



The Cardinal Project Newsletter

August 2013
Part 3, Issue 3

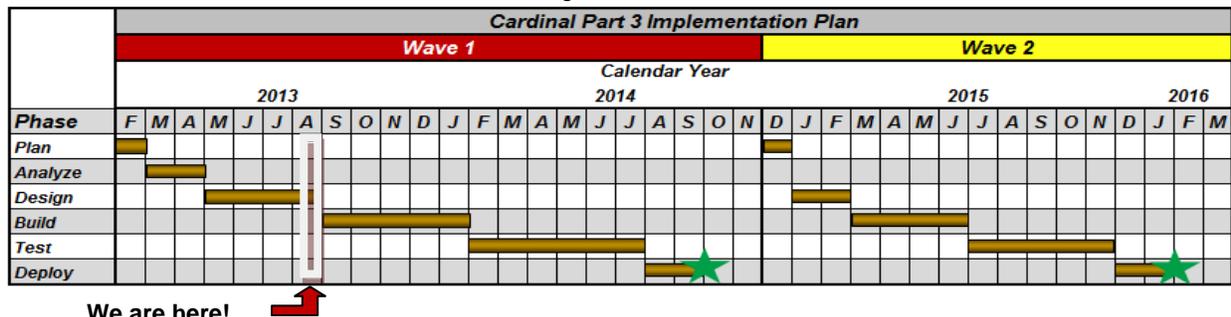
New Website Address!!

www.cardinalproject.virginia.gov

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Project Status



The Design Phase for Part 3, Wave 1, is now complete. Agency activities completed during the past 2 months include:

- Budget structure Office Hours with 69 agencies opting to use agency level budgets
- Interface Kickoff Meeting and activities with pilot interfacing agencies (see Interface Pilot article)
- Accounts Payable Questionnaire with 147 Wave 1 agencies responding
- CARS FY13 Project Data Cleanup Task with 93% of Wave 1 agencies maintaining data in CARS completing the task by the due date
- Cardinal Introductory Meetings by Change Agents with their agency stakeholders and staff
- Change Network Meeting #2 with Wave 1 Primary Contacts and Accounts Payable Subject Matter Experts

Interface Pilot

The Wave 1 Interface Pilot will establish a stable foundation for the rollout of Cardinal to the Wave 2 interfacing agencies: Department of Rail and Public Transportation, Virginia College Savings Plan, Virginia Information Technologies Agency, and Virginia Correctional Enterprises of Department of Corrections. The pilot agencies are representative of the agencies converting in Wave 2.

Design Phase – through August 2013

The Interface Kickoff for the pilot agencies was conducted July 13, 2013, and attended by 17 agency representatives, who worked with the Cardinal Project Team to identify the interfaces they need and provide information for their design.

Build Phase – through January, 2014

Pilot agencies will complete data mapping and work with the Cardinal Team to build and unit test interface programs. Wave 1 Interface Workshops will be conducted from September 10 to 25, 2013.

Test Phase – February through July 2014

Pilot agencies will work with the Cardinal Team to system test interfaces. Once testing of the interfaces is complete (fall of 2014), Cardinal will share preliminary flat file layouts with Wave 2 interfacing agencies.

Deploy Phase – October 2014

Pilot agencies implement Cardinal and begin interfacing data between their agency systems and Cardinal.

Welcome to the Cardinal Home Page!!

The screenshot shows the Cardinal Home Page interface. At the top, there is a navigation header with links for Home, Worklist, Add to Favorites, and Sign out. Below this is a Favorites section with a Main Menu button. The main content area is divided into two columns. The left column contains a Main Menu with a search box and a list of folders such as myCardinal Financials, Employee Self-Service, Manager Self-Service, Supplier Contracts, Customers, Customer Contracts, Items, Vendors, Procurement Contracts, Purchasing, eProcurement, Services Procurement, Sourcing, Project Costing, Travel and Expenses, Billing, Accounts Receivable, Accounts Payable, Banking, Commitment Control, General Ledger, Allocations, Set Up Financials/Supply Chain, Enterprise Components, Worklist, Tree Manager, Reporting Tools, PeopleTools, My Personalizations, and My System Profile. The right column contains myCardinal Messages and myCardinal Financials sections. The myCardinal Financials section includes links for Financials Report Execution, Financials Report Retrieval, AP Reports, AR Reports, GL Reports, Financials Query-based Reports, FIN Report Manager, and FIN Process Monitor. A Help button is located in the top right corner.

Navigation Header - has links to your Home page, your Worklist (for approving transactions), Add to Favorites, and to Sign out.

Main Menu - customized to list the items you need to perform your tasks in Cardinal

myCardinal Financials - provides links to run commonly used AP Reports, AR Reports and GL Reports as well as queries (Financials Query-based Reports). It also provides a quick link to report manager and process monitor where you can retrieve previously generated reports

Personalize your Menu!!
Use the Add to Favorites tool on the Navigation Header to add pages to your Favorites for quick access.

For example, if your tasks include creating Cardinal Vouchers, you can create a direct link to the Add/Update page in your Favorites menu, instead of navigating Main Menu > Accounts Payable > Vouchers > Add/Update.

Help - links you to the Cardinal website

This is your Cardinal Home page - the page you see when you first log into Cardinal. It is customized to display only the menu items you need, based on the tasks you perform in Cardinal. You can personalize your Home page by adding quick links in your Favorites folder for frequently used pages. You can also update or modify the Content and Layout.

To access data in Cardinal, you navigate through the Main Menu. If you click on Main Menu, a cascading list of folders displays. You can mouse over these cascading folders to see the content of each one, and click on the item or page you want to view.

Cardinal Tweets!!!

Workflow: Workflow is the tool Cardinal uses to route certain items through the approval process. Usually, the user who enters a transaction is different from the user or users who approve it. Workflow places the item that needs approving on the approver's worklist which is accessed from the Navigation Header on Cardinal's Main Menu. (See screenshot above.) Once you open your Worklist, you can click on the item needing approval. Cardinal then directs you to the related page where you can review and approve their transaction. Items remain on your worklist until worked.

Upcoming Activities

- Complete data mapping for interfaces – August 19 to September 27, 2013
- Design, build, and unit test interfaces – September 2 to April 30, 2014
- Identify agency trainers – October 2013 - February, 2014
- Complete tasks to define ChartField values – followed by additional configuration tasks – starting September 2013

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Our Cardinal Website address has changed!!

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