

FINANCIALS

Procurement WorkCenter

August 11, 2026

Agenda

01

Welcome & Cardinal Upgrade Overview

02

Procurement WorkCenter & Enhancements

03

Live Demonstration

04

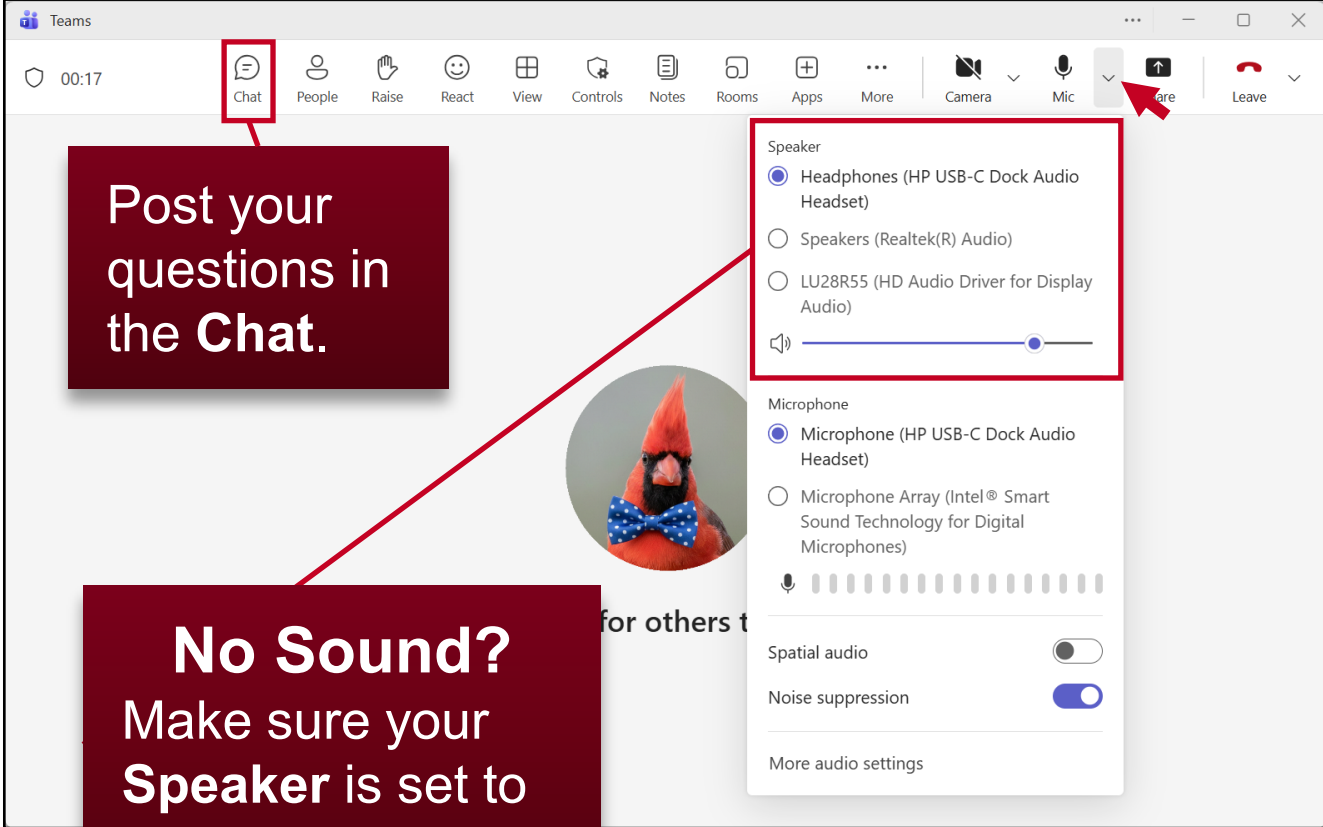
Wrap-Up and Q&A

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.

All attendees have been muted.



The screenshot shows the Microsoft Teams interface. The top toolbar includes icons for Chat, People, Raise, React, View, Controls, Notes, Rooms, Apps, More, Camera, Mic, and a red arrow pointing to the 'More' icon. A red box highlights the 'Chat' icon. A red callout box points to the 'Chat' icon with the text: "Post your questions in the Chat." Another red callout box points to the 'More' icon with the text: "No Sound? Make sure your Speaker is set to the correct device." The 'More' menu is open, showing the 'Speaker' section with three options: "Headphones (HP USB-C Dock Audio Headset)" (selected), "Speakers (Realtek(R) Audio)", and "LU28R55 (HD Audio Driver for Display Audio)". A volume slider is visible below these options. The 'Microphone' section shows "Microphone (HP USB-C Dock Audio Headset)" as the selected device. Below the microphone section are toggles for "Spatial audio" (off) and "Noise suppression" (on). A "More audio settings" link is at the bottom of the menu.

Post your questions in the Chat.

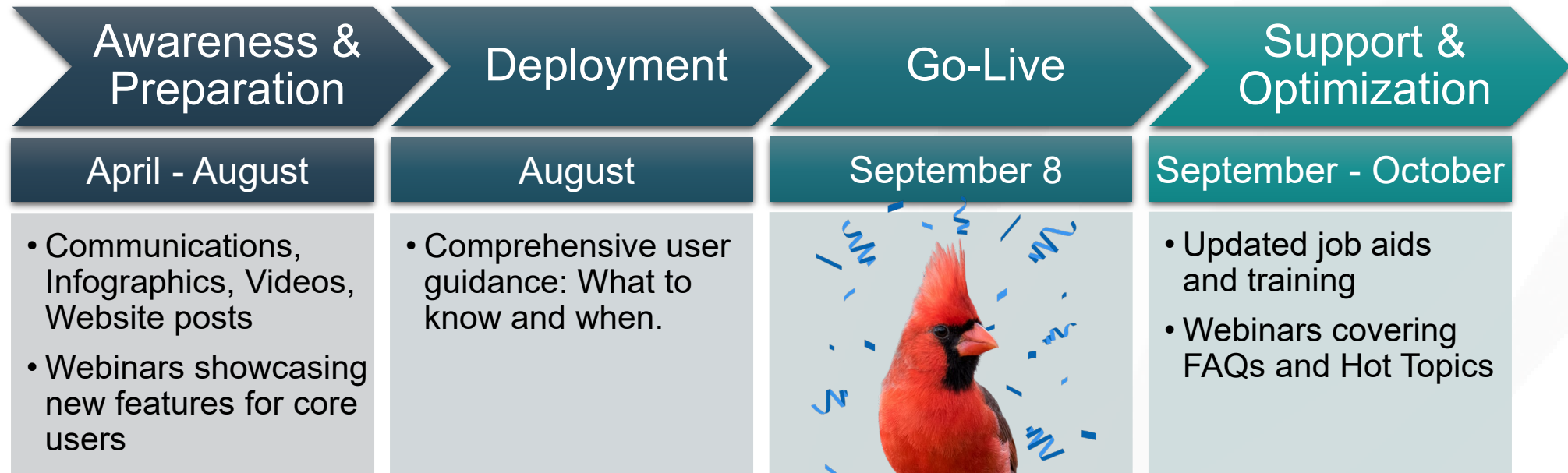
No Sound?
Make sure your Speaker is set to the correct device.

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 do not discuss a particular Cardinal function, it is likely unchanged as part of the upgrade.
- ✓ All job aids, training, and support materials are being updated for 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**.



01

Welcome & Cardinal Upgrade Overview

02

Procurement WorkCenter & Enhancements

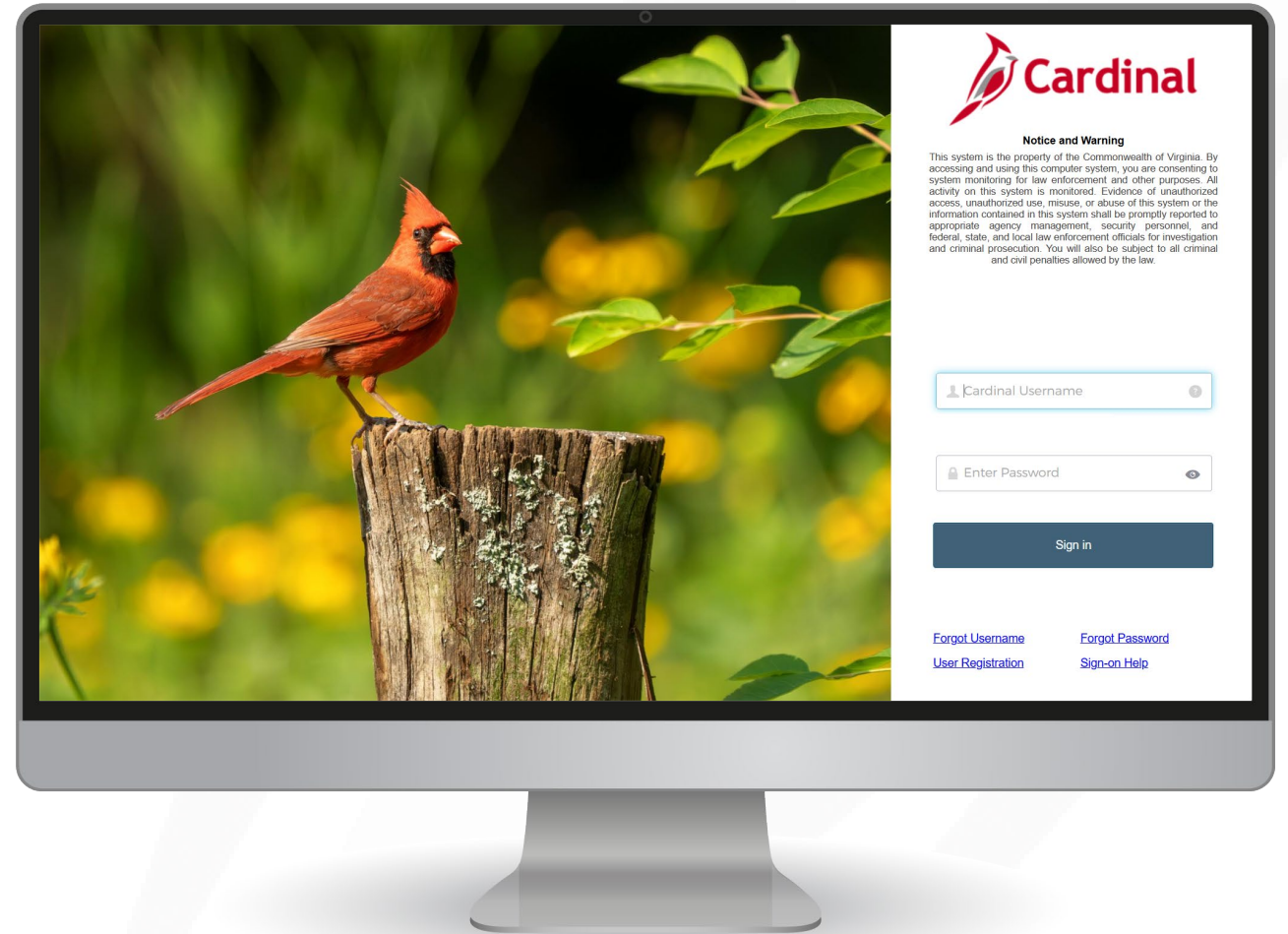
03

Live Demonstration

04

Wrap-Up and Q&A

A Fresh New Look



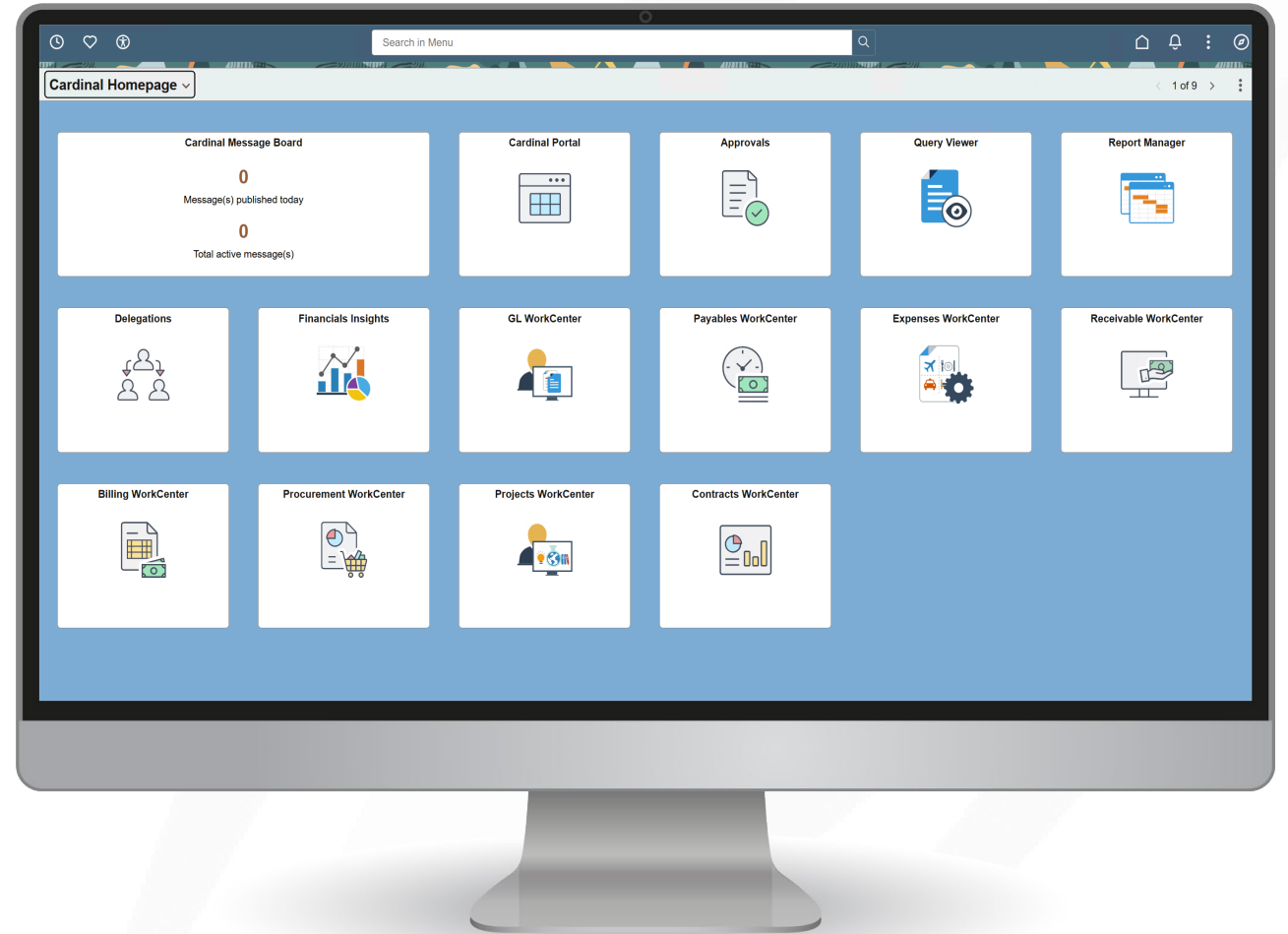
Current State

- **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**



Procurement WorkCenter

The screenshot displays the Procurement WorkCenter interface. The top navigation bar includes a search bar labeled "Search in Menu" and several icons (back, clock, heart, person). The left sidebar contains a "Pending Approvals" section with a list of items: "My Work", "My Approvals", "Pending Approvals" (expanded), "Requisition" (22 items), "Purchase Order" (4 items), and "Delegation of Authority". Below this are sections for "Links", "Queries", and "Reports/Processes". The main content area is titled "Requisition" and shows a list of pending approvals with columns for "Requisition", "Amount", and "Status". A blue callout box is overlaid on the right side of the interface, containing the text: "The Procurement WorkCenter is a central hub for Procurement Processors and Approvers that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform Procurement related job functions."

Pending Approvals

- My Work
- My Approvals
- Pending Approvals
 - Requisition** (22)
 - Purchase Order (4)
 - Delegation of Authority
- > Links
- > Queries
- > Reports/Processes

Requisition

Pending Approvals

Requisition	Amount	Status
Requisition	1,750,000.00	
Requisition	350,000.00	
Requisition	550,000.00	
Requisition	122,523.36 USD	Medium Priority Escalated

Procurement WorkCenter

The screenshot shows the Procurement WorkCenter interface. On the left is a navigation sidebar with sections: My Work, My Approvals, Links, and Queries/Reports/Processes. The main area displays a table of procurement items with columns for Name, Date, Vendor, Amount, Currency, Status, and Action. Callout boxes point to specific features: 'My Work' points to the 'Reconcile PCard Statement' link in the sidebar and the table; 'My Approvals' points to the 'Requisition' and 'Purchase Order' links in the sidebar; 'Links' points to the 'Worklist' link in the sidebar; and 'Queries and Reports/Processes' points to the 'Queries' and 'Reports/Processes' links in the sidebar.

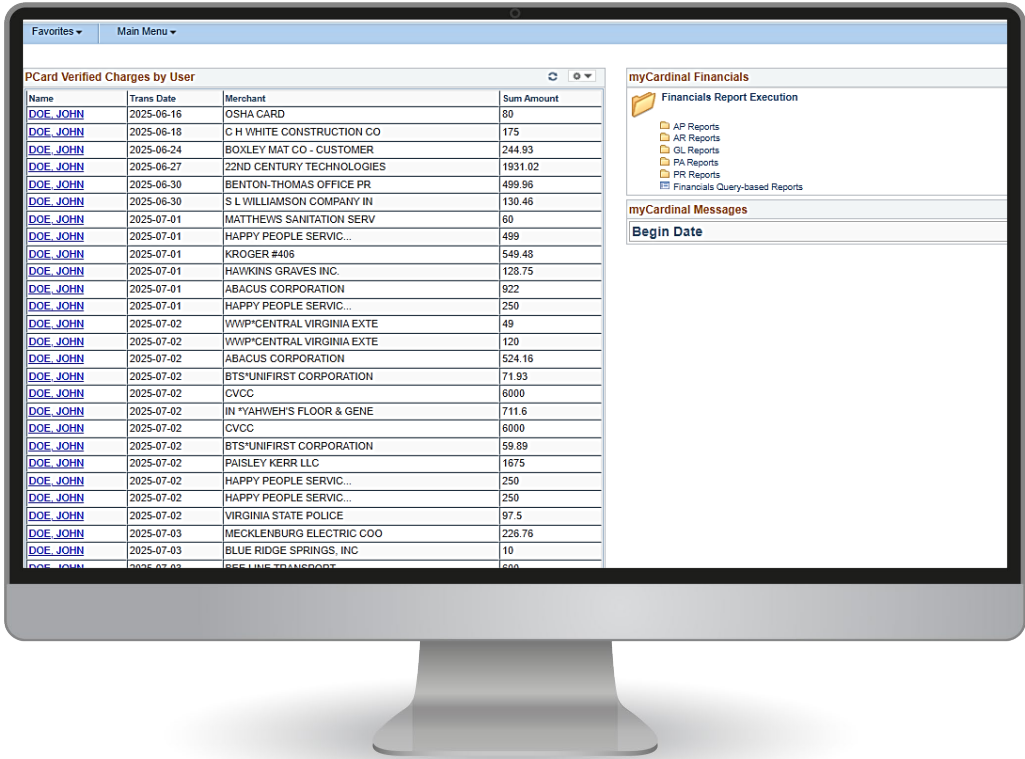
My Work: Your “To-Do” List. Displays PCard Statements requiring reconciliation (role-based).

My Approvals: Displays Requisitions, Purchase Orders, and Delegations pending approval.

Links: Direct navigation to the pages used in day-to-day Procurement tasks.

Queries and Reports/Processes: Quick access to the most common Procurement Queries, Reports and Processes directly from the WorkCenter.

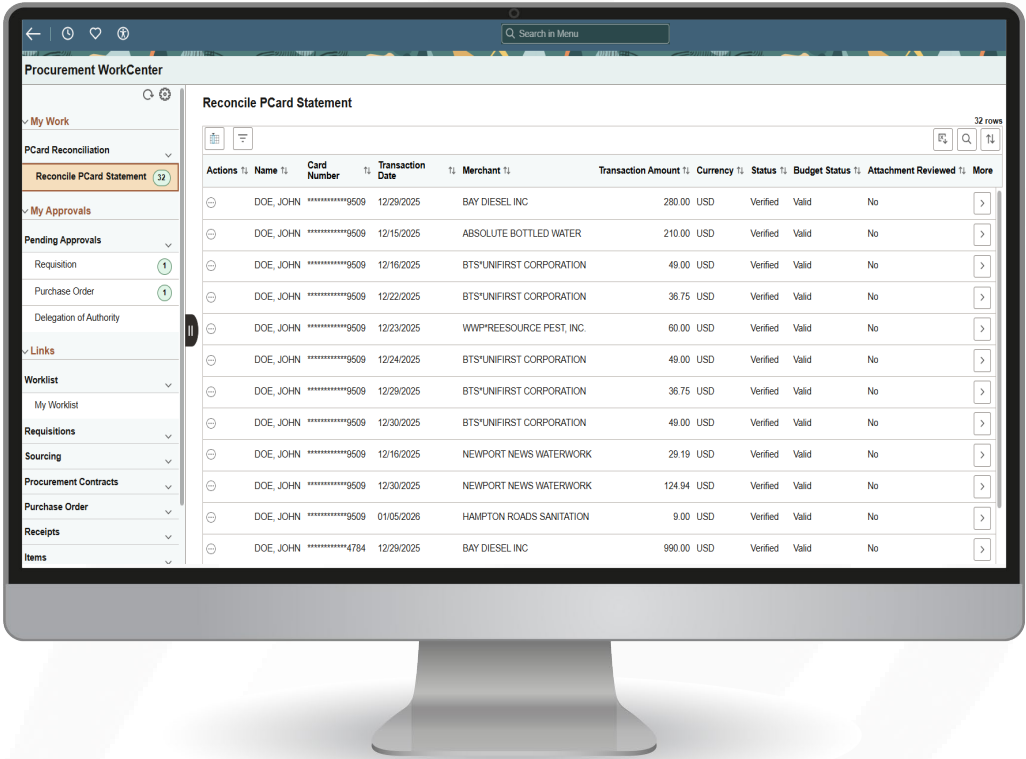
PCard Approvals



The screenshot shows a web application interface for PCard management. The main section is titled "PCard Verified Charges by User" and displays a table of transactions. The table has columns for Name, Trans Date, Merchant, and Sum Amount. The data is filtered for user "DOE, JOHN" and shows transactions from 2025-06-16 to 2025-07-03. A sidebar on the right contains navigation links for "myCardinal Financials" and "myCardinal Messages".

Name	Trans Date	Merchant	Sum Amount
DOE, JOHN	2025-06-16	OSHA CARD	80
DOE, JOHN	2025-06-18	C H WHITE CONSTRUCTION CO	175
DOE, JOHN	2025-06-24	BOXLEY MAT CO - CUSTOMER	244.93
DOE, JOHN	2025-06-27	22ND CENTURY TECHNOLOGIES	1931.02
DOE, JOHN	2025-06-30	BENTON-THOMAS OFFICE PR	499.96
DOE, JOHN	2025-06-30	S L WILLIAMSON COMPANY IN	130.46
DOE, JOHN	2025-07-01	MATTHEWS SANITATION SERV	60
DOE, JOHN	2025-07-01	HAPPY PEOPLE SERVIC...	499
DOE, JOHN	2025-07-01	KROGER #406	549.48
DOE, JOHN	2025-07-01	HAWKINS GRAVES INC.	128.75
DOE, JOHN	2025-07-01	ABACUS CORPORATION	922
DOE, JOHN	2025-07-01	HAPPY PEOPLE SERVIC...	250
DOE, JOHN	2025-07-02	WWP*CENTRAL VIRGINIA EXTE	49
DOE, JOHN	2025-07-02	WWP*CENTRAL VIRGINIA EXTE	120
DOE, JOHN	2025-07-02	ABACUS CORPORATION	524.16
DOE, JOHN	2025-07-02	BTS*UNIFIRST CORPORATION	71.93
DOE, JOHN	2025-07-02	CVCC	6000
DOE, JOHN	2025-07-02	IN *YAHWEH'S FLOOR & GENE	711.6
DOE, JOHN	2025-07-02	CVCC	6000
DOE, JOHN	2025-07-02	BTS*UNIFIRST CORPORATION	59.89
DOE, JOHN	2025-07-02	PAISLEY KERR LLC	1675
DOE, JOHN	2025-07-02	HAPPY PEOPLE SERVIC...	250
DOE, JOHN	2025-07-02	HAPPY PEOPLE SERVIC...	250
DOE, JOHN	2025-07-02	VIRGINIA STATE POLICE	97.5
DOE, JOHN	2025-07-03	MECKLENBURG ELECTRIC COO	226.76
DOE, JOHN	2025-07-03	BLUE RIDGE SPRINGS, INC	10
DOE, JOHN	2025-07-03	SEE LIVE TRANSPORT	600

Current State

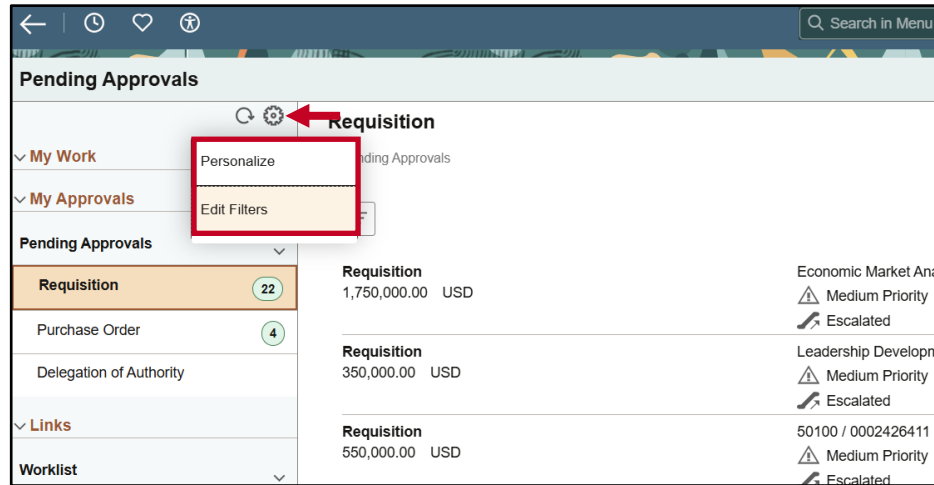


The screenshot shows a more modern web application interface for PCard management. The main section is titled "Reconcile PCard Statement" and displays a table of transactions. The table has columns for Actions, Name, Card Number, Transaction Date, Merchant, Transaction Amount, Currency, Status, Budget Status, Attachment, and Reviewed. The data is filtered for user "DOE, JOHN" and shows transactions from 12/29/2025 to 12/29/2025. A sidebar on the left contains navigation links for "Procurement WorkCenter", "My Work", "My Approvals", "Pending Approvals", "Links", "Worklist", "Requisitions", "Sourcing", "Procurement Contracts", "Purchase Order", "Receipts", and "Items".

Actions	Name	Card Number	Transaction Date	Merchant	Transaction Amount	Currency	Status	Budget Status	Attachment	Reviewed
⊖	DOE, JOHN	*****9509	12/29/2025	BAY DIESEL INC	280.00	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****9509	12/15/2025	ABSOLUTE BOTTLED WATER	210.00	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****9509	12/16/2025	BTS*UNIFIRST CORPORATION	49.00	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****9509	12/22/2025	BTS*UNIFIRST CORPORATION	36.75	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****9509	12/23/2025	WWP*RESOURCE PEST, INC.	60.00	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****9509	12/24/2025	BTS*UNIFIRST CORPORATION	49.00	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****9509	12/29/2025	BTS*UNIFIRST CORPORATION	36.75	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****9509	12/30/2025	BTS*UNIFIRST CORPORATION	49.00	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****9509	12/16/2025	NEWPORT NEWS WATERWORK	29.19	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****9509	12/30/2025	NEWPORT NEWS WATERWORK	124.94	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****9509	01/05/2026	HAMPTON ROADS SANITATION	9.00	USD	Verified	Valid	No	
⊖	DOE, JOHN	*****4784	12/29/2025	BAY DIESEL INC	990.00	USD	Verified	Valid	No	

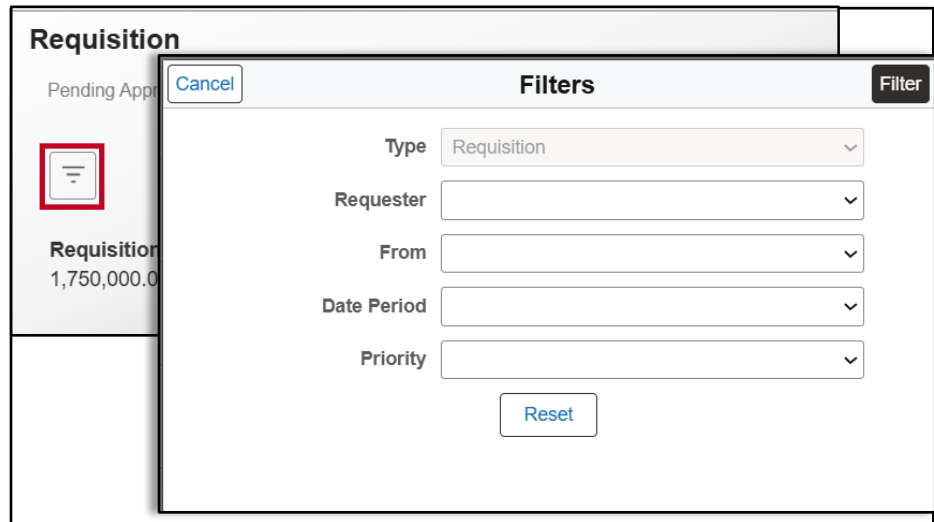
Future State

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.

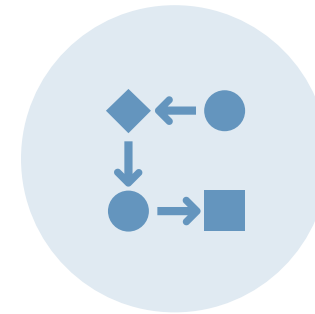
What's Changing?

Additional Procurement enhancements coming with the Cardinal Upgrade.



Approvals

—
New Approvals Tile



Delegation

—
New Delegation Tile

Approvals

Approvals can be accessed via the **Approvals tile** from the Financials homepage or in the **Procurement Work Center** under **My Approvals**.

Cardinal Financials

Cardinal Message Board

0
Message(s) published today

0
Total active message(s)

Cardinal Portal

Approvals

2

Query Viewer

Report Manager

Procurement WorkCenter

My Work

PCard Reconciliation

Reconcile PCard Statement 32

My Approvals

Pending Approvals

Requisition 1

Purchase Order 1

Delegation of Authority

Links

Worklist

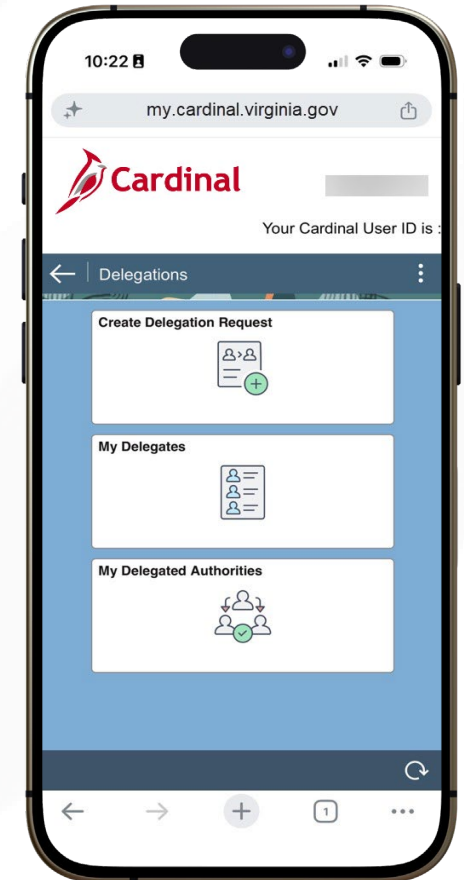
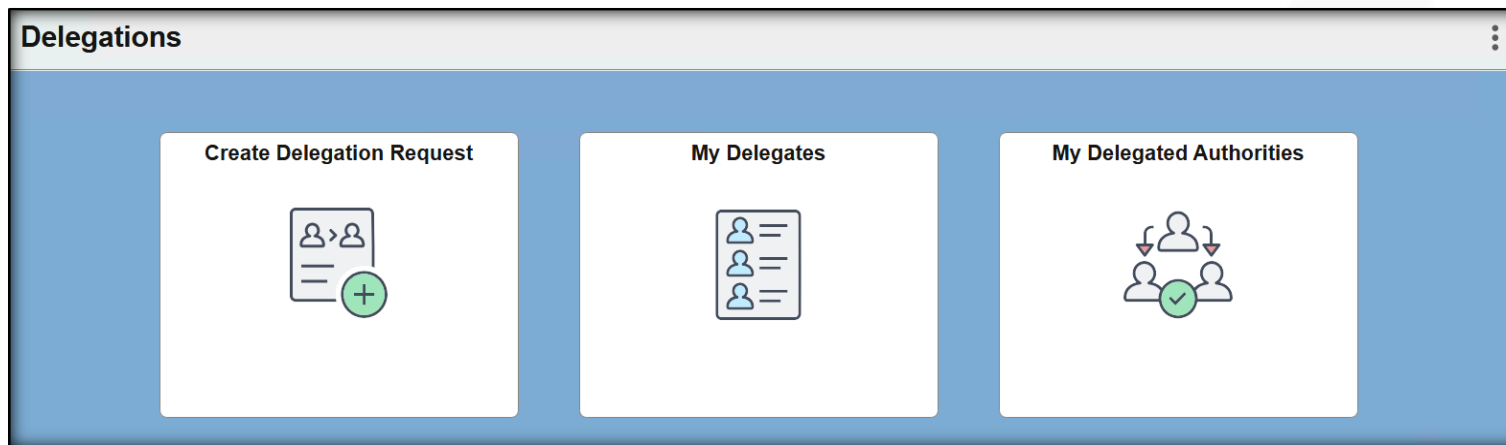
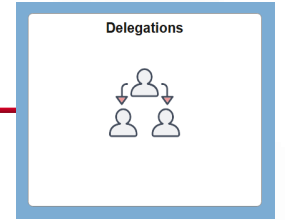
Purchase Orders and **Requisitions** requiring approval will be listed on the **Pending Approvals** page.

Pending Approvals					⋮
View By Type ▾		All			
🌐 All 2		☰			
📄 Purchase Order 1		Requisition			2 rows
🛒 Requisition 1		50100 / 0002428537 V_PR_TESTUSER_2			
		13,387.50 USD			
		⚠️ Medium Priority			Routed 07/22/2026 ➤
		Purchase Order			
		3,682.50 USD			
		⚠️ Medium Priority			Routed 07/22/2026 ➤

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.



LIVE DEMONSTRATION

Procurement WorkCenter





Q & A

Next Steps

EXPLORE THE CARDINAL UPGRADE WEBPAGE

 cardinalproject.virginia.gov/upgrade



Communications & Infographics



Videos



Webinar Recordings & Presentations



Go-Live Resources

Share Your Feedback!

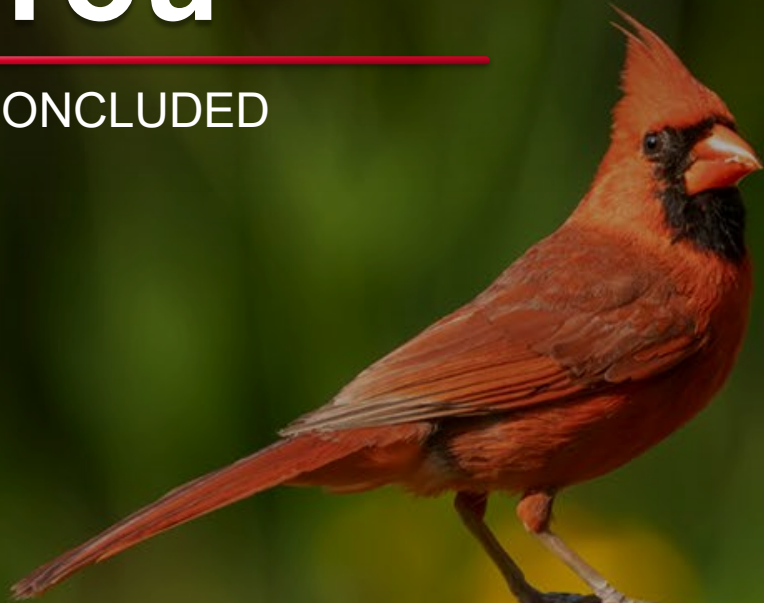
Scan the QR code or click the link below to take a brief survey.



<https://forms.office.com/g/mn8Qni7PzF>

Thank You

PRESENTATION CONCLUDED



We Value Your Feedback!

Scan the QR code or click the link below to take a brief survey.



<https://forms.office.com/g/mn8Qni7PzF>

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

www.cardinalproject.virginia.gov