



NEW FEATURES PREVIEW

---

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

February 12, 2026

[www.cardinalproject.virginia.gov](http://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:

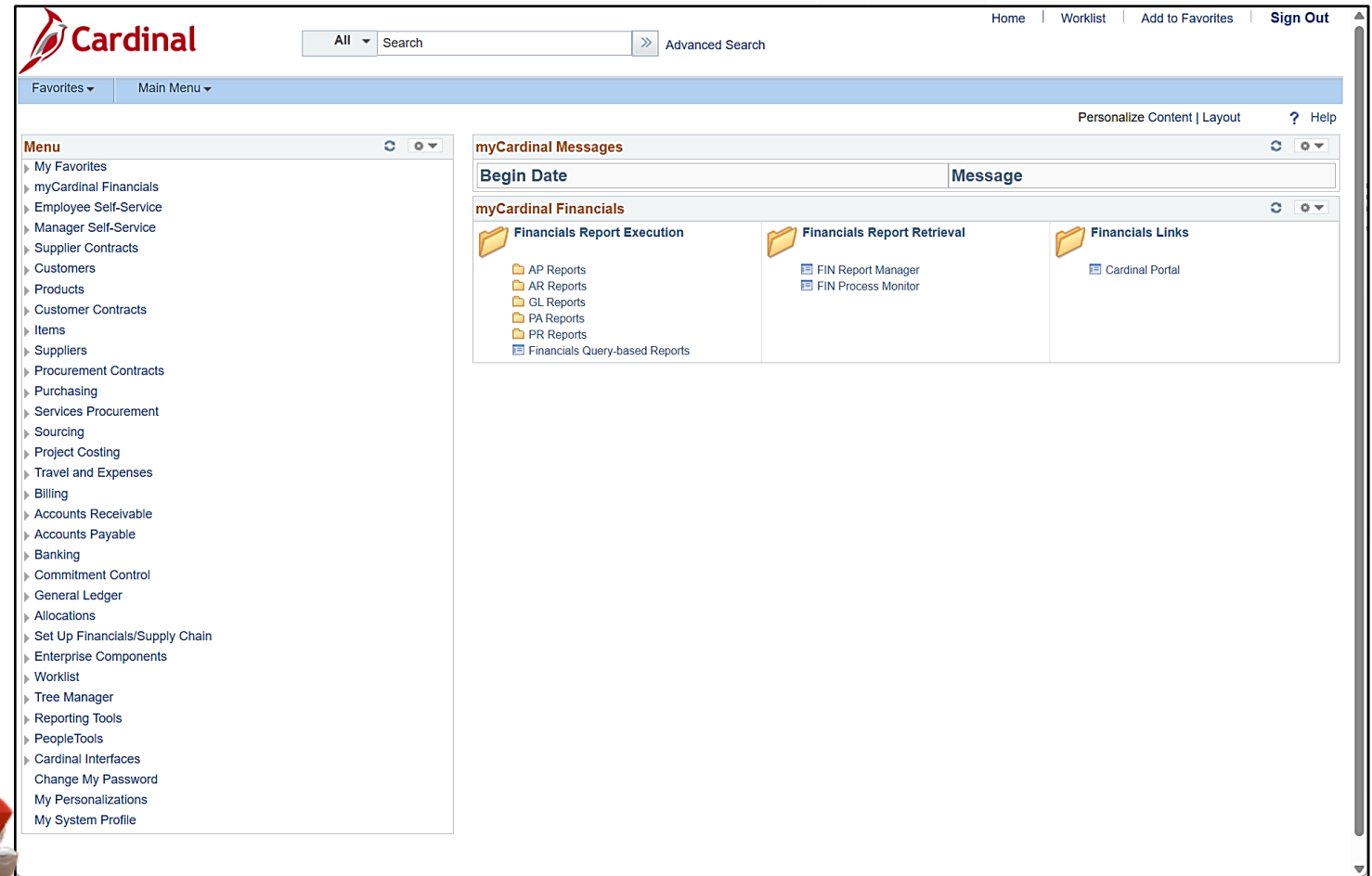
- **Centralized Access:** Consolidates reports, queries, tasks, and relevant links into a single workspace.
- **Prioritize Workflows:** “My Work” transaction list highlighting where user action is needed. Refreshes on login or after page refresh.
- **Flexible Filtering:** filters and layouts allow users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

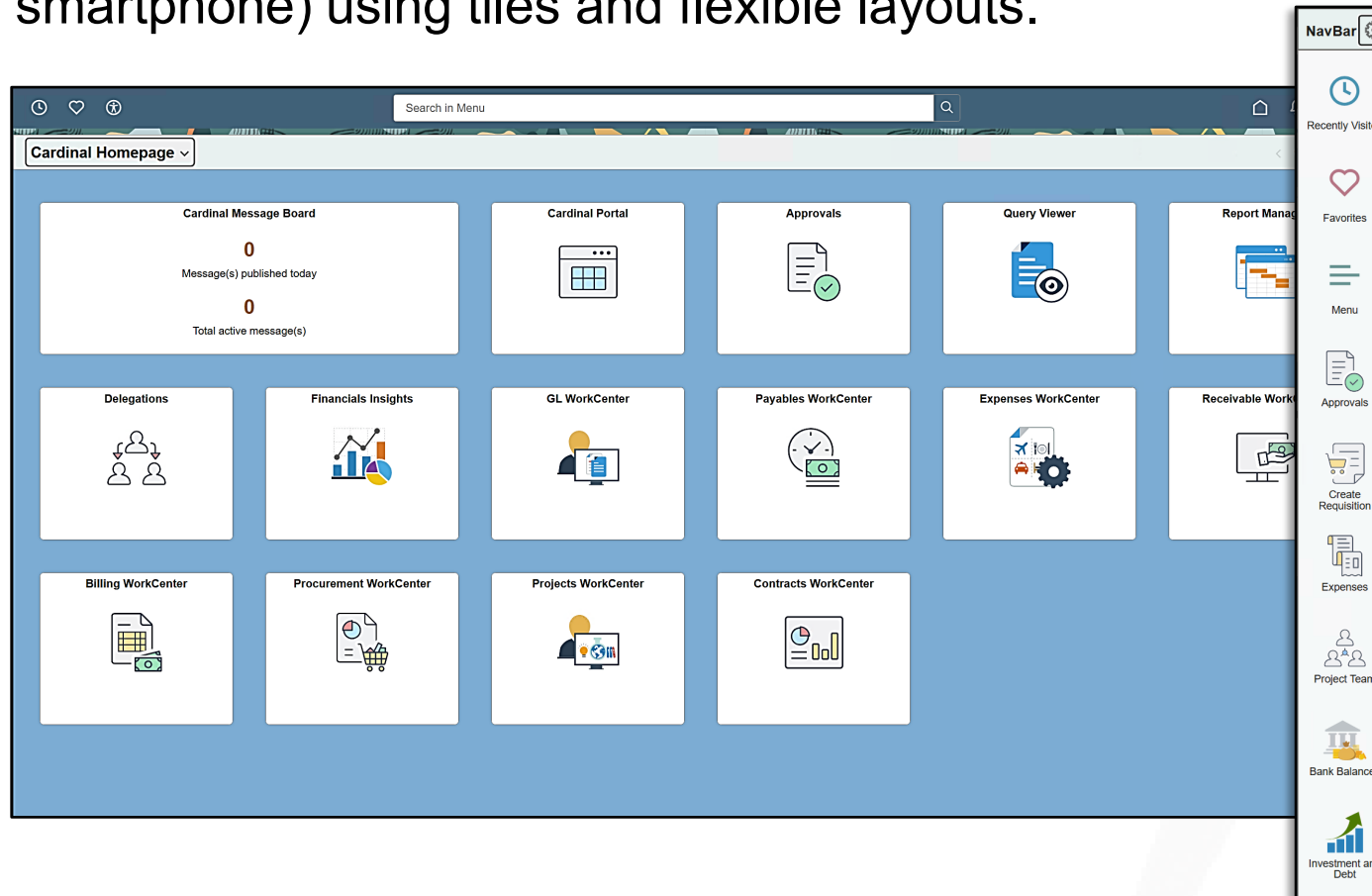
**Rigid Framework:** Built on fixed, "pixel-perfect" layouts that do not scale.

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



# 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**

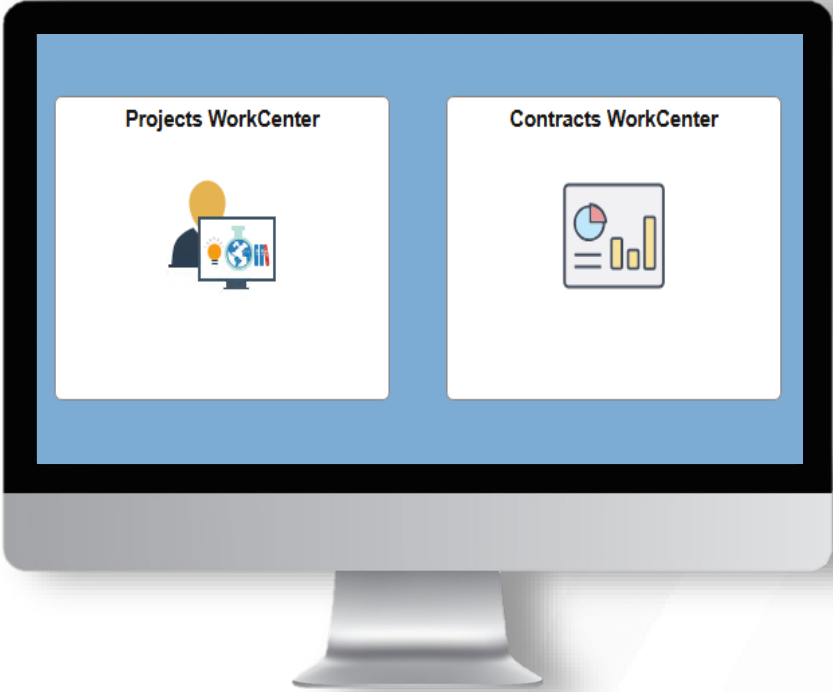
**Walkthrough & Demonstrations**

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.

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

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

The screenshot displays the 'Projects WorkCenter' interface. At the top, there is a header with the title 'Projects WorkCenter' and two icons: a refresh icon and a settings gear icon. Below the header is a navigation menu with several sections:

- Links:** A section with a downward arrow icon, containing 'Project Costing' (with a downward arrow) and 'Define Project General Info' (highlighted in orange).
- Project Budget:** A section with a downward arrow icon, containing 'Review Budget Detail'.
- Other Links:** A section with a downward arrow icon.
- Queries:** A section with a rightward arrow icon.
- Reports/Processes:** A section with a downward arrow icon, containing 'Project Reports' (with a downward arrow).

# 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.

Contracts WorkCenter	
	 
✓ <b>My Work</b>	
Billing Exceptions	▼
Revenue Exceptions	▼
✓ <b>Links</b>	
Customer Contracts	▼
Federal Contracts	▼
Project Costing	▼
Billing	▼
Other Links	▼
✓ <b>Queries</b>	
Query Manager	
Contract Queries	▼
✓ <b>Reports/Processes</b>	
Contract Reports and Processes	▼

# Customer Contracts WorkCenter (continued)

The screenshot displays the 'Contracts WorkCenter' interface. On the left is a sidebar with a 'My Work' section containing categories: 'Billing Exceptions' (with a sub-item 'Past Due Billing Events' highlighted and a count of 4), 'Plans On Hold' (2420), 'Invalid Bill Plans' (8), 'Revenue Exceptions' (with a sub-item 'Past Due Revenue Events' and a count of 4), and 'Plans On Hold' (18). Below these is a 'Links' section. The main area is titled 'Past Due Billing Events' and contains a table with columns: Actions, Business Unit, Contract, Contract Name, Plan ID, Plan Description, Event Status, Event Date, Amount, and Hold Status. An 'Actions' dropdown menu is open over the first row, showing 'Open Contract' and 'Open Bill Plan' options.

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

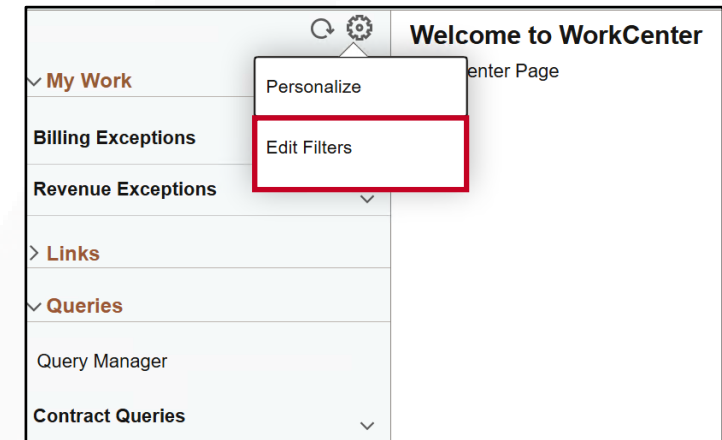
- **My Work** area provides visual clues as to the number of items in each category; counts refresh at log in or after screen refresh.
- Contracts in each category display in a list in the main section of the page; users can perform actions directly without navigating through multiple menus.
- Each **My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

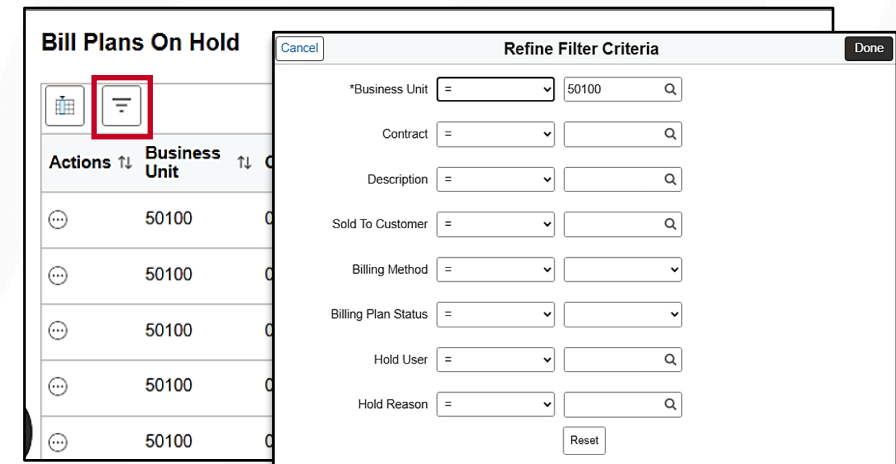
## Set Default Filters

- 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

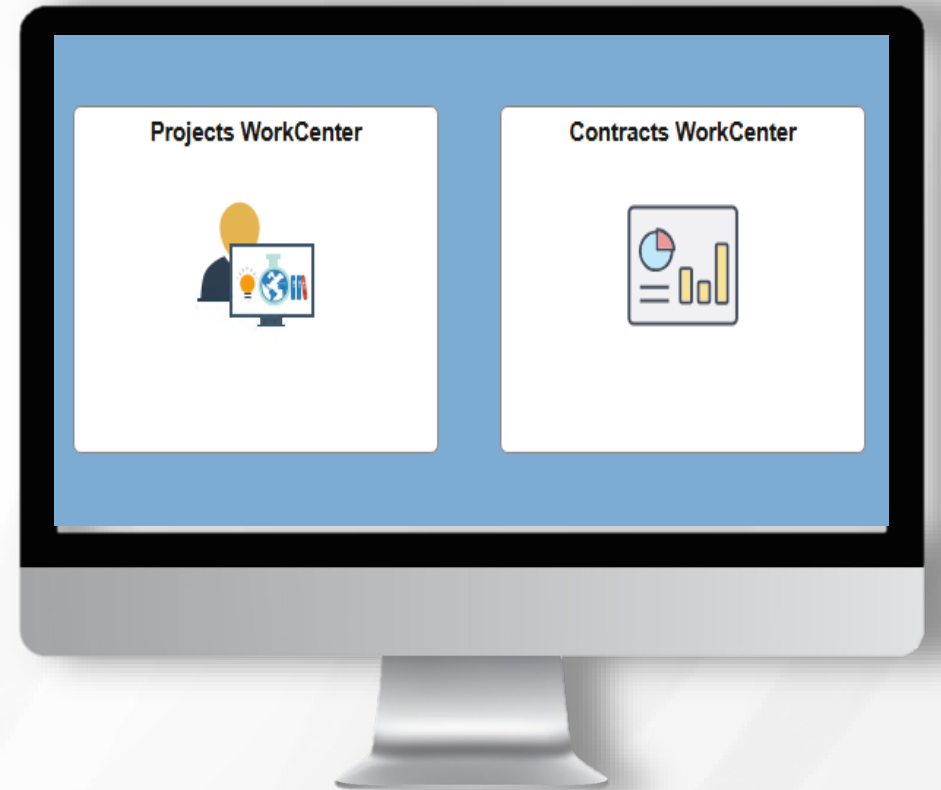
- While working with a category, a user may refine the filter to temporarily focus on a particular Business Unit(s) or other criteria by using the **Refine Filter** option for the WorkCenter item.



# LIVE DEMONSTRATION

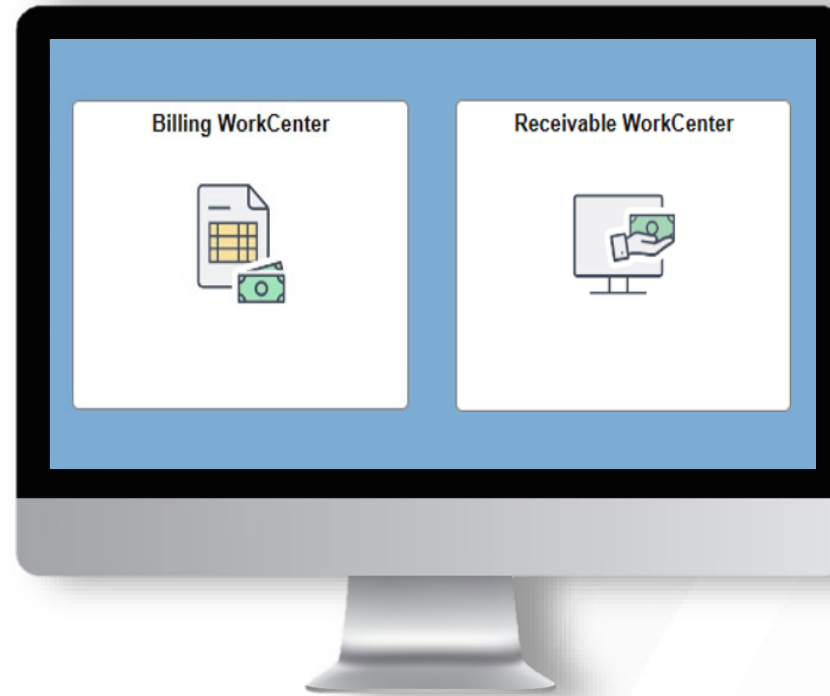
---

Project Accounting WorkCenters



# Accounts Receivable / Billing WorkCenters

---



# Billing WorkCenter

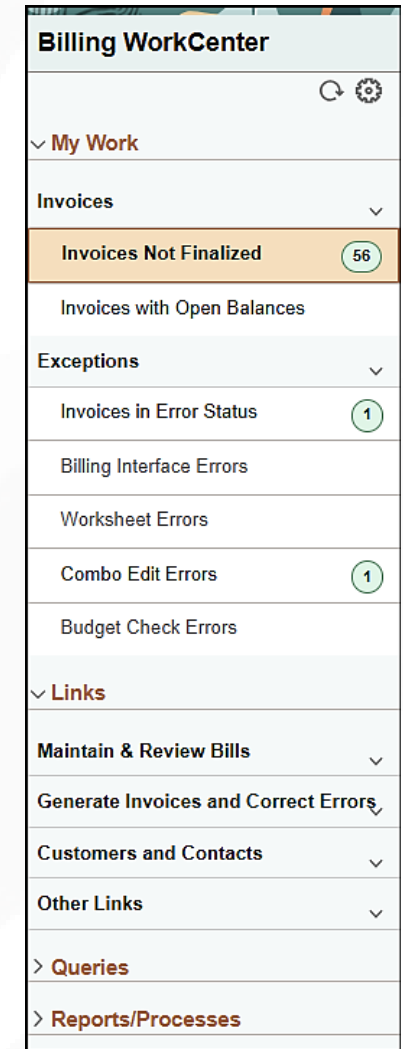
The **Billing WorkCenter** is a central hub for Billing Processors and Approvers that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform Billing related job functions.

**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)

The screenshot displays the Billing WorkCenter interface. On the left is a navigation sidebar with categories: My Work, Invoices, Invoices Not Finalized (56), Invoices with Open Balances, Exceptions, Invoices in Error Status (1), Billing Interface Errors, Worksheet Errors, and Combo Edit Errors (1). The main area is titled 'Invoices Not Finalized' and shows a table with 56 rows. The table has columns for Business Unit, Invoice, Bill To, Customer Name, Invoice Amount, Currency, Bill Status, and More. The data rows show five invoices for Business Unit 50100, all with status 'NEW'.

<input type="checkbox"/>	Business Unit ↑↓	Invoice ↑↓	Bill To ↑↓	Customer Name ↑↓	Invoice Amount ↑↓	Currency ↑↓	Bill Status ↑↓	More
<input type="checkbox"/>	50100	RVSM000018	0000100140	COUNTY WARREN	-125,000.00	USD	NEW	>
<input type="checkbox"/>	50100	RVSM000017	0000100140	COUNTY WARREN	-125,000.00	USD	NEW	>
<input type="checkbox"/>	50100	RVSM000016	0000100140	COUNTY WARREN	-125,000.00	USD	NEW	>
<input type="checkbox"/>	50100	RVSM000015	0000100140	COUNTY WARREN	372,000.00	USD	NEW	>
<input type="checkbox"/>	50100	RVSM000014	0000100140	COUNTY WARREN	372,000.00	USD	NEW	>

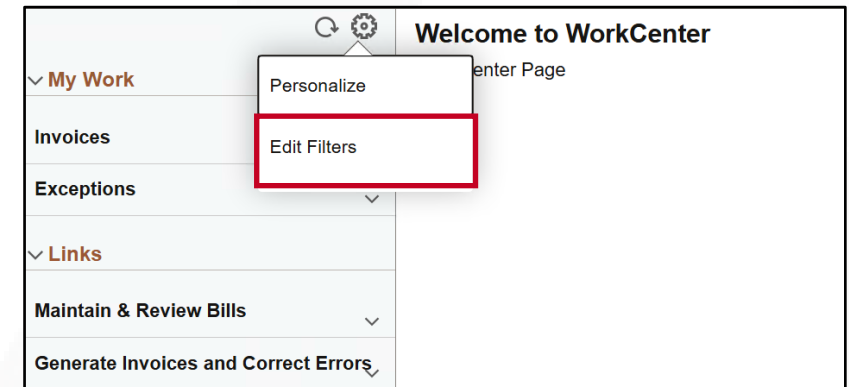
- **My Work** area provides visual clues as to the number of items in each category; counts refresh at log in or after screen refresh.
- Invoices for each category display in a list in the main section of the page; users can perform actions directly without navigating through multiple menus.
- Users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

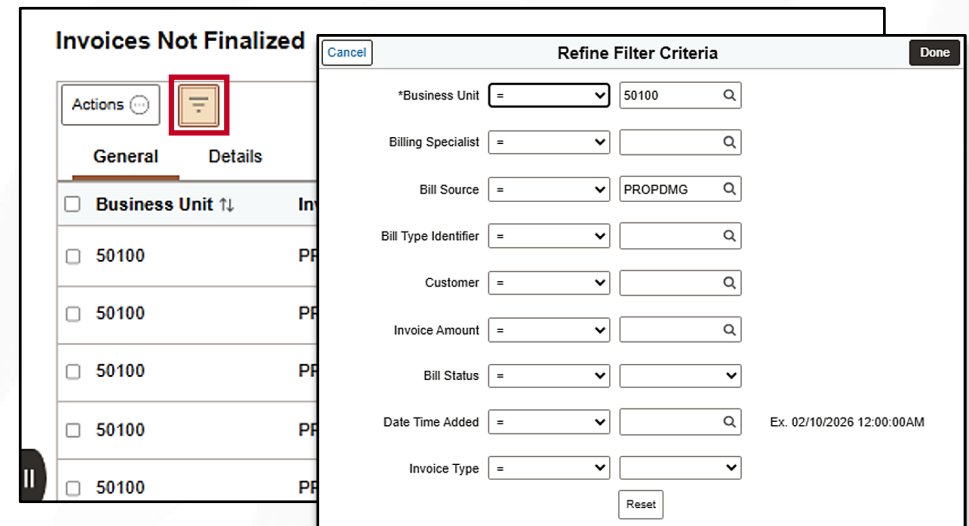
## Set Default Filters

- 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

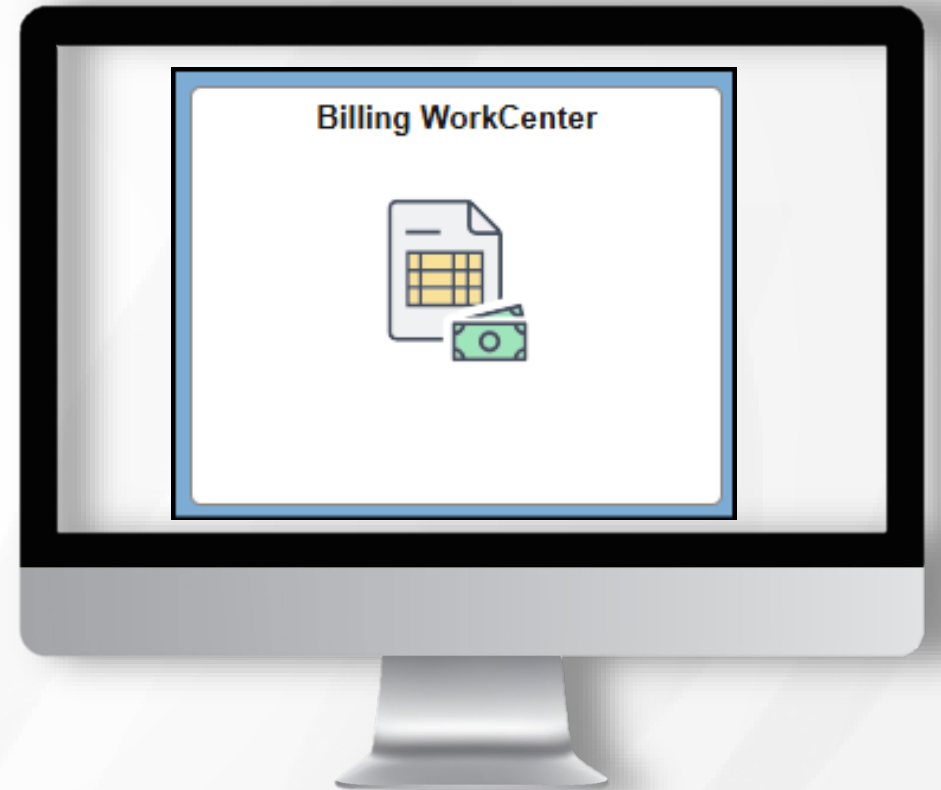
- While working with a category, a user may refine the filter to temporarily focus on a particular Business Unit(s) or other criteria by using the **Refine Filter** option for the WorkCenter item.



# LIVE DEMONSTRATION

---

Billing WorkCenter



# Accounts Receivable WorkCenter

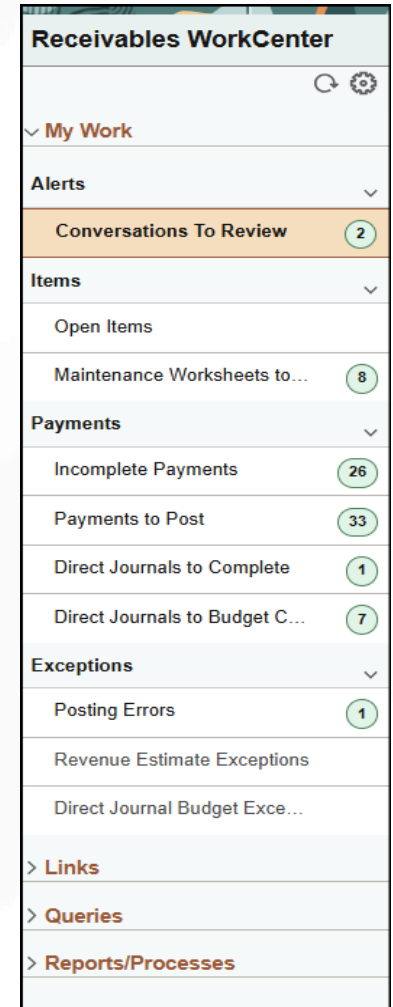
The **Receivables WorkCenter** is a central hub for Funds Receipts users and AR Specialists that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform Receivables related job functions.

**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)

The screenshot displays the 'Receivables WorkCenter' interface. On the left is a navigation menu with categories like 'My Work', 'Alerts', 'Items', 'Payments', and 'Direct Journals to Complete'. The 'Conversations To Review' item is highlighted with a count of 2. The main area shows a table with columns: Business Unit, Cust ID, Customer Name, Created By, Description, Conversation Date, and Status. Two rows are visible, each with a checkbox and a right-pointing arrow.

Business Unit	Cust ID	Customer Name	Created By	Description	Conversation Date	Status
50100	000000004	BOWMAN CONSULTING	LINDA.GILLIS	COLLECTION ACTIVITY	09/12/2019	New
50100	000000015	WHITEHURST PAVING COMPANY, INC.	DOUGLAS.SNELL	REC'D CHK	03/24/2016	New

- **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

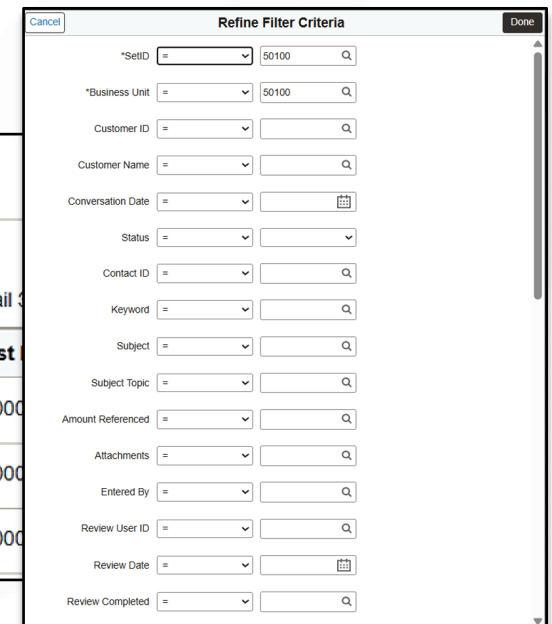
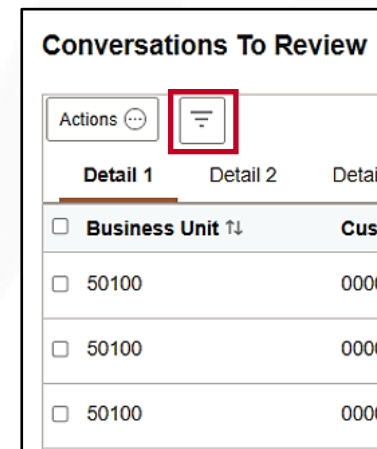
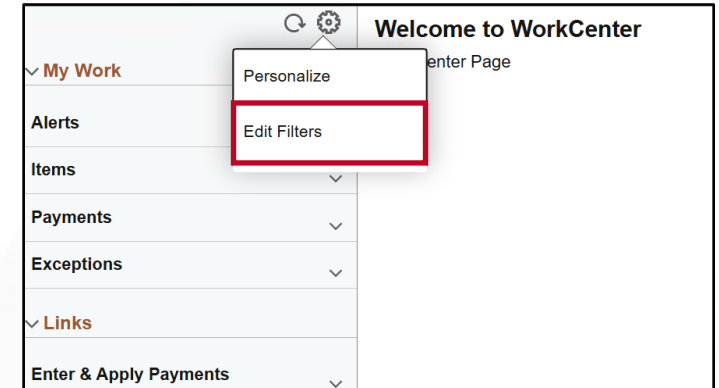
Required Filters are pre-set based on the Business Units to which the user has access.

## 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

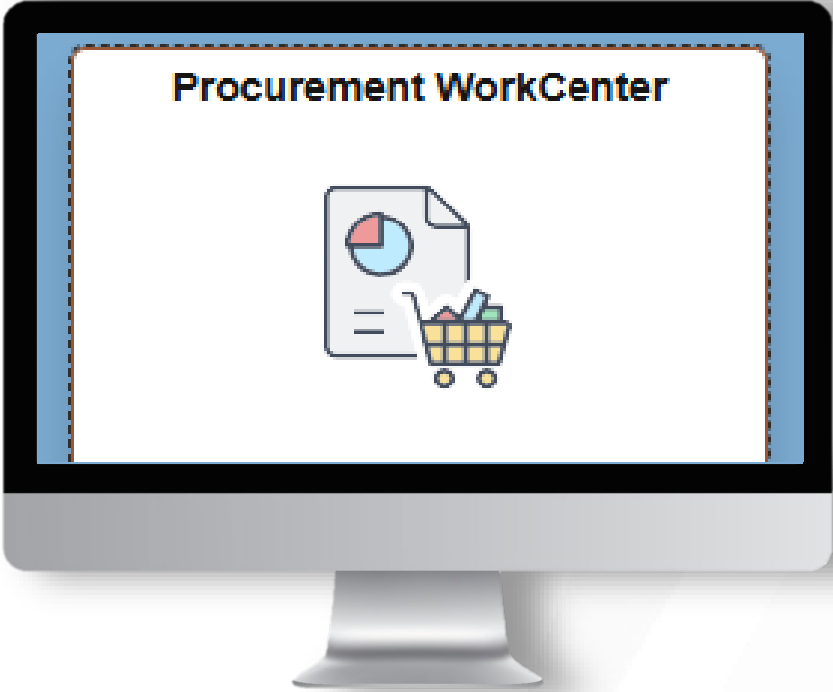
---

AR WorkCenter



# 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	
	 
✓ My Work	
PCard Reconciliation	▼
Reconcile PCard Statement	1332
✓ My Approvals	
Pending Approvals	▼
Requisition	2
Purchase Order	1
Delegation	
✓ Links	
Worklist	▼
My Worklist	
Requisitions	▼
Sourcing	▼
Procurement Contracts	▼
Purchase Order	▼
Receipts	▼
Items	▼
Other Links	▼
> Queries	
> Reports/Processes	

# Procurement WorkCenter (continued)

Procurement WorkCenter											
Reconcile PCard Statement <span style="float: right;">1332 rows</span>											
<div style="display: flex; justify-content: space-between;"><span>📅</span><span>🔍</span><span>↕</span></div>											
Actions	Name	Card Number	Transaction Date	Merchant	Transaction Amount	Currency	Status	Budget Status	Attachment	Reviewed	More
⋮	KING,TERESA W	*****8643	09/03/2025	AASHTO 2 WFPG	567.00	USD	Verified	Valid	No		>
⋮	KING,TERESA W	*****8643	09/03/2025	THE SUPPLY ROOM AOPD	392.68	USD	Verified	Valid	No		>
⋮	RYDER,BARBARA C	*****9691	09/08/2025	MSB*ALLEGHANYTREASURER	434.31	USD	Verified	Valid	No		>
⋮	RYDER,BARBARA C	*****9691	09/09/2025	SHENANDOAH VALLEY ELEC	1102.56	USD	Verified	Valid	No		>

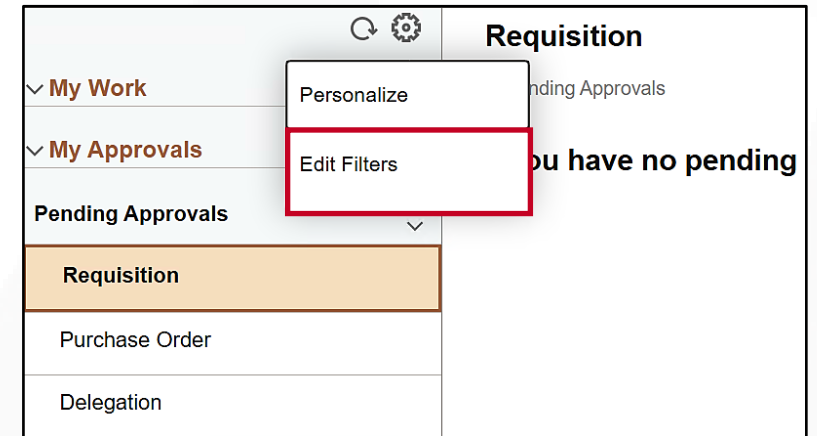
- The **My Work** area provides visual clues as to the number of items in each category (e.g., Reconciled P-Card transactions); counts refresh at log in or after screen refresh.
- **My Work** section displays based on roles.
- Users can refine their results (such as filtering by specific Cardholder or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

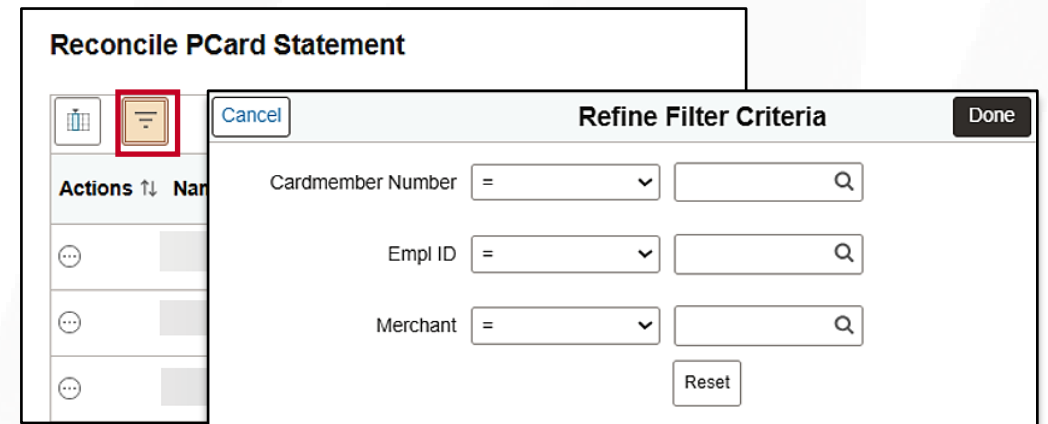
## Set Default Filters

- 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



# PUM Upgrade – Agency Readiness



## 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](http://www.cardinalproject.virginia.gov)