Copying a Voucher Overview

This Job Aid provides the steps necessary to create a Voucher by copying an existing Voucher using the **Copy Voucher** page.

The **Copy Voucher** page allows users to:

- Select the Voucher to copy
- Enter the **Invoice Number** and **Invoice Receipt** date of the new Voucher
- Make any applicable updates
- Submit the new Voucher for processing

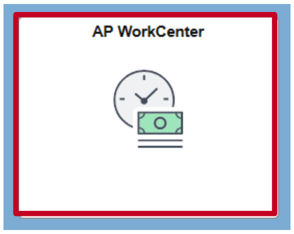
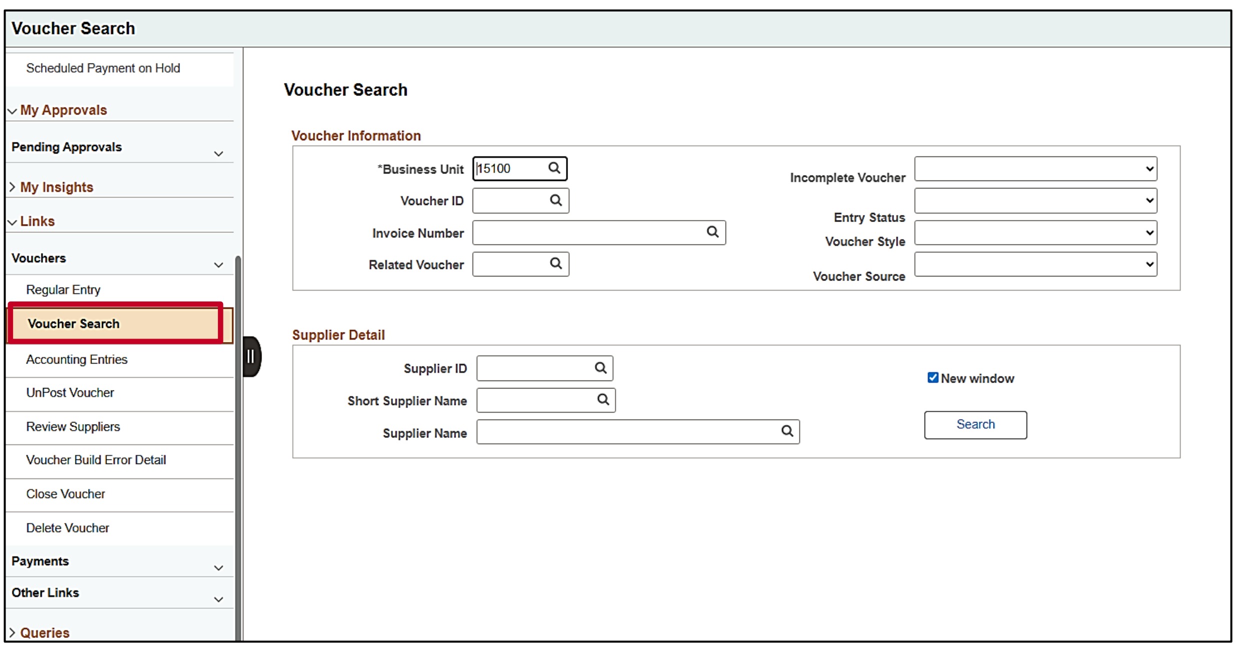
Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

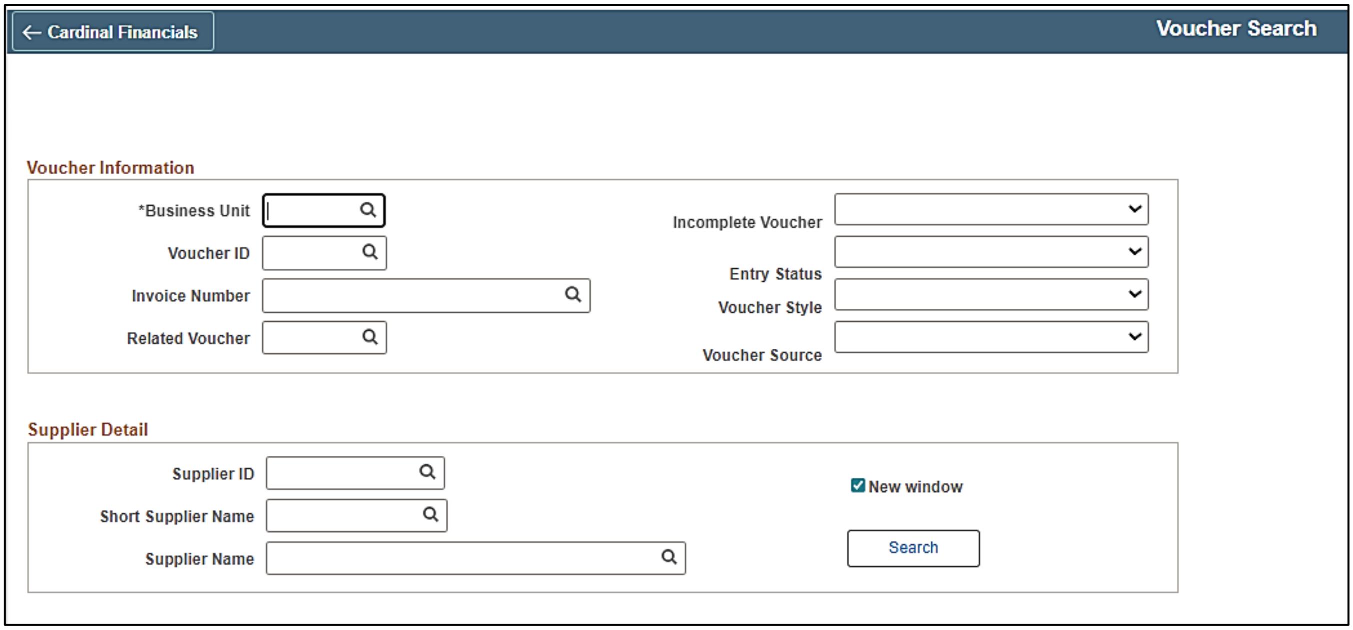
Table of Contents

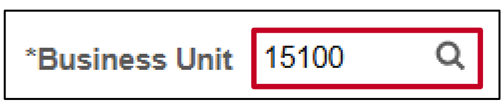
Revision History

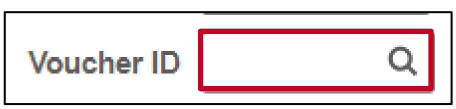
Revision Date	Summary of Changes
9/1/2026	Baseline.

Copying a Voucher

Step	Action
1.	Navigate to the **Voucher Search** page by clicking the **AP WorkCenter** tile on the Cardinal Financials Homepage. 
i	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: **Links > Vouchers > Voucher Search** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
i	Users can also access the **Regular Entry** page using the following navigation path: **NavBar > Menu > Accounts Payable > Vouchers > Add/Update > Voucher Search**

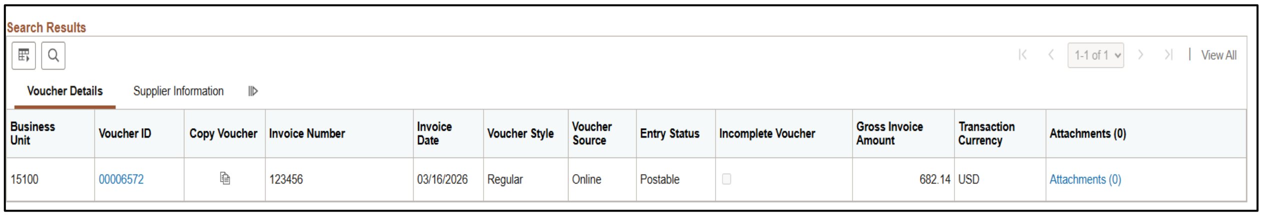
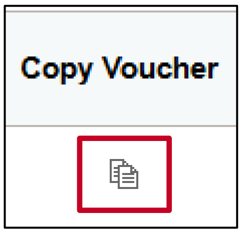
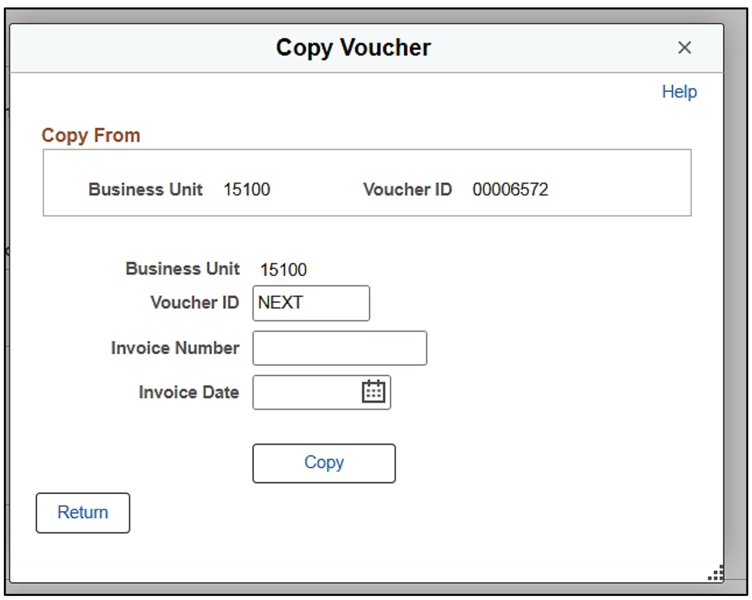
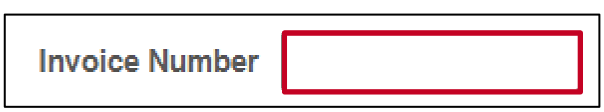
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Voucher Search page displays.


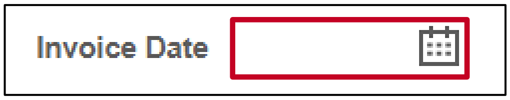
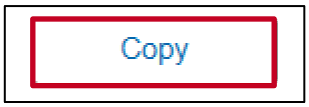
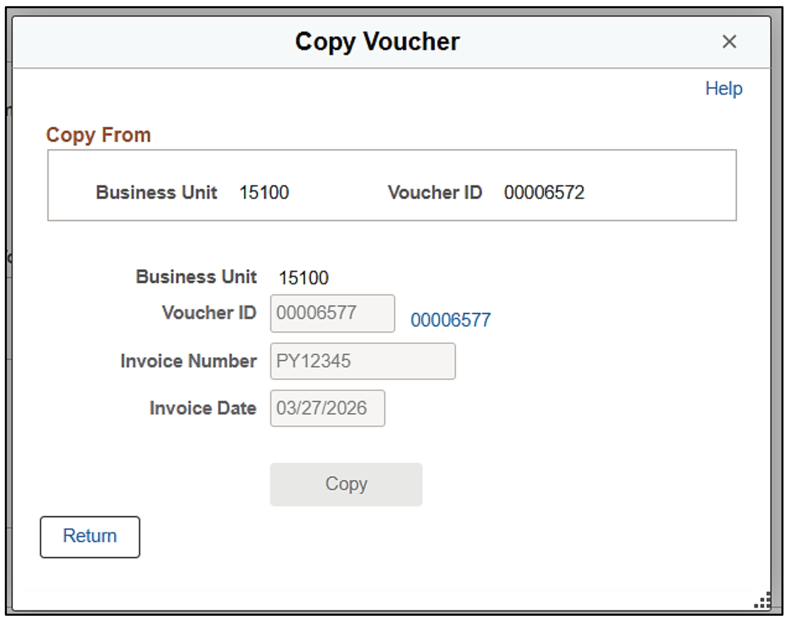
</td></tr>
<tr><td>2.</td><td>The Business Unit field defaults to the user’s Agency can be changed as needed.


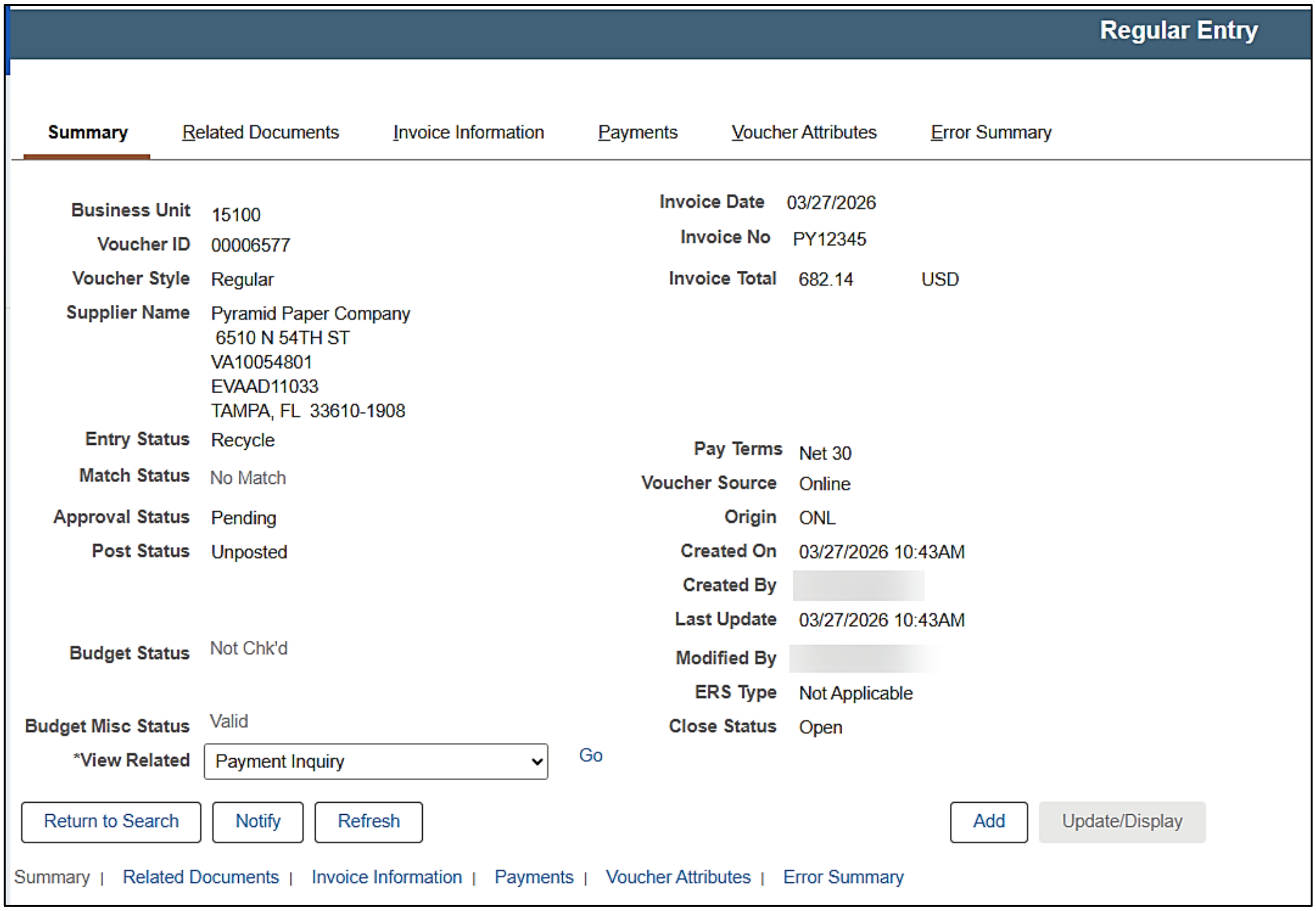
</td></tr>
<tr><td>3.</td><td>Enter the Voucher ID number for the Voucher to be copied in the Voucher ID field.


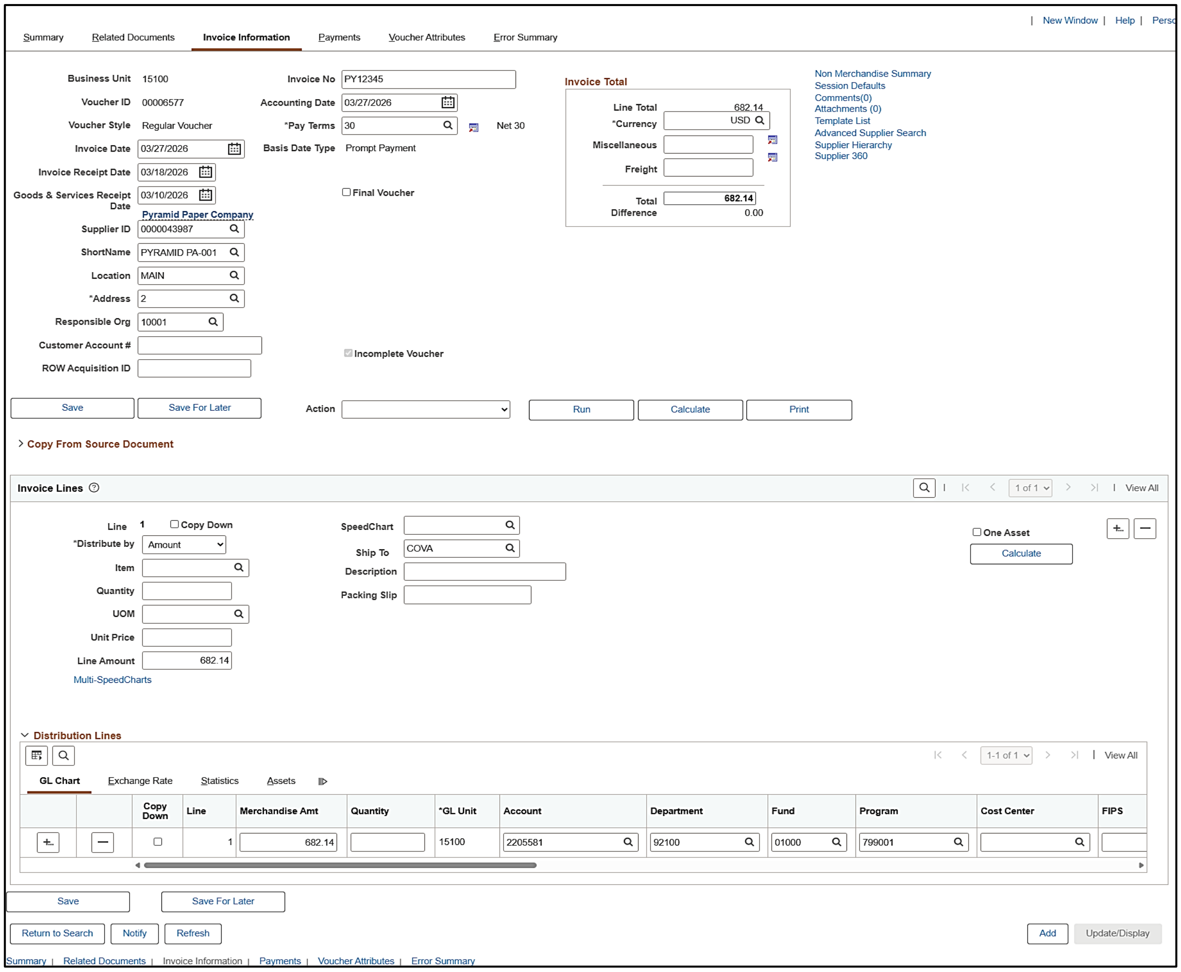
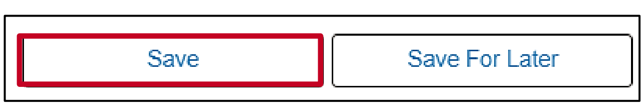
</td></tr>
<tr><td></td><td>If the Voucher ID is not known, use any of the search fields on this page to find the applicable Voucher.</td></tr>
<tr><td>4.</td><td>Click the Search button.


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

Step	Action
	The Voucher(s) that meet the search criteria display in the **Search Results** section. **Note**: For this scenario, a specific Voucher number was entered. 
5.	Click the **Copy Voucher** icon to select the Voucher to be copied. 
	The **Copy Voucher** page displays in a pop-up window. 
6.	Enter the Invoice number for the new Voucher in the **Invoice Number** field. 

Step	Action
7.	Enter the Invoice date for the new Voucher in the **Invoice Date** field. 
8.	Click the **Copy** button. 
The **Copy Voucher** page refreshes and displays the new Voucher number in the **Voucher ID** field. 	
9.	Click the **Voucher ID** number link. 

Step	Action
The **Summary** page displays for the new Voucher. 	
	The new Voucher brings in all the fields from the copied Voucher. The **Entry Status** displays as “Recycle”. This means that although the Voucher has copied all the information, it must be “Saved” to process.
10.	Click the **Invoice Information** tab. 

Step	Action
The **Invoice Information** page displays. 	
11.	Review and update any applicable information for the new Voucher on the **Invoice Information** and/or **Payments** tab(s) as needed.
	It is **VERY IMPORTANT** <u>not to click the **Save** button</u> before reviewing the copied information to avoid duplicate payments.
12.	Click the **Save** button to submit the Voucher. 
	If an error message displays, make the applicable updates and then click the **Save** button. Once successfully submitted the Voucher will go through normal Voucher downstream processes.