

FINANCIALS

Project Accounting WorkCenters

August 4, 2026

Agenda

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Welcome & Cardinal Upgrade Overview

02

Project Accounting WorkCenters

03

Live Demonstration

04

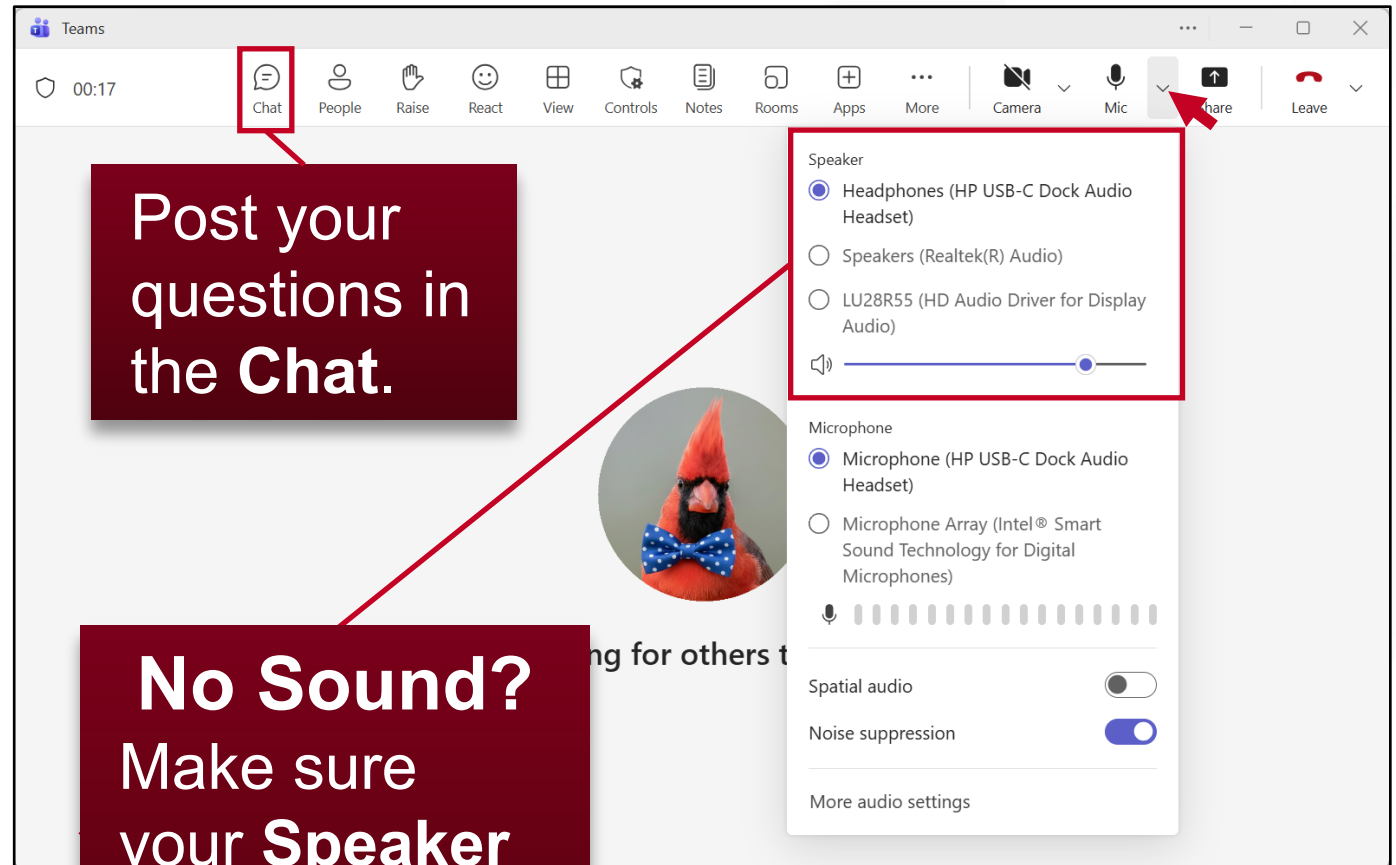
Wrap-Up and Q&A

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.



Post your questions in the **Chat**.

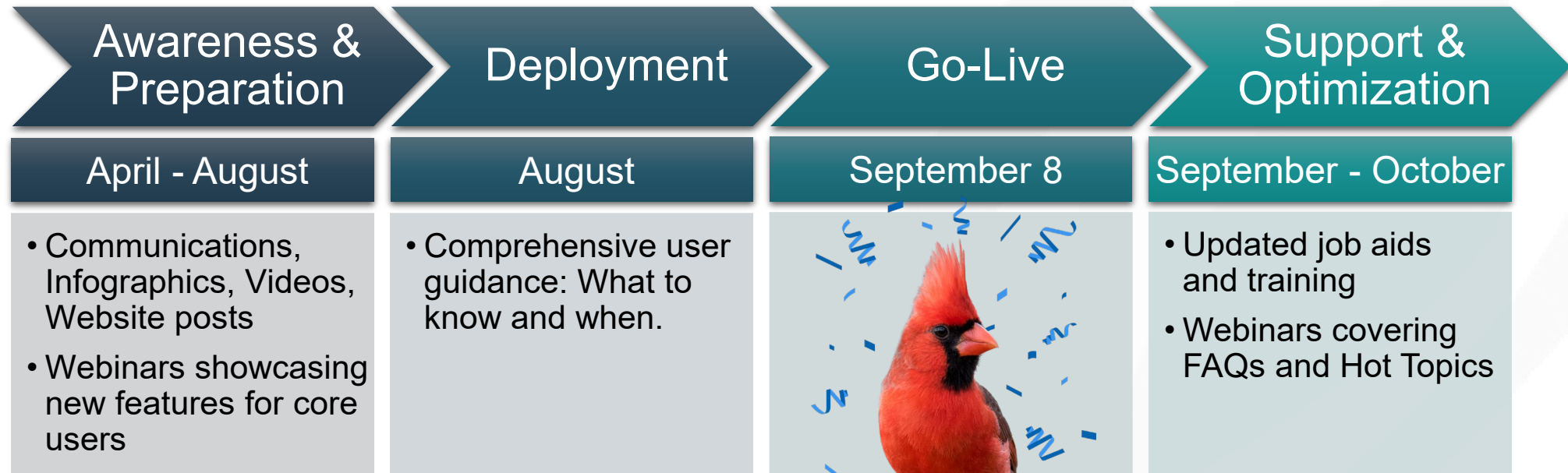
No Sound?
Make sure your **Speaker** is set to the correct device.

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

Project Accounting WorkCenters

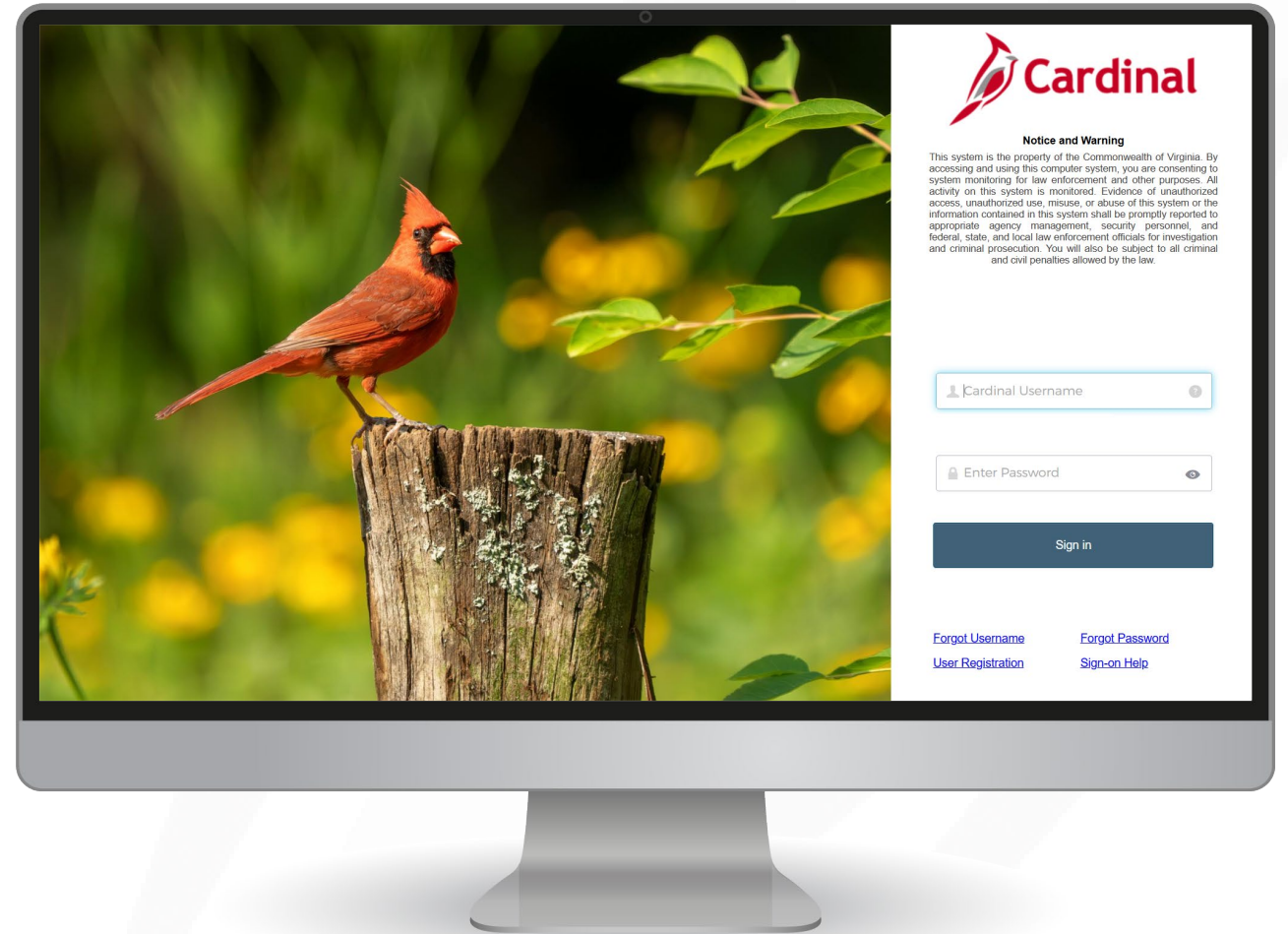
03

Live Demonstration

04

Wrap-Up and Q&A

A Fresh New Look



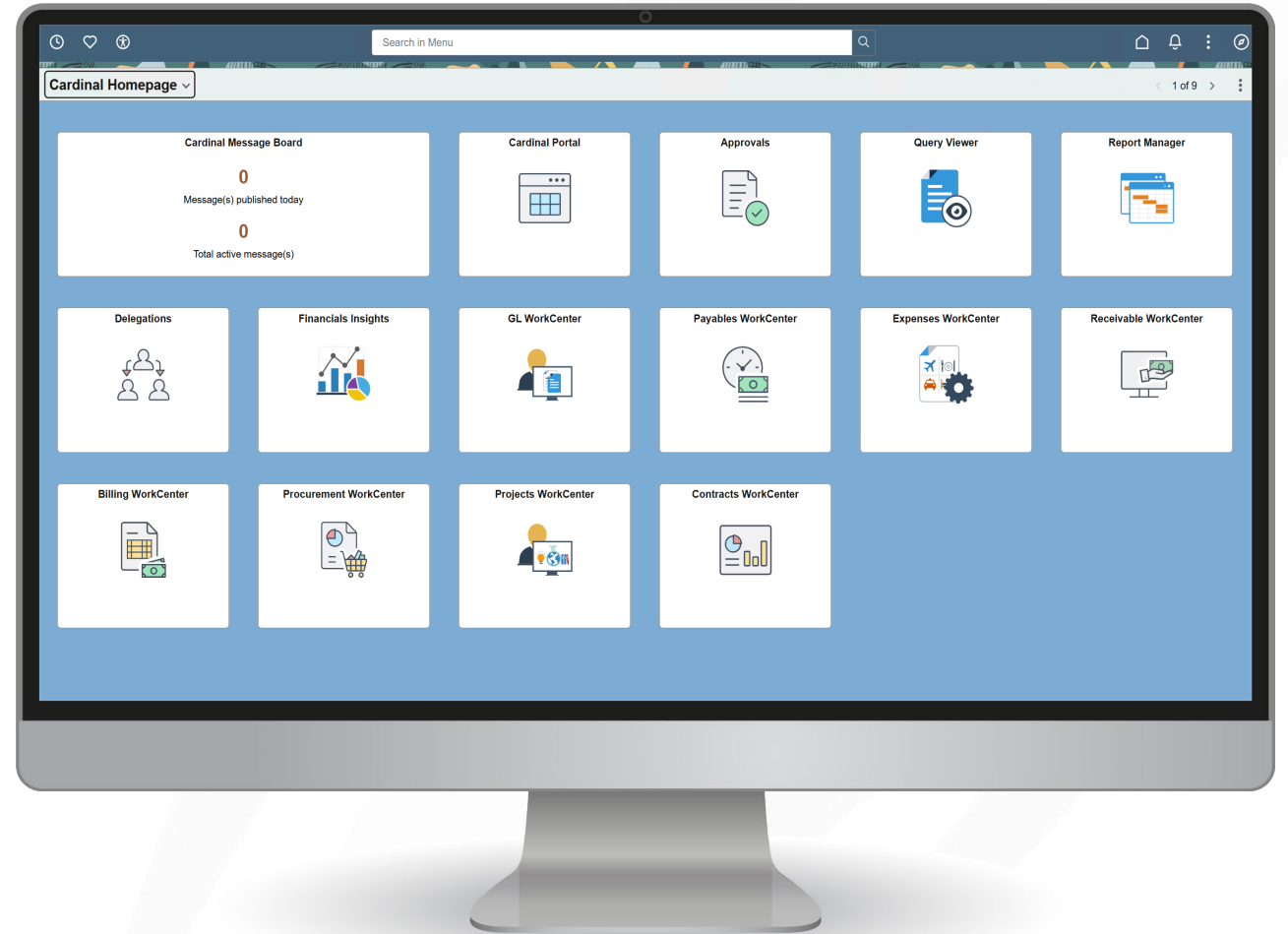
Current State

- **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**



Projects WorkCenter

The screenshot displays the Projects WorkCenter interface. At the top, there is a navigation bar with a back arrow, a clock icon, a heart icon, and a search bar labeled "Search in Menu". Below this is a "General Information" header. The left sidebar contains a menu with sections: "Links" (including Project Costing, Define Project General Info, Define Project Activities, Project Budget, and Other Links), "Queries" (including Projects Queries), and "Reports/Processes" (including Project Reports). The "Define Project General Info" option is highlighted. The main content area also has a "General Information" header and a "Find an Existing" section with a "Search Criteria" dropdown and a text input field. Below this is a "Recent Search" section. At the bottom of the main area are "Search" and "Clear" buttons. A large blue text box is overlaid on the right side of the interface.

General Information

Find an Existing

Search Criteria

Enter any information

Recent Search

Search

Clear

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.

Projects WorkCenter

The screenshot shows the Projects WorkCenter interface. At the top, there is a navigation bar with a back arrow, a clock icon, a heart icon, and a search bar labeled "Search in Menu". Below the navigation bar is a section titled "General Information". On the left side of this section is a sidebar menu with three main categories: "Links", "Queries", and "Reports/Processes". Each category has a dropdown arrow. Under "Links", there are items: "Project Costing", "Define Project General Info" (highlighted with an orange background), "Define Project Activities", "Project Budget", and "Other Links". Under "Queries", there is "Projects Queries". Under "Reports/Processes", there is "Project Reports". Three callout boxes with red lines pointing to the sidebar items provide explanations: "Links: Provide access to pages you visit frequently when performing your day-to-day tasks." (pointing to "Define Project General Info"), "Queries: Access to run the most frequently used Project queries directly from the WorkCenter." (pointing to "Projects Queries"), and "Reports/Processes: Quick access to the most common Project Reports." (pointing to "Project Reports"). The main content area on the right shows a search interface with a "Find an..." label, a "Search Criteria" section with a text input and a "Search" button, and a "Description" section with a "begins with" dropdown and a "Program" dropdown. There is also a "Detail Project" button.

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.

Contracts WorkCenter

The screenshot shows the Contracts WorkCenter interface. At the top, there is a navigation bar with icons for back, clock, heart, and user, and a search bar labeled "Search in Menu". Below this is a header "Contracts WorkCenter" with refresh and settings icons. The left sidebar contains a "My Work" section with "Billing Exceptions" (6 items) and "Revenue Exceptions" (6 items). The "Billing Exceptions" section is expanded, showing "Past Due Billing Events" (6 items), "Plans On Hold" (893 items), and "Invalid Bill Plans". The "Revenue Exceptions" section shows "Past Due Revenue Events" (6 items) and "Plans On Hold" (3 items). Below these are sections for "Links", "Queries", and "Reports/Processes". The main content area is titled "Past Due Billing Events" and shows a table with columns "Actions", "Business", and "Date". The table contains five rows, each with a menu icon, the value "50100", and a date. A large blue text box is overlaid on the right side of the interface.

The Contracts WorkCenter is a central hub for users with the Contract Manager role that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform Contracts related job functions.

Contracts WorkCenter

The screenshot shows the Contracts WorkCenter interface. The top navigation bar includes a search bar labeled "Search in Menu". The left sidebar contains a menu with the following items: "My Work" (expanded), "Billing Exceptions", "Past Due Billing Events" (6), "Plans On Hold" (893), "Invalid Bill Plans", "Revenue Exceptions" (expanded), "Past Due Revenue Events" (6), "Plans On Hold" (3), "Links", "Queries", and "Reports/Processes". The main content area displays a table of "Past Due Billing Events" with columns for "Business Unit", "Contract", "Contract Name", "Plan ID", "Plan Description", "Event Status", and "Event Date". The table contains several rows of data, including one for "Rte 60 Widening & Complete St" with a status of "Ready" and an event date of "12/13/2025".

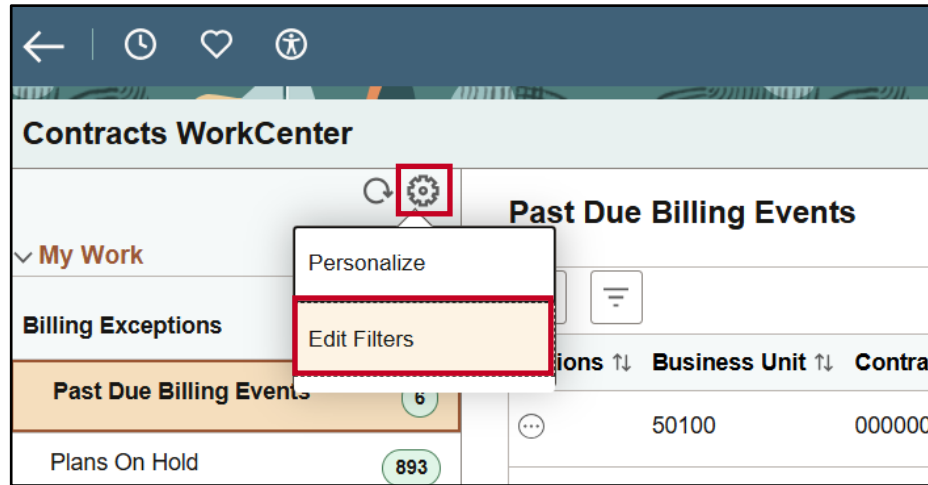
My Work: View of exceptions requiring review or correction.

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.

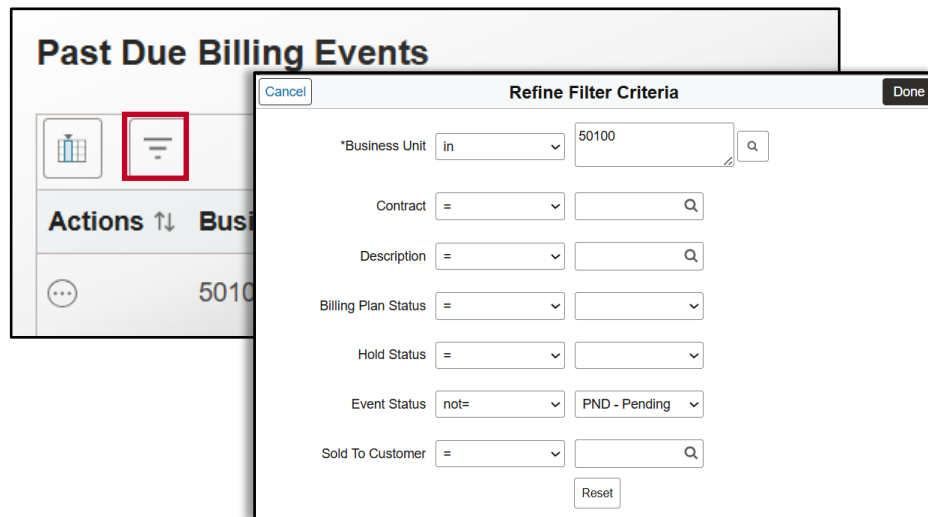
Reports/Processes: Quick access to the most common Contract Reports.

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.

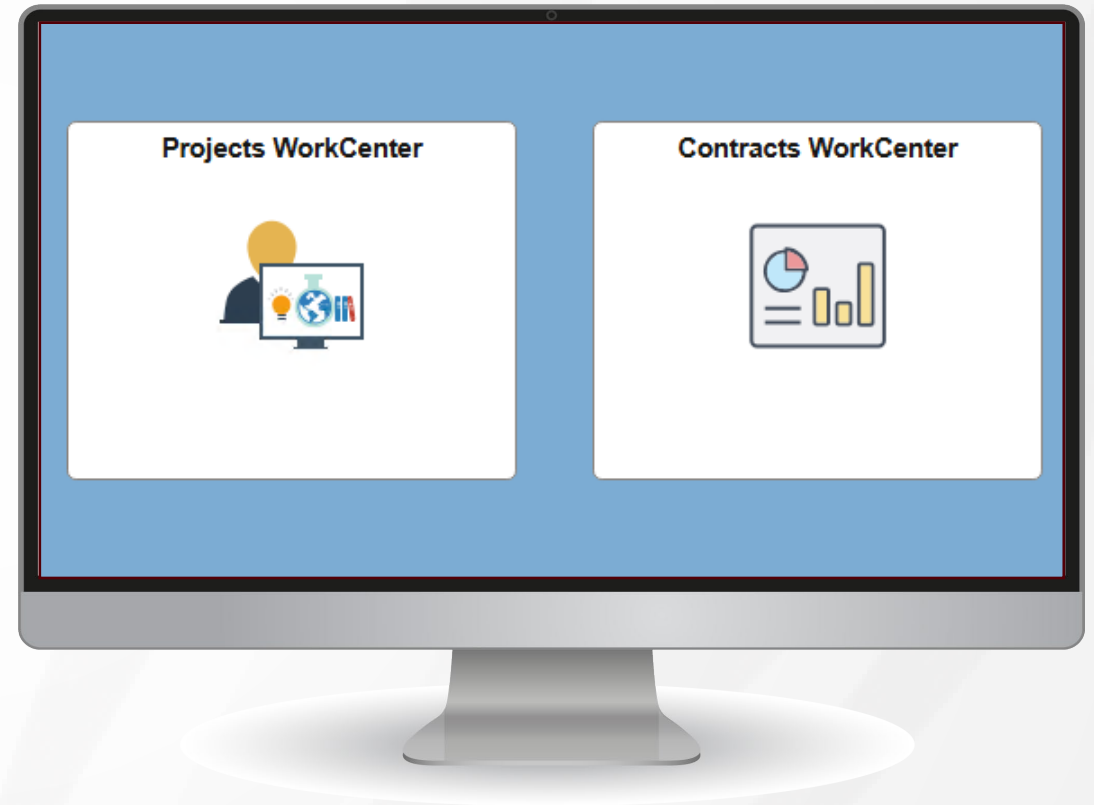


Set Temporary Filters

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.

LIVE DEMONSTRATION

Projects and Contracts WorkCenters





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!

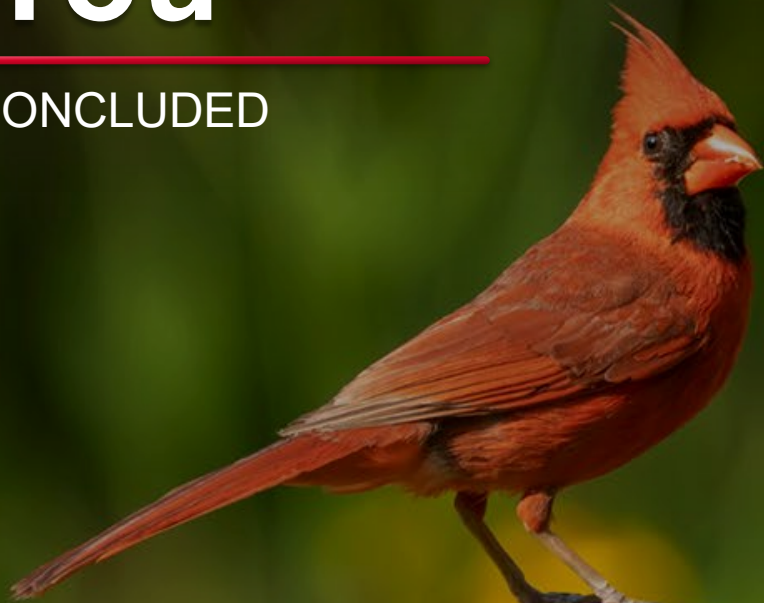
Scan the QR code or click the link below to take a brief survey.



<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.

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