

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.



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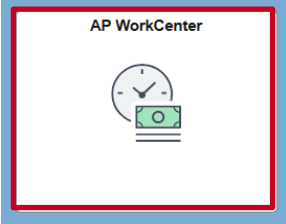
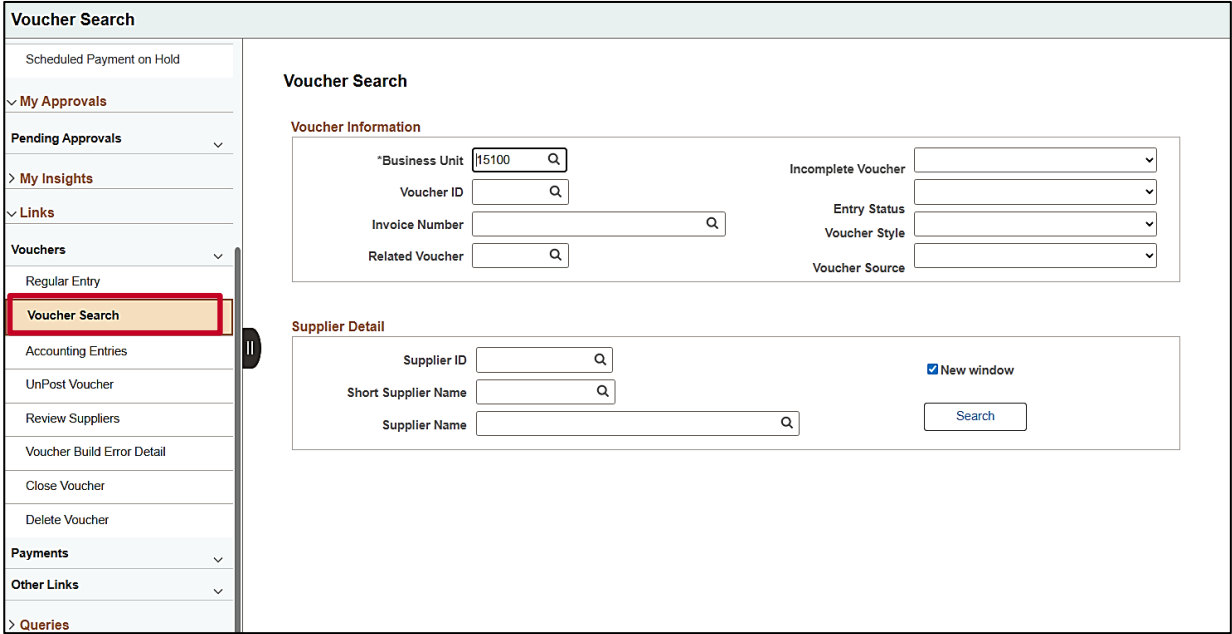
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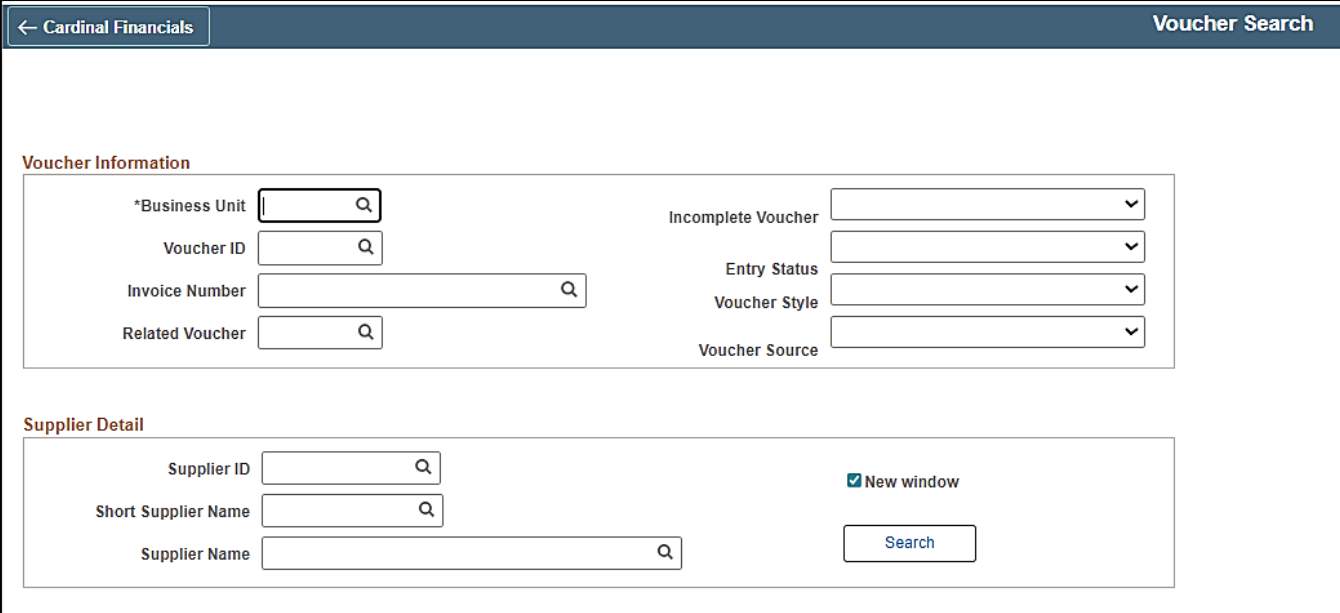
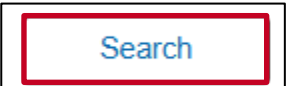
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Revision History

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. 
	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. 
	Users can also access the Regular Entry page using the following navigation path: NavBar > Menu > Accounts Payable > Vouchers > Add/Update > Voucher Search

Step	Action
	The Voucher Search page displays. 
2.	The Business Unit field defaults to the user's Agency can be changed as needed. 
3.	Enter the Voucher ID number for the Voucher to be copied in the Voucher ID field. 
	If the Voucher ID is not known, use any of the search fields on this page to find the applicable Voucher.
4.	Click the Search button. 

Step	Action
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The Voucher(s) that meet the search criteria display in the **Search Results** section.

Note: For this scenario, a specific Voucher number was entered.

Search Results

1-1 of 1 | View All

Voucher Details Supplier Information ID

Business Unit	Voucher ID	Copy Voucher	Invoice Number	Invoice Date	Voucher Style	Voucher Source	Entry Status	Incomplete Voucher	Gross Invoice Amount	Transaction Currency	Attachments (0)
15100	00006572		123456	03/16/2026	Regular	Online	Postable	☐	682.14	USD	Attachments (0)

5. Click the **Copy Voucher** icon to select the Voucher to be copied.



The **Copy Voucher** page displays in a pop-up window.

Copy Voucher [X] [Help](#)

Copy From

Business Unit 15100 Voucher ID 00006572

Business Unit 15100

Voucher ID

Invoice Number

Invoice Date

6. Enter the Invoice number for the new Voucher in the **Invoice Number** field.

Invoice Number

Step	Action
7.	Enter the Invoice date for the new Voucher in the Invoice Date field. Invoice Date
8.	Click the Copy button. Copy The Copy Voucher page refreshes and displays the new Voucher number in the Voucher ID field. Copy Voucher × Help Copy From Business Unit 15100 Voucher ID 00006572 Business Unit 15100 Voucher ID 00006577 00006577 Invoice Number PY12345 Invoice Date 03/27/2026 Copy Return
9.	Click the Voucher ID number link. Voucher ID 00006577 00006577



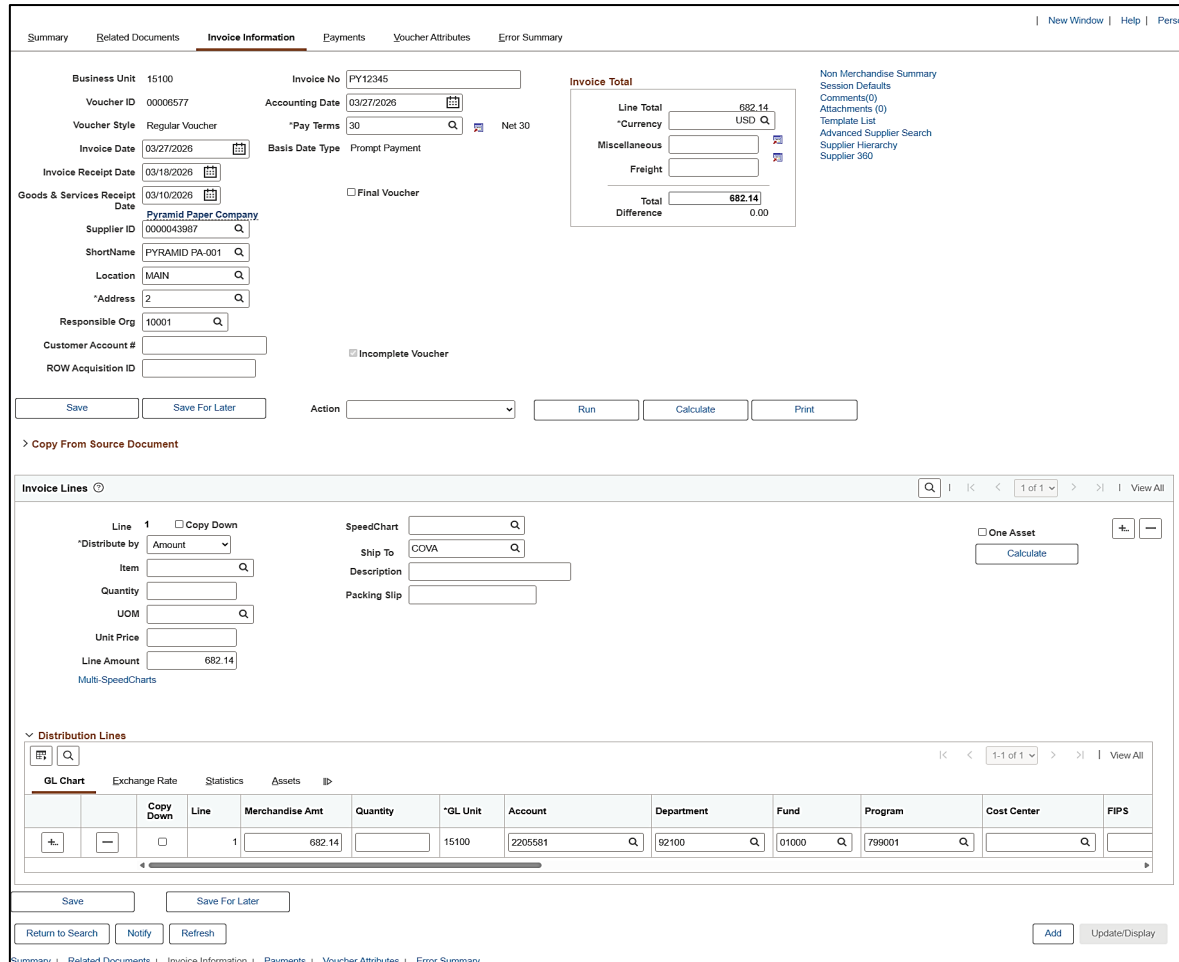
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Step	Action
	The Summary page displays for the new Voucher. Regular Entry Summary Related Documents Invoice Information Payments Voucher Attributes Error Summary Business Unit15100 Voucher ID00006577 Voucher StyleRegular Supplier NamePyramid Paper Company 6510 N 54TH ST VA10054801 EVAAD11033 TAMPA, FL 33610-1908 Entry StatusRecycle Match StatusNo Match Approval StatusPending Post StatusUnposted Budget StatusNot Chk'd Budget Misc StatusValid *View RelatedPayment Inquiry Invoice Date03/27/2026 Invoice NoPY12345 Invoice Total682.14USD Pay TermsNet 30 Voucher SourceOnline OriginONL Created On03/27/2026 10:43AM Created By Last Update03/27/2026 10:43AM Modified By ERS TypeNot Applicable Close StatusOpen Return to Search Notify Refresh Add Update/Display Summary Related Documents Invoice Information Payments Voucher Attributes Error Summary
	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. Summary Related Documents Invoice Information Payments Voucher Attributes Error Summary

Step	Action
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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.
	Save Save For Later
	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.