



NEW FEATURES PREVIEW

General Ledger

February 12, 2026

www.cardinalproject.virginia.gov

Agenda

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Question & Answer

Meet the Team

Cardinal Team

- **Shauntell Cox**
- Cornelia Ryan
- Lisa Branch
- **Kim White**
- Sravanthi Gondi
- Sridhar Kamatala
- Bilal Khan



Shauntell Cox
Presenter
GL 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

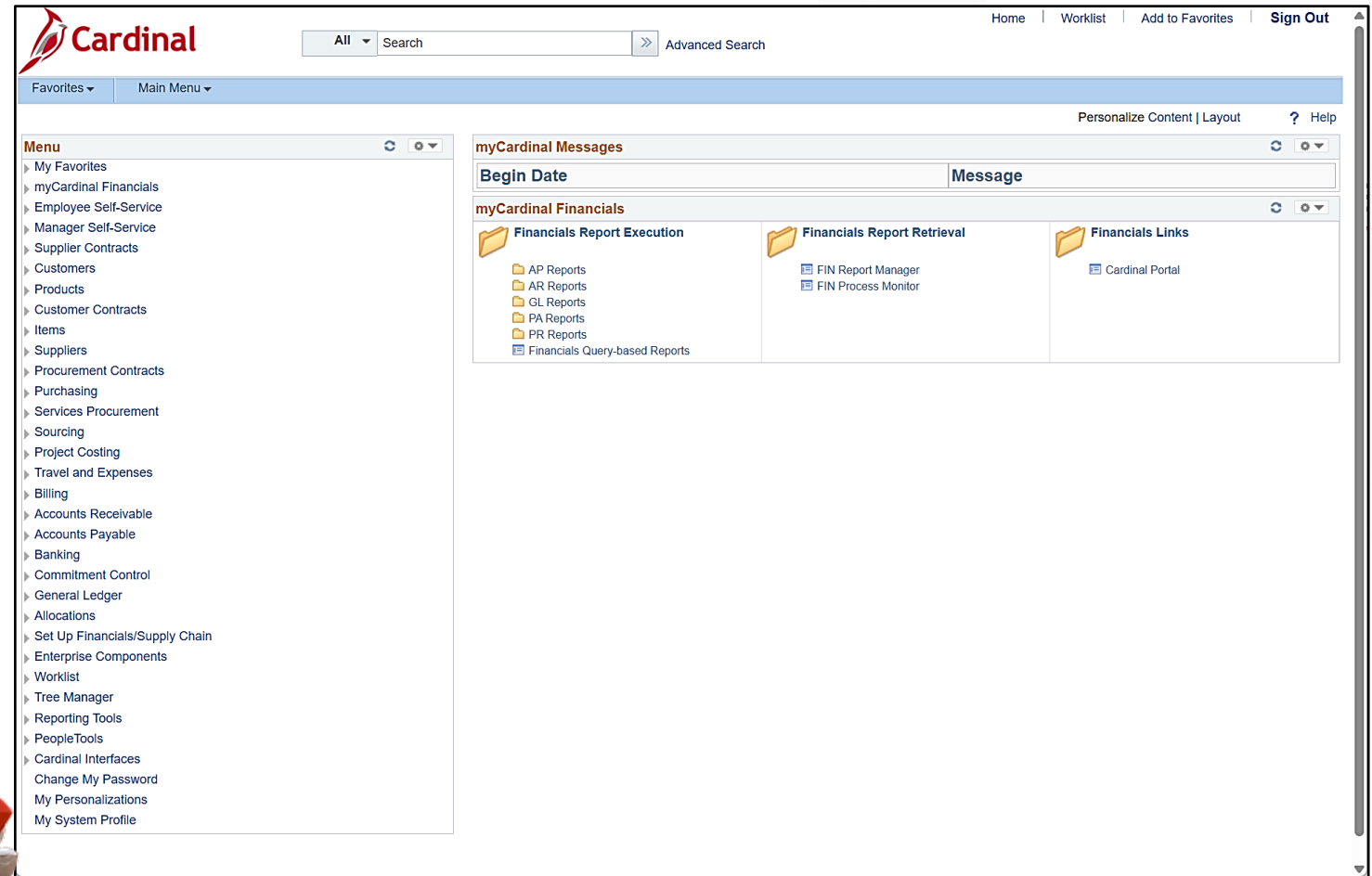
WorkCenters serve as a centralized hub for users to access the key module components, tailored to the core user's responsibilities.

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.

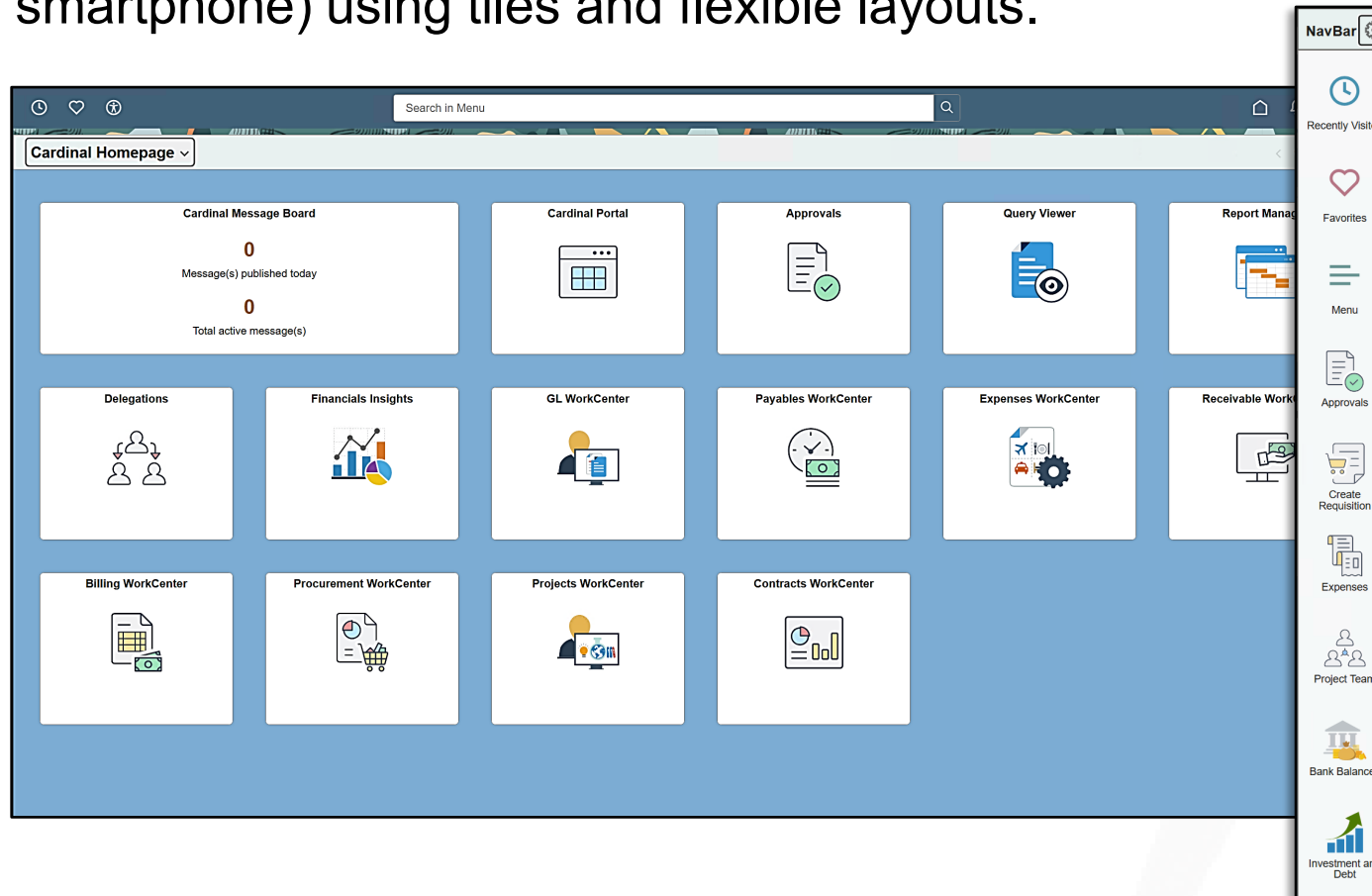
The Legacy Experience: PeopleSoft Classic

- **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.

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 General Ledger module.

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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General Ledger WorkCenter

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

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

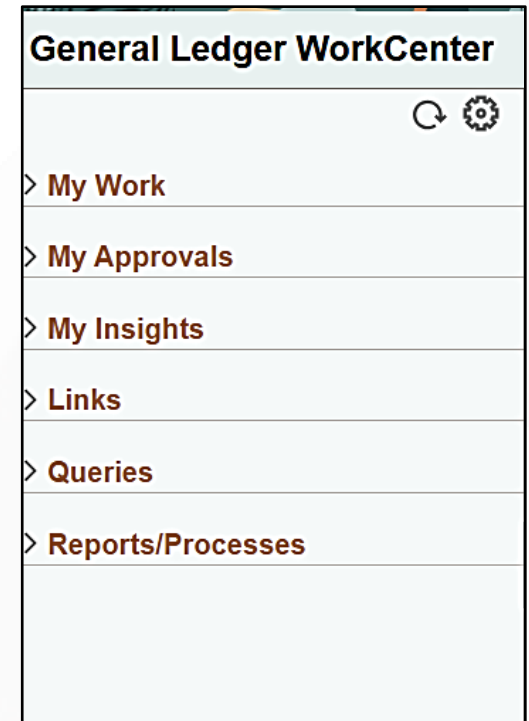
My Approvals: Displays Journals pending your approval (role based).

My Insights: Provides a quick link to the GL Insights Dashboards.

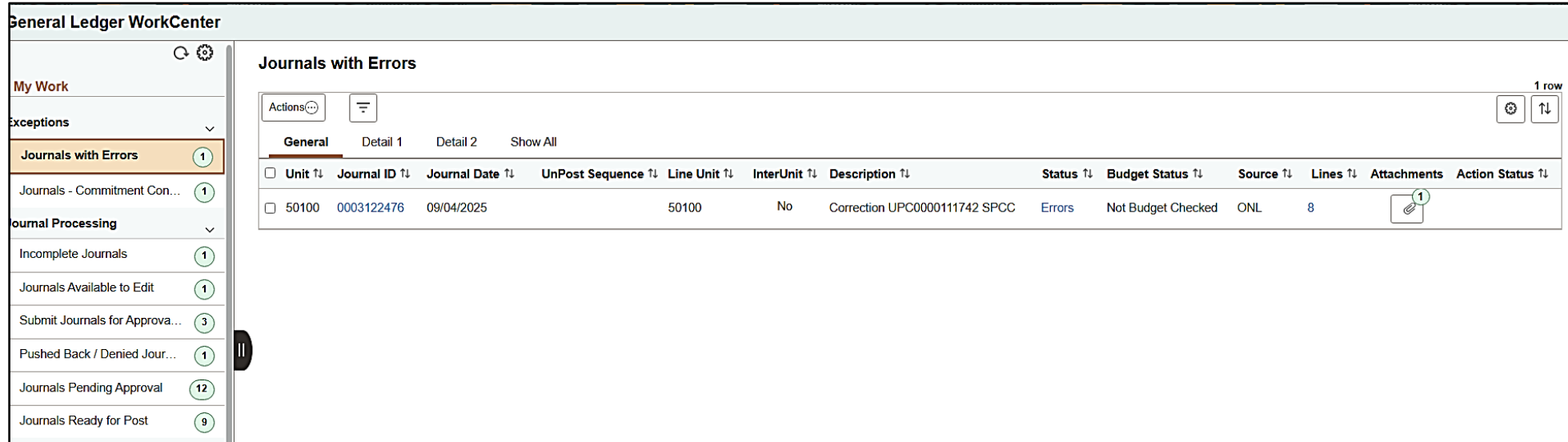
Links: Direct navigation to the pages used in day-to-day General Ledger tasks.

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

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



General Ledger WorkCenter (continued)



The screenshot displays the General Ledger WorkCenter interface. On the left is a navigation pane under 'My Work' with categories: Exceptions, Journals with Errors (1), Journals - Commitment Con... (1), Journal Processing, Incomplete Journals (1), Journals Available to Edit (1), Submit Journals for Approva... (3), Pushed Back / Denied Jour... (1), Journals Pending Approval (12), and Journals Ready for Post (9). The main area is titled 'Journals with Errors' and shows a table with one row of data. The table has columns: Unit, Journal ID, Journal Date, UnPost Sequence, Line Unit, InterUnit, Description, Status, Budget Status, Source, Lines, Attachments, and Action Status. The data row shows: Unit 50100, Journal ID 0003122476, Journal Date 09/04/2025, Line Unit 50100, InterUnit No, Description Correction UPC0000111742 SPCC, Status Errors, Budget Status Not Budget Checked, Source ONL, Lines 8, and an Attachments icon with a '1' notification bubble. Above the table are tabs for 'General', 'Detail 1', 'Detail 2', and 'Show All', along with an 'Actions' menu and a '1 row' indicator.

Unit	Journal ID	Journal Date	UnPost Sequence	Line Unit	InterUnit	Description	Status	Budget Status	Source	Lines	Attachments	Action Status
50100	0003122476	09/04/2025		50100	No	Correction UPC0000111742 SPCC	Errors	Not Budget Checked	ONL	8		

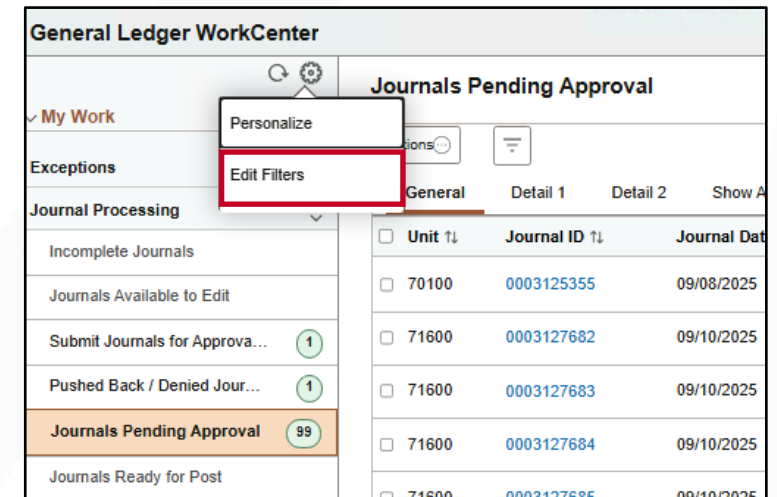
- **My Work** area provides visual clues as to the number of items in each category; counts refresh at log in or after screen refresh.
- Journals for each category display in a list in the main section of the page; users can perform actions directly without navigating through multiple menus.
- Users can refine their results using the filters that are available.

WorkCenter Filters

Required Filters are pre-set based on the Business Units to which the user has access.

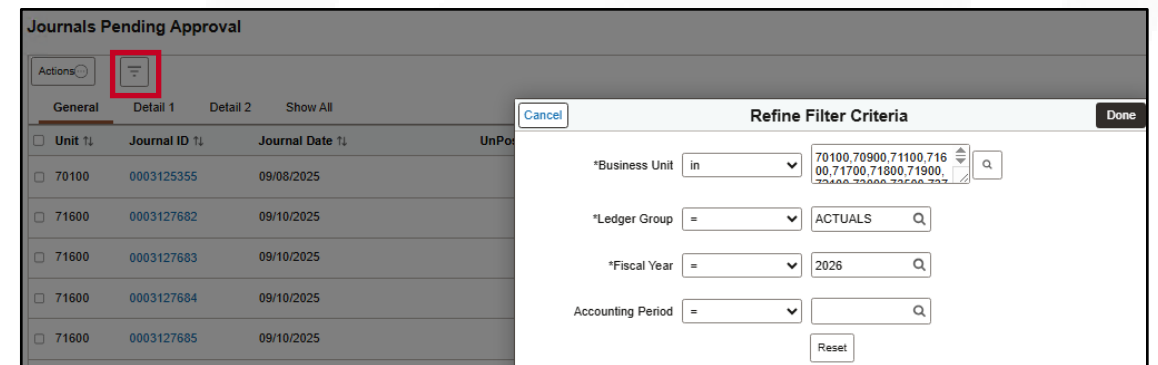
Set Default Filters

- 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. Users will need to remember to update the Fiscal Year filter annually if that filter is enabled.



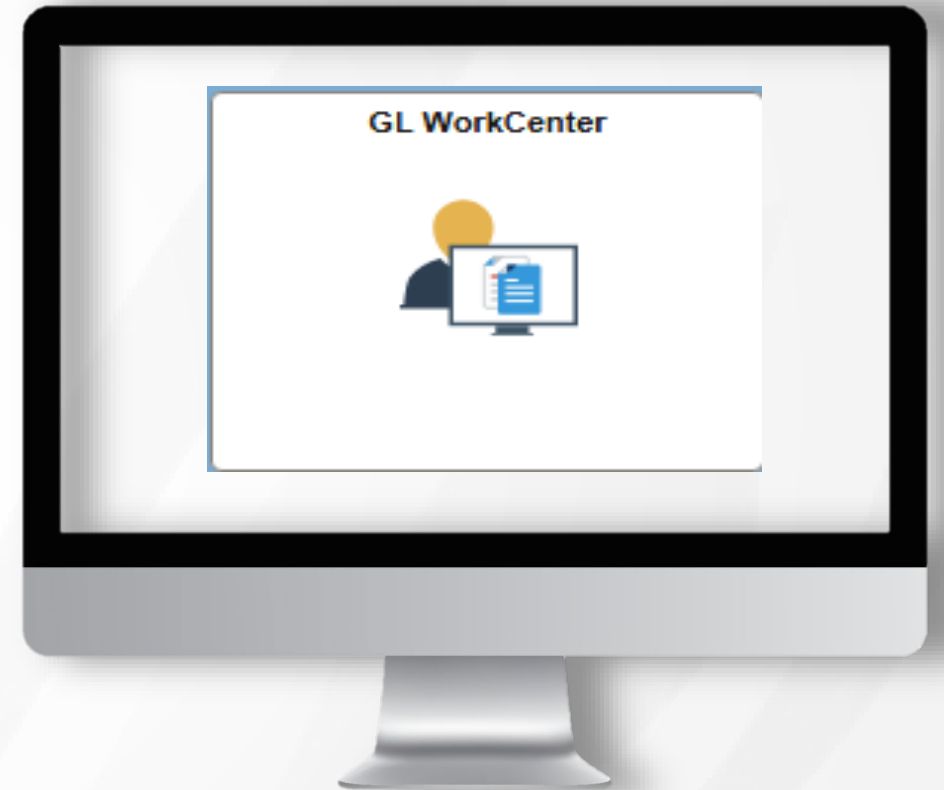
Set Temporary Filters

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

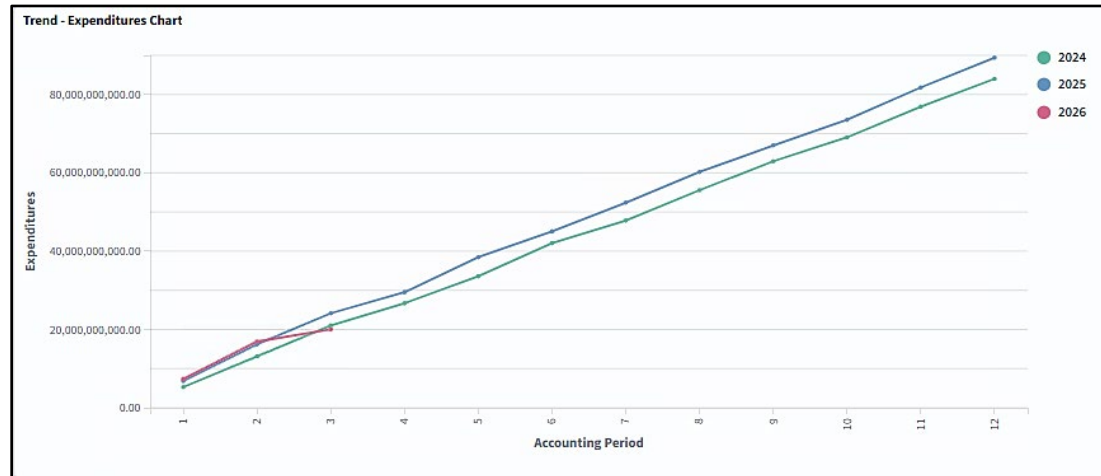
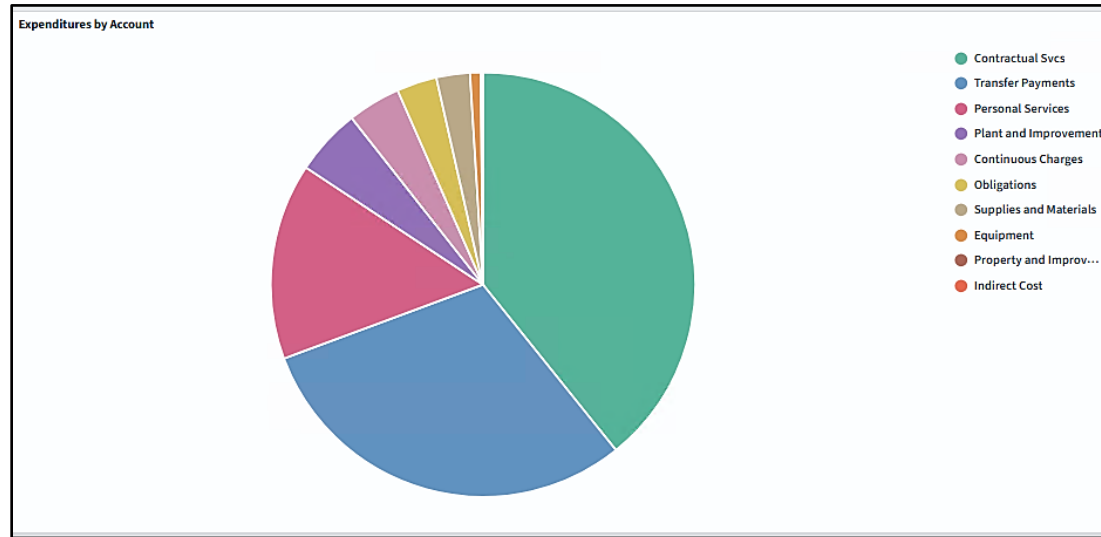


LIVE DEMONSTRATION

General Ledger WorkCenter

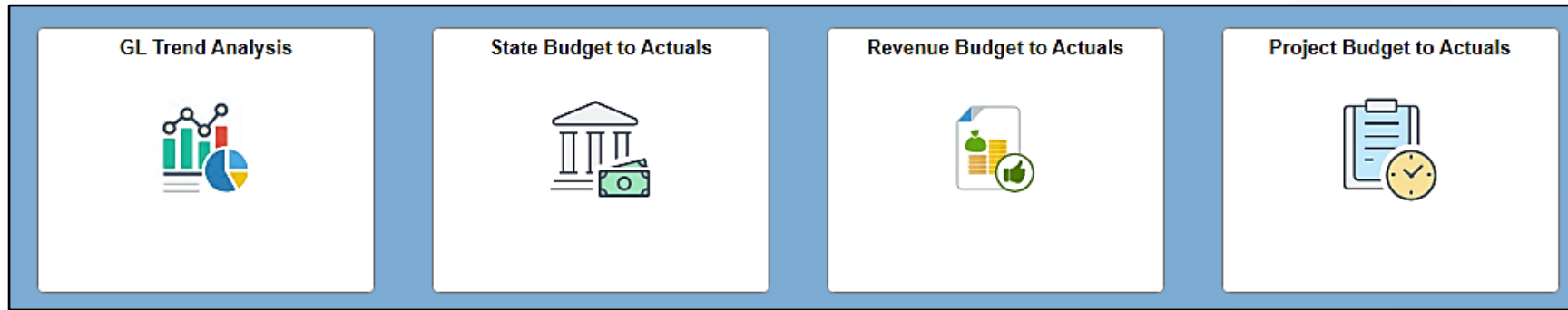


General Ledger Insights



- Insights is accessible via the **Financial Insights** tile on the Homepage or through 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, fund, program, project they desire more information on.

General Ledger Insights (continued)



- **GL Trend Analysis** includes visualizations for FY Expenditures and Revenues to easily compare one fiscal year to another.
- **State Budget to Actuals** includes visualizations related to Appropriation Budget to Actuals and Expenditure details, with filters for Business Unit, Account, Program and Fund.
- **Revenue Budget to Actuals** includes visualizations related to the Official Revenue Estimate Budget to Actual Revenue collections, with filters for Business Unit, Fund and Account.
- **Project Budget to Actuals** includes visualizations for the life-to-date Project Budget to Actual Expenditures, with filters for Business Unit, Project, Effective Status, Project Start and End Date.

LIVE DEMONSTRATION

General Ledger 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!

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Survey Link:

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



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