Cardinal

NEW FEATURES PREVIEW

WorkCenters – Project Accounting, Accounts Receivable/Billing, and Procurement

February 12, 2026

www.cardinalproject.virginia.gov

Agenda

01 Welcome & Introductions

02 Upgrade Project Information

03 Session Objectives

04 Walkthrough & Demonstrations

05 Question & Answer

01 **Welcome & Introductions**

02 Upgrade Project Information

03 Session Objectives

04 Walkthrough & Demonstrations

05 Question & Answer

Meet the Team

Cardinal Team

- **Tony Spears**
- **Sravanthi Gondi**
- **Jens Jorgensen**
- Krishna Narayanan
- Sinoj Moni
- Vijay Kakani
- Adrian Saunders
- Sridhar Kamatala
- Bilal Khan

Tony Spears
Presenter
PA Team Lead

Jens Jorgensen
Presenter
AR Team Lead

Sravanthi Gondi
Presenter
FIN Deputy Lead

Dana Smith
Facilitator
Change Leadership

Monica Kauffman
Facilitator
Change Leadership

01 Welcome & Introductions

02 **Upgrade Project Information**

03 Session Objectives

04 Walkthrough & Demonstrations

05 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:

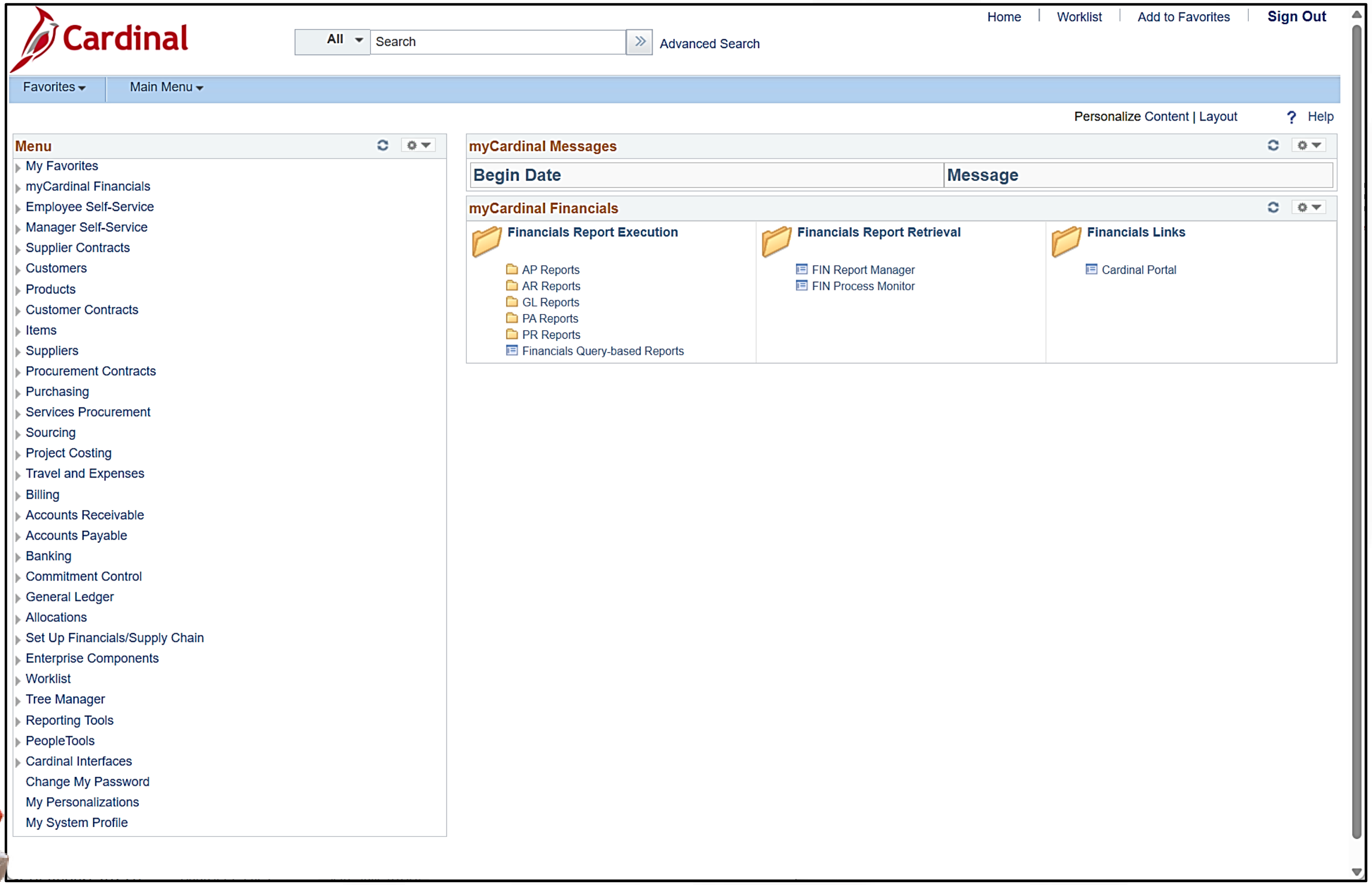
- **Centralized Access**: Consolidates reports, queries, tasks, and relevant links into a single workspace.
- **Prioritize Workflows**: “My Work” transaction list highlighting where user action is needed. Refreshes on login or after page refresh.
- **Flexible Filtering**: filters and layouts allow users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

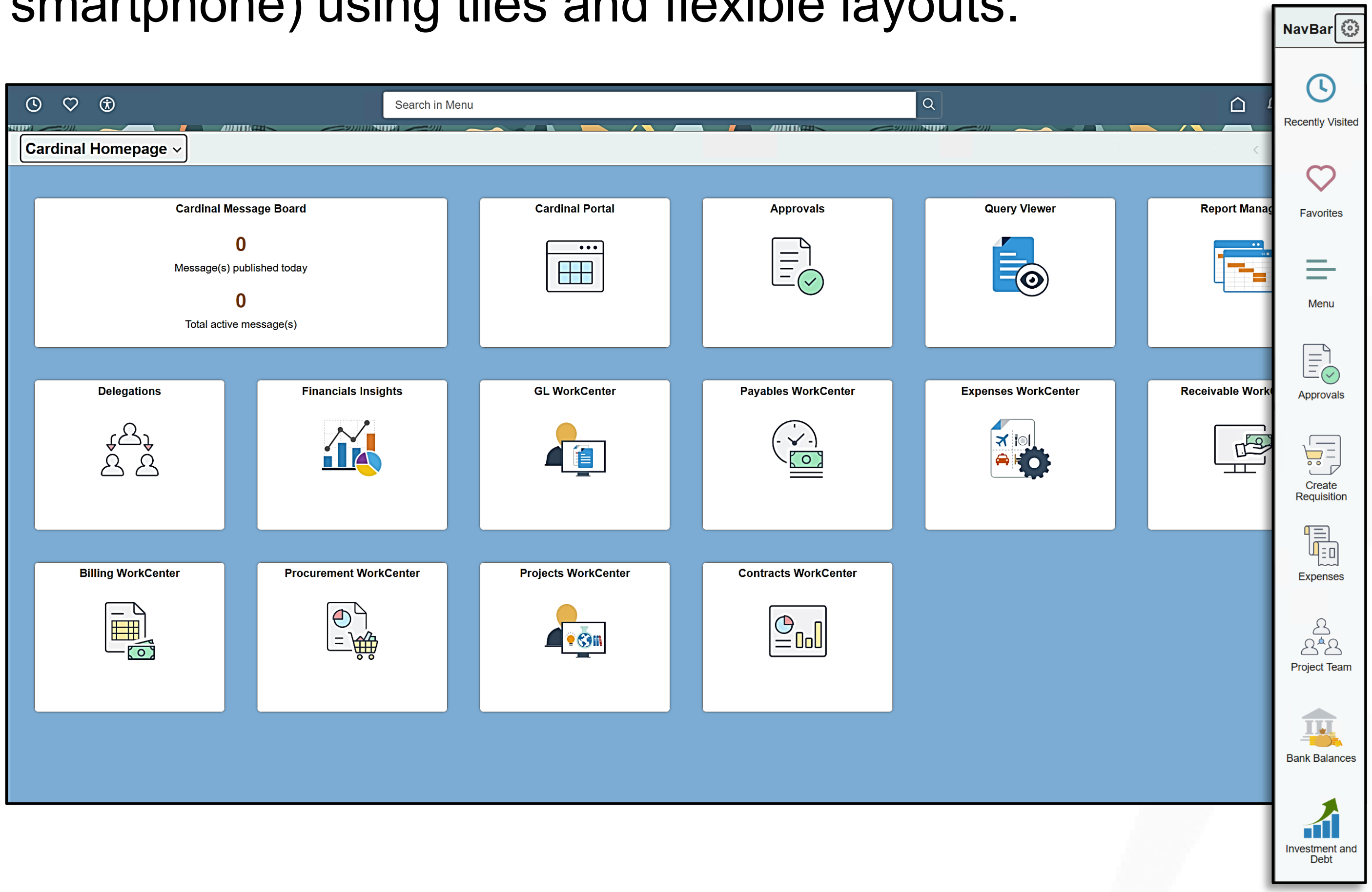
Deep Navigation: Relies on traditional, multi-level menu trees.



Cardinal

PeopleSoft Fluid

Fluid is a 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

01 Welcome & Introductions

02 Upgrade Project Information

03 Session Objectives

04 Walkthrough & Demonstrations

05 Question & Answer

Session Objectives

Purpose

First Look: An exclusive preview of new features in the Project Accounting, Accounts Receivable/Billing, and Procurement 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.

01 Welcome & Introductions

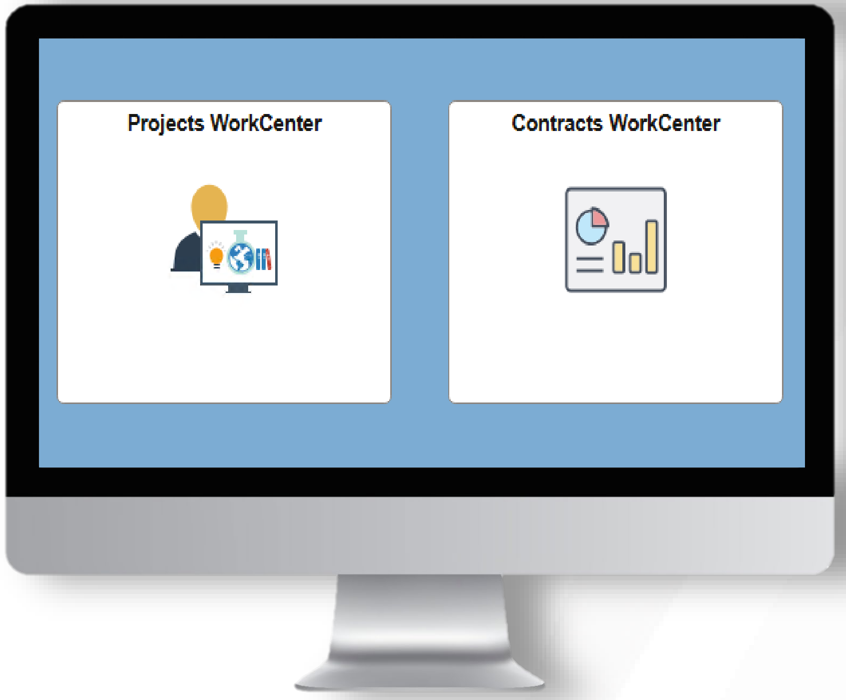
02 Upgrade Project Information

03 Session Objectives

04 Walkthrough & Demonstrations

05 Question & Answer

Project Accounting (PA) WorkCenters



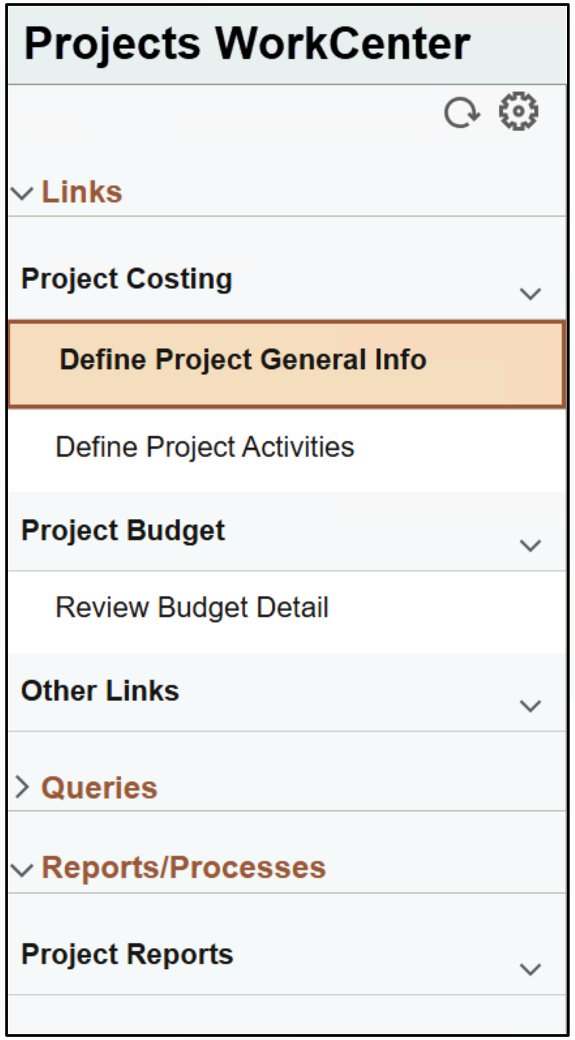
Projects WorkCenter

The Projects WorkCenter is a central hub for users with the Project Manager role that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform Projects related job functions.

Links: Provide access to pages you visit frequently when performing your day-to-day tasks.

Reports/Processes: Quick access to the most common Project Reports.

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



Customer Contracts WorkCenter

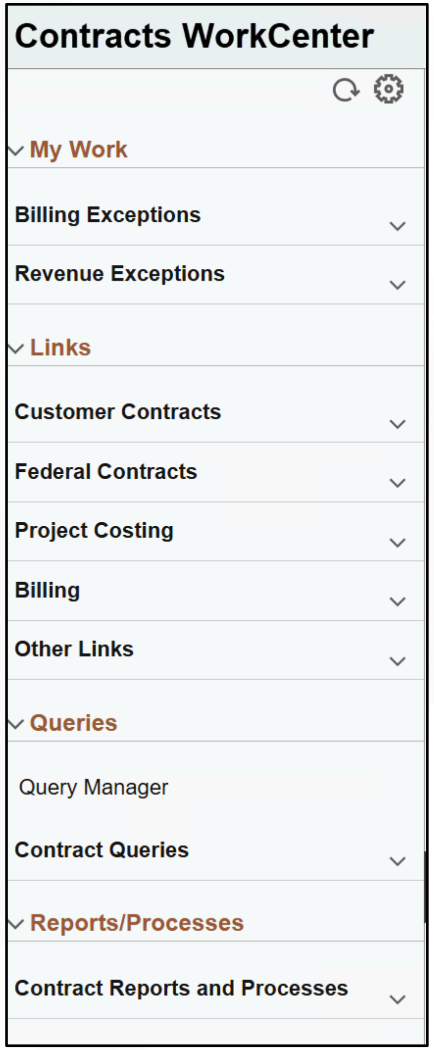
The Customer Contracts WorkCenter contains similar sections as the Projects WorkCenter (plus My Work) and is available to users with the Contract Manager role.

My Work: Your "To-Do" list. View of exceptions requiring review or correction.

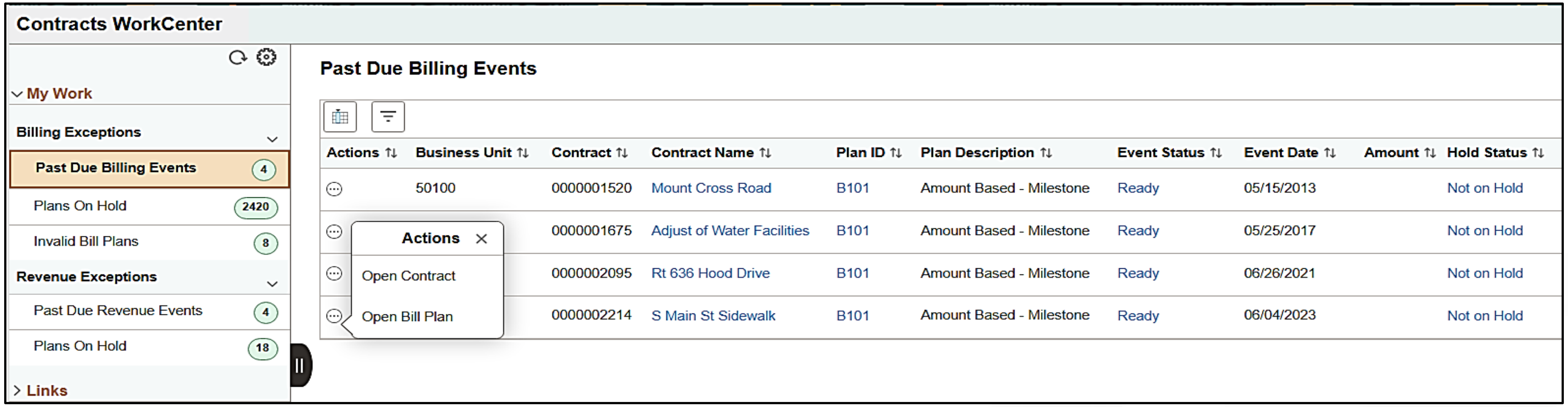
Links: Provide access to pages you visit frequently when performing your day-to-day tasks.

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

Reports/Processes: Quick access to the most common Contract Reports.



Customer Contracts WorkCenter (continued)



Actions	Business Unit	Contract	Contract Name	Plan ID	Plan Description	Event Status	Event Date	Amount	Hold Status
	50100	0000001520	Mount Cross Road	B101	Amount Based - Milestone	Ready	05/15/2013		Not on Hold
		0000001675	Adjust of Water Facilities	B101	Amount Based - Milestone	Ready	05/25/2017		Not on Hold
		0000002095	Rt 636 Hood Drive	B101	Amount Based - Milestone	Ready	06/26/2021		Not on Hold
		0000002214	S Main St Sidewalk	B101	Amount Based - Milestone	Ready	06/04/2023		Not on Hold

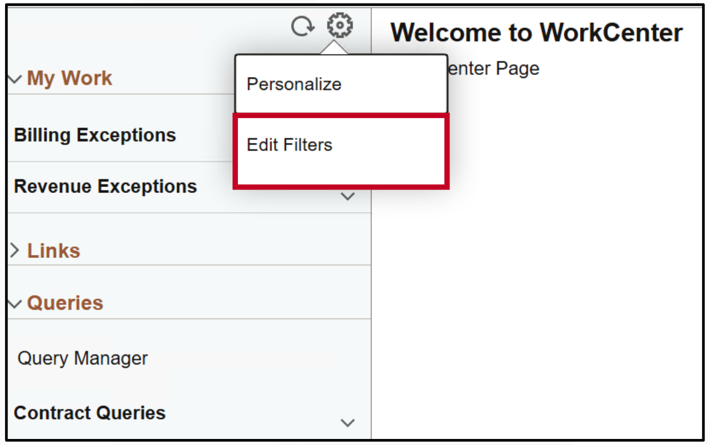
- **My Work** area provides visual clues as to the number of items in each category; counts refresh at log in or after screen refresh.
- Contracts in each category display in a list in the main section of the page; users can perform actions directly without navigating through multiple menus.
- Each **My Work** section displays based on roles (i.e., Exceptions only display for VDOT users).
- 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.

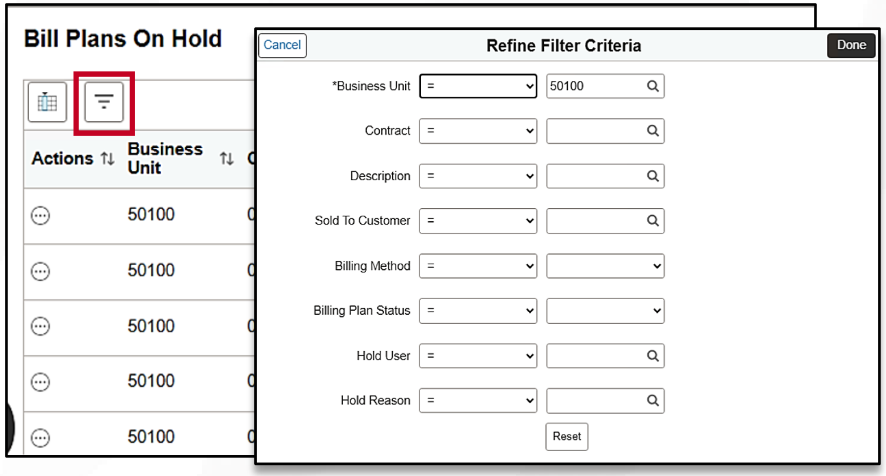
Set Default Filters

- 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.



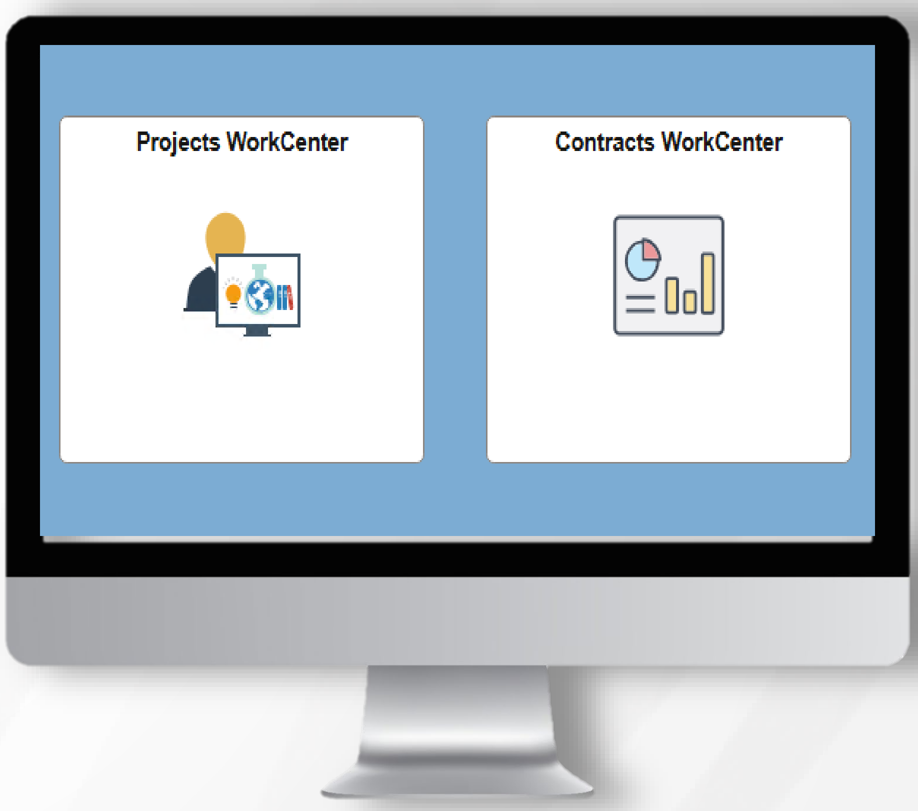
Set Temporary Filters

- 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 the WorkCenter item.

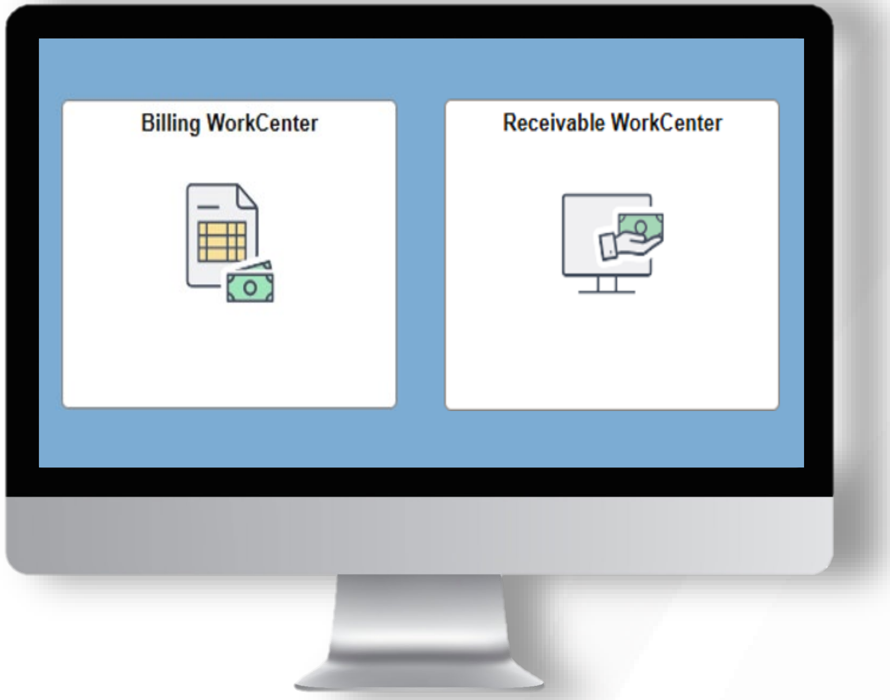


LIVE DEMONSTRATION

Project Accounting WorkCenters



Accounts Receivable / Billing WorkCenters



Billing WorkCenter

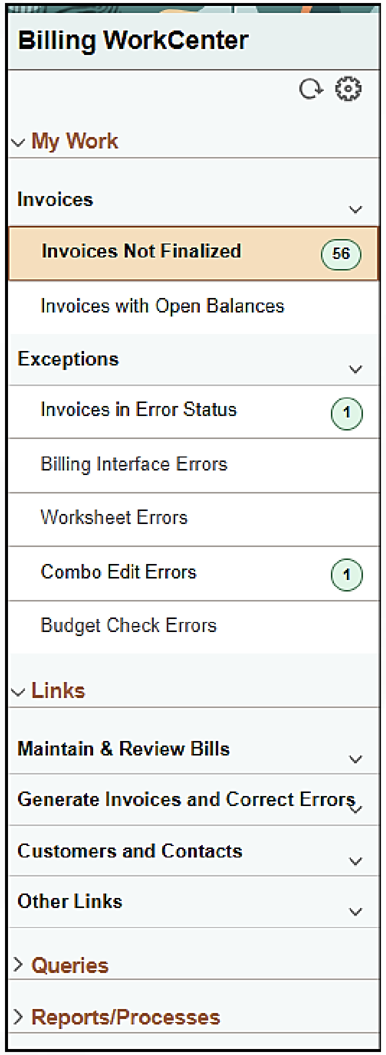
The Billing WorkCenter is a central hub for Billing Processors and Approvers that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform Billing related job functions.

My Work: Your “To-Do” list. View of invoices and exceptions requiring review or correction (role based).

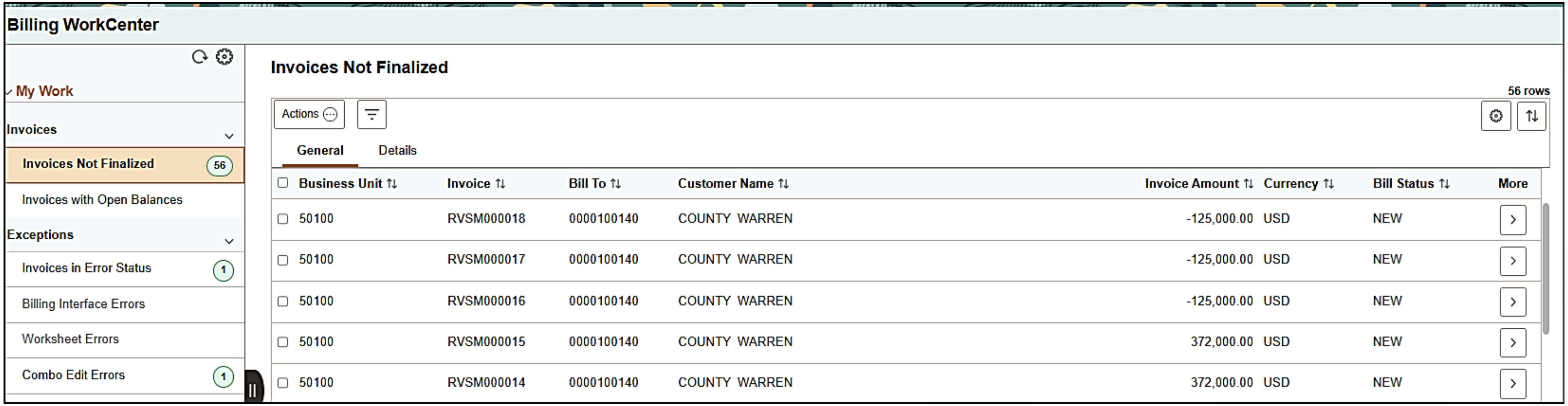
Links: Provide access to pages you visit frequently when performing your day-to-day tasks.

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

Reports/Processes: Quick access to the most common Billing Reports/Processes.



Billing WorkCenter (continued)



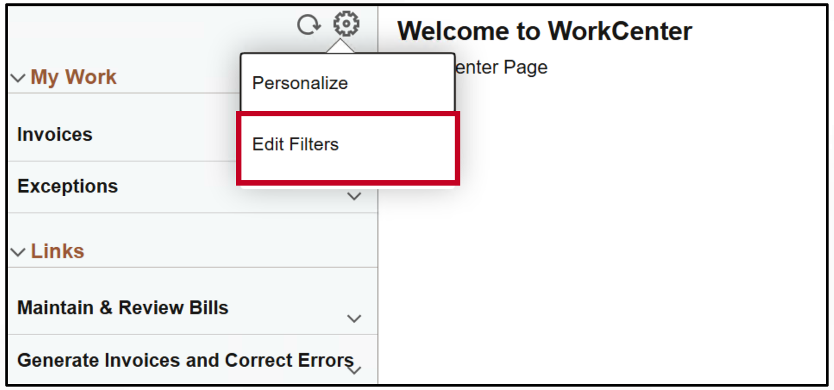
- **My Work** area provides visual clues as to the number of items in each category; counts refresh at log in or after screen refresh.
- Invoices for each category display in a list in the main section of the page; users can perform actions directly without navigating through multiple menus.
- Users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

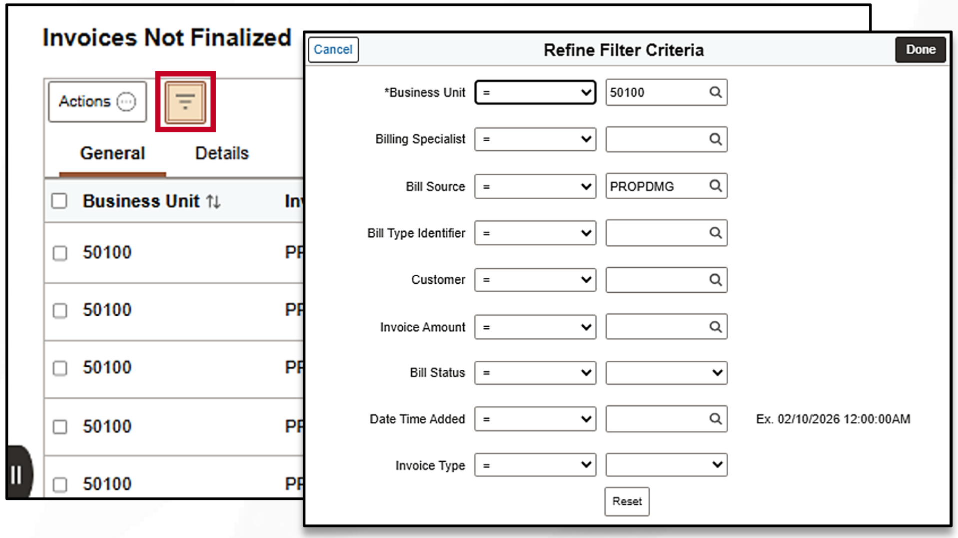
Set Default Filters

- 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.



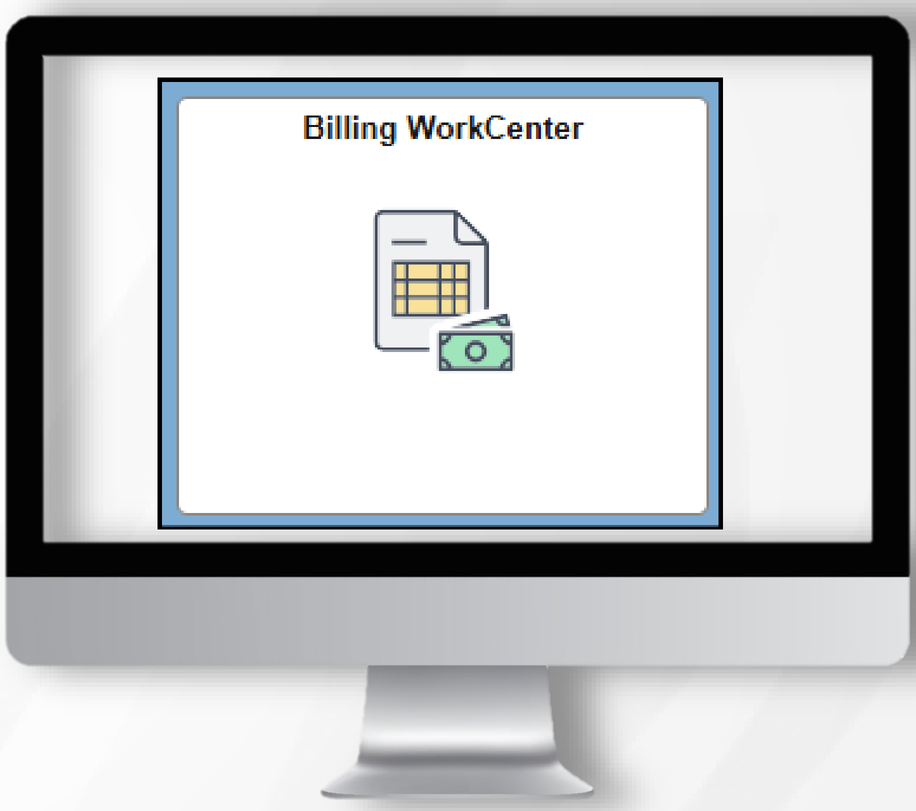
Set Temporary Filters

- 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 the WorkCenter item.



LIVE DEMONSTRATION

Billing WorkCenter



Accounts Receivable WorkCenter

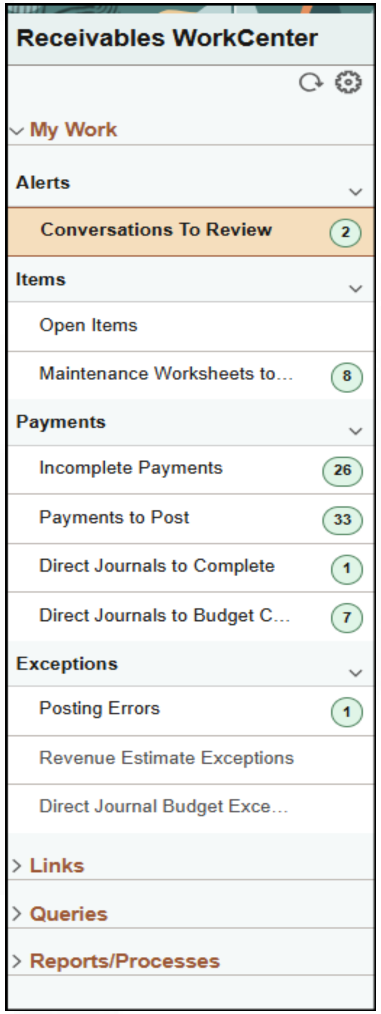
The Receivables WorkCenter is a central hub for Funds Receipts users and AR Specialists that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform Receivables related job functions.

My Work: Your “To-Do” list. View of AR Items and Payments requiring attention (role-based).

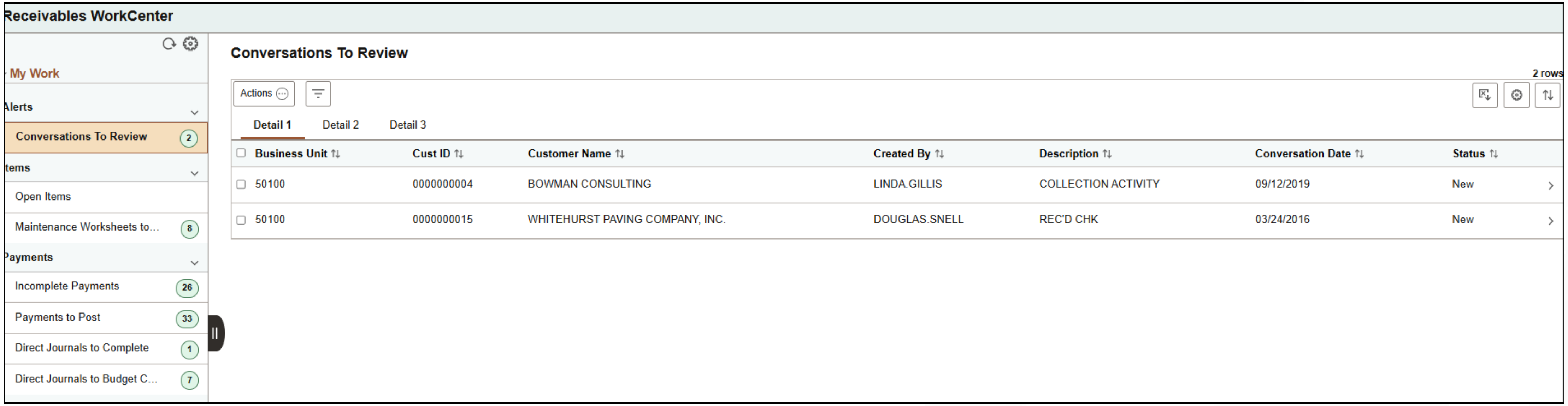
Links: Provide access to pages you visit frequently when performing your day-to-day tasks.

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

Reports/Processes: Quick access to the most common AR Reports/Processes.



Accounts Receivable WorkCenter (continued)



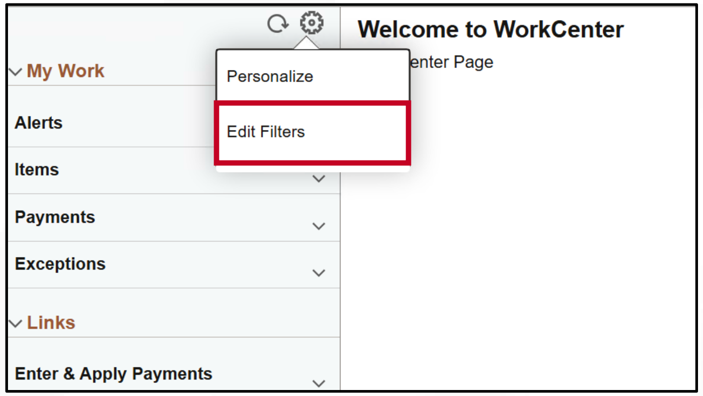
- **My Work** area provides visual clues as to the number of items in each category; counts refresh at log in or after screen refresh.
- AR Items and Payments for each category display in a list in the main section of the page; users can perform actions directly without navigating through multiple menus.
- 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.

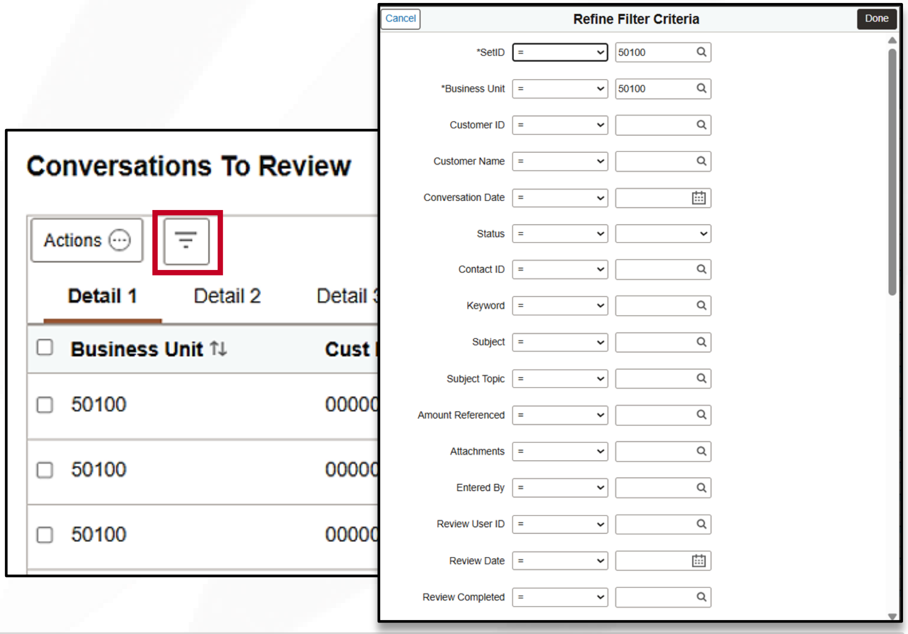
Set Default Filters

- 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.



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 the WorkCenter item.

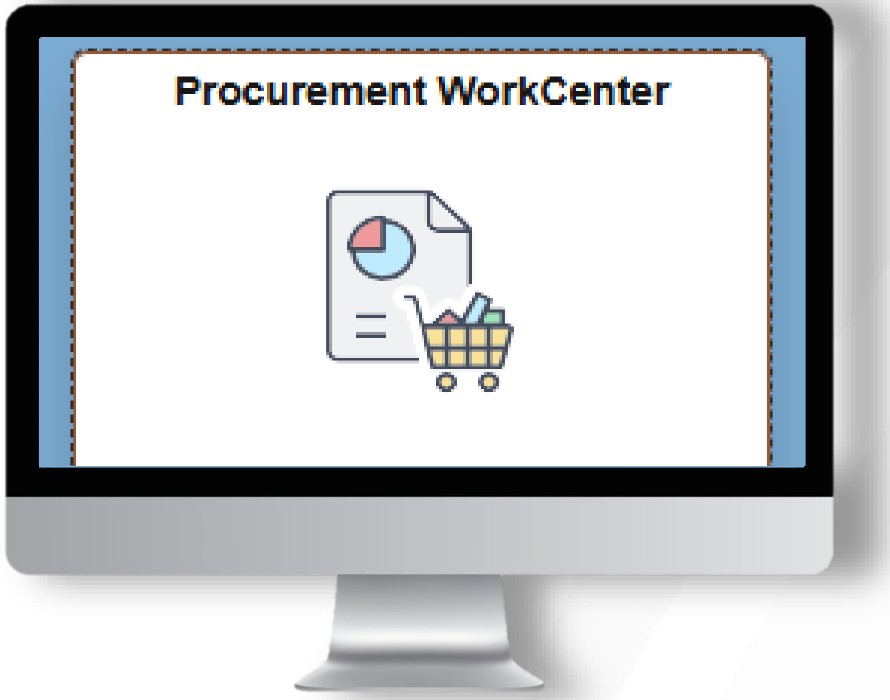


LIVE DEMONSTRATION

AR WorkCenter

Cardinal

Procurement WorkCenter



Procurement WorkCenter

The Procurement WorkCenter is a central hub for Procurement users including Requisitioners, Buyers, Approvers, Sourcing, and Contracts staff that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform Procurement related job functions.

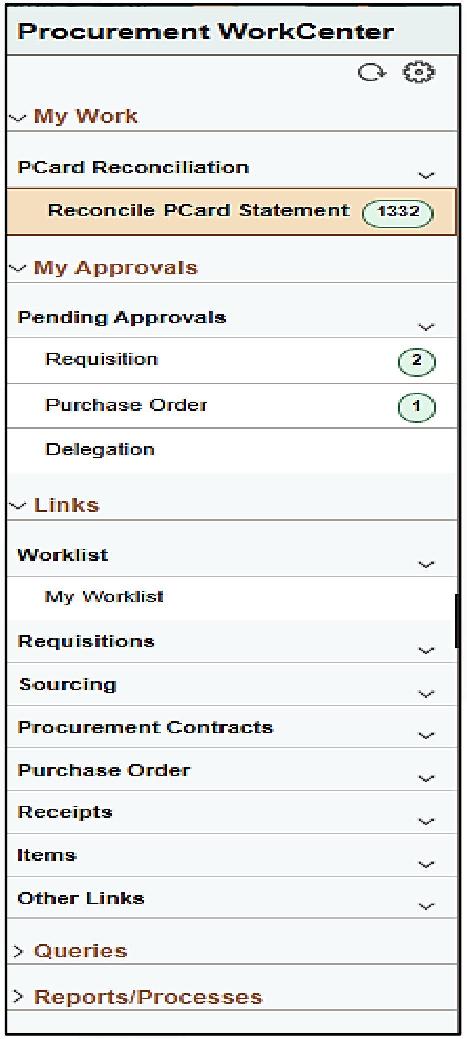
My Work: A role-based view of the Reconciled P-Cards that require attention.

My Approvals: Displays Requisitions and Purchase Orders pending your approval based on your role.

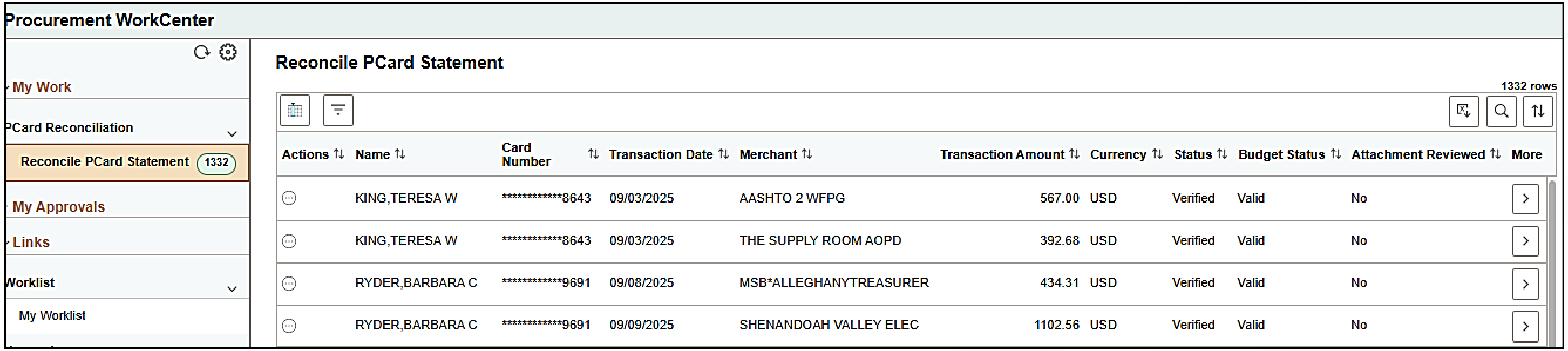
Links: Provide access to pages you visit frequently when performing your day-to-day tasks.

Queries: Access to run the most frequently used Sourcing, Procurement and Purchasing queries directly from the WorkCenter.

Reports/Processes: Quick access to the most common Sourcing and Procurement reports and batch processes.



Procurement WorkCenter (continued)



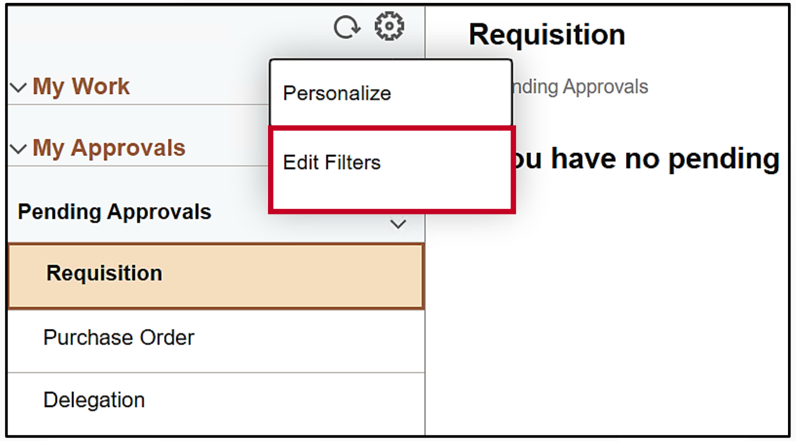
- The **My Work** area provides visual clues as to the number of items in each category (e.g., Reconciled P-Card transactions); counts refresh at log in or after screen refresh.
- **My Work** section displays based on roles.
- Users can refine their results (such as filtering by specific Cardholder or Merchant) using the filters that are available.

WorkCenter Filters

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

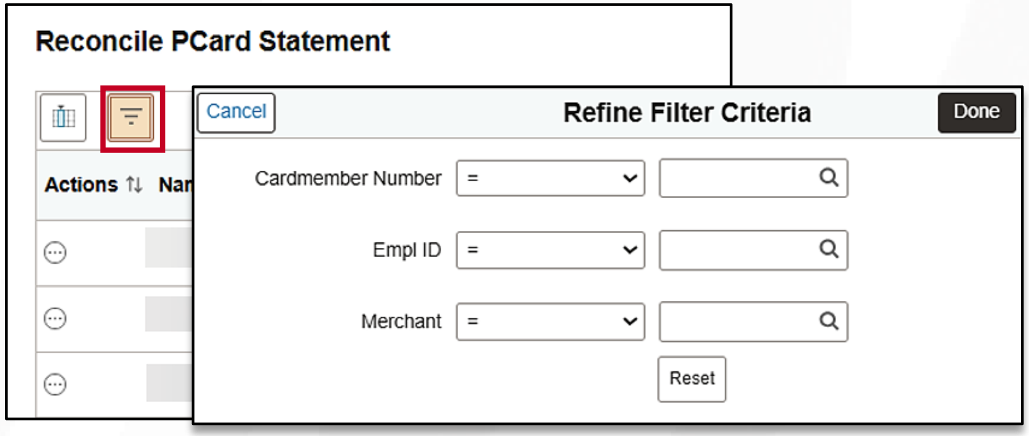
Set Default Filters

- 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.



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 the WorkCenter item.



LIVE DEMONSTRATION

Procurement WorkCenter

Cardinal

PUM Upgrade – Agency Readiness

Awareness & Preparation	Deployment	Go-Live	Support & Optimization
April - August	August	September	September - October
• Communications, Infographics, Videos, Website posts • Forums showcasing new features for core users	• Comprehensive user guidance: What to know and when.		• Forums covering FAQs and Hot Topics • Updated job aids and training

Key Agency Actions

- Promote participation
- Prepare teams
- Provide feedback

01 Welcome & Introductions

02 Upgrade Project Information

03 Session Objectives

04 Walkthrough & Demonstrations

05 Question & Answer

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/WPGB71EQHJ

A copy of this presentation and the recording will be sent to all attendees and invitees.

www.cardinalproject.virginia.gov