Financials

Expenses WorkCenter, Insights, and Other New Features

August 18, 2026

Cardinal UPGRADE

www.cardinalproject.virginia.gov

Agenda

01 Welcome & Cardinal Upgrade Overview

02 Expenses WorkCenter

03 New Features

04 Financials Insights

05 Wrap-Up

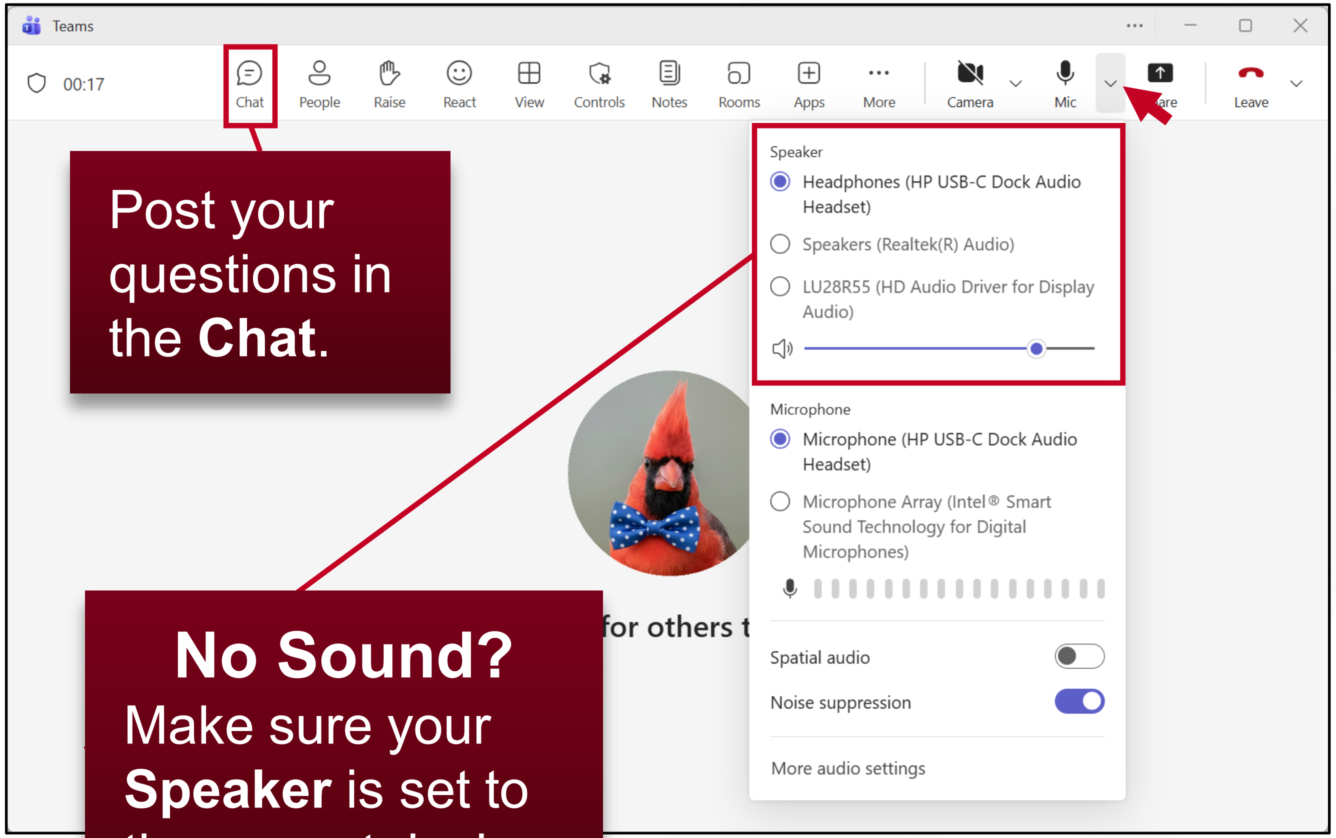
Cardinal

Welcome to Today’s Webinar!

Q&A Format
Post your questions in the Chat. While we may not answer every question during today’s session, all inquiries will be captured for follow-up.

Agency-Specific Questions
Will **not** be addressed today – please open a ticket instead.

All attendees have been muted.



Post your questions in the **Chat.**

No Sound?
Make sure your **Speaker** is set to the correct device.

What to Expect in This Webinar

- ✓ This session highlights new features and changes in the Cardinal Upgrade. It is an informational overview, not a formal training class.
- ✓ If we have not discussed a particular Cardinal function in today's webinar, it is likely unchanged as part of the upgrade.
- ✓ Agency users will not have access to a training environment to preview the upgraded system.
- ✓ All job aids, training, and support materials are being updated and will be made available before the upgrade.
- ✓ Retaking completed Cardinal training is **not required**.
- ✓ **This session is being recorded**. The recording will be made available shortly after the event.

What is the Cardinal Upgrade?

- The Cardinal team is enhancing the Financials (FIN) and Human Capital Management (HCM) applications.
- This upgrade will deliver a range of new features designed to improve system functionality and your overall user experience.
- Scheduled to go live on **September 8, 2026**.

Awareness & Preparation	Deployment	Go-Live	Support & Optimization
April - August	August	September 8	September - October
• Communications, Infographics, Videos, Website posts • Webinars showcasing new features for core users	• Comprehensive user guidance: What to know and when.		• Updated job aids and training • Webinars covering FAQs and Hot Topics

Cardinal Upgrade: Impact on Your Favorites

As Cardinal transitions to a modern navigation experience, existing Homepage personalizations and My Favorites will no longer exist. Please note the following impacts on your saved items:

- **Homepage Personalizations**: Automatically removed at go-live due to the new navigation structure.
- **My Favorites**: Existing favorites will be removed at go-live as the links will no longer work due to the new navigation structure.
  - **Note:** A communication will go out to all users with instructions about re-creating favorites in the upgraded system.
- **Queries & Run Controls**: Existing favorite queries and saved run control IDs will remain intact—no action required.

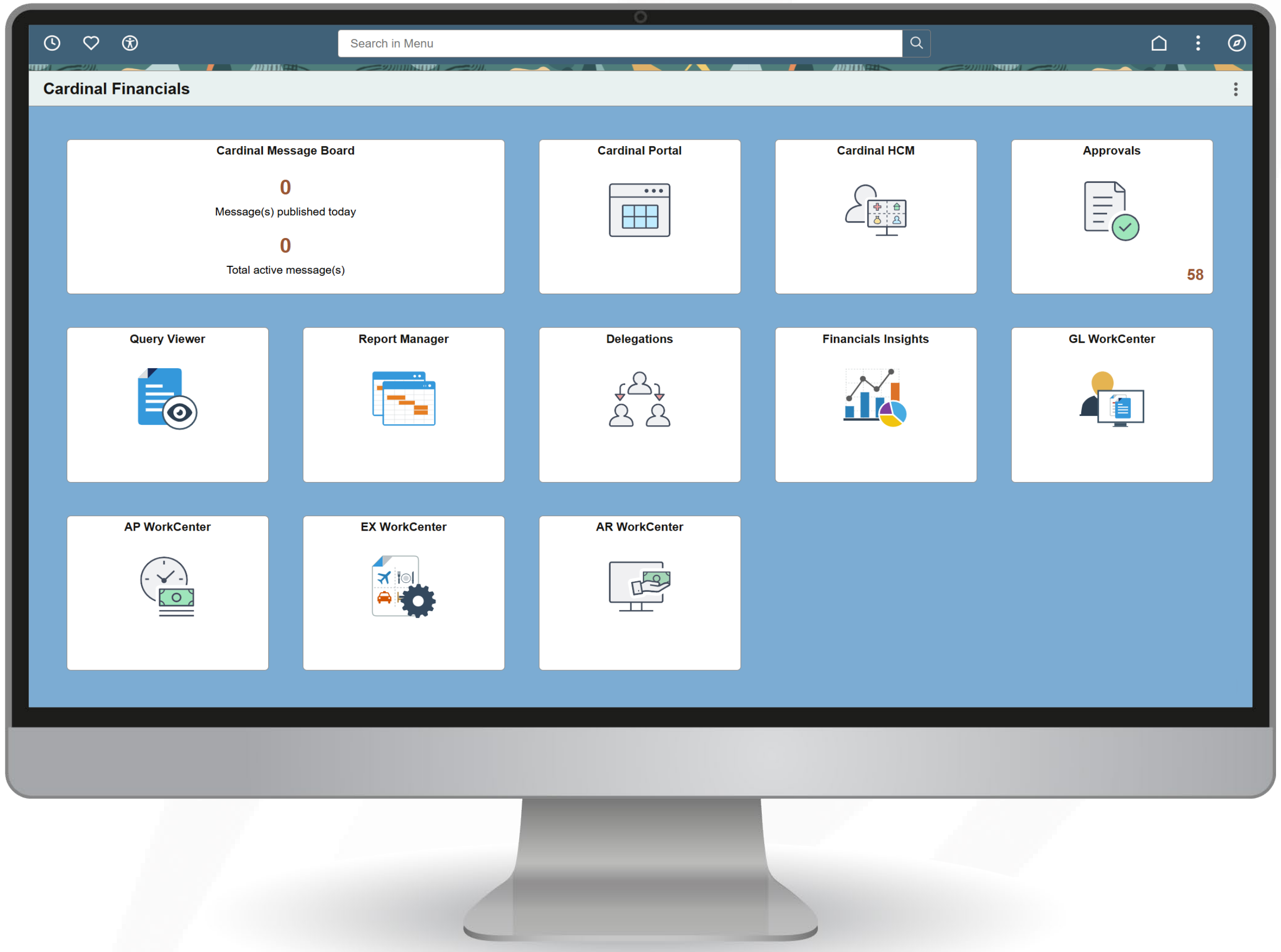
A Fresh New Look

Current State

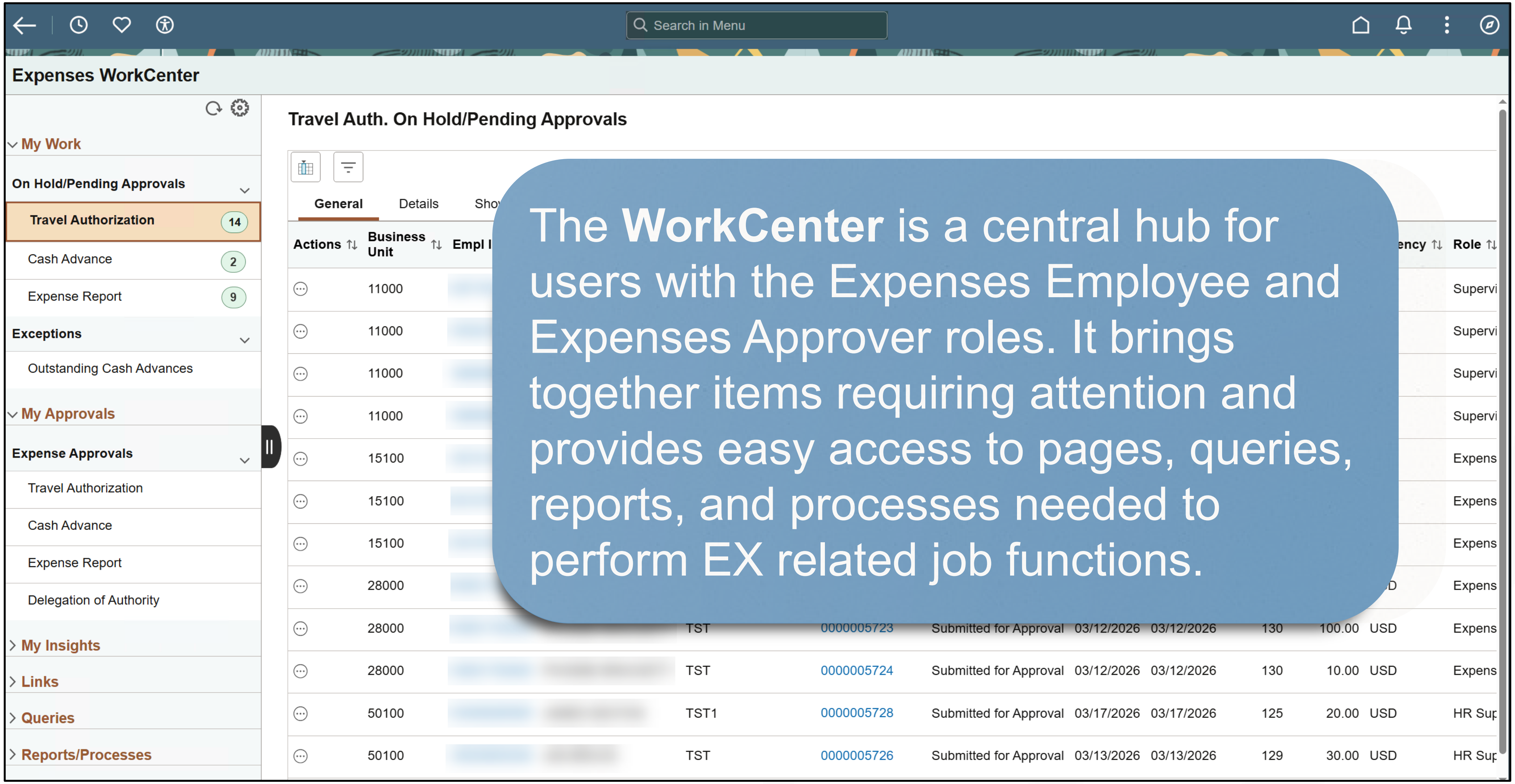
- Text heavy layout
- Lengthy menu lists
- Nested folders
- Excessive scrolls, hovers, and clicks

Future State

- Clean Modern Layout
- Simplified tile-based navigation
- One click away from key tasks

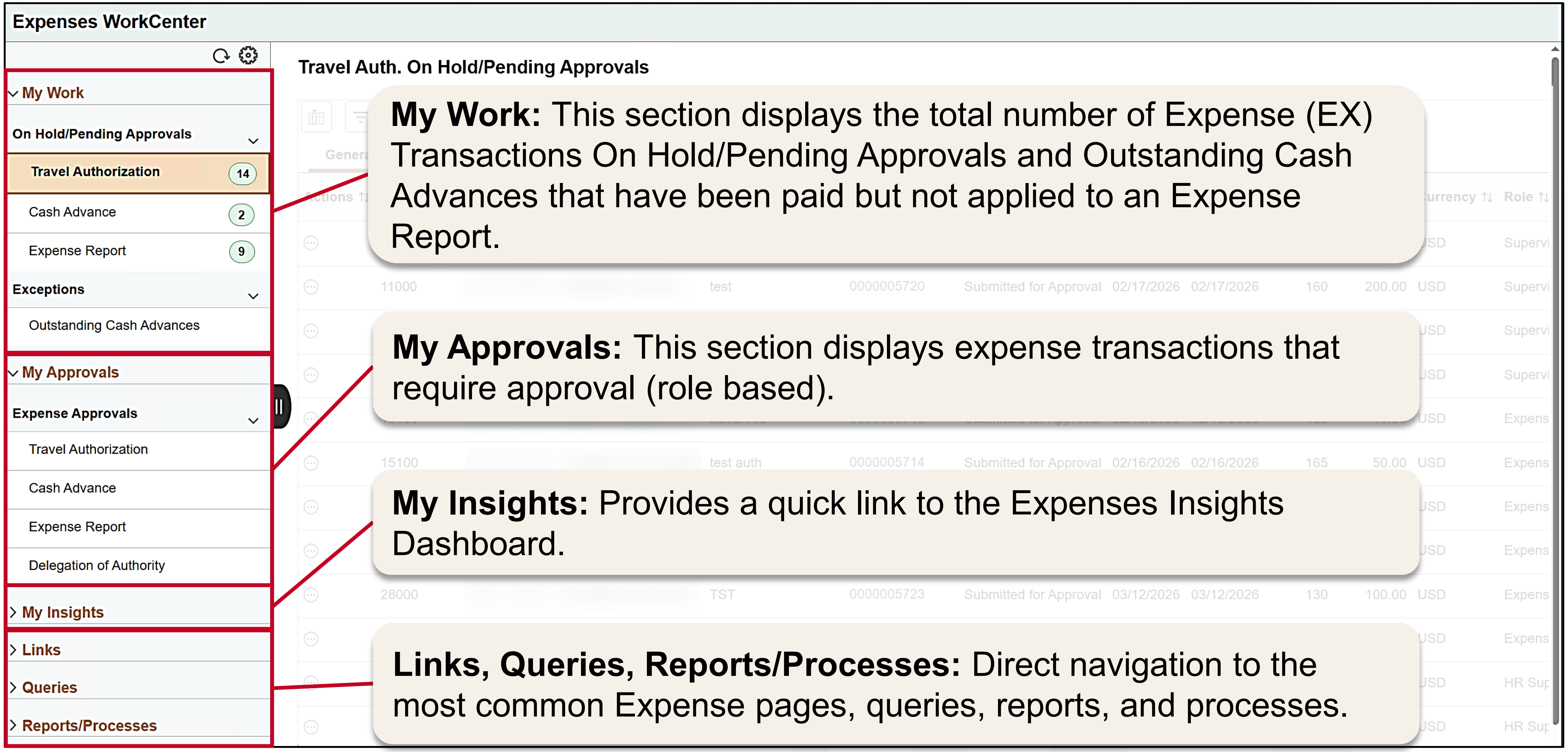


Expenses WorkCenter



The **WorkCenter** is a central hub for users with the Expenses Employee and Expenses Approver roles. It brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform EX related job functions.

Expenses WorkCenter



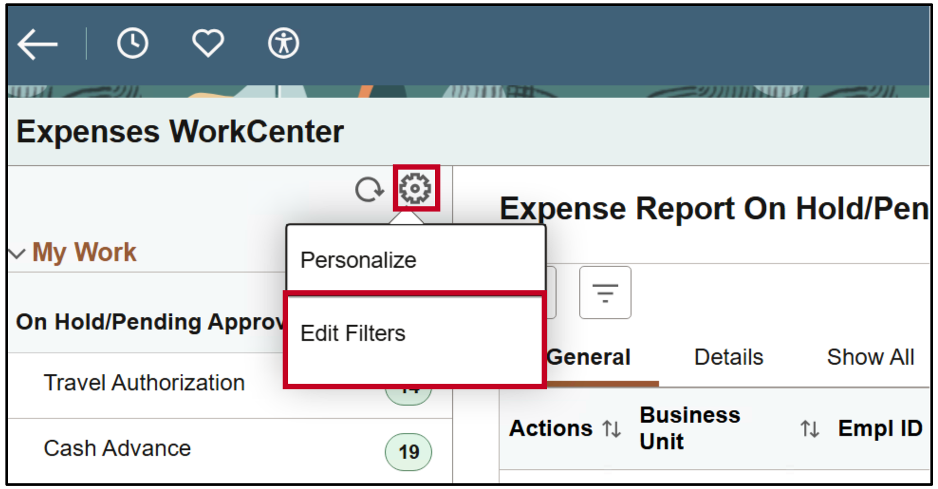
My Work: This section displays the total number of Expense (EX) Transactions On Hold/Pending Approvals and Outstanding Cash Advances that have been paid but not applied to an Expense Report.

My Approvals: This section displays expense transactions that require approval (role based).

My Insights: Provides a quick link to the Expenses Insights Dashboard.

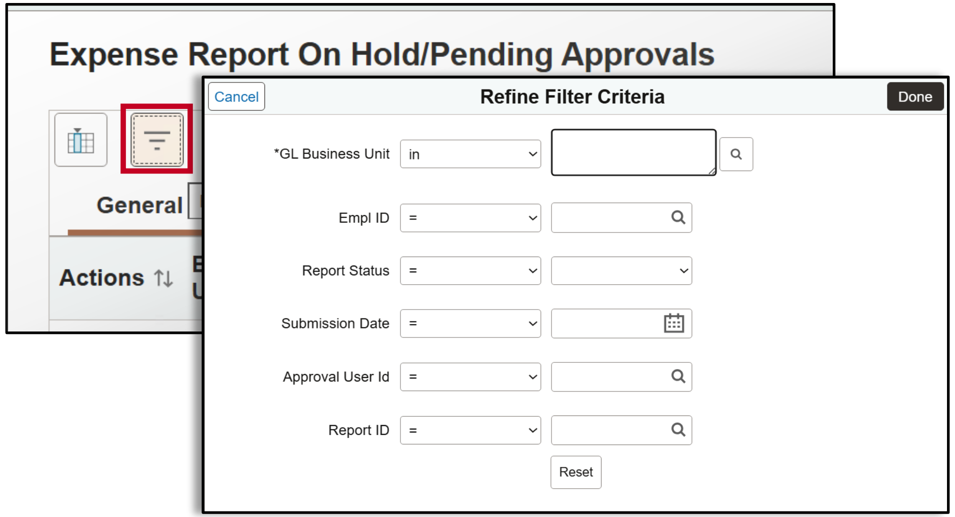
Links, Queries, Reports/Processes: Direct navigation to the most common Expense pages, queries, reports, and processes.

WorkCenter Filters



Set Default Filters

Users may update the pre-set filters using the **Edit Filters** available in the Navigation panel. This is 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 in the Transaction panel to temporarily focus on a particular Business Unit(s) or other criteria by using the **Refine Filter** option.

Required filters are pre-populated based on user Business Unit access and can be updated by the user.

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What’s Changing?

Additional enhancements coming with the Cardinal Upgrade.

Travel Authorization

Improved page and functionality

Expense Report

Improved page and functionality

Approvals & Delegation

New Approvals and Delegation Tiles

Proxies

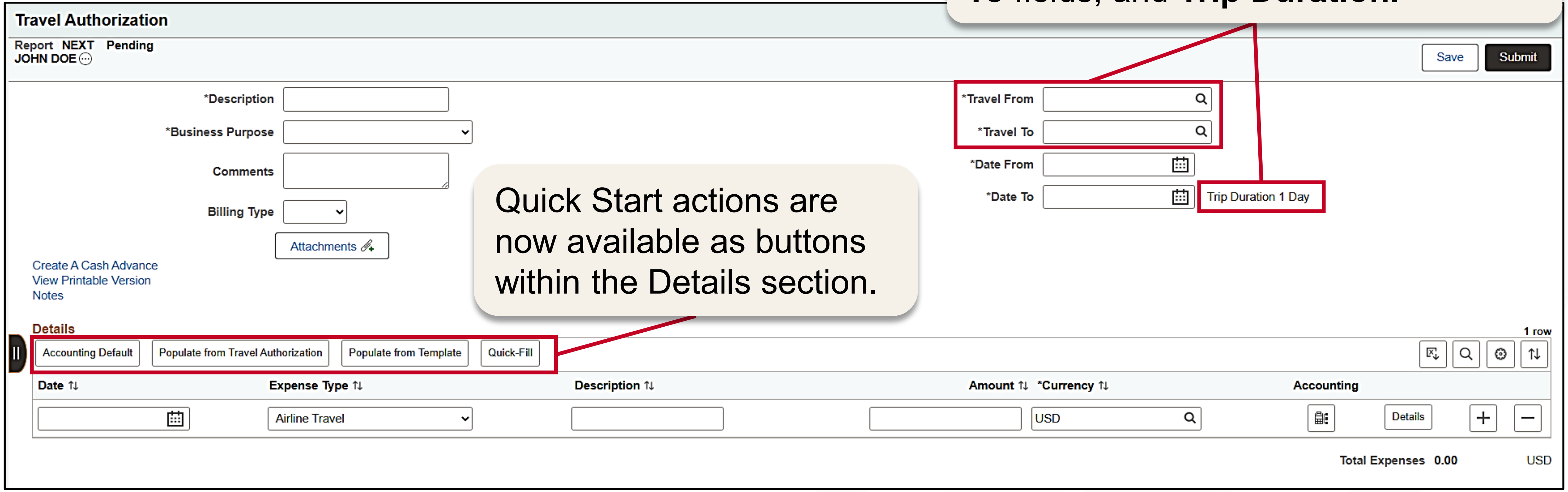
Proxies for Entering Expenses

Travel Authorization

The Travel Authorization page has been updated with a more intuitive structure, new fields and buttons, and integrated Related Actions.

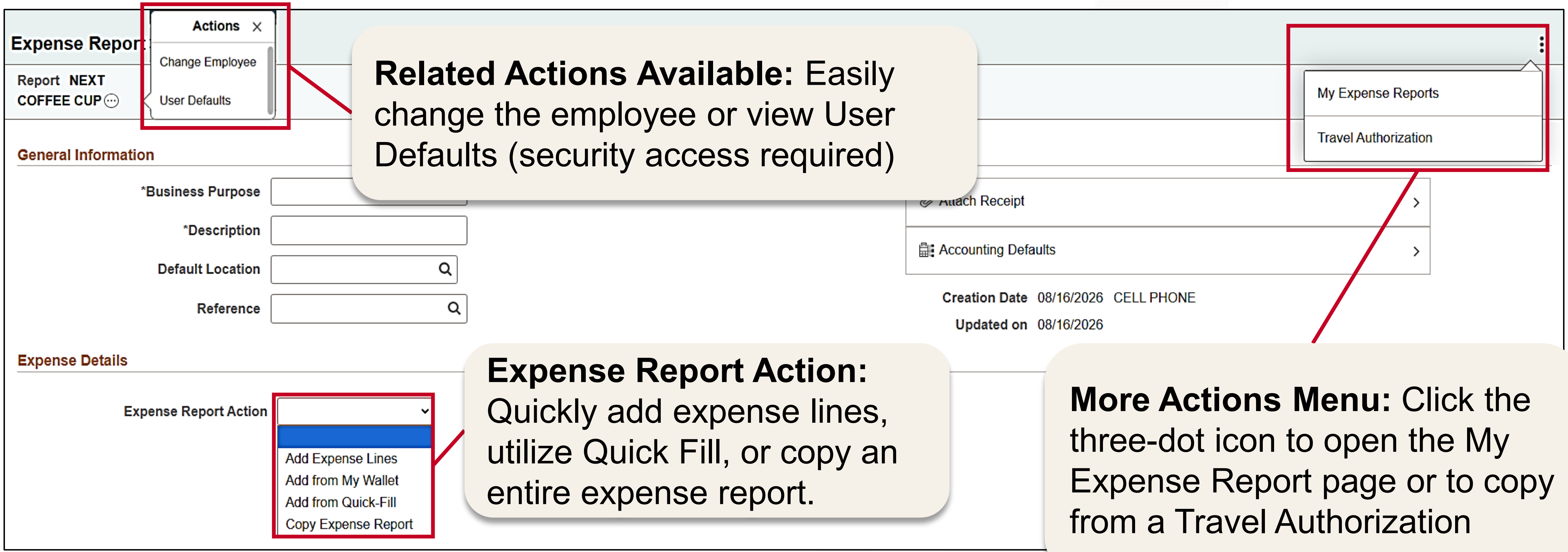
New! Added **Travel From** and **Travel To** fields, and **Trip Duration.**

Quick Start actions are now available as buttons within the Details section.



Expense Report

The Expense Report page has been updated with Header information now displaying on a separate page.



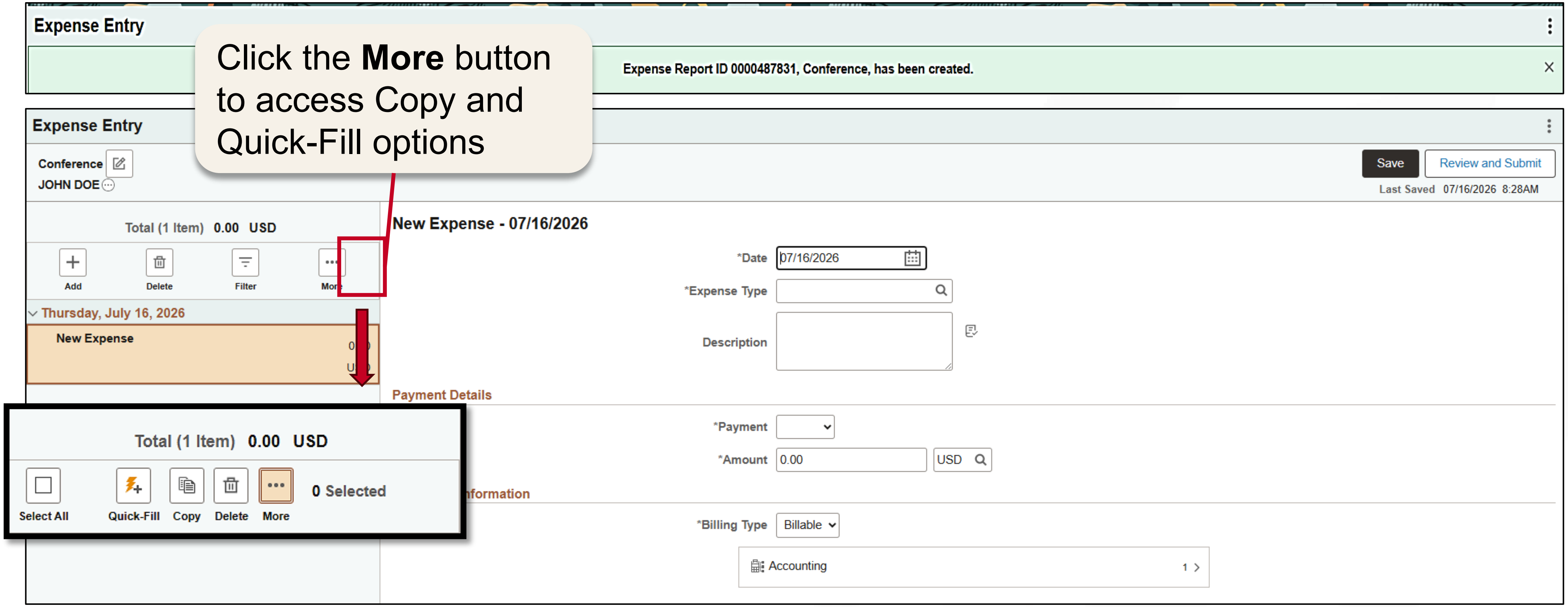
Related Actions Available: Easily change the employee or view User Defaults (security access required)

Expense Report Action: Quickly add expense lines, utilize Quick Fill, or copy an entire expense report.

More Actions Menu: Click the three-dot icon to open the My Expense Report page or to copy from a Travel Authorization

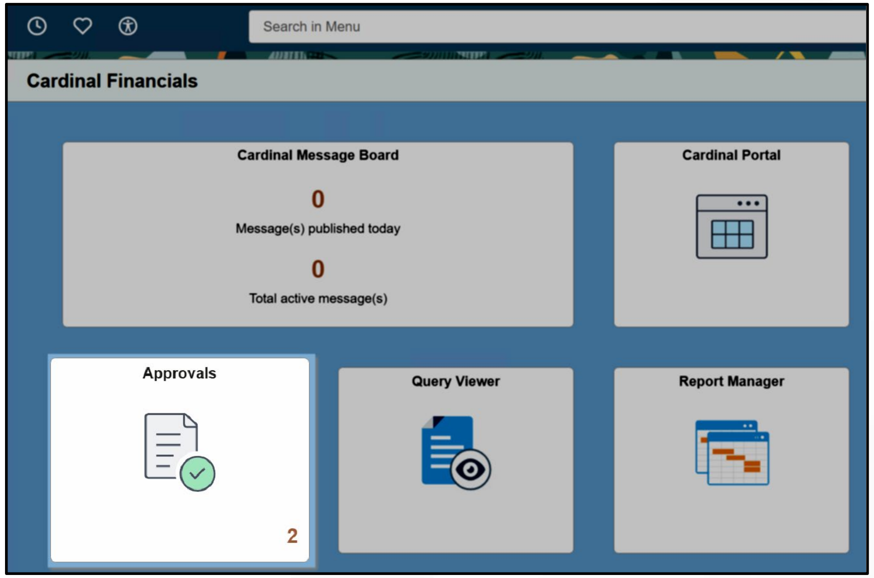
Expense Entry Page

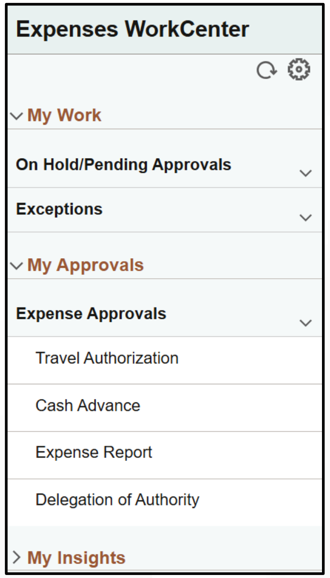
The Expense Entry page displays a green banner after clicking the **Add Expense Lines** button with the Expense Report number.



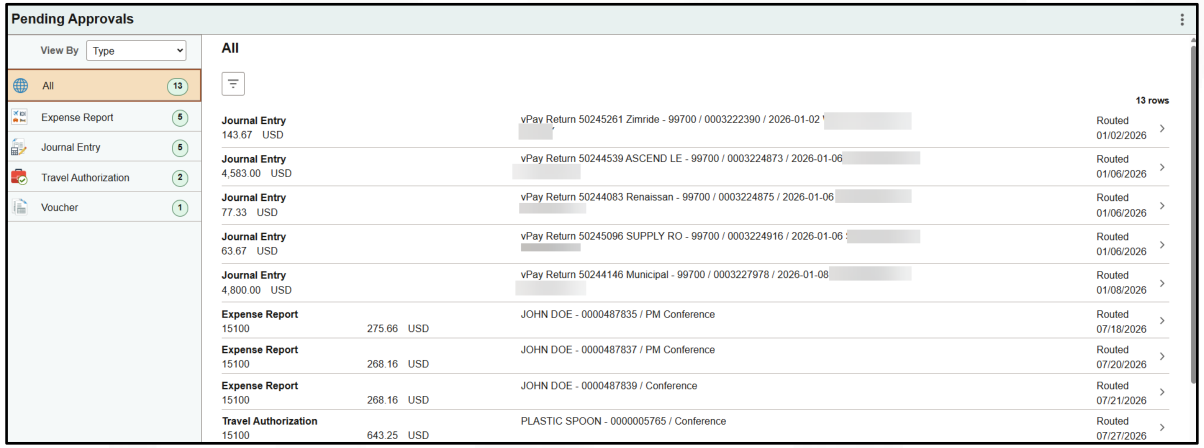
Approvals

Approvals can be accessed via the **Approvals tile** from the Financials Homepage.

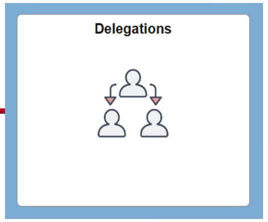




Expense transactions requiring approval will be listed in the **EX WorkCenter** under the **My Approvals** section.

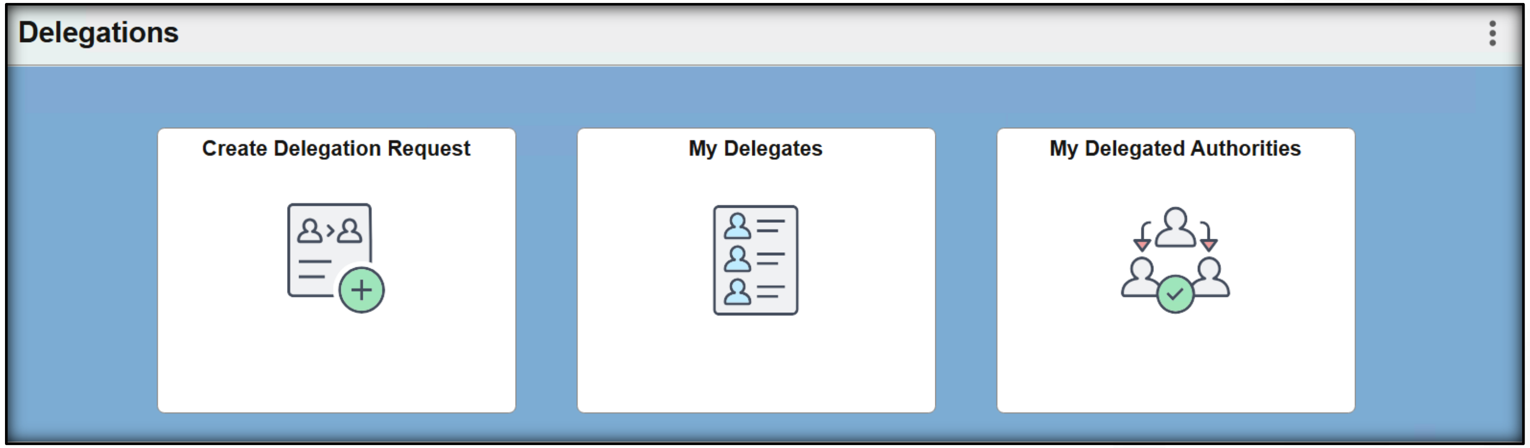


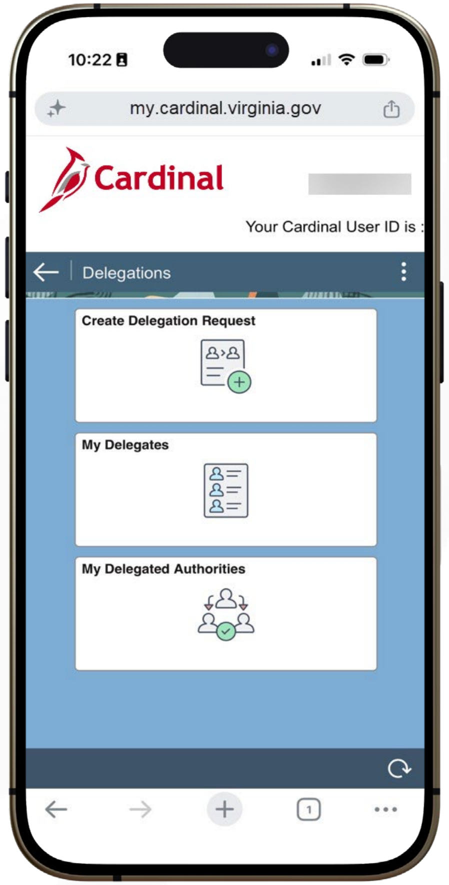
Delegation



Manage **Delegation** using the Delegation tile to handle tasks and permissions on your computer or your mobile device.

- **Create Delegation Request**: Delegate your approval authority to another approver.
- **My Delegates**: Track and review the requests you have assigned to others.
- **My Delegated Authorities**: View Transactions delegated to you by another approver.





VDOT Expense Users - Proxies

VDOT is moving to the statewide standard for processing expense transactions.

- **Current**: VDOT users do not need a proxy setup; anyone with the V_AP_EXPENSES_EMPLOYEE role can submit an expense report for any employee.
- **After the Upgrade**: Employees may continue to enter and submit their own expense transactions using employee self-service navigation. A Proxy must be assigned to the employee to submit transactions on behalf of that employee. Multiple Proxies can be assigned to a single employee.

LIVE DEMONSTRATION

Expenses WorkCenter

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Q&A

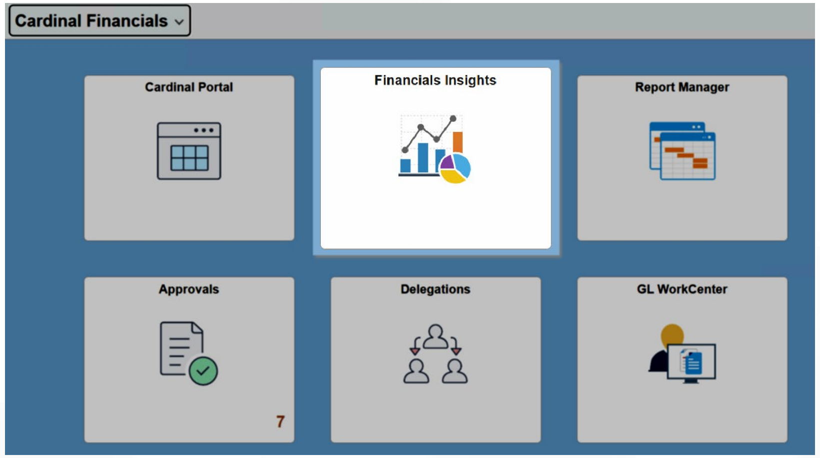
Financials Insights

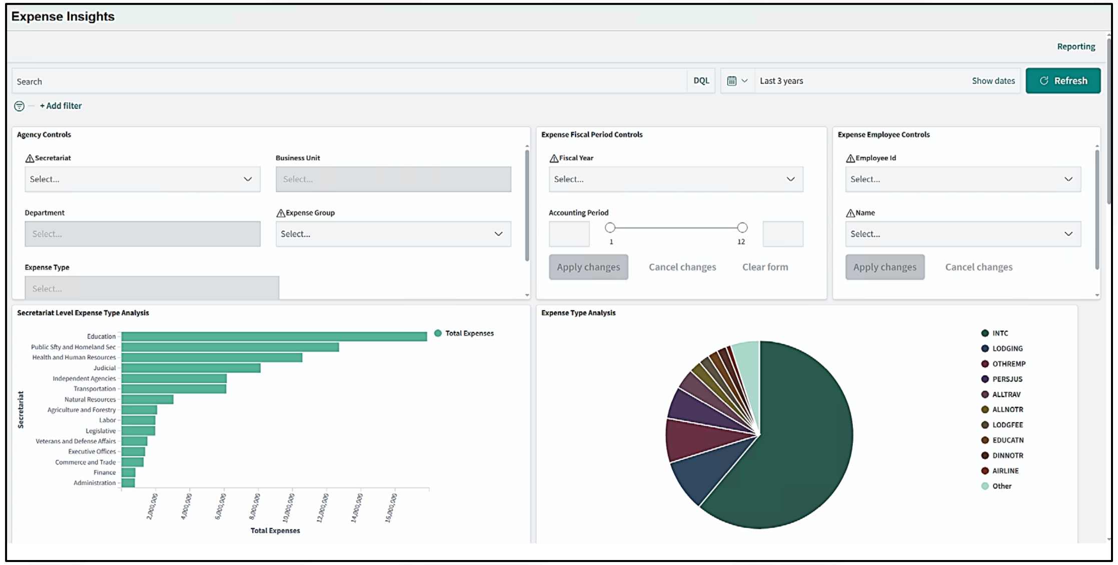
Available via the **Financials Insights** tile or direct link in the related **WorkCenter**.

Visual Dashboards: Features multiple visualizations of employee expenses data.

Scope: Provides access across all Business Units and Departments.

Flexible Filtering: Easily filter by agency, expense type, or specific employees to drill into detailed information.





LIVE DEMONSTRATION

Expenses Insights

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Tips for Financials Insights

Use Filters

- Focus on relevant data by selecting only the filters you need.

Apply Changes

- Always click Apply Changes after selecting filters to update your view.

Use Dropdowns

- Select values from drop-down menus whenever possible to prevent case-sensitive errors.

Search Values

- If an expected value is not listed, start typing the exact name (case-sensitive) or the correct number.

Export Data

- Export raw data to Excel if you need additional custom calculations or deep-dive analysis.

Masked Data

- Be aware that sensitive information may appear redacted with asterisks.

Q&A

Next Steps

EXPLORE THE CARDINAL UPGRADE WEBPAGE

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- Communications & Infographics
- Videos
- Webinar Recordings & Presentations
- Go-Live Resources

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