

Creating and Maintaining Projects Overview

This Job Aid provides the steps for creating and maintaining projects in Cardinal. A project is a planned undertaking with a finite beginning and end date. Typically, it requires both fiscal year and life to date budget and actual reporting. Projects can be set up when an agency needs to bill for expenditures incurred. At the highest level, projects are managed within a Project Costing Business Unit.

In Cardinal, there are five types of detailed projects:

- Administrative (ADMIN)
- Capital Outlay (CAPOL)
- Construction (CONST)
- Maintenance (MAINT)
- Research/Planning (RANDP)

Each project type has a specific project template that is used when creating the detail project. Within a detailed project, costs are organized and analyzed by activity. Activities are specific undertakings that make up a project. Each project type template contains the activities for that specific type of project.

The project’s **Processing Status** controls when transactions, budget, or expenditures, can be charged to the project. Projects and their associated distribution(s) must be approved. There is no automatic routing for approvals, so follow your agency policy regarding notifying approver(s) that the project and distribution are ready for review and approval.

Navigation Note: Please note that you may see 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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Determining the Project Type

The first step in creating a detailed project is to determine the project type. The project type is determined by the activities that are allowed on the project. Each project type has a specific set of standard activities assigned by the project template.

An activity can only be used on one project type. See the Job Aid titled **PA_Project Type – Activity Relationships** to assist with determining the type of project. This job aid is on the Cardinal Website in **Job Aids** under **Learning**. Once you have determined the type of project, it can be setup in Cardinal.

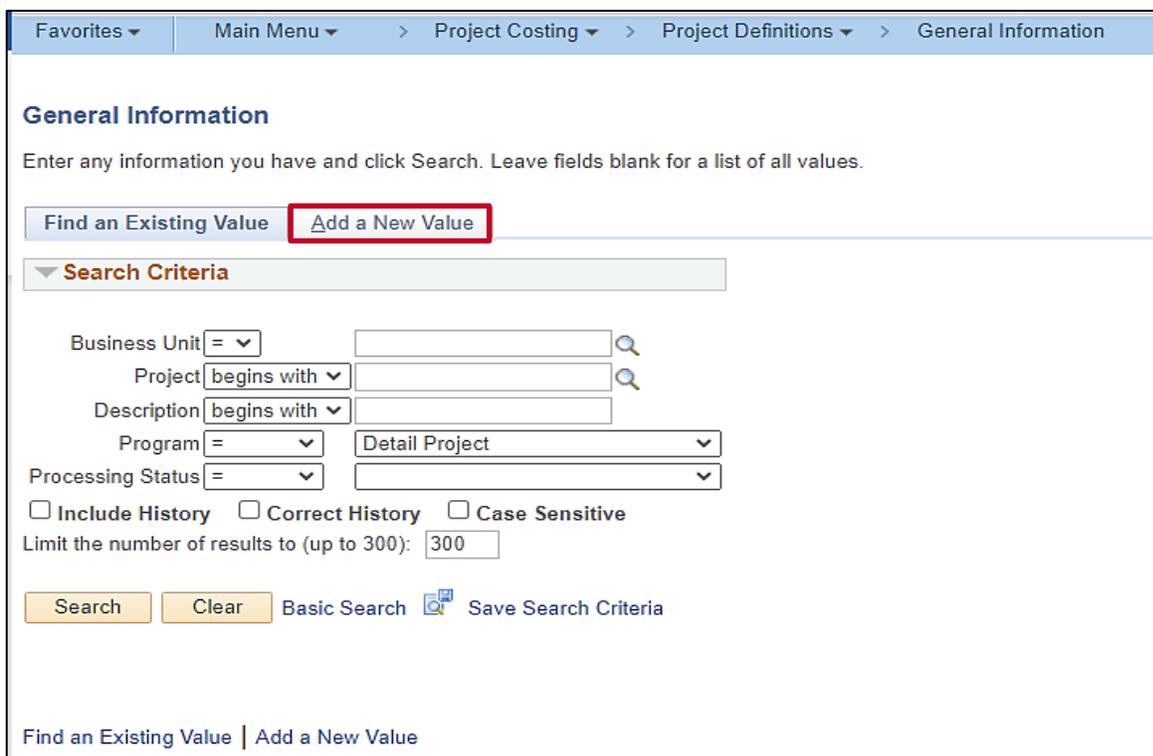
Note: If a project is created with the incorrect project type (activities), a new project will need to be created in order to obtain the correct activities. If expenditures were charged to the incorrect project, journal entries would need to be created to move them.

Setting Up the Project Details

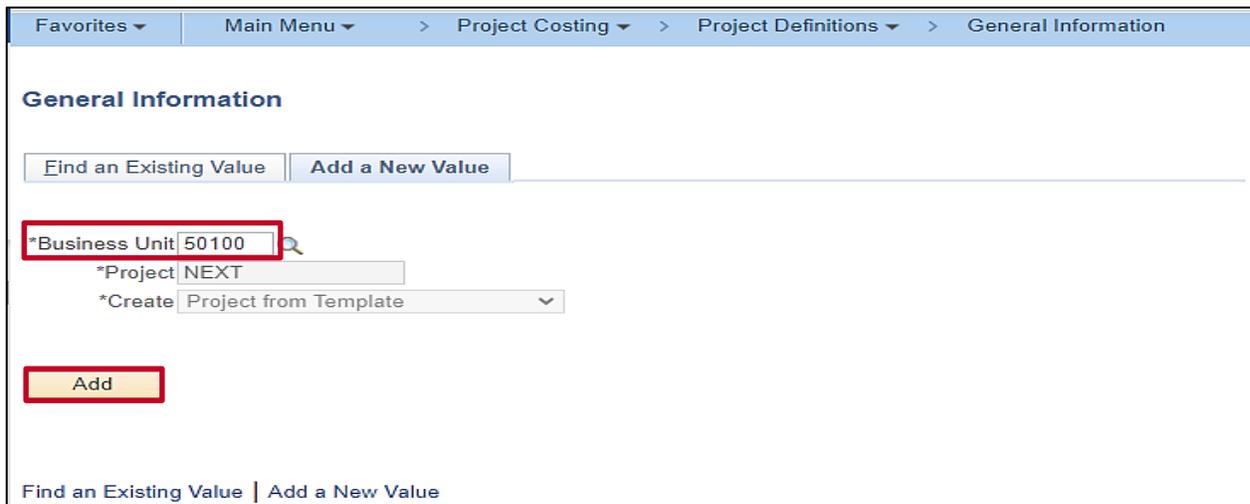
1. To create a detailed project, navigate to the **General Information** page using the following path:

Main Menu > Project Costing > Project Definitions > General Information

The **General Information Search** page displays.

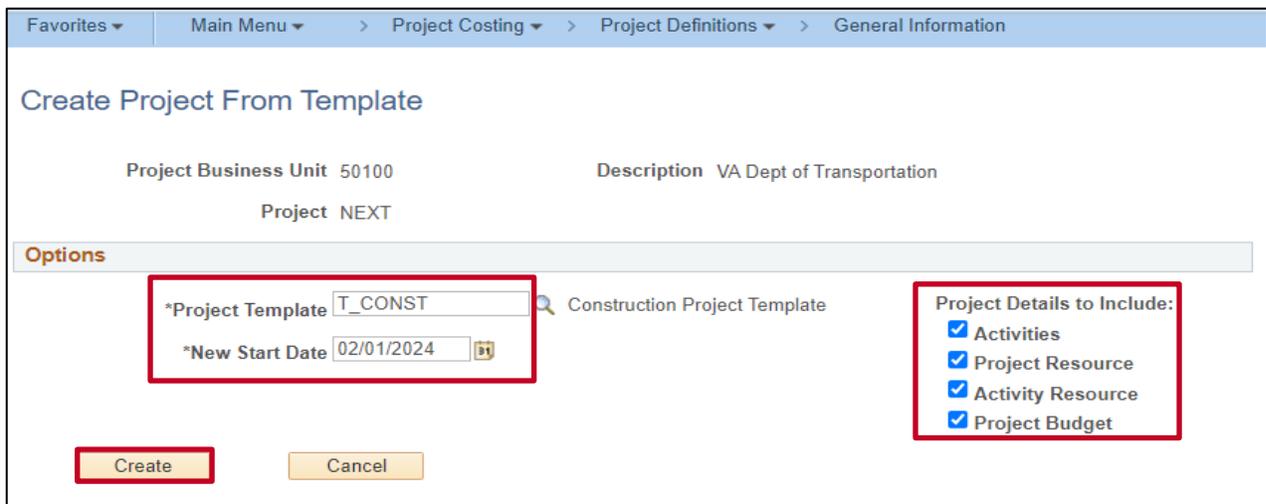


2. The **Find an Existing Value** tab displays by default. Click the **Add a New Value** tab.



3. The **Business Unit** defaults and can be changed if you have access to more than one BU.
4. The **Project** field defaults to **NEXT**. Do not change this value as Cardinal auto assigns the project number.
5. The **Create** field defaults to **Project from Template**. Do not change this value.
6. Click the **Add** button.

The **Create Project from Template** page displays.



7. Select the appropriate **Project Template** based on the determined Project Type.
For this scenario, the **Construction Project Template** is selected.
8. In the **New Start Date** field, enter the begin date for the project.
Note: Do not uncheck any of the boxes under **Project Details to Include** section.
9. Click the **Create** button.



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The **General Information** tab displays.

Use the information in the table below to complete the fields on this tab.

Header Section

Fields	Description
Project	This field displays the auto generated Project ID number
Add to My Projects button	<p>Click this button to save the project to your personal list of projects so it can be viewed on your My Projects page.</p> <p>Note: When this option is selected, a Message displays indicating the Project was added to My Project List. Click the OK button to return the General Information page.</p> <p>Navigation path to access the My Projects Page: Main Menu > Project Costing > My Projects</p>
Description	This field defaults based on the description associated to the project template selected on the previous page. Update as appropriate based on the project.
Integration	This field allows the project to integrate with other modules within the business unit.



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Fields	Description
	<p>Note: This field defaults to your agency BU and should not be changed.</p>
Project Type	<p>This field defaults based on the Project Type that was selected. DO NOT CHANGE THIS VALUE.</p>
Program Checkbox	<p>Do not check this checkbox when entering detailed projects. Note: This checkbox is only used when creating a summary project.</p>
Percent Complete	<p>Not used in Cardinal.</p>
Project Health	<p>Not used in Cardinal</p>
Processing Status	<p>The project processing status field is updated based on the Project Status. There are three processing statuses:</p> <ul style="list-style-type: none"> • Pending (Project Status value is Pending) • Active (Project Status values are Budget, Open or Hold) • Inactive (Project Status is Closed) <p>For more information about processing status, see the job aid titled 501 PA: Project Status located on the Cardinal website in Job Aids under Learning.</p>
Project Status	<p>The project status is updated over the life of the project. When the project status is updated, it will automatically update the Processing Status. Project statuses are as follows:</p> <ul style="list-style-type: none"> • Pending • Budget • Open • Hold • Closed <p>See the job aid titled 501 PA: Project Status for more details. See the PA355 PA Approvals Course for more details on updating the Project Status.</p> <p>In the rare case that a project has been closed and needs to be reopened with a date that is prior to the last effective dated status, a Help Desk Ticket must be submitted requesting it to be reopened and provide an explanation for the request.</p>
Additional Dates	<p>This hyperlink provides access to additional date fields (e.g., Baseline Start Date, Early Start Date, Actual Start Date, and Late State Date) that are used for informational purposes only.</p>



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Project Schedule and Description Sections

The screenshot shows the 'General Information' tab for Project 0000124090. The 'Project Schedule' section includes fields for Start Date (02/01/2024) and End Date (06/30/2025). The 'Description' section has a text area with the content 'Add Annex Structure to Main Street Building on Route 659'. At the bottom left, the 'Save' button is highlighted with a red box. Other buttons include 'Return to Search', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Fields	Description
Start Date and End Date	<p>The Start Date field defaults from the new start date entered on the Create Project from Template page.</p> <p>The End Date defaults to one year after the start date and should be updated appropriately.</p> <p>Note: The Start Date and End Dates are for informational purposes only and do not control transaction processing. The Start Date of a project cannot be after any associated activity.</p>
Description	<p>This field is used to capture a more detailed description of the project. This field allows entry of up to 354 characters. The information in this field is interfaced via Project Expense Journal extract.</p>
Long Description	<p>This field is available to capture additional descriptive detail for the project. The field allows entry of up to 354 characters</p>

10. After selecting and entering the appropriate values for the project, click the **Save** button.



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Project Costing Definition page

The **Project Costing Definition** tab contains nine sections. These are internal additional required attributes that default from the Business unit and are used for subsequent transaction processing. This page is grayed out and users cannot make any changes.

The screenshot shows the 'Project Costing Definition' page for Project 0000124090. The page is divided into several sections:

- System Fields:** FS_08 SetID 50100, System Source PPC
- Project Currency:** Currency Code USD, Rate Type CRRNT, Effective Date Default Accounting Date
- Options:** Standard Activities, Allow Interest Calculation
- Enforce Team:** Do Not Enforce, Project Team Only, Project and Activity Team
- Analysis Group Options:** Cost Budget BUD, Revenue Budget RBUD, Actual Cost PSCST, Actual Revenue PSREV, Forecast Cost EAC, Forecast Revenue FREV
- Percent Complete:** Calculation Method Manual, Summary Method None, Retain History Weekly
- Projects Utilities:** Project Tree...
- Funds Distribution:** Group Target Definitions
- Profitability Analysis Groups:** Actual Margin = Actual Revenue PSREV - Actual Cost PSCST, Forecast Margin = Forecast Revenue FREV - Forecast Cost EAC

Buttons at the bottom include: Save as Template, Import from Template, Copy Project, My Projects, Project Valuation, Project Team, Project Activities, Go To (More), Save, Return to Search, Refresh, Add, Update/Display, Include History, Correct History.



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Manager Tab - Assigning a Project Manager

The **Manager** tab is used to add, update, or view the project manager for a project.

Note: This tab is not required to be completed. Follow your agency guidelines.

The screenshot shows the 'Project Manager' tab for Project 0000124090. The 'Effective Date' field is pre-filled with '03/04/2024'. Other fields like 'Manager Name', 'Project Role', 'Start Date', and 'End Date' are empty. A red box highlights the 'Effective Date' field. Below the form are buttons for 'Save as Template', 'Import from Template', and 'Copy Project'. At the bottom, the 'Project Team' link is highlighted with a red box.

11. The **Effective Date** field defaults to the current date. The remaining fields are blank until a project manager has been assigned.
12. To add a Project Manager, click the **Project Team** link.

The **Team** tab displays.

The screenshot shows the 'Project Team' tab for Project 0000124090. It displays project details: Start Date 02/01/2024, End Date 06/30/2025, and Processing Status Pending. Below is a table for 'Project Team Members' with columns for EmpID, Name, Project Role, Project Manager, Email Notify, Start Date, and End Date. A 'Team Member' row is shown with a checkbox for 'Project Manager' and a checked box for 'Email Notify'. Below the table are sections for 'Add Members Using Job Code' and 'Remove Members Using Job Code', each with a 'Job Code' input field and a 'Default Project Role' dropdown. A red box highlights the 'Add Team Member' button.

13. Click the **Add Team Member** button.



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The **Team Detail** tab displays.

Project 0000124089 Description Annex Structure_Route 659

Start Date 02/01/2024 End Date 06/30/2025 Processing Status Pending

Employee ID [] Name DOE, JOHN

Email ID [] Email Notify for Status Change

Description []

Schedule	*Project Role	Project Manager	*Start Date	*End Date
1	PROJ MANAGER	<input checked="" type="checkbox"/>	02/01/2024	06/30/2025

Activity	Description	Start Date	End Date
----------	-------------	------------	----------

[Return to Project Team Summary](#)

14. Complete the following fields:
 - a. **Employee ID:** Enter the Employee ID of the Project Manager or use the lookup button to search for and select the employee.
 - b. **Email ID:** Not used in Cardinal
 - c. Uncheck the **Email Notify for Status Change** checkbox
 - d. **Project Role:** Select **PROJ MANAGER**
 - e. **Project Manager:** Check this box. This checkbox impacts reporting.
 - f. **Start Date/End Date:** Default based on the project **Start Date** and **End Date** and should not be changed.
15. Click the **Save** button.
16. Click the Return to **Project Team Summary** hyperlink.



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The **Team** tab returns.

The screenshot shows the 'Team' tab selected. At the top, there is a breadcrumb trail: Favorites > Main Menu > Project Costing > Project Definitions > General Information > Team. Below this, there are tabs for 'Team' and 'Team Detail'. The main content area displays project information: Project 0000124090, Description Annex Structure_Route 659, Start Date 02/01/2024, End Date 06/30/2025, and Processing Status Pending. A table titled 'Project Team Members' is shown, with a red box highlighting the first row. The table has columns for EmplID, Name, Project Role, Project Manager, Email Notify, Start Date, and End Date. The first row contains: [Redacted], JOHN DOE, PROJ MANAGER, [checked], [unchecked], 02/01/2024, 06/30/2025. Below the table are two sections: 'Add Members Using Job Code' and 'Remove Members Using Job Code', each with a 'Job Code' input field and an 'Add Team Members' or 'Remove Team Members' button. At the bottom, there are buttons for 'Add Team Member', 'Save as Template', and 'Import from Template'. A 'Go To:' section has 'Team Rates' selected, and a red box highlights the 'Return to General Information' link. At the very bottom are 'Save', 'Return to Search', and 'Refresh' buttons.

Note: The Project Manager information now displays on the **Team** tab.

17. Click the **Return to General Information** link.

The **Manager** tab displays.

The screenshot shows the 'Manager' tab selected. The breadcrumb trail is: Favorites > Main Menu > Project Costing > Project Definitions > General Information. The tabs at the top are: General Information, Project_Costing Definition, **Manager**, Projects, Projects Distribution, User Fields, Rates, Attachments. The main content area displays project information: Project [Redacted], Description Annex Structure_Route 659. A section titled 'Project Manager' is shown, with a 'Find | View All' link and 'First 1 of 1 Last' navigation. The section contains: Effective Date 02/01/2024, Manager Name JOHN DOE, Project Role PROJ MANAGER, Start Date 02/01/2024, and End Date 06/30/2025. Below this are buttons for 'Save as Template', 'Import from Template', and 'Copy Project'. At the bottom, there are buttons for 'My Projects', 'Project Valuation', 'Project Team', and 'Project Activities' (with a dropdown menu). At the very bottom are 'Save', 'Return to Search', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History' buttons.

Note: The **Project Manager** section displays the information based on the values that were entered.



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Projects Tab

The **Projects** page is divided into five sections which will be reviewed in this section of the job aid.

Navigation: Favorites > Main Menu > Project Costing > Project Definitions > General Information

General Information | Project Costing Definition | Manager | **Projects** | Projects Distribution | User Fields | Rates | Attachments

Business Unit: 50100 Project: [Redacted] Annex Project Type: CONST CONSTRUCTION
Structure_Route 659

Project Information

External Project Number [Text Box] Responsible Dept [Text Box] 🔍
Disaster Number [Text Box]
 Disaster Indicator Property Damage Indicator

Project Reporting Categories

Find | View All First 1 of 1 Last
Reporting Category [Text Box] 🔍

Project Route

Find | View All First 1 of 1 Last
Route [Text Box] 🔍

Budget Information

Overall Project Budget

Project Amount [Text Box]

Project Budget

Find | View All First 1 of 1 Last
Phase [Text Box] 🔍 Amount [Text Box]

Grant Information

Grant ID Prefix [Text Box] Progress Report Status [Text Box] Grant In/Outbound Indicator
Sub-Grant Number [Text Box] Progress Report Date [Text Box] 📅 Sub-Grant Indicator
Fed Catalog Number [Text Box] Obligation Date [Text Box] 📅 Grantor Grant ID [Text Box]
Grant Amount [Text Box] Obligation Deadline [Text Box] 📅 Fed Declaration Number [Text Box]
Grantor [Text Box] 🔍 Grantee [Text Box] 🔍

Buttons: Save Return to Search Refresh Add Update/Display Include History Correct History



Project Information Section

Business Unit: 50100 Project: 0000124090 Annex Project Type: CONST CONSTRUCTION
 Structure_Route 659

Project Information

External Project Number Responsible Dept

Disaster Number

Disaster Indicator Property Damage Indicator

Fields	Description
External Project Number	This is the project's number in an external system (e.g., SiteManager)
Responsible Dept	Identifies the Division/District responsible for the management of the project and is used as part of the criteria on various reports. This should be the same as at least one Department ID on the Project Distribution tab.
Disaster Number	This field captures an externally generated disaster number that associates projects related to that disaster. If this field is populated, you must also select the Disaster Indicator checkbox.
Disaster Indicator checkbox	This field facilitates disaster reporting. If this indicator is selected, you must enter a disaster number in the Disaster Number field.
Property Damage indicator	This field indicates that the project is related to property damage. Note: Currently there are no reports that utilize this information.



Project Reporting Categories and Project Route

The **Project Reporting Categories** section allows one or more reporting categories to be associated with a project.

Project Reporting Categories Find | View All First ◀ 1 of 1 ▶ Last

Reporting Category

Project Route Find | View All First ◀ 1 of 1 ▶ Last

Route

Fields	Description
Reporting Category	This field allows for reporting by select categories. (e.g., COAL (Coal Severance), FDEL (Federal Eligible), RAIL (Rail Access, etc.) Note: To create a new reporting category, send a request to the Central Office Fiscal Division.
Route (Agency Use 2)	This field allows for reporting on specific route(s) associated with the project.

Budget Information section

This **Budget Information** section allows you to enter project related budget data. That data entered here is for informational purposes and does not relate to budget journal transactions.

Budget Information

Overall Project Budget

Project Amount

Project Budget Find | View All First ◀ 1 of 1 ▶ Last

Phase Amount

Fields	Description
Overall Project Budget – Project Amount	Enter the overall project budget in this field.
Project Budget – Phase	Enter the Project Phase. Use the (+) button to add phases
Project Budget – Amount	Enter the budget amount for each phase of the project

Grant Information section

If a project relates to a grant, enter the information in this section as applicable. The section also contains the **Fed Catalog Number** (CFDA).

Grant Information					
Grant ID Prefix	<input type="text"/>	Progress Report Status	<input type="text"/>	<input type="checkbox"/>	Grant In/Outbound Indicator
Sub-Grant Number	<input type="text"/>	Progress Report Date	<input type="text"/>	<input type="checkbox"/>	Sub-Grant Indicator
Fed Catalog Number	<input type="text"/>	Obligation Date	<input type="text"/>		Grantor Grant ID
Grant Amount	<input type="text"/>	Obligation Deadline	<input type="text"/>		Fed Declaration Number
Grantor	<input type="text"/>				Grantee

18. The **Fed Catalog Number** field (CFDA) is used when the project has federal funds. Enter the appropriate value here if applicable.

Note: While the field is labeled as **Fed Catalog Number**, this is now referred to as Assistance Listing Number - ALN.

19. The **Grant Information** fields are mostly free form fields and are used for informational purposes only. Enter the values as appropriate if applicable.

Note: The **Grantor** and **Grantee** fields must be selected from a list of valid values.

Project Distribution Tab

The project distribution defines the combination of accounting ChartField values that will be used when entering project related transactions. This definition may include multiple Chartfield strings for which the project costs may be distributed. All projects must have at least one distribution line populated.

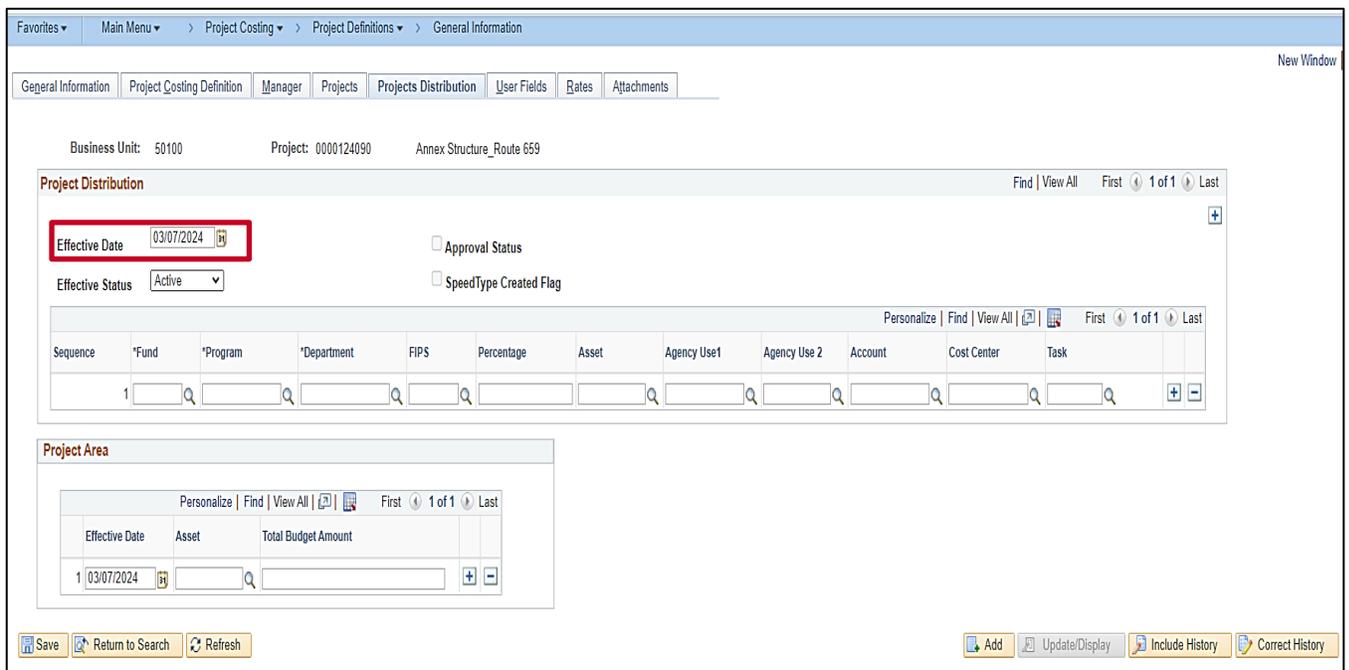
The two key purposes for the project distribution are:

- It creates funds distribution rules allowing Project costs to be distributed
- It creates a SpeedType/SpeedChart which defaults the specified ChartFields values on the project related transactions.

When entering project distributions, determine the number of rows to add to the project distribution and the associated percent split. The percentage determines how the project expenditures are split.

Note: The more ChartFields you use to split the transaction, the more complex it becomes to calculate the percentage for each distribution line.

Once the project is approved and SpeedTypes are created the project number is used as the SpeedType/SpeedChart value.



20. Enter the **Effective Date**. The **Effective Date** is the date Cardinal begins applying the project distribution to costs interfaced to the Project Costing module.

Note: This date should be greater than or equal to the date the **Project Status** was set to **Open (O)** and before any expenditures can be processed. This date also updates the effective date on the project SpeedChart definition and start date of the fund's distribution rule.

When determining the effective date, consideration should be given to all modules (transaction types) that will charge to this project (for example, Time and Attendance).



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Business Unit: 50100 Project: 0000124090 Annex Structure_Route 659

Project Distribution Find | View All First 1 of 1 Last

Effective Date: 03/14/2024 Approval Status

Effective Status: Active SpeedType Created Flag

Sequence	*Fund	*Program	*Department	FIPS	Percentage	Asset	Agency Use1	Agency Use 2	Account	Cost Center	Task
	04720	603004	11000	003	50.00						

21. Enter the required ChartField values which are:
 - a. Fund
 - b. Program
 - c. Department
 - d. FIPS (may or may not be required depending on the project)
 - e. Percentage

Business Unit: 50100 Project: 0000124090 Annex Structure_Route 659

Project Distribution Find | View All First 1 of 1 Last

Effective Date: 03/14/2024 Approval Status

Effective Status: Active SpeedType Created Flag

Sequence	*Fund	*Program	*Department	FIPS	Percentage	Asset	Agency Use1	Agency Use 2	Account	Cost Center	Task
1	04720	603004	11000	003	50.00						

22. When you need to enter multiple distributions click the (+) button to add a row.

Business Unit: 50100 Project: 0000124090 Annex Structure_Route 659

Project Distribution Find | View All First 1-2 of 2 Last

Effective Date: 03/14/2024 Approval Status

Effective Status: Active SpeedType Created Flag

Sequence	*Fund	*Program	*Department	FIPS	Percentage	Asset	Agency Use1	Agency Use 2	Account	Cost Center	Task
1	04720	603004	11000	003	50.00						
2	04720	603006	11000	003	50.00						

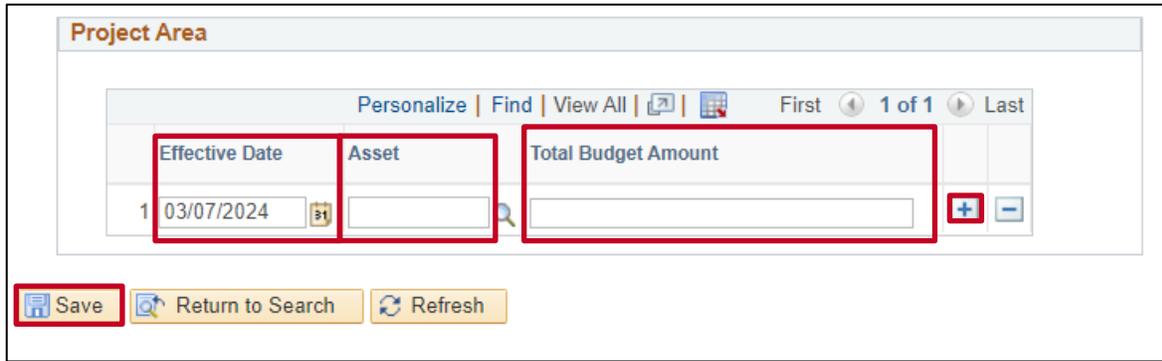
23. Enter the accounting information.
24. Ensure that the **Percentage** field is updated appropriately and total 100%.

Note: One or more distribution lines can be entered for a project. When a project has multiple lines, only the first distribution line is used to create SpeedTypes/SpeedCharts and fund distribution rules.

Assets tied to Federal contracts cannot be entered on the project distribution lines.

Project Area section

The Project area section associates one or more Assets (i.e., structures) to the project. Enter all Assets related to the project in this section as needed. The assets in this section are included in the Chart of Accounts (COA) extract which is sent to SiteManager daily.



The screenshot displays the 'Project Area' section of a software application. It features a table with the following columns: 'Effective Date', 'Asset', and 'Total Budget Amount'. The 'Effective Date' field contains the value '03/07/2024'. The 'Asset' field is empty and includes a magnifying glass icon for a lookup. The 'Total Budget Amount' field is also empty. To the right of the table are '+' and '-' buttons. Below the table, there are three buttons: 'Save', 'Return to Search', and 'Refresh'. The 'Save' button is highlighted with a red box.

25. The **Effective Date** field defaults with today's date and can be updated as appropriate. It is not associated to the project distribution effective date.
26. Select the **Asset** using the lookup icon.
27. Enter the **Total Budget Amount**. This is the budget amount for the associated structure and is optional and used for informational purposes only.
28. Click the (+) button to add additional asset and budget information as necessary.
29. Click the **Save** button.



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User Fields Tab

Navigation: Favorites ▾ | Main Menu ▾ > Project Costing ▾ > Project Definitions ▾ > General Information

General Information | Project Costing Definition | Manager | Projects | Projects Distribution | **User Fields** | Rates | Attachments

Project 0000124090 Description Annex Structure_Route 659

User Fields

Field 1 <input type="text"/>	User Currency <input type="text"/> 🔍
Field 2 <input type="text"/>	Amount 1 <input type="text"/>
Field 3 <input type="text"/>	Amount 2 <input type="text"/>
Field 4 <input type="text"/>	Amount 3 <input type="text"/>
Field 5 <input type="text"/>	Date 1 <input type="text"/> 📅
	Date 2 <input type="text"/> 📅

My Projects Project Valuation Project Team Project Activities Go To ▾

30. This tab is not required to be completed. It is used to provide additional information about the project in several free form user defined fields.

Note: Follow your agency guidelines on the use of these fields when setting up a project.



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Rates Tab

The Rates tab displays information for rate-based customer contracts which are billing the project and activity combination. If this project and activity are on a rate-based contract, the contract information will display here.

The screenshot shows the 'Rates' tab for Project 0000124090, Description Annex Structure_Route 659. The 'Associated Contracts' table is empty. The 'Rates' panel on the right shows 'Rate Selection' with a 'Rate' field and 'View/Add Rates' and 'Update Activities' buttons. Navigation buttons at the bottom include 'Save as Template', 'Import from Template', 'Copy Project', 'My Projects', 'Project Valuation', 'Project Team', 'Project Activities', 'Go To More', 'Save', 'Return to Search', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Note: This tab does not require any data entry when creating a project.

Screenshot Example of Rates tab with data from Contract

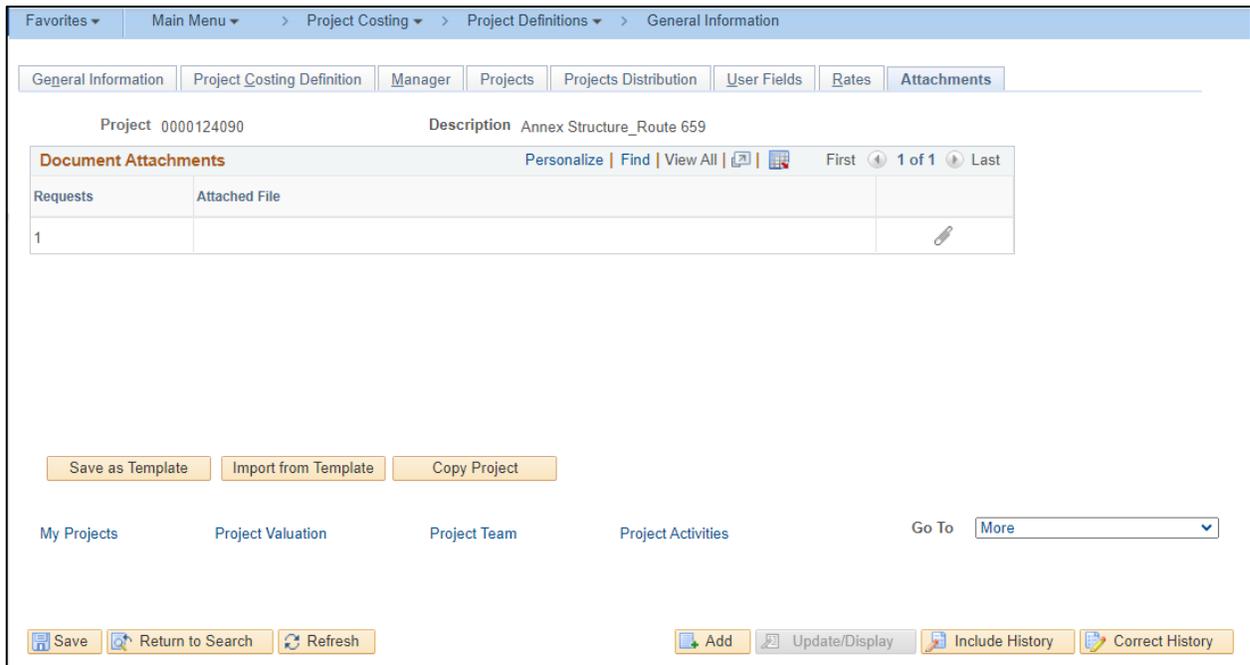
The screenshot shows the 'Rates' tab for Project 0000120005, Description PM44-984-722, P401. The 'Associated Contracts' table contains five rows of data:

Activity	Sold To Customer	Contract Number	Line			Rate Selection	Description
631	0000055002	PM04516	17	Billing	Revenue	Rate Set	ADC_0AW0_100
632	0000055002	PM04516	17	Billing	Revenue	Rate Set	ADC_0AW0_100
633	0000055002	PM04516	17	Billing	Revenue	Rate Set	ADC_0AW0_100
63401	0000055002	PM04516	17	Billing	Revenue	Rate Set	ADC_0AW0_100
635	0000055002	PM04516	17	Billing	Revenue	Rate Set	ADC_0AW0_100

The 'Rates' panel on the right shows 'Rate Selection' with a 'Rate' field and 'View/Add Rates' and 'Update Activities' buttons. Navigation buttons at the bottom include 'Save as Template', 'Copy Project', 'My Projects', 'Project Valuation', 'Project Team', 'Project Activities', 'Go To More', 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', 'Update/Display', and 'Include History'.

Attachments Tab

The **Attachments** tab is used to attach supporting documentation for the project. For a detailed listing of the file extensions that are allowed in Cardinal, see the **Allowed Extensions on Attachments in Cardinal** section of this job aid.



The screenshot shows the 'Attachments' tab in the Cardinal software interface. The breadcrumb trail at the top reads: Favorites > Main Menu > Project Costing > Project Definitions > General Information. Below this, a series of tabs includes 'General Information', 'Project Costing Definition', 'Manager', 'Projects', 'Projects Distribution', 'User Fields', 'Rates', and 'Attachments' (which is selected). The main content area displays 'Project 0000124090' and 'Description Annex Structure_Route 659'. A 'Document Attachments' section is visible, featuring a table with columns 'Requests' and 'Attached File'. The table contains one row with the number '1' in the 'Requests' column and a pencil icon in the 'Attached File' column. Below the table are buttons for 'Save as Template', 'Import from Template', and 'Copy Project'. At the bottom of the interface, there are navigation links for 'My Projects', 'Project Valuation', 'Project Team', and 'Project Activities', along with a 'Go To' dropdown menu set to 'More'. A footer bar contains buttons for 'Save', 'Return to Search', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Note: Follow your agency guidelines as to what documents if any should be attached for the project.

Project Activities

The project template selected controls the detail and summary activities that are available for a project.

Detail Activities

- Used when entering project expenditure transactions
- Check the activity status and update as appropriate
- Each detail activity rolls up to an associated activity type or phase
- Activities with an **Activity Status** of **Budget** are used for budget purposes only and cannot be used on expenditure transactions
- Project expenditure transactions can only be coded at the detail activity level (cannot be done at the phase or roll up level)

Summary Activities

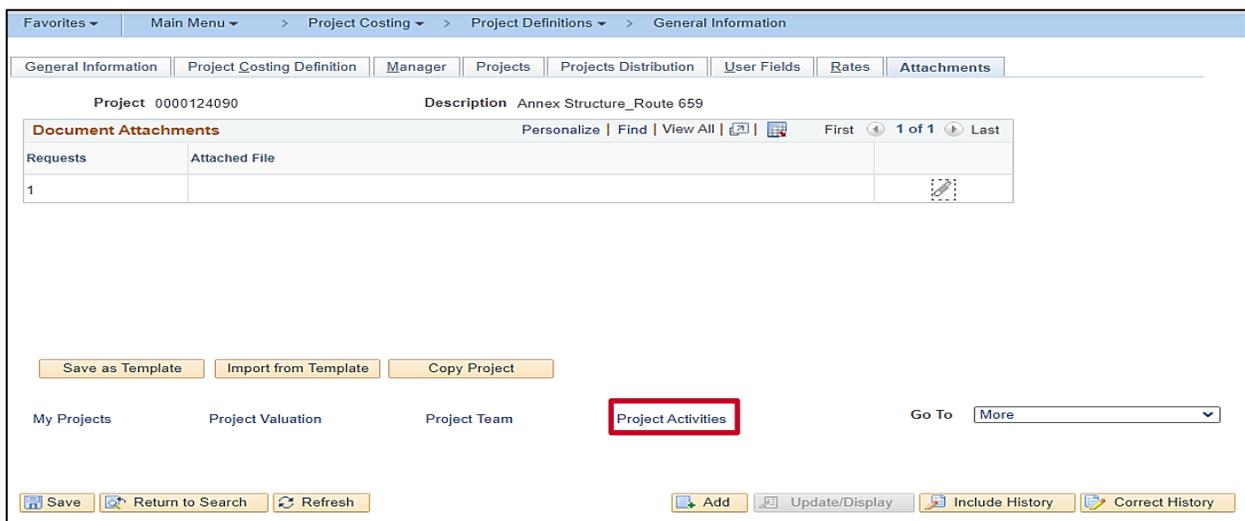
- Represent a phase and cannot be used on expenditure transactions
- Each summary activity is divided into participating and non-participating activities
- Participating activities are associated to federal contracts and non-participating are associated with the non-federal contracts.

To activate an activity, it must be done at the summary level and not the detail level. Activating the summary level activates all activities in the phase. The phase summary activity should be selected and updated to **Active**. Phases that should not be active should remain **Inactive** until they need to be made available to charge expenditures.

Note: When the project **Status** is **Open** and an **Activity** status is **Active**, the project and activity can be used on transactions in other modules.

To access the project activities information, click the **Project Activities** link at the bottom of the page.

Note: This link is available on the bottom of all the tabs except **Projects** and **Projects Distribution**.



31. Click the **Project Activities** link.



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The **Project Activities** page displays.

The screenshot shows the 'Project Activities' page for Project 0000124089. The page includes a breadcrumb trail: Favorites > Main Menu > Project Costing > Project Definitions > General Information > Project Activities. The project details are: Project 0000124089, Description Annex Structure_Route 659, Processing Status Pending. The 'Number Rows' is set to 1, and the 'Expand' dropdown is set to 'All Subtasks'. The table below lists activities with columns for Select, WBS ID, Activity Name, Activity, Start Date, End Date, and Percent Complete.

Select	WBS ID	*Activity Name	*Activity	*Start Date	*End Date	Percent Complete
<input type="checkbox"/>	1	Preliminary Engineering I	9101	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1	PE Participating	9161	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.1	PE/Constr - Constr on PE	602	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.2	Advanced R/W Prior to Acq	606	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.3	R/W Stakeout for Cond. an	607	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.4	Const. Stakeout Prior to Av	608	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.5	P.E. Educational Courses	609	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.6	Preliminary Surveys	611	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.7	Preliminary Studies	612	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.8	Location Surveys	613	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.9	Soil Surveys	614	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.10	Foundation Investigations	615	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.11	Road Plans	616	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.12	Structure Plans	617	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.13	Sign And Signal Plans	618	02/01/2024	01/30/2025	0.00

32. This page displays based on the Level in the **Expand** field and defaults to **All Subtasks**. The level and can be adjusted by clicking the drop-down arrow.

Note: Users with read only access do not have the ability to change the display Level.

The screenshot shows the 'Project Activities' page with the 'Expand' dropdown menu open. The dropdown menu is highlighted with a red box and contains the following options: All Subtasks, Level 1, Level 2, Level 3, Level 4, Level 5, Level 6, Level 7, Level 8, and Level 9. The table below shows the first few rows of the activity list.

Select	WBS ID	*Activity Name	*Activity	*End Date	Percent Complete	
<input type="checkbox"/>	1	Preliminary Engineering I	9101	01/30/2025	0.00	
<input type="checkbox"/>	1.1	PE Participating	9161	01/30/2025	0.00	
<input type="checkbox"/>	1.1.1	PE/Constr - Constr on PE	602	02/01/2024	01/30/2025	0.00
<input type="checkbox"/>	1.1.2	Advanced R/W Prior to Acq	606	02/01/2024	01/30/2025	0.00

33. Choose the desired Level option.



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Schedule Tab

The **Schedule** tab displays by default and displays the standard set of activities that default from the project template selected when the project was created.

Project 0000124090 Description Annex Structure_Route 659 Processing Status Pending

Number Rows Expand Run to Excel

Project Activities Personalize | Find | View 100 | First 1-25 of 250 Last

Schedule More Dates Details User Fields

Select	WBS ID	*Activity Name	*Activity	*Start Date	*End Date	Percent Complete		
<input type="checkbox"/>	1	Preliminary Engineering I	9101	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	1.1	PE Participating	9161	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	1.2	PE Non Participating	9171	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2	Right of Way Phase	9102	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1	RW Participating	9162	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1.1	Staff Appraising	621	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1.2	Fee Appraising	622	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1.3	Court Testimony Staff Appr	623	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1.4	Court Testimony Fee Appr	624	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1.5	Appraisal Review	625	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1.6	RW/PE-PE Activities on RV	626	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1.7	RW/Constr - Constr on Rw	627	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1.8	RW Educational Courses	629	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1.9	Attorney Fees - Other	651	02/01/2024	01/30/2025	0.00		
<input type="checkbox"/>	2.1.10	Staff Attorneys	652	02/01/2024	01/30/2025	0.00		

Save as Template Import from Template

Return to General Information

Save Return to Search Notify Refresh

The table below provides information for the Headings on this page:

Fields	Description
WBS ID	<p>The grid is referred to as the Work Breakdown Structure (WBS). This is a hierarchical grid that illustrates the relationship of the summary activity values (i.e., project phases) with their related detail activity values.</p> <p>The WBS allows the activities associated with each project to roll up to summary activities that represent a phase. Updates to the WBS are only made to a project template and will affect all projects with the same project type.</p>



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Fields	Description
Activity Name	Displays a unique description of the activity. Use the (+) and (-) icons next to the Activity Name to view the detail activities associated to the summary activity.
Activity	Displays the Activity number.
Start Date	This fields defaults to the project start date. This value can be updated as appropriate.
End Date	This date is the start date plus one year. This value can be updated as appropriate. Note: The activity Start and End dates do not control when an activity can be used on a transaction. However, these dates are used for reporting purposes to identify the time frame the activity/phase should be used.
Percent Complete	Not used in Cardinal

More Dates Tab

The **More Dates** tab contains optional activity dates that can be populated and used for reporting purposes. This tab is not used in Cardinal.

The screenshot shows the 'Project Activities' section of the software. At the top, it displays 'Project 0000124089', 'Description Annex Structure_Route 659', and 'Processing Status Pending'. Below this, there are controls for 'Number Rows' (set to 1) and 'Expand' (set to Level 2). The main table is titled 'Project Activities' and has tabs for 'Schedule', 'More Dates', 'Details', and 'User Fields'. The 'More Dates' tab is active, showing a table with columns for 'Select', 'WBS ID', '*Activity Name', 'Baseline Start', 'Baseline Finish', 'Actual Start', 'Actual Finish', 'Early Start', 'Early Finish', 'Late Start', and 'Late Finish'. The table lists several activity phases, each with a checkbox and a plus icon for expansion.

Select	WBS ID	*Activity Name	Baseline Start	Baseline Finish	Actual Start	Actual Finish	Early Start	Early Finish	Late Start	Late Finish
<input type="checkbox"/>	1	Preliminary Engineering I								
<input type="checkbox"/>	1.1	PE Participating								
<input type="checkbox"/>	1.2	PE Non Participating								
<input type="checkbox"/>	2	Right of Way Phase								
<input type="checkbox"/>	2.1	RW Participating								
<input type="checkbox"/>	2.2	RW Non Participating								
<input type="checkbox"/>	3	Inc. Construction Phase								
<input type="checkbox"/>	3.1	IC Non Participating								
<input type="checkbox"/>	4	Construction Phase								



Project Accounting Job Aid

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Details Tab

The **Details** tab contains additional activity attributes.

Select	WBS ID	*Activity Name	Activity Type	Cascade Owner	Activity Owner	Name	Activity Status	Processing Status	Milestone	Allow Interest Calculation
<input type="checkbox"/>	1	Preliminary Engineering I	9101	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1.1	PE Participating	9101	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1.2	PE Non Participating	9101	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2	Right of Way Phase	9102	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2.1	RW Participating	9102	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2.2	RW Non Participating	9102	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3	Inc. Construction Phase	9103	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3.1	IC Non Participating	9103	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	4	Construction Phase	9104	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	4.1	CN Participating	9104	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	4.2	CN Non Participating	9104	<input type="checkbox"/>			...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	5	Budget Activities		<input type="checkbox"/>			Budget	Active	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	5.1	Construction Project Budget		<input type="checkbox"/>			Budget	Active	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	5.2	PE Budget	9101	<input type="checkbox"/>			Budget	Active	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	5.3	RW Budget	9102	<input type="checkbox"/>			Budget	Active	<input type="checkbox"/>	<input type="checkbox"/>

Fields	Description
Activity Type	Represents the phase the activity is associated to and defaults from the project template. Do not change these values. They are used for reporting purposes.
Activity Status	Defaults from the Project template and cannot be changed. Note: Activities with an Activity Status of Budget or Hold cannot be used on expenditure transactions.
Processing Status	There are two statuses: Active and Inactive Note: An activity must have a status of Active for it to be available for selection in other Cardinal modules such as GL and AP. These values should be updated as appropriate for the project.
Milestone checkbox	Not used in Cardinal
Allow Interest Calculation checkbox	Not used in Cardinal

34. Update the **Processing Status** for each **Activity** as appropriate.

Note: For convenience, the **Processing Status** should be updated at the highest level not at each individual activity level.



Project Accounting Job Aid

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User Fields Tab

Note: This tab is not currently used in Cardinal.

Favorites > Main Menu > Project Costing > Project Definitions > General Information > Project Activities

Project Activities New Window | Help | Personalize Page

Project 0000124089 Description Construction Project Template Processing Status Pending

Number Rows Expand All Subtasks Run to Excel

Project Activities Personalize | Find | View 100 | First 1-4

Schedule | More Dates | Details | **User Fields**

Select	WBS ID	Activity Name	Field 1	Field 2	Field 3	Field 4	Field 5	User Currency	Amount 1	Amount 2	Amount 3	Date 1	Date 2
<input type="checkbox"/>	1	Preliminary Engineering I	<input type="text"/>										
<input type="checkbox"/>	1.1	PE Participating	<input type="text"/>										
<input type="checkbox"/>	1.1.1	PE/Constr - Constr on PE	<input type="text"/>										
<input type="checkbox"/>	1.1.2	Advanced R/W Prior to Acq	<input type="text"/>										
<input type="checkbox"/>	1.1.3	R/W Stakeout for Cond. an	<input type="text"/>										
<input type="checkbox"/>	1.1.4	Const. Stakeout Prior to Av	<input type="text"/>										

Save as Template Import from Template

[Return to General Information](#)

35. Click the **Save** button.

Allowed Extensions on Attachments in Cardinal

The following is a list of file extensions that are allowed on attachments uploaded to Cardinal. You should only attach key supporting documents that either enhance the electronic Cardinal transaction approval process or are instrumental as part of the transaction history. The Cardinal system should not be relied upon to maintain agency documentation and should not be considered the official retention source of the agency. Supporting documents, as required by all applicable regulatory/governing bodies, should be maintained by the agency apart from the Cardinal attachment functionality.

Allowed Extensions on Attachments in Cardinal		
.BMP	.CSV	.DOC
.DOCX	.JPE	.JPEG
.JPG	.MSG	.PDF
.PNG	.PST	.RTF
.TIF	.TIFF	.TXT
.XLS	.XLSX	.XML