The Cardinal Project Newsletter
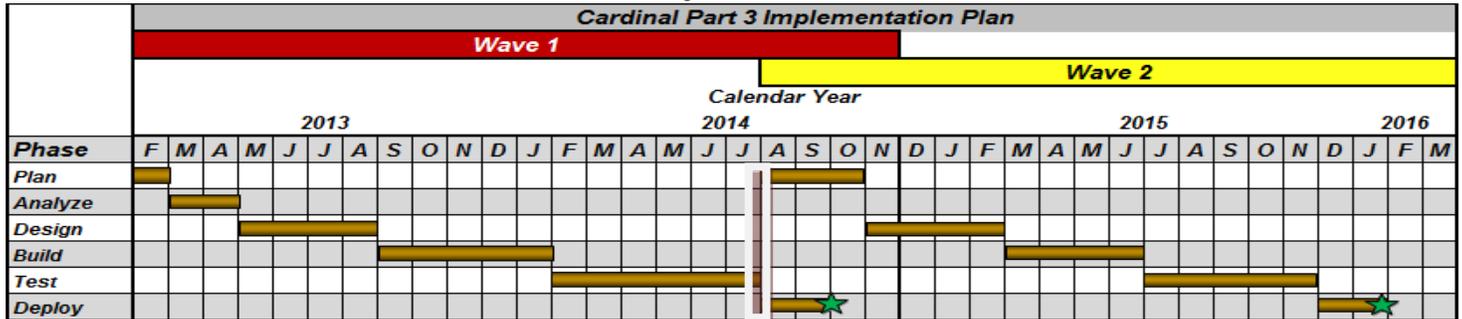
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Project Status

Cardinal Part 3 Implementation Plan

We are here!

Implementation Dates

Project activities completed during the last month include:

- Confirmation of Technical Requirements for End-Users' Workstations
- Interface Testing with Wave 1 Pilot Agencies
- Verification of Users' Access to WBT and Enrollment in ILT (see below)
- Completion of Tasks to Update ChartField and Conversion Values

CARDINAL TRAINING FOR WAVE 1 AGENCIES

The COVKC (Commonwealth of Virginia Knowledge Center) is being used to deliver and manage Wave 1 Cardinal training. Users can take Web Based Training (WBT) courses online and register for Instructor Led Training (ILT) courses through COVKC. ILT courses will be offered in Richmond (R), Lynchburg (L), Staunton (S), Suffolk (SU) and Bristol (B).

Cardinal Courses for Wave 1:

WBT Course Title (Course Number)	ILT Course Title (Course Number) (Location(s))
Cardinal Overview (SW INTRO101)	Introduction to Reporting in Cardinal (SW NAV220) (R, L, S, B)
Accounts Payable and Expenses Overview (SW INTRO110)	Voucher Processing (SW AP312) (R, L, S, SU, B)
General Ledger Overview (SW INTRO130)	Employee Expenses Administration (SW AP316) (R, L, SU)
Navigation in Cardinal (SW NAV201)	Processing Petty Cash (SW AP320) (R)
Introduction to Approvals (SW NAV210)	Accounts Receivable – Funds Receipts (SW AR326) (R, L, S, SU, B)
Introduction to Business Intelligence Reporting (SW NAV241) *	Processing Journal Entries (SW GL332) (R, L, S, SU, B)
Approving Vouchers (SW AP313)	Processing Budget Journals (SW GL334) (R, S)
Processing Employee Expenses (SW AP315)	General Ledger Maintenance (SW GL336) (R)
Approving Employee Expenses (SW AP317)	
Approving Journals (SW GL333)	

Agency Training Contacts are notifying their agency users regarding which courses they need to take in order to prepare for Cardinal. Each user will then be able to take WBTs online and register for ILTs.

WBTs are generally introductory courses that require one to two hours each to complete. They are available now on COVKC to all users.

ILTs are provided for more advanced courses, and generally last between four and eight hours each. ILTs are scheduled to start the third week in August. Registration for ILTs is limited to those users who need the training for the job duties they will perform in Cardinal. Training courses must be completed prior to accessing Cardinal.

Inquiry type users who do not enter transactions or data online in Cardinal should take the NAV220 Introduction to Reporting in Cardinal prior to Wave 1 go-live. All other Cardinal users should plan to take NAV220 after go-live.

WHAT ARE JOB AIDS AND SIMULATIONS?

It is essential Cardinal users obtain a good understanding of Cardinal's features and functionalities during training. However, once the training sessions are completed, there are additional resources for staff to use at their work stations. The Cardinal website provides many avenues to offer help.

A **job aid** is a step-by-step instructional document that guides users through processing specific Cardinal transactions. Think of a job aid as a cookbook for a chef or a playbook for a football player. Job aids have various formats. Some provide detailed how-to directions, multiple screen shots, and checklists. Others are reference materials where you can look up definitions, Chart of Account values, etc. Job aids are located on the Cardinal website under Job Aids in the Statewide Toolbox, arranged by functional area. The Cardinal website boasts of some of the best job aids around; so, please become very familiar with these to help you during your transition to Cardinal.
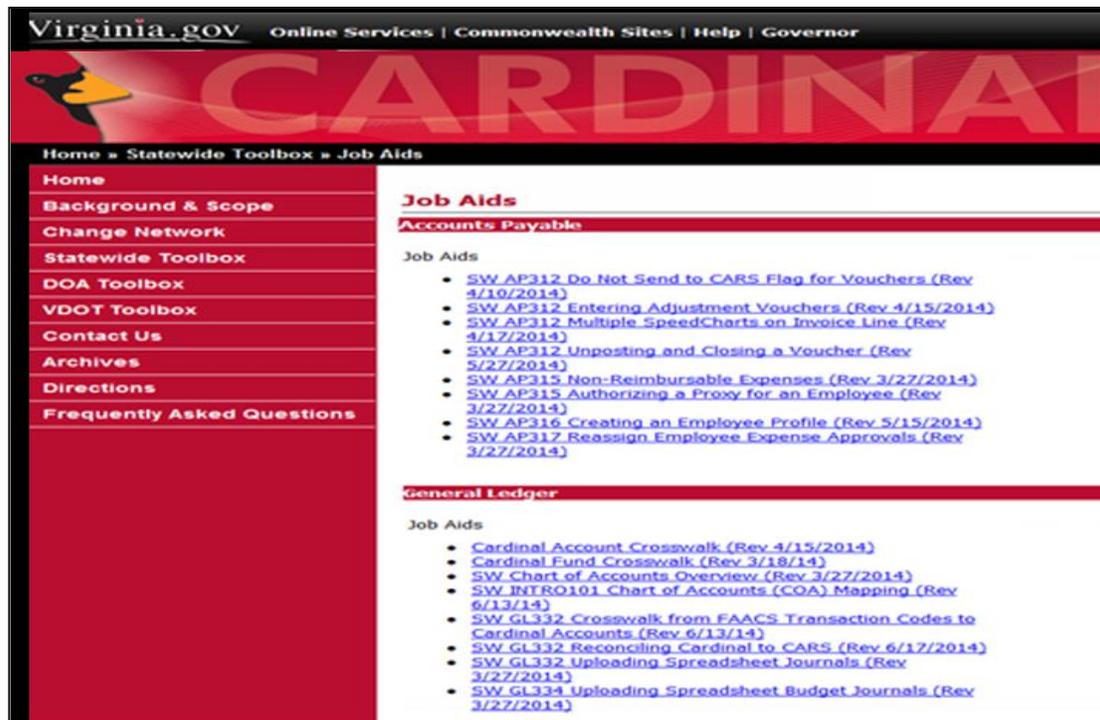
A **simulation** is an interactive tool used in training that is also a job aid. Simulations are available in five different modes:

- **See It** mode enables you to learn by watching a demonstration of tasks being performed in a simulated Cardinal environment
- **Try It** mode enables you to learn the tasks by practicing with step-by-step instructions, again in a simulated Cardinal environment
- **Know It** mode enables you to test your knowledge of each task
- **Do It** mode guides you while you perform each task
- **Print It** mode enables you to print step by step instructions (job aid) that you can use later when you perform tasks online in Cardinal.

Like other job aids, simulations are also available on the website. They are included in both the Job Aids and Training Materials folders.

CARDINAL TWEET!! CARDINAL TRAINING and STATE/AGENCY POLICY

Training materials and job aids are a great resource when you want to know how to perform a task in Cardinal (e.g., how to approve an expense report, or how to enter a journal), but they do not address Commonwealth policy. The Department of Accounts' Commonwealth Accounting Policies and Procedures (CAPP) Manual provides detailed guidance on Commonwealth requirements for compliance. Users also rely on their own agency's specific policies and procedures to address transactions or processes that are unique to their agency.

The Department of Accounts is currently reviewing the Commonwealth Accounting Policies and Procedures (CAPP) Manual. Some adjustments will be made to refine policies that are impacted by Cardinal. Wave 1 Agency contacts are also reviewing their agency specific policies to determine whether any agency policies/procedures may be impacted by Cardinal.

DOA will continue to govern Statewide accounting policy and house the CAPP Manual on its website. Agencies will continue to maintain any additional policies they need to meet their specific needs. Cardinal courses and job aids will provide the "how to" instructions for data entry and reporting, that enable users to use the system effectively and comply with state and/or agency policy.

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Upcoming Activities

- Wave 1 Change Network Meeting #5
- Availability of WBTs and ILTs for Wave 1

- User Acceptance Testing – Execute Testing for Wave 1
- Wave 2 Cardinal Reintroduction Meetings