucher ID	00001149
Invoice Number	101234	Created By	
Supplier Name	Crane-Snead & Associates Inc	Modified By	
Due Date	01/16/26	Invoice Date	12/17/25
Voucher Source	Online	Voucher Style	Regular Voucher

[Edit Voucher](#)

Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1		PO05217140	0.0000		0.00 USD	129.50 USD

More Information

[View Attachments \(1\)](#)

[View Printable Version](#)

[View Remit Supplier Information](#)

Approver Comments

[Approval Chain](#)

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

[View Remit Supplier Information](#)

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

Remit Supplier Information

Business Unit 18100

Voucher ID 00001149

Invoice Number 101234

Remit Supplier

1 row

Remit SetID	Remit Supplier	Supplier Name	Additional Name	Supplier Location	Remitting Address
STATE	0000036625	Crane-Snead & Associates Inc		EPAY	3

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

Remit Supplier Information



Step

Action

The **Voucher** page redisplay.

Voucher

129.50 USD

In Process

Approve

Deny

More

Summary

Business Unit

18100

Invoice Number

101234

Supplier Name

Crane-Snead & Associates Inc

Due Date

01/16/26

Voucher Source

Online

Voucher ID

00001149

Created By

Modified By

Invoice Date

12/17/25

Voucher Style

Regular Voucher

Edit Voucher

Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1		PO05217140	0.0000		0.00 USD	129.50 USD

More Information

View Attachments (1)

>

View Printable Version

>

View Remit Supplier Information

>

Approver Comments

Approval Chain

>

i

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

Approver Comments

19.

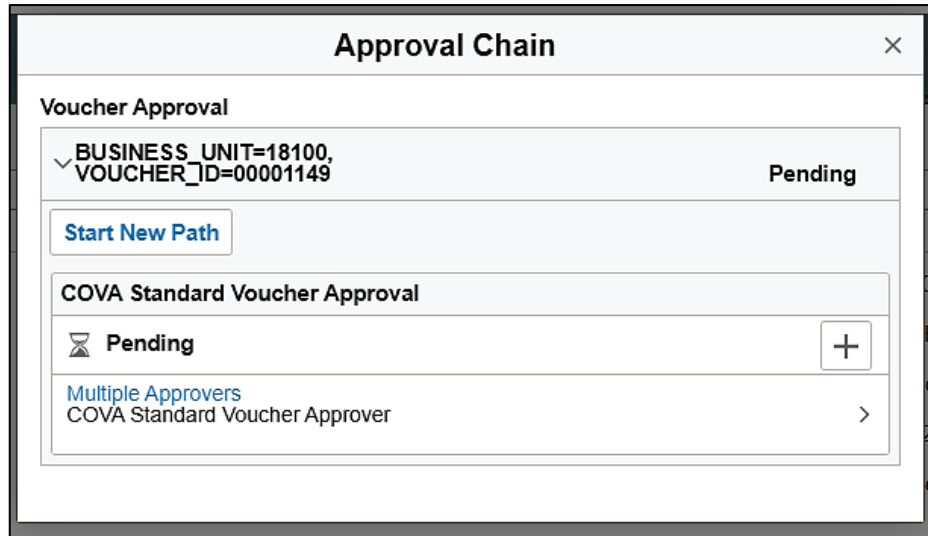
Click **Approval Chain** to see the approval flow for the Voucher.

Approval Chain

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Step	Action
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The **Approval Chain** page displays in a pop-up window.

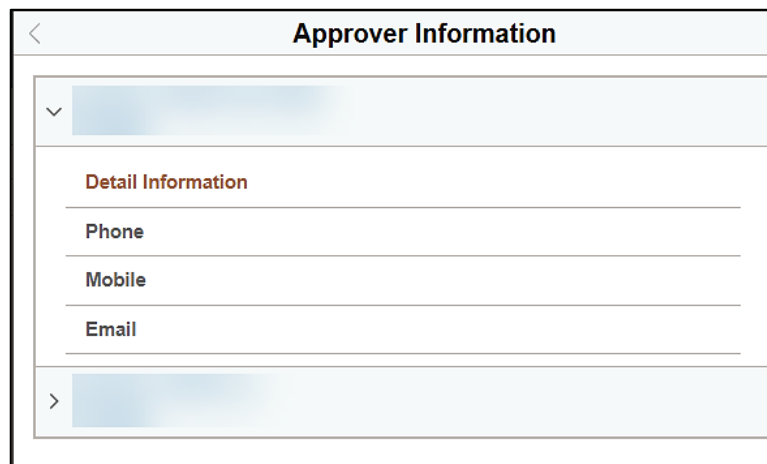


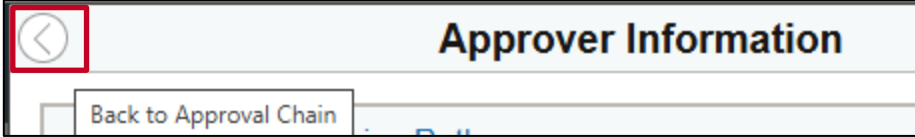
	The Multiple Approvers link displays when it is a pooled approval.
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20. Click the **Multiple Approvers** link if desired, to see all approvers in the pool otherwise proceed to **Step 23**.

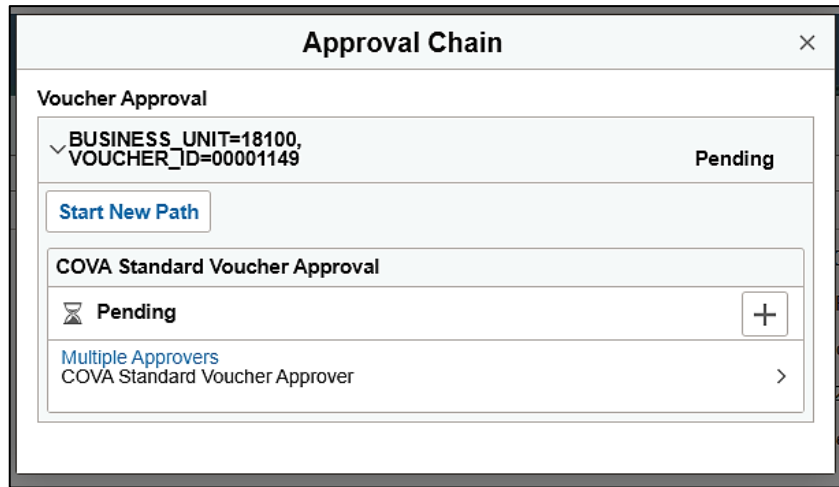


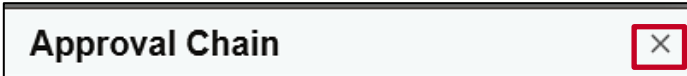
The **Approver Information** page displays.



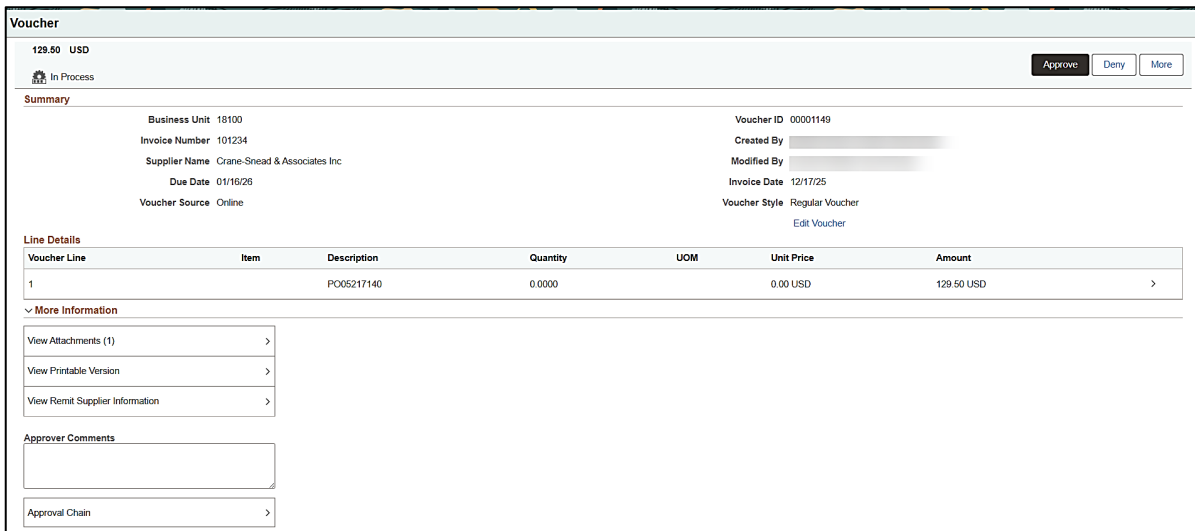
Step	Action
21.	Review the information as applicable and click the Back to Approval Chain icon. 

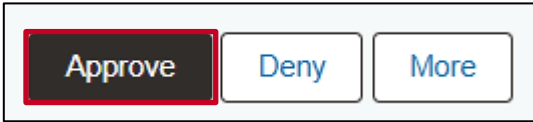
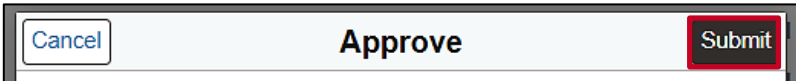
The **Approval Chain** page redisplay.

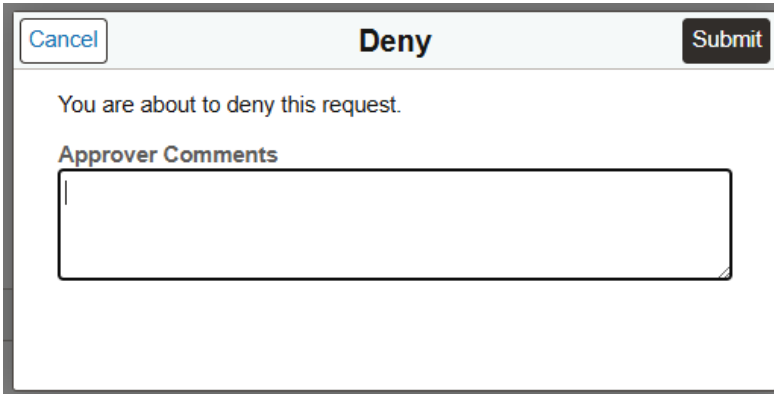
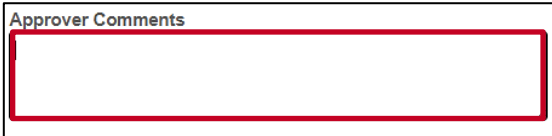
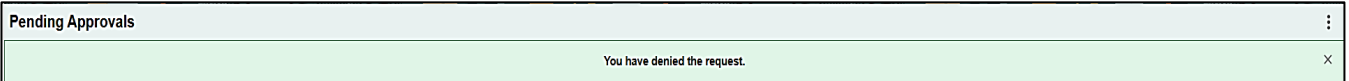


22.	Click the “x” to close the window and return to the Voucher page. 
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The **Voucher** page redisplay.

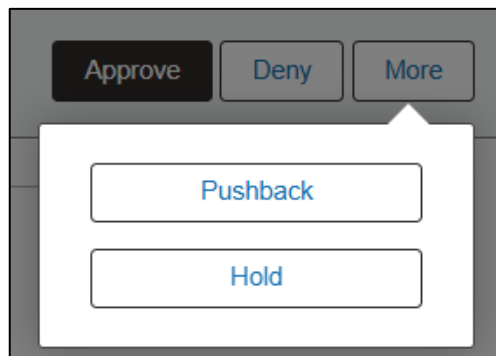


Step	Action
23.	Take the applicable approval action. Proceed to the applicable step based on the approval action sections. • Approve – Proceed to the next step • Deny – Proceed to Step 26 • Pushback – Proceed to Step 29 • Hold – Proceed to Step 33
24.	Approving the Voucher Click the Approve button. 
The Approve page displays in a pop-up window. 	
	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 Processor who entered the Voucher so the applicable action can be completed for the Voucher.

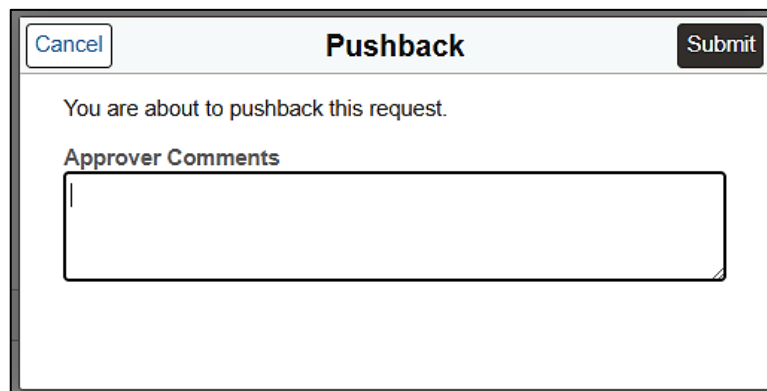
Step	Action
29.	Pushing Back a Voucher Click the More Button. Approve Deny More

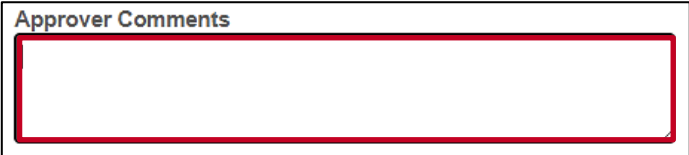
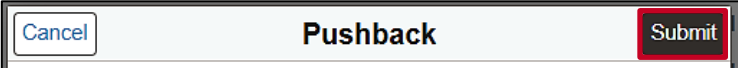
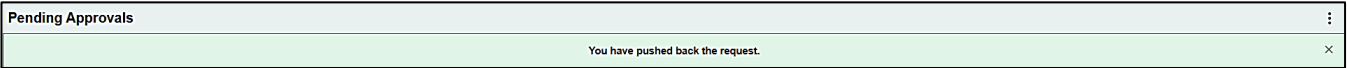
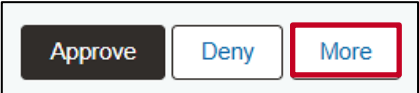
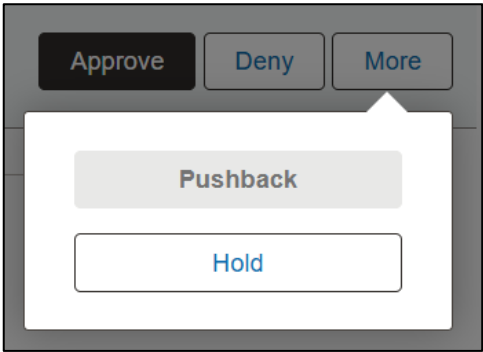
The **Pushback** and **Hold** buttons display in a pop-up window.

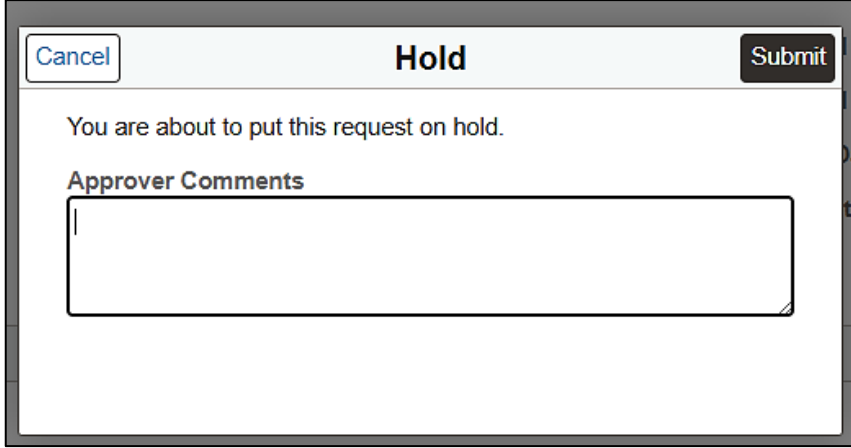
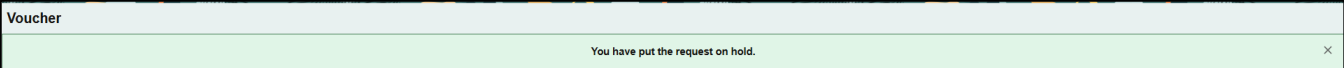


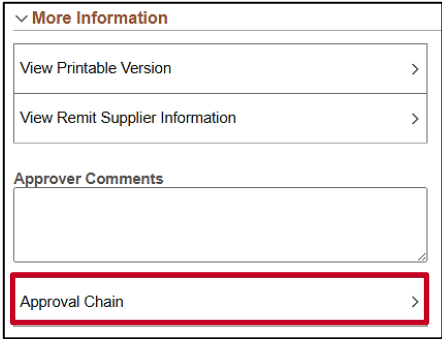
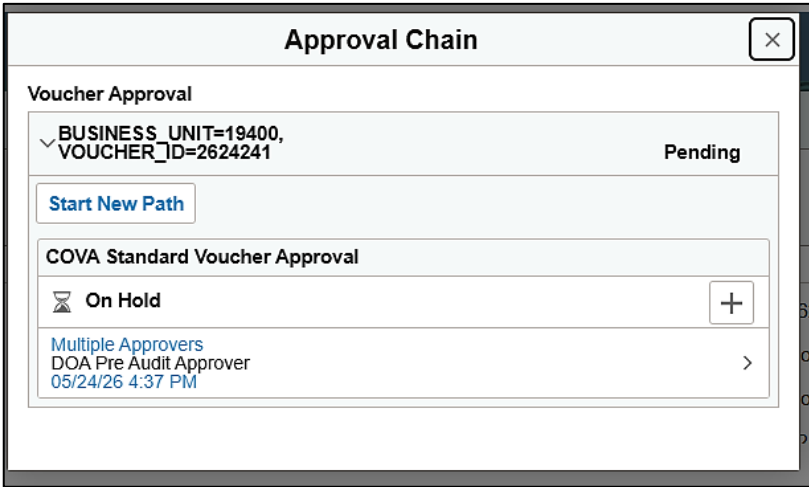
	The Pushback button is only available for Agencies with multiple levels of approvals. The Pushback option routes the Voucher back to the previous approver for updates.
30.	Click the Pushback button. Pushback

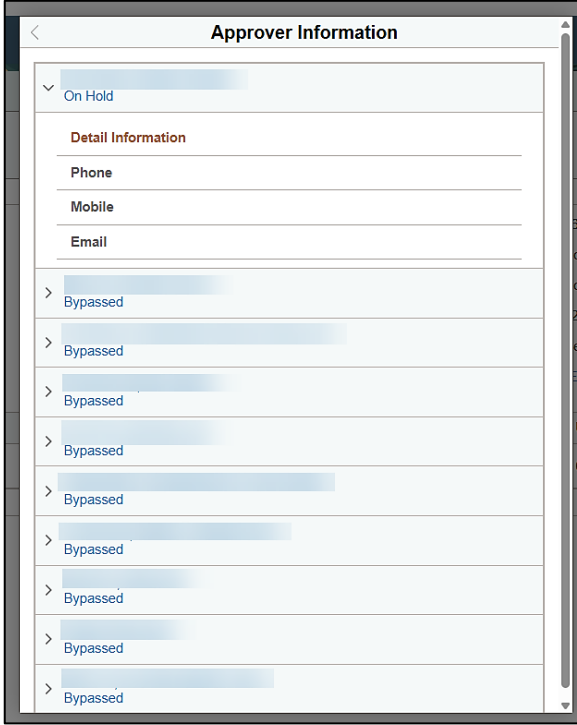
The **Pushback** page displays in a pop-up window.


A screenshot of a 'Pushback' pop-up window. The window has a title bar with 'Cancel' on the left and 'Submit' on the right. The main content area says 'You are about to pushback this request.' Below this, there is a section labeled 'Approver Comments' with a large text input field.

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. 	
	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. 	

Step	Action
37.	Click Approval Chain option under the Voucher More Information section to confirm the "Hold". 
The Approval Chain page displays in a pop-up window. 	
	The Voucher displays an "On Hold" message under the COVA Standard Voucher Approval section of the page.
38.	Click the Multiple Approvers section. 

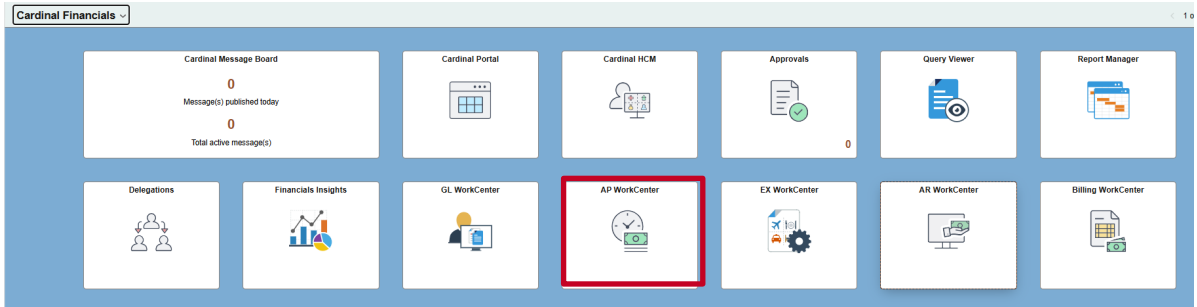
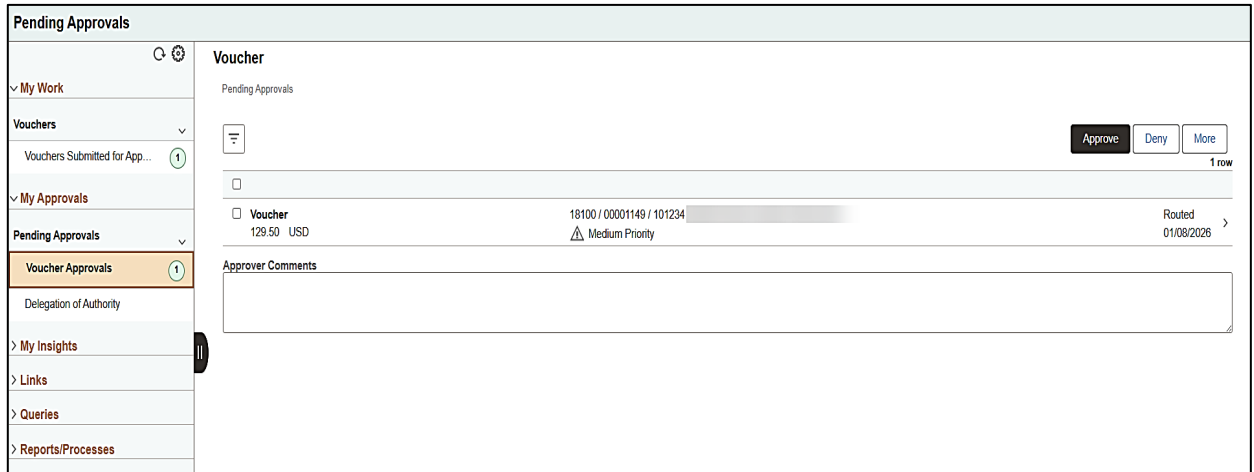
Step	Action
	The Approver Information page displays with the name of the person that placed the Voucher “On Hold” at the top. 
	All other approvers are noted as “Bypassed”. Only the approver that placed the hold can take any additional action on the Voucher.

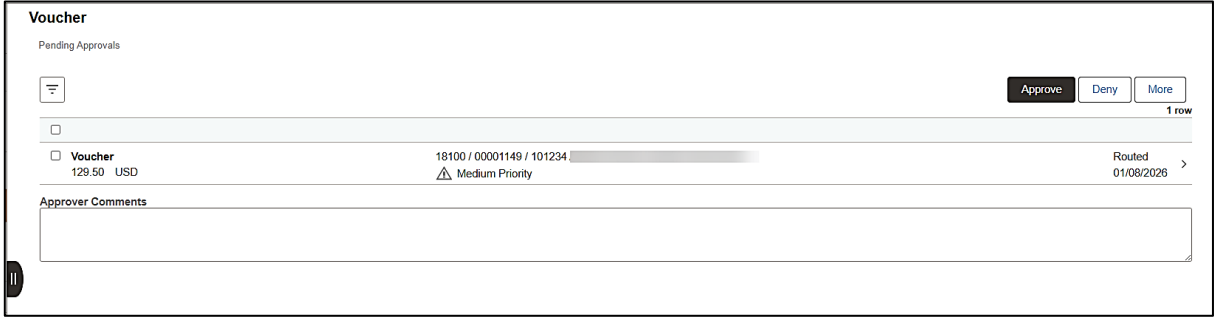
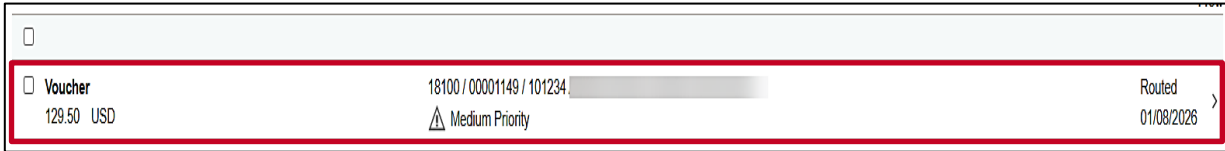


Accounts Payable Job Aid

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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. 

Step	Action
	The number of Vouchers that require approval displays next to Voucher Approvals in the Transaction panel.  The Voucher(s) display in the Transaction panel. 
3.	Click the row for the Voucher to be reviewed for approval. 



Accounts Payable Job Aid

AP313 Approving Vouchers

Step

Action

The **Voucher** page displays.

Voucher

My Work

Vouchers

Vouchers Submitted for App... 1

My Approvals

Pending Approvals

Voucher Approvals 1

Delegation of Authority

My Insights

Links

Queries

Reports/Processes

Voucher

Pending Approvals > Header

129.50 USD

In Process

Approve Deny More

Summary

Business Unit 18100

Invoice Number 101234

Supplier Name Crane-Snead & Associates Inc

Due Date 01/16/26

Voucher Source Online

Voucher ID 00001149

Created By ARMSTRONG,SUSAN FERGUSON

Modified By Control-M Batch User AP team

Invoice Date 12/17/25

Voucher Style Regular Voucher

Edit Voucher

Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount	
1		PO05217140	0.0000		0.00 USD	129.50 USD	>

More Information

View Attachments (1) >

View Printable Version >

View Remit Supplier Information >

Approver Comments

Approval Chain >

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.