



NEW FEATURES PREVIEW

Accounts Payable and Expenses

February 11, 2026

www.cardinalproject.virginia.gov

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Question & Answer

Meet the Team

Cardinal Team

- Jeevan Ramagiri
- Kiran Gudapati
- **Kim White**
- Sravanthi Gondi
- Sridhar Kamatala
- Bilal Khan



Jeevan Ramagiri
Presenter
AP/EX Team Lead



Kim White
Presenter
Special Projects



Dana Smith
Facilitator
Change Leadership



Monica Kauffman
Facilitator
Change Leadership

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Question & Answer

What is the PUM Upgrade Project?

The Cardinal team is enhancing the Financials (FIN) and Human Capital Management (HCM) applications.

This upgrade will deliver a variety of new features aimed at improving both the user experience and overall system functionality, including:

WorkCenters

- Centralized tasks, reports, queries, and transactions.

PeopleSoft Insights

- A new tool for analytics, with embedded, visual data metrics

Foundation Upgrades

- A technical refresh of PeopleTools, ensuring a stable and high-performing system

1,400 + Enhancements

- New features designed to improve reporting and processing and refresh the user interface.

Refreshed Learning

- Comprehensive updates to all training materials to ensure a smooth transition for your teams.

Advantages of WorkCenters

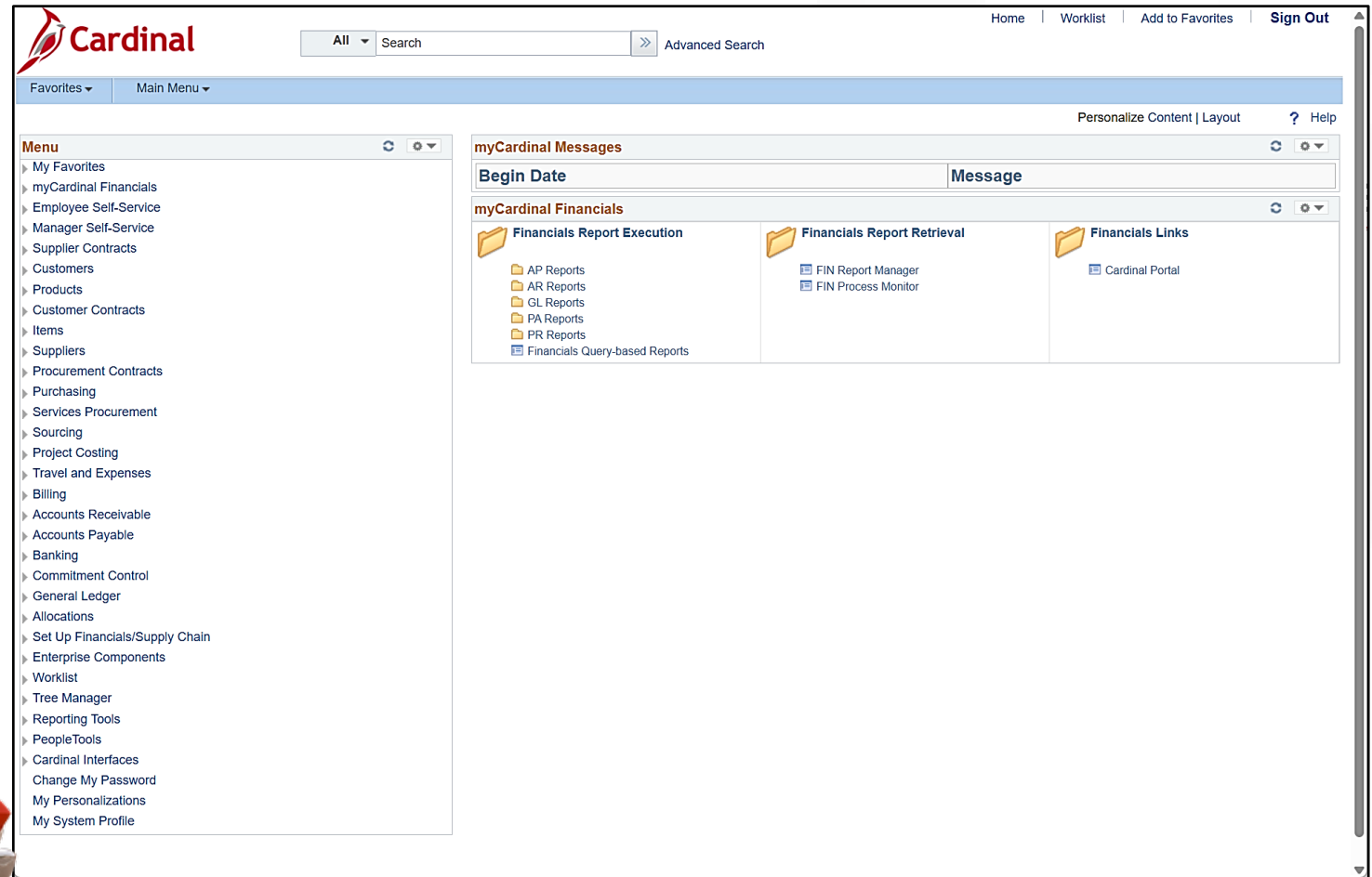
WorkCenters serve as a centralized hub for users to access the key module components, tailored to the core user's responsibilities.

Primary advantages include:

- **Centralized Access:** Consolidates reports, queries, tasks, and relevant links into a single workspace.
- **Prioritize Workflows:** “My Work” transaction list highlighting where user action is needed. Refreshes on login or after page refresh.
- **Flexible Filtering:** filters and layouts allow users to sort and view only the most relevant transaction data.

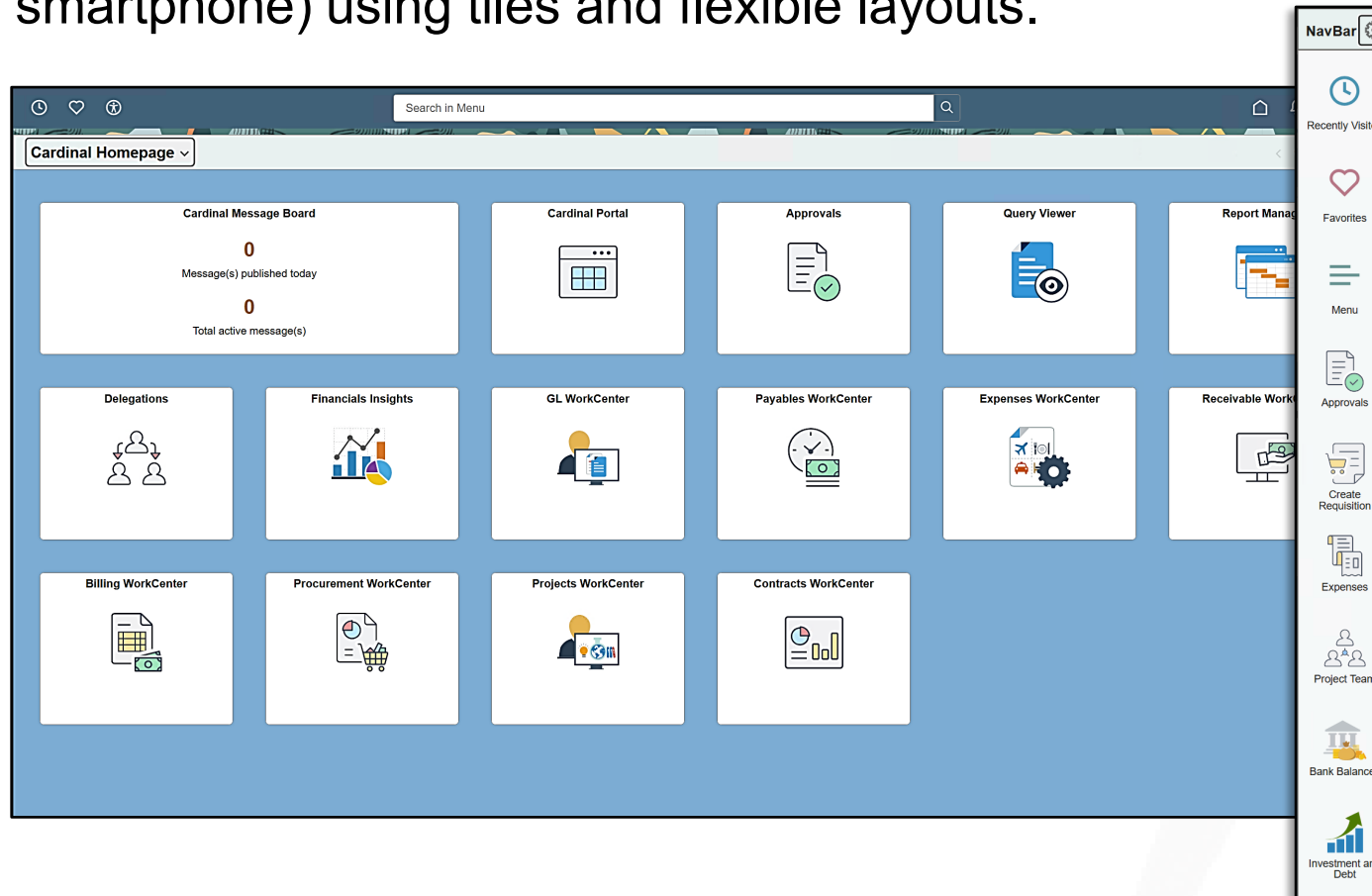
The Legacy Experience: PeopleSoft Classic

- **Desktop-Centric:**
Designed specifically for large monitors and mouse clicks
- **Rigid Framework:** Built on fixed, "pixel-perfect" layouts that do not scale
- **Deep Navigation:** Relies on traditional, multi-level menu trees



PeopleSoft Fluid

Fluid is modern and responsive, designed to adapt across devices (desktop, tablet, smartphone) using tiles and flexible layouts.



- Modern appearance using current web standards
- Simplified, tile-based navigation and a navigation bar (NavBar)
- Pages that adjust based upon the screen size and orientation of the device
- Enhanced search capabilities

Benefits of Insights

Insights is an analytics engine leveraging OpenSearch Dashboards to provide, fast, interactive, and actionable data visualizations (charts, graphs, tables) directly within PeopleSoft Fluid pages. Data refreshes nightly and all FIN Core Users will have access to the dashboards. Benefits include:

- **Improved Decision-Making & Analytics:** Provides rich, visual analytics for better understanding of data trends.
- **No Operational Performance Impact:** Analytics run against search indexes rather than the transactional database, ensuring system performance is not compromised.
- **Intuitive Visualization Tools:** Features include interactive charts and tables, allowing for easy data interpretation and trend identification.
- **Filter Capability:** Users can easily navigate from high-level visualizations to detailed, actionable records.

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Session Objectives

Purpose

First Look: An exclusive preview of new features in the Accounts Payable and Expenses modules.

Input: Use your expertise to help the Cardinal team identify nuances in the user journey to ensure our support materials meet real-world needs.

Desired Outcomes

User-Ready Materials: Your insights will help inform our communication and training strategy, ensuring processes and challenges are addressed.

Engagement & Advocacy: Foster excitement and confidence by involving key agency subject matter experts who can carry the value of the new features back to their agencies with enthusiasm, increasing user adoption.

Making the Most of Our Time Together



Stay in the Zone

- Your focus helps us catch the small details that make a big difference.



Curiosity is Encouraged

- Ask questions. If you are thinking it, someone else probably is too.



Bring your Agency Perspective

- Be honest and open-minded. Your constructive feedback helps us build better training and communications.



Leave your Mark

- Complete the post-session survey, ensuring your agency's voice is officially captured in our planning.

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Accounts Payable WorkCenter

The **Accounts Payable WorkCenter** is a central hub for Voucher Processors and Approvers that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform Accounts Payable related job functions.

My Work: Your “To-Do” list of Vouchers that require attention (role based).



My Approvals: Displays Vouchers pending your approval (role based).

My Insights: Provides a quick link to the AP Insights Dashboard.

Links: Direct navigation to the pages used in day-to-day Accounts Payable tasks.

Queries: Access to run the most frequently used AP queries directly from the WorkCenter.

Reports/Processes: Quick access to the most common AP Reports and Processes.

Accounts Payable WorkCenter	
	 
∨ My Work	
Vouchers	∨
Matching	∨
Voucher Exceptions	∨
Payments	∨
∨ My Approvals	
> My Insights	
> Links	
> Queries	
> Reports/Processes	

Accounts Payable WorkCenter (continued)

- **My Work** area provides visual clues as to the number of items in each category; counts refresh at log in or after screen refresh.
- Each **My Work** section displays based on roles (e.g., Matching only displays for VDOT users). Users can refine their results using the filters that are available.
- **Vouchers** for the highlighted category display in a list in the main section of the page; users can perform actions directly without navigating through multiple menus.

My Work		Budget Check Errors						
Vouchers		Voucher List						
Matching		<input type="checkbox"/>	Business Unit ↑↓	Voucher ↑↓	Number Of Errors ↑↓	Exceptions ↑↓	Misc Exceptions ↑↓	Supplier ↑↓
Voucher Exceptions		<input type="checkbox"/>	14800	00014718	2	Exceptions	Misc Exceptions	0000112938
Recycled Vouchers		<input type="checkbox"/>	14800	00014722	2	Exceptions	Misc Exceptions	0000113432
Budget Check Errors		<input type="checkbox"/>	14800	00014724	2	Exceptions	Misc Exceptions	0000030272
Payments								

Expenses WorkCenter

The **Expenses WorkCenter** contains the same sections as AP and is available to users with Expenses Employee, Expense Coordinator and Expense Approver roles.

- **My Work** is a centralized view of Travel Authorizations, Cash Advances and Expense Reports that require attention.

General Details Show All										
Actions	Business Unit	Empl ID	Employee Name	Report ID	Report Description	Status	Aging (Days)	Total Amount	Currency	Role
⋮	24100	██████████	EILEEN STREMPPEL	0000472346	8/24-28 Board Advisors Orient	Submitted for Approval	128	1,077.07 USD	Expenses Manager	
⋮	24100	██████████	TIFFANY BIRDSONG	0000472411	7/29 Lodging-no show-emergency	Submitted for Approval	128	318.28 USD	Expenses Manager	
⋮	24500	██████████	Allen Fleming	0000472505	T 7/15-7/16/2025	Submitted for Approval	127	1,340.86 USD	Expenses Manager	
⋮	24500	██████████	Allen Fleming	0000472490	7/14-7/15/2025	Submitted for Approval	127	190.70 USD	Expenses Manager	
⋮	24500	██████████	Allen Fleming	0000472505	T 7/15-7/16/2025	Submitted for Approval	127	1,340.86 USD	Expenses Manager	

Expenses WorkCenter

Refresh Settings

My Work

On Hold/Pending Approvals

- Travel Authorization (2)
- Cash Advance (1)
- Expense Report (7)**

Exceptions

- Outstanding Cash Advances (3)

My Approvals

My Insights

Links

Queries

Reports/Processes

WorkCenter Filters

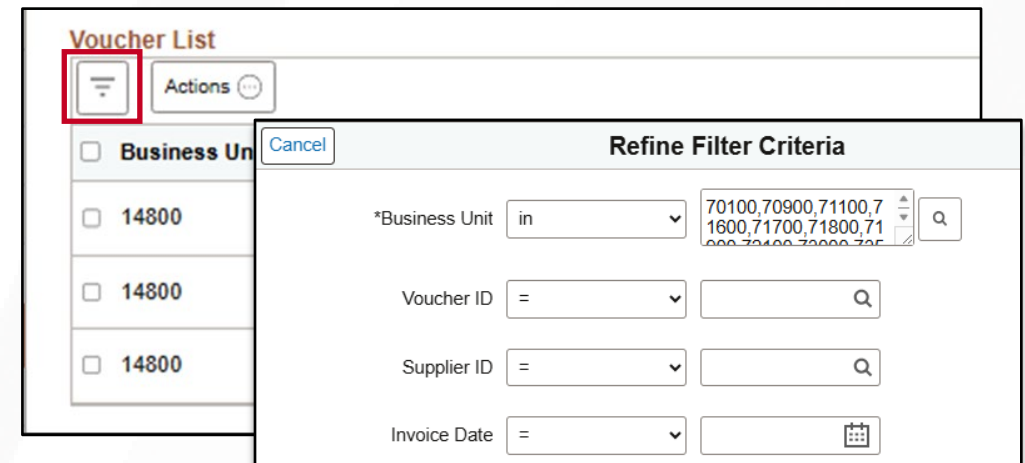
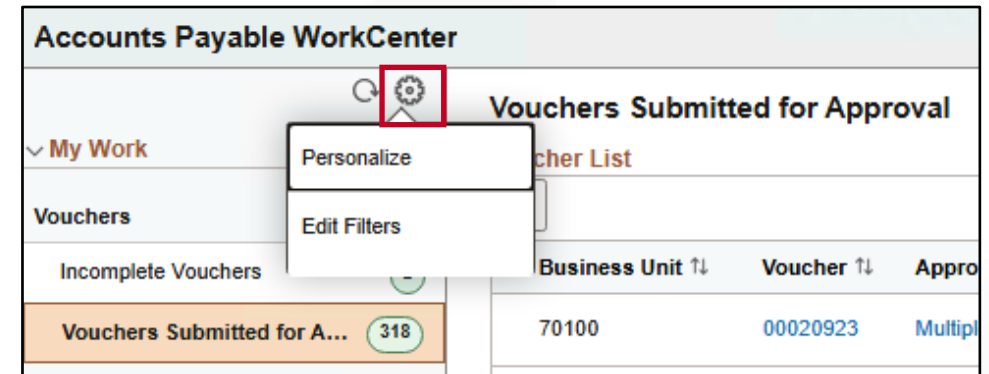
Required Filters are pre-set for users based on the Business Units to which they have access.

Set Default Filters

Users may update the pre-set filters using the **Edit Filters** icon available in the left-hand pane. Selections are saved and will be applied every time the user accesses the WorkCenter.

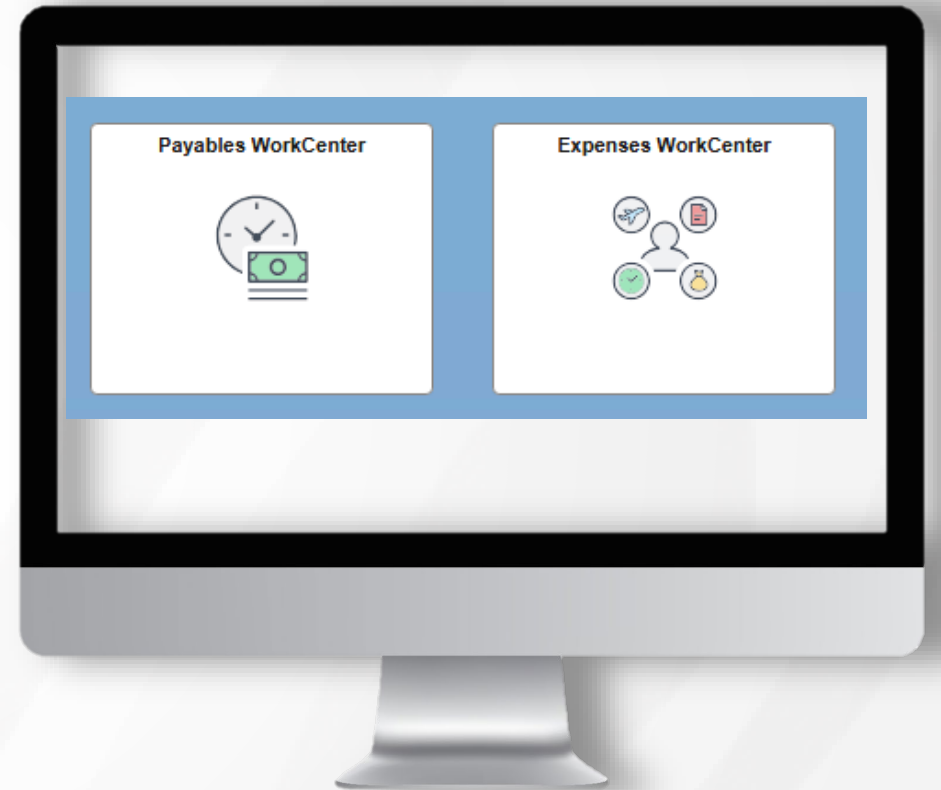
Set Temporary Filters

While working with a category, a user may refine the filters to temporarily focus on a particular Business Unit(s) or other criteria by using the **Refine Filter** option for the WorkCenter item.



LIVE DEMONSTRATION

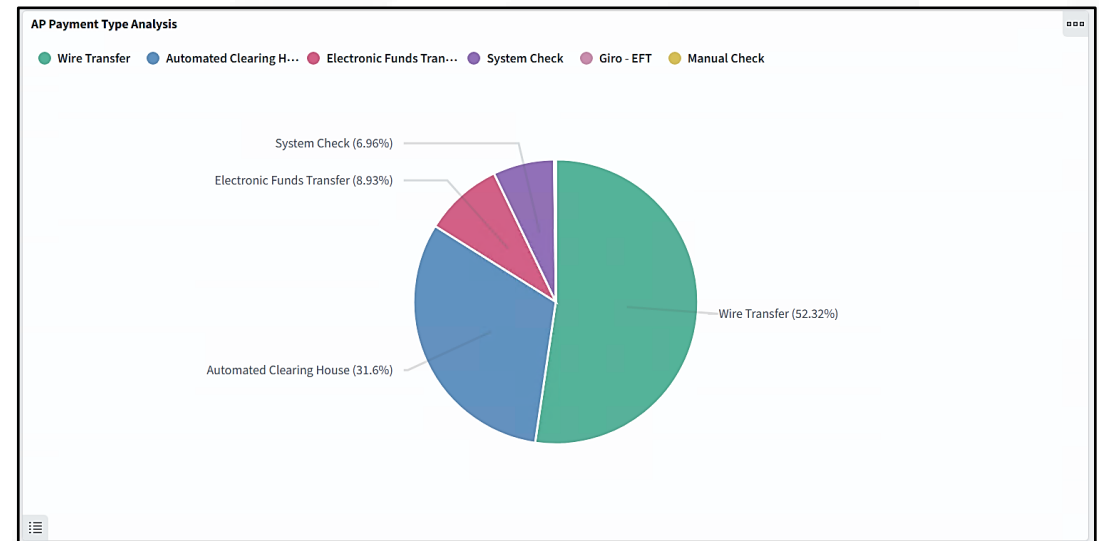
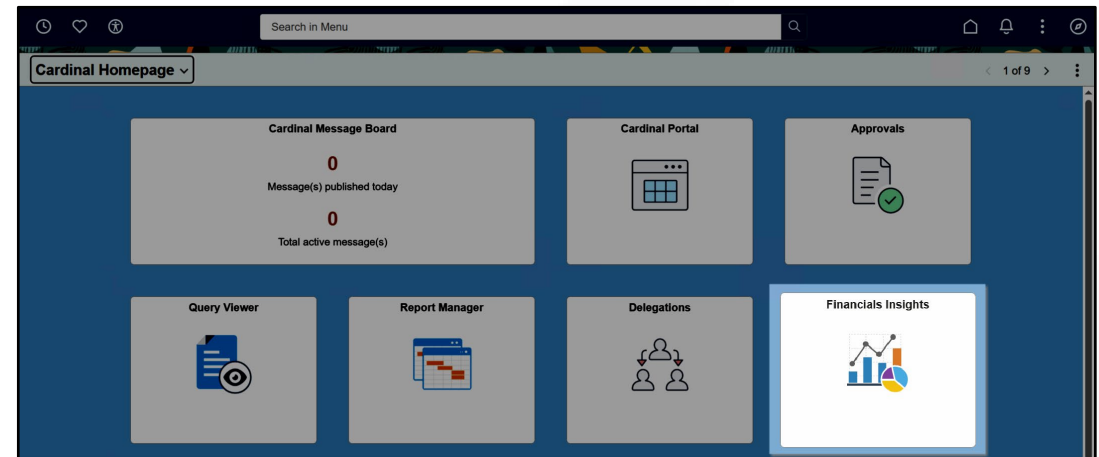
AP and EX WorkCenters



Accounts Payable Insights

Supplier Spend Analysis is accessible via the **Financial Insights** tile on the Homepage or through a link in the related WorkCenter.

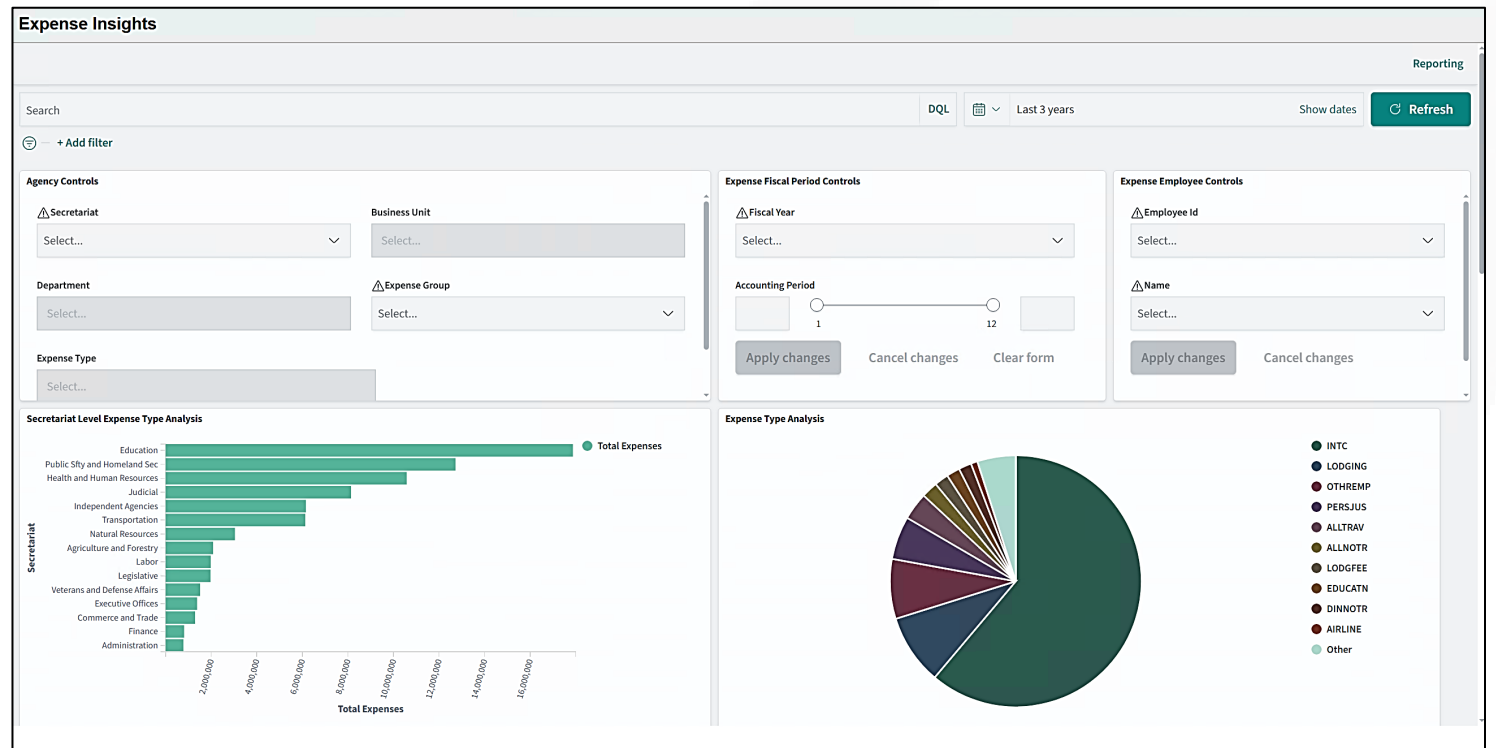
- Data will be available for the current Fiscal Year and the three preceding years.
- Users will have access to all Business Units.
- Sensitive data identified by agencies will be redacted.
- Multiple filters are available to allow users to focus on the agency, invoices or suppliers they desire more information on.



Employee Expenses Insights

Employee Expenses Insights is also accessible via the **Financial Insights** tile on the Homepage or through a link in the related WorkCenter.

- Dashboard with multiple visualizations of Expense Report data.
- Users will have access to all Business Units.
- Sensitive data identified by agencies will be redacted.
- Multiple filters are available to allow users to focus on the agency, expense type or employee(s) they desire more information on.



LIVE DEMONSTRATION

AP and EX Insights



PUM Upgrade – Agency Readiness



Key Agency Actions



Promote participation



Prepare teams



Provide feedback

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Thank You

PRESENTATION CONCLUDED

We Value Your Feedback!

Please scan the QR code to complete a brief session survey.

Survey Link:

<https://forms.office.com/g/ra6cqBGtKs>



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