

Mass Upload Process Overview

Agencies can load large volumes of data using an Excel-based mass upload tool. There are several Mass Upload tools, some of which require PPS or SPO to perform the upload, while others can be performed by Agencies.

From a Cardinal system standpoint, the Mass Upload process is the same, regardless of the upload. This Job Aid covers the process to complete the following Mass Uploads:

Mass Upload Description	Upload prepared by	Review by DHRM	Upload loaded by
Additional Pay	Agency	N/A	Agency
Dept-Posn Funding Mass Upload	Agency	N/A	Agency
Leave Balance Mass Upload	Agency	N/A	Agency
Managing Teleworker Employee Data Mass Upload	Agency	N/A	Agency
Performance Rating Mass Upload	Agency	N/A	Agency
Reward & Recognition Mass Upload	Agency	N/A	Agency
Job Data Mass Upload	Agency	DHRM	PPS
New Hire Mass Upload	Agency	DHRM	PPS
Position Mass Upload	Agency	DHRM	PPS
General Deduction Mass Upload	Agency	N/A	SPO

Note: As a reminder, positions cannot be deleted in the Cardinal system. Before adding new positions, validate that there are not inactive positions that can be re-purposed. DHRM will be checking each position mass upload against the agency's current vacant positions as a validation.

Note: Mass uploads that require DHRM approval (New hires, job data updates, and position data updates) must be uploaded to DHRM's "File Utility Upload" repository by the agency. If you do not have access to this repository, please submit the [DHRM Computer Applications Access Request Form](https://web1.dhrm.virginia.gov/itech/forms/DHRMUserAccessRegistrationform.pdf) (<https://web1.dhrm.virginia.gov/itech/forms/DHRMUserAccessRegistrationform.pdf>) to iHelp@dhrm.virginia.gov.



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Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1 ; after Steps 21). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



Agency Mass Uploads Loaded into Cardinal by the Agency

All files are located on the Cardinal Project website under Resources > HCM Update Templates

Mass Upload Description	Query Name	Template Name	Navigation to Upload File
Dept-Posn Funding Mass Upload	V_HR_Pos_Funding_Mass_Load	HR373_Department-Position_Funding_Mass_Upload.xlsm	Cardinal Interfaces > Mass Uploads > Department-Position Funding Mass Upload
Leave Balance Adj Mass Upload	V_TA_Leave_Bal_Adj	TA792_Leave_Balance_Adj_Mass_Upload.xlsm	Cardinal Interfaces > Mass Uploads > Leave Balance Adj Mass Upload Note: Agencies that use Cardinal Absence Management should use this Mass Upload when uploading recognition leave.
Managing Employee Teleworker Data Mass Upload	V_HR_TELEWORK_MASS_UPLOAD	HR520 Teleworker Mass Upload Template	Cardinal Interfaces > HR Interfaces > Mass Uploads > Teleworkers Mass Upload
Performance Rating Mass Upload	V_HR_Performance_Rating	HR371_Performance_Rating_Mass_Upload.xlsm	Cardinal Interfaces > HR Interfaces > Mass Uploads > Performance Rating Mass Upload



Cross Functional Job Aid

Performing a Mass Upload

Mass Upload Description	Query Name	Template Name	Navigation to Upload File
Rewards & Recognition Mass Upload	V_HR_Reward_Recogn_Mass_Data	HR409_Reward and Recognition_Mass_Upload.xlsm	<p>Cardinal Interfaces > HR Interfaces > Mass Uploads > Reward and Recognition Mass Upload</p> <p>Note:</p> <ul style="list-style-type: none">• Agencies that use Cardinal Absence Management should use this Mass Upload when uploading monetary recognition.• Agencies that do not use Cardinal Absence Management should use this Mass Upload for recognition leave and monetary recognition.
Additional Pay	V_Addlpay_Mass	RPY476_Add_Pay_QRY	Cardinal Interfaces > Mass Uploads > Additional Pay



Cross Functional Job Aid




Performing a Mass Upload


Run a Query

Each Agency runs a query to obtain current Cardinal data. The below is an example of how to run the query for Dept_Posn Funding Mass Upload.

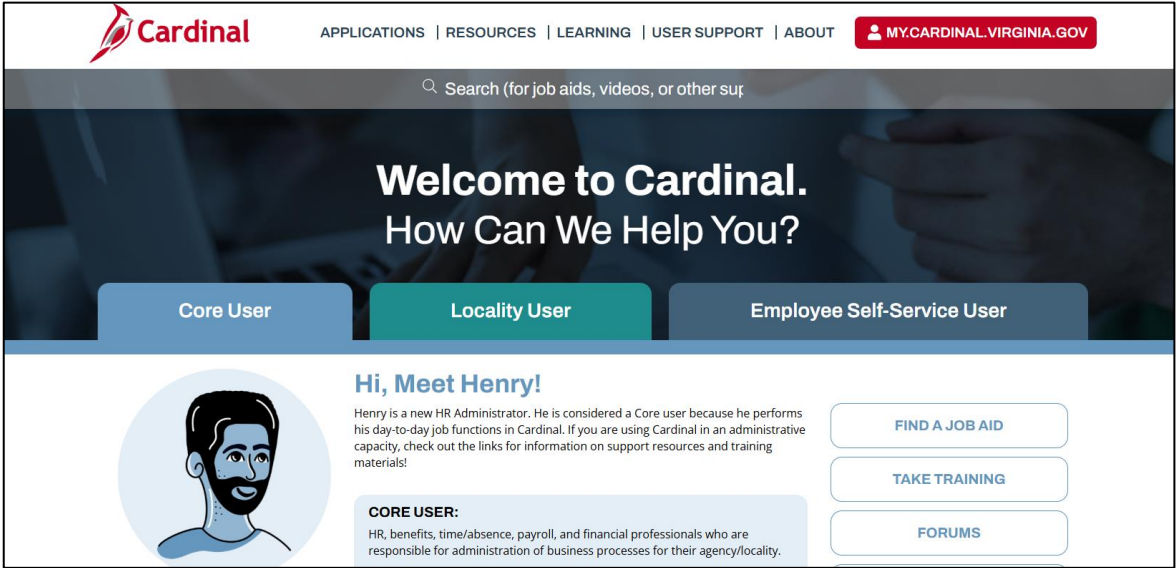
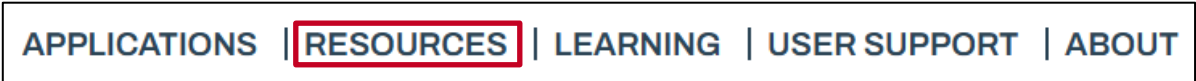
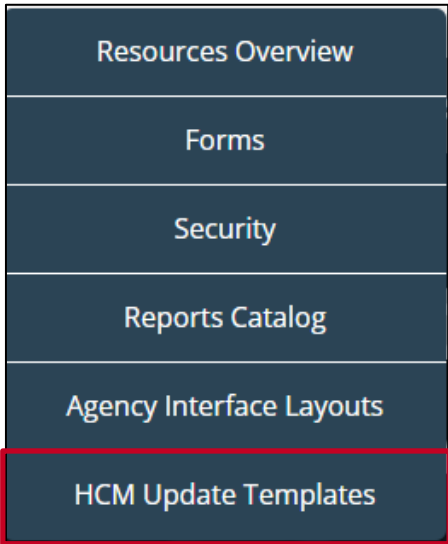
Step	Action																				
1.	Navigate to the Query Viewer Search page using the following path: NavBar > Menu > Reporting Tools > Query > Query Viewer																				
The Query Viewer Search page displays.																					
<div><div>< Cardinal Homepage</div><div>Query Viewer</div></div> <div><h3>Query Viewer</h3><p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p><div><div>*Search By</div><div>Query Name <div></div></div><div>begins with</div><div></div></div><div><div>Search</div><div>Advanced Search</div></div></div>																					
2.	Enter the Query Name in the Query Name field. Scenario: In this example, the name of the query is V_HR_POS_FUNDING_MASS_LOAD .																				
<div><div>*Search By</div><div>Query Name <div></div></div><div>begins with</div><div></div></div>																					
3.	Click the Search button.																				
<div><div>Search</div></div>																					
The Query Viewer Search page refreshes with the search results displayed at the bottom.																					
<div><div><h3>Query Viewer</h3><p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p><div><div>*Search By</div><div>Query Name <div></div></div><div>begins with</div><div>V_HR_POS_FUNDING_MASS_LOAD</div></div><div><div>Search</div><div>Advanced Search</div></div></div><div><h3>Search Results</h3><div><div>*Folder View</div><div>-- All Folders -- <div></div></div></div><div><div>Query</div><div><div><div></div><div></div></div><div>1-1 of 1 <div></div></div><div>View All</div></div><table><tr><th>Query Name</th><th>Description</th><th>Owner</th><th>Folder</th><th>Run to HTML</th><th>Run to Excel</th><th>Run to XML</th><th>Schedule</th><th>Definitional References</th><th>Add to Favorites</th></tr><tr><td>V_HR_POS_FUNDING_MASS_LOAD</td><td>Position Funding Query</td><td>Public</td><td></td><td>HTML</td><td>Excel</td><td>XML</td><td>Schedule</td><td>Lookup References</td><td>Favorite</td></tr></table></div></div></div>		Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites	V_HR_POS_FUNDING_MASS_LOAD	Position Funding Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites												
V_HR_POS_FUNDING_MASS_LOAD	Position Funding Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite												

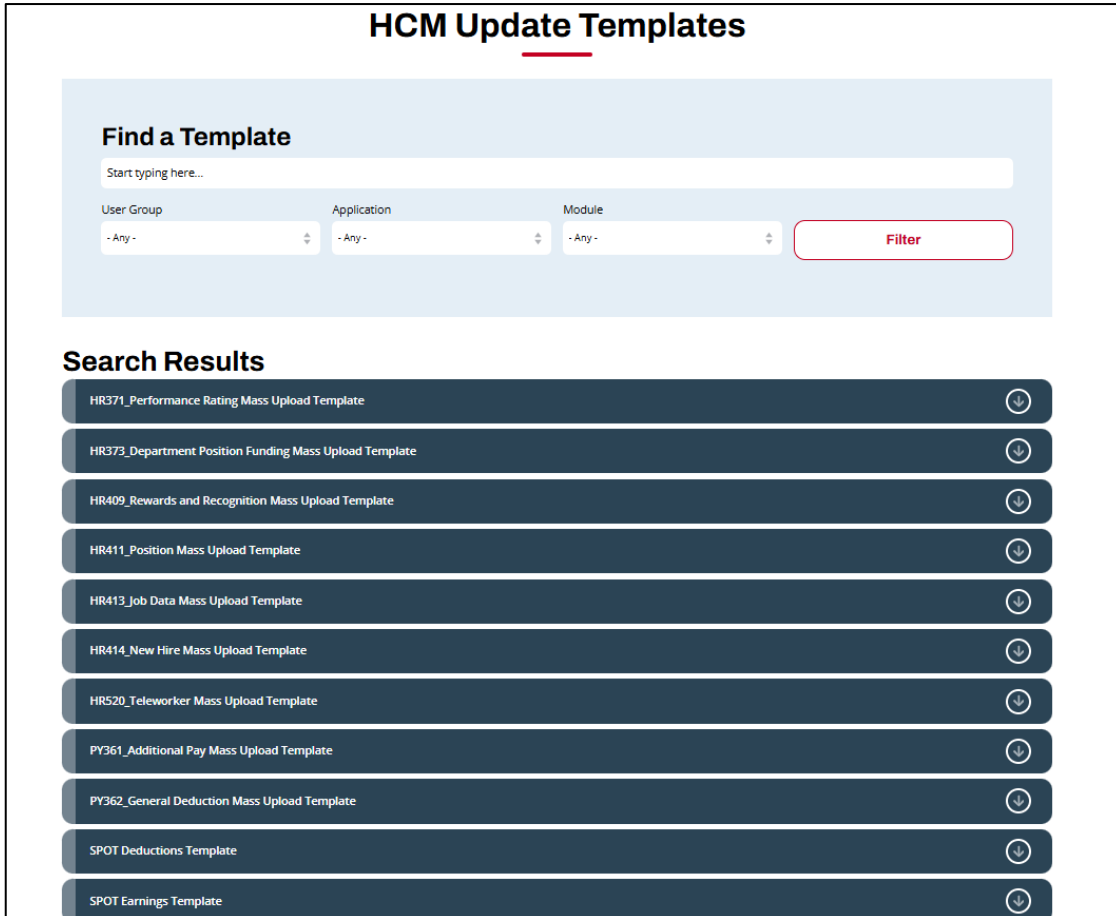

Step	Action																											
4.	<div>Click the link for the desired query output format (i.e., HTML, Excel, XML).</div> <div><table><tr><td>Run to HTML</td><td>Run to Excel</td><td>Run to XML</td><td>Schedule</td></tr><tr><td>HTML</td><td>Excel</td><td>XML</td><td>Schedule</td></tr></table></div>	Run to HTML	Run to Excel	Run to XML	Schedule	HTML	Excel	XML	Schedule																			
Run to HTML	Run to Excel	Run to XML	Schedule																									
HTML	Excel	XML	Schedule																									
<div>The Position Funding Query page is displays in a separate window.</div> <div><div>V_HR_POS_FUNDING_MASS_LOAD - Position Funding Query</div><div><div>*As Of Date</div><div>SETID (Leave Blank for All)</div><div>DEPTID (Leave Blank for All)</div><div>FISCAL YEAR (Blank for All)</div><div>View Results</div><table><tr><td>Row</td><td>Setid</td><td>Deptid</td><td>Fiscal Year</td><td>Bud Lvl Inc</td><td>Effective Date</td><td>Eff Status</td><td>Position Nbr</td><td>Disc_PCT</td><td>Fund Code</td><td>Chartfield2</td><td>Deptid CF</td><td>Chartfield1</td><td>Product</td><td>Class Fld</td><td>Operating Unit</td><td>Chartfield3</td><td>Budget Ref</td><td>Business Unit PC</td><td>Project ID</td><td>Activity ID</td><td>Resource Type</td><td>Resource Cat</td><td>Resource Sub Cat</td><td>Affiliate</td><td>Affiliate Intra1</td><td>Program Code</td></tr></table></div></div>		Row	Setid	Deptid	Fiscal Year	Bud Lvl Inc	Effective Date	Eff Status	Position Nbr	Disc_PCT	Fund Code	Chartfield2	Deptid CF	Chartfield1	Product	Class Fld	Operating Unit	Chartfield3	Budget Ref	Business Unit PC	Project ID	Activity ID	Resource Type	Resource Cat	Resource Sub Cat	Affiliate	Affiliate Intra1	Program Code
Row	Setid	Deptid	Fiscal Year	Bud Lvl Inc	Effective Date	Eff Status	Position Nbr	Disc_PCT	Fund Code	Chartfield2	Deptid CF	Chartfield1	Product	Class Fld	Operating Unit	Chartfield3	Budget Ref	Business Unit PC	Project ID	Activity ID	Resource Type	Resource Cat	Resource Sub Cat	Affiliate	Affiliate Intra1	Program Code		
<div><div>i</div></div>	<div>This page displays regardless of the selected output format. The field names may vary based upon the query; this example shows the fields for the V_HR_POS_FUNDING_MASS_LOAD query.</div>																											
5.	<div>Enter or select the As of Date using the As of Date Calendar icon.</div> <div><div>*As Of Date</div><div></div><div></div></div>																											
6.	<div>Enter or select the SETID using the SETID Look Up icon.</div> <div><div>SETID (Leave Blank for All)</div><div></div><div></div></div>																											
<div><div>i</div></div>	<div>Leave the SETID field blank if searching for all Business Units (A Business Unit is a 5 digit code such as “50100” or “15100”. The query only returns the Business Unit (BU) values for which the user has security access.)</div>																											
7.	<div>Enter or select the Department ID using the DEPTID Look Up icon.</div> <div><div>DEPTID (Leave Blank for All)</div><div></div><div></div></div>																											
<div><div>i</div></div>	<div>Leave the DEPTID field blank if all Department ID values are desired. The query only returns the Department IDs for which the user has security access.</div>																											
8.	<div>Click the View Results button.</div> <div><div>View Results</div></div>																											

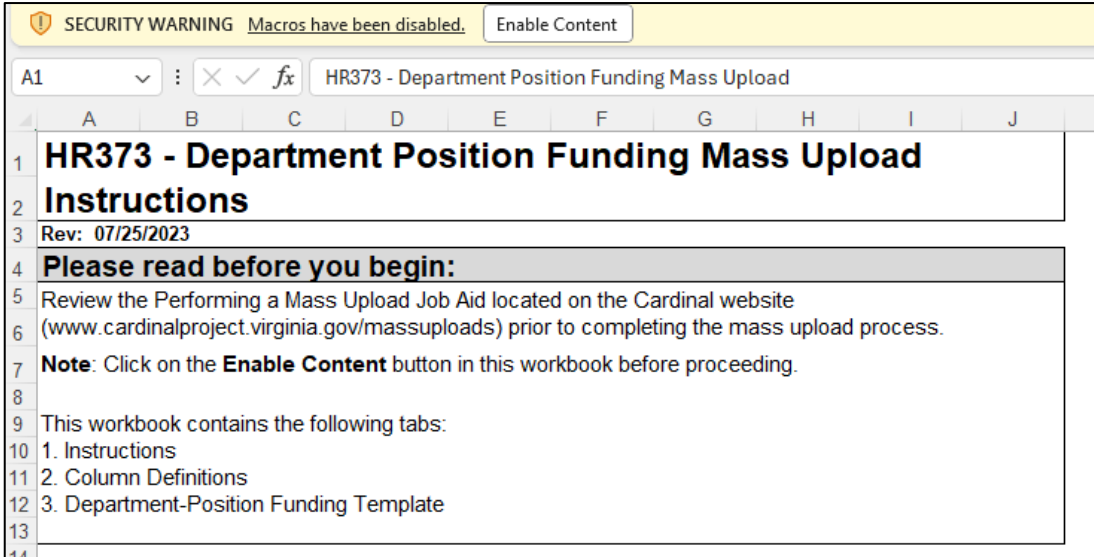
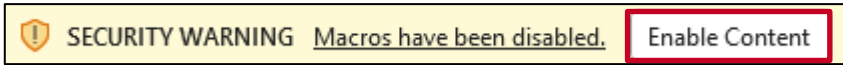

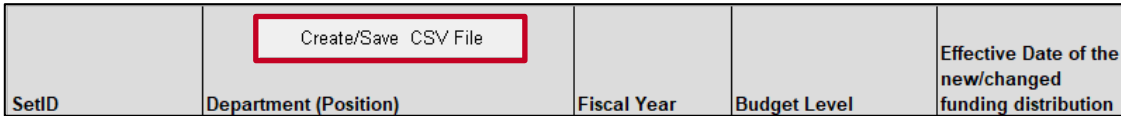

Step	Action																																																																	
	<p>The Position Funding Query page refreshes.</p> <div> <p>V_HR_POS_FUNDING_MASS_LOAD - Position Funding Query</p> <p>As Of Date <input type="text" value="07/01/2019"/> </p> <p>SETID (Leave Blank for All) <input type="text" value="15100"/> </p> <p>DEPTID (Leave Blank for All) <input type="text" value="95400"/> </p> <p>View Results</p> <p>Download results in : Excel SpreadSheet CSV Text File XML File (1 kb)</p> <p>View All</p> <table> <tr> <th>Row</th><th>Setid</th><th>Deptid</th><th>Fiscal Year</th><th>Bud Lvl Inc</th><th>Effective Date</th><th>Eff Status</th><th>Position Nbr</th><th>Disc_PCT</th><th>Fund Code</th><th>Chartfield2</th><th>Deptid CF</th><th>Chartfield</th></tr> <tr> <td>1</td><td>15100</td><td>95400</td><td>2020</td><td>D</td><td>07/01/2019</td><td>A</td><td></td><td>100.000</td><td>01000</td><td>737001</td><td>95400</td><td></td></tr> <tr> <td>2</td><td>15100</td><td>95400</td><td>2020</td><td>P</td><td>07/01/2019</td><td>A</td><td>DOA00006</td><td>100.000</td><td>01000</td><td>737002</td><td>94400</td><td></td></tr> <tr> <td>3</td><td>15100</td><td>95400</td><td>2020</td><td>P</td><td>07/01/2019</td><td>A</td><td>DOA00222</td><td>50.000</td><td>01000</td><td>737001</td><td>95400</td><td></td></tr> <tr> <td>4</td><td>15100</td><td>95400</td><td>2020</td><td>P</td><td>07/01/2019</td><td>A</td><td>DOA00222</td><td>50.000</td><td>01000</td><td>737004</td><td>95200</td><td></td></tr> </table> </div>	Row	Setid	Deptid	Fiscal Year	Bud Lvl Inc	Effective Date	Eff Status	Position Nbr	Disc_PCT	Fund Code	Chartfield2	Deptid CF	Chartfield	1	15100	95400	2020	D	07/01/2019	A		100.000	01000	737001	95400		2	15100	95400	2020	P	07/01/2019	A	DOA00006	100.000	01000	737002	94400		3	15100	95400	2020	P	07/01/2019	A	DOA00222	50.000	01000	737001	95400		4	15100	95400	2020	P	07/01/2019	A	DOA00222	50.000	01000	737004	95200	
Row	Setid	Deptid	Fiscal Year	Bud Lvl Inc	Effective Date	Eff Status	Position Nbr	Disc_PCT	Fund Code	Chartfield2	Deptid CF	Chartfield																																																						
1	15100	95400	2020	D	07/01/2019	A		100.000	01000	737001	95400																																																							
2	15100	95400	2020	P	07/01/2019	A	DOA00006	100.000	01000	737002	94400																																																							
3	15100	95400	2020	P	07/01/2019	A	DOA00222	50.000	01000	737001	95400																																																							
4	15100	95400	2020	P	07/01/2019	A	DOA00222	50.000	01000	737004	95200																																																							

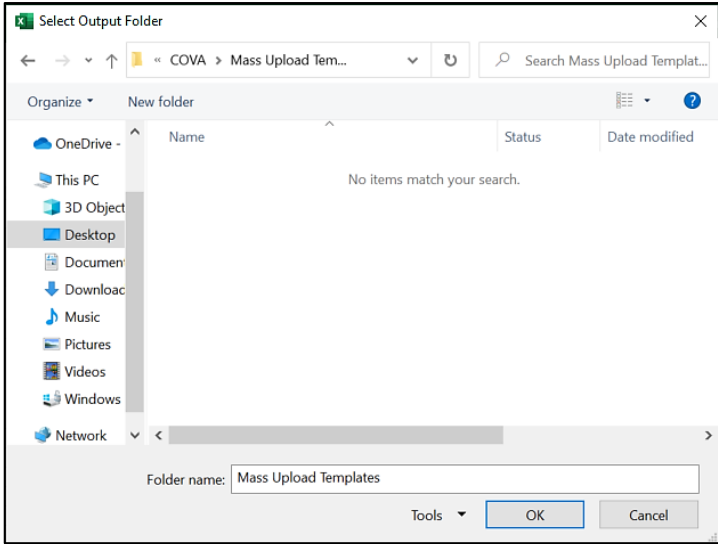



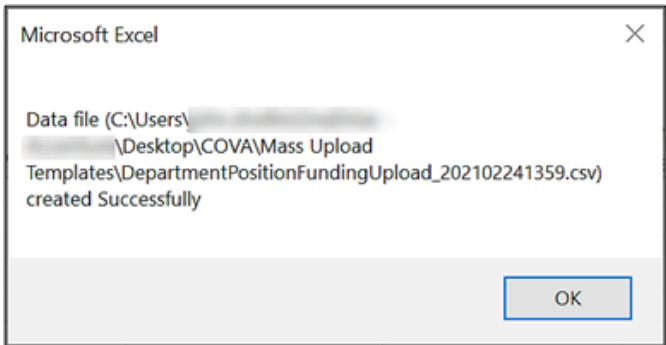
	<p>The above screenshot displays if the HTML Query Output Format link is selected. A download initiates if the Excel or XML Query Output Format link is selected. After the file is downloaded, select the file to open and view the query results. The information within the output is used to prepare the Mass Upload file.</p>
9.	<p>If desired, click the corresponding link to download a file version (i.e., Excel, CSV, XML) of the query.</p> <div> <p>Download results in : Excel SpreadSheet CSV Text File XML File (1 kb)</p> </div>

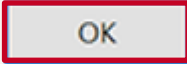
Prepare the Upload File

Step	Action
10.	<p>Navigate to the Cardinal Project Website by clicking the following link:</p> <p>https://www.cardinalproject.virginia.gov/</p>
<p>The Cardinal Project Website displays:</p> 	
11.	<p>Click on Resources.</p> 
12.	<p>Click on HCM Upload Templates.</p> 

Step	Action
	<p>The HCM Update Templates page displays.</p> <div data-bbox="259 375 1369 1285">  </div>
13.	<p>Locate and open the appropriate CSV Template file</p> <p>Scenario: The name of the file is HR373_Deparment_Position_Funding_Mass_Upload_Template.xlsm.</p>
	<p>Select the appropriate CSV Template file and download the blank template file.</p>

Step	Action
	<p>The appropriate CSV Template file opens in Excel.</p> 
14.	<p>When the excel file opens, click on Enable Content.</p> 
15.	<p>Enter the required data using the information within the query performed in the Run a Query section of this Job Aid.</p>
	<p>When copying the data from the query and into the applicable excel template, ensure that:</p> <ol style="list-style-type: none"> 1. The columns from the query and the template match and are aligned; 2. After copying the data, when pasting into the template, right click cell 2A and hover over the options under Paste Options until you find one of the following: Keep Text Only, Match Destination Formatting, or Values (any one of these options will function properly) and select it; 3. Ensure that only the rows that are being changed are copied over into the applicable excel template from the query. Providing data that contains no changes will result in the data failing to load into Cardinal. This will impact the error report.
16.	<p>Click the Create/Save CSV File.</p> 
	<p>The naming of the file can't be altered before uploading it to Cardinal and it will overwrite the previous upload document.</p>

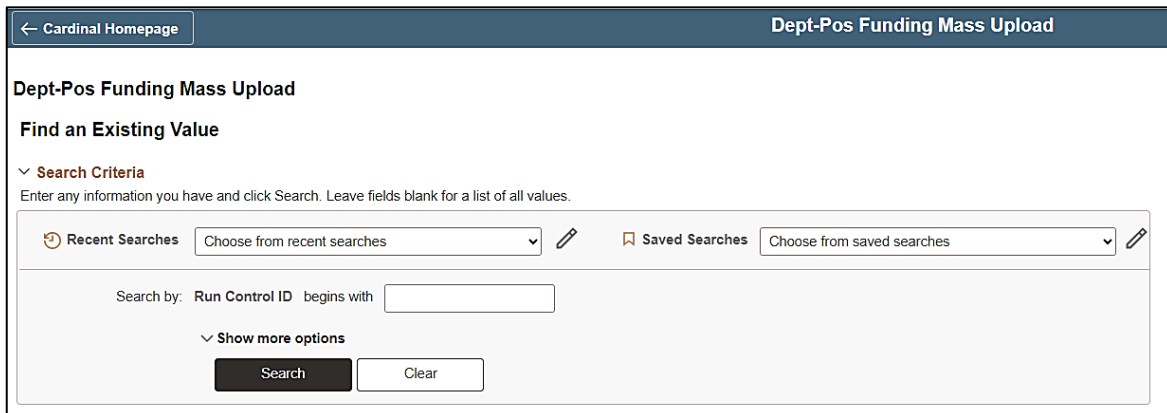
Step	Action
	<p>The Select Output Folder pop-up window displays.</p> 
17.	Navigate to the desired location.
	If the file contains Personal Information (i. e. Performance Ratings, Employee ID, Compensation) ensure the file is saved to a local secure folder.
18.	Click the OK button.
	
	The file is automatically named and saved in a CSV format after the OK button is clicked. Do not attempt to rename the file.
	<p>A message displays.</p> 
19.	Copy the file name for future use.

Step	Action
20.	<p data-bbox="289 327 552 361">Click the OK button.</p> <div data-bbox="293 380 534 478"></div>



Upload a File

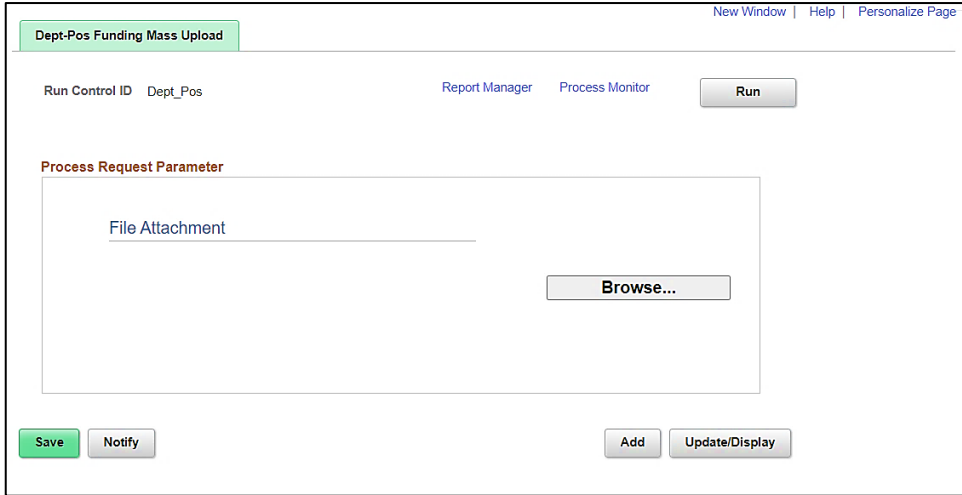

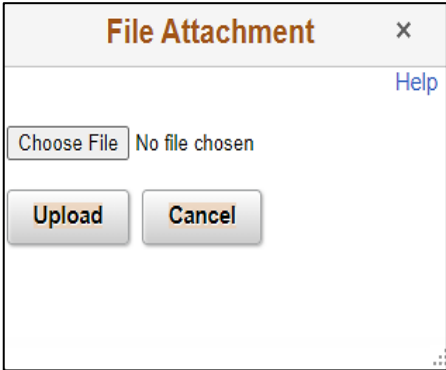

Step	Action
21.	<p>Navigate to the appropriate Mass Upload page using one of the following paths:</p> <p>Scenario: This example follows the Dept-Pos Funding Mass Upload.</p> <p>Dept-POS Funding Mass Upload:</p> <p>NavBar > Menu > Cardinal Interfaces > Mass Uploads > Dept-POS Funding Mass Upload</p> <p>Leave Balance Adj Mass Upload:</p> <p>NavBar > Menu Cardinal Interfaces > Mass Uploads > Leave Balance Adj Mass Upload</p> <p>Performance Rating Mass Upload:</p> <p>NavBar > Menu > Cardinal Interfaces > HR Interfaces > Mass Uploads > Performance Rating Mass Upload</p> <p>Reward and Recognition Mass Upload:</p> <p>NavBar > Menu > Cardinal Interfaces > HR Interfaces > Mass Uploads > Reward and Recognition Mass Upload</p> <p>Additional Pay Mass Upload:</p> <p>NavBar > Menu > Cardinal Interfaces > Mass Uploads > Additional Pay</p> <p>Managing Employee Teleworker Employee Data</p> <p>NavBar > Menu > Cardinal Interfaces > Mass Uploads > HR Interfaces > Mass Uploads > Teleworkers Mass Upload</p>

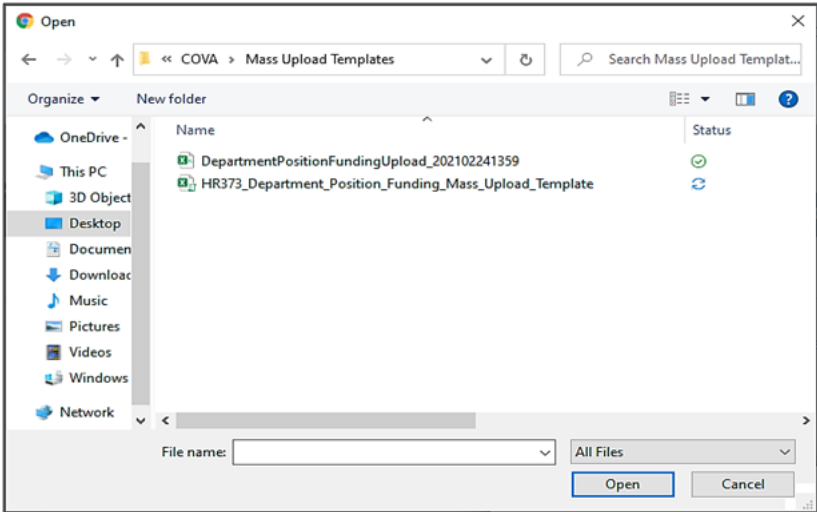

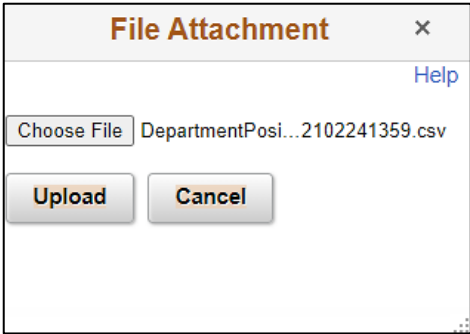

The **Dept-Pos Funding Mass Upload Find an Existing Value** page displays.





For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

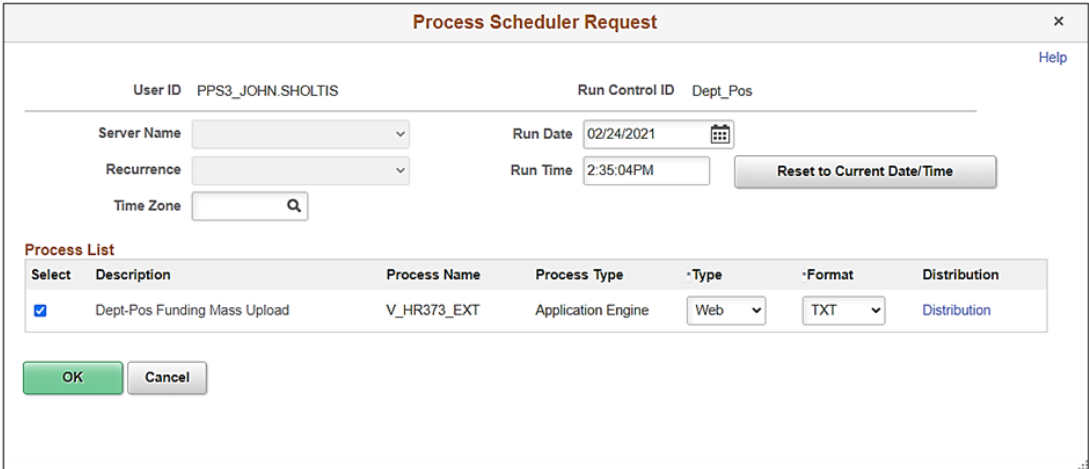
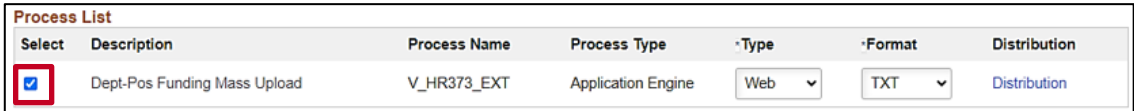

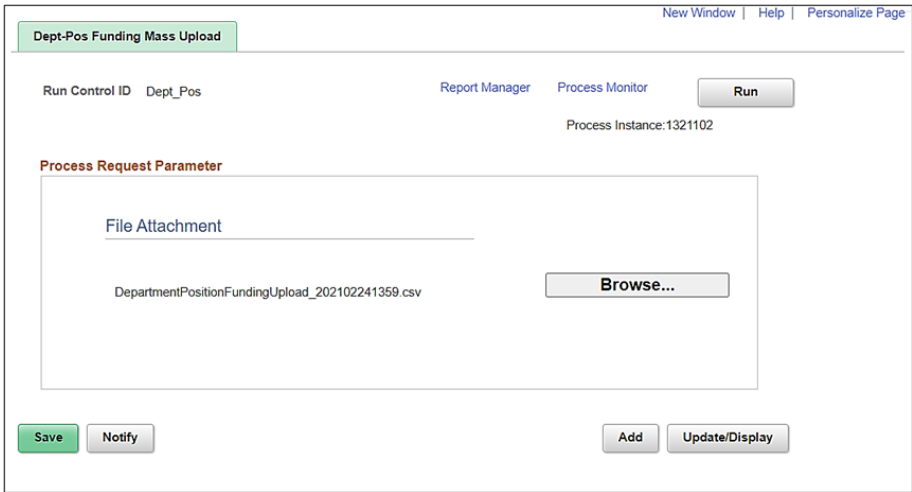
Step	Action
	<p>If an existing Run Control ID is known, proceed to Step 22.</p> <p>If an existing Run Control ID is not known, skip to Step 24.</p>
22.	<p>If an existing Run Control ID is known, enter the Run Control ID in the Run Control ID field.</p> <p>Search by: Run Control ID begins with <input type="text"/></p>
23.	<p>Click the Search button. Skip to Step 29.</p> <p>Search Advanced Search</p>
24.	<p>Click the Add a New Value tab.</p> <p>Find an Existing Value Add a New Value</p>
<p>The Add a New Value tab displays.</p> <div data-bbox="431 974 1190 1421"> <p>Dept-Pos Funding Mass Upload New Window Help</p> <p>Find an Existing Value Add a New Value</p> <p>Run Control ID <input type="text"/></p> <p>Add</p> <p>Find an Existing Value Add a New Value</p> </div>	
25.	<p>Enter the desired Run Control ID in the Run Control ID field.</p> <p>Run Control ID <input type="text"/></p>
	<p>A Run Control ID only needs to be added once and can be reused once added.</p>
26.	<p>Click the Add button.</p> <p>Add</p>

Step	Action
	<p>The Dept-Pos Funding Mass Upload page displays.</p> 
27.	<p>Click the Browse button.</p> 
	<p>The File Attachment page displays in a pop-up window.</p> 
28.	<p>Click the Choose File button.</p> 

Step	Action
	<p>The Open File window displays.</p> 
29.	<p>Navigate to and select the appropriate Mass Upload file saved during the Prepare the Upload File section of this Job Aid.</p> <p>Scenario: This example demonstrates the Department Position Funding Mass Upload.</p>
30.	<p>Click the Open button.</p> 
	<p>The File Attachment page returns.</p> 
31.	<p>Click the Upload button.</p> 
32.	<p>If an error message does not display, skip to Step 34.</p>

Step	Action
	<p>An Error Message page displays in a pop-up window if the selected file is not a CSV file.</p> 
33.	<p>Click the OK button.</p> 
34.	<p>Repeat Steps 25 – 29, ensuring to upload the template saved in a CSV format.</p> <p>The Dept-Pos Funding Mass Upload page refreshes.</p> 
35.	<p>Click the Run button.</p> 

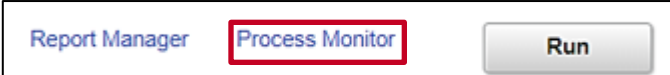
Verify the Upload File

Step	Action
	<p>The Process Scheduler Request page displays in a pop-up window.</p> 
36.	<p>Verify the Select checkbox is selected for the appropriate upload description. (Select the checkbox if it is not already selected).</p> 
37.	<p>Click the OK button.</p> 
	<p>The Dept-Pos Funding Mass Upload page returns.</p> 

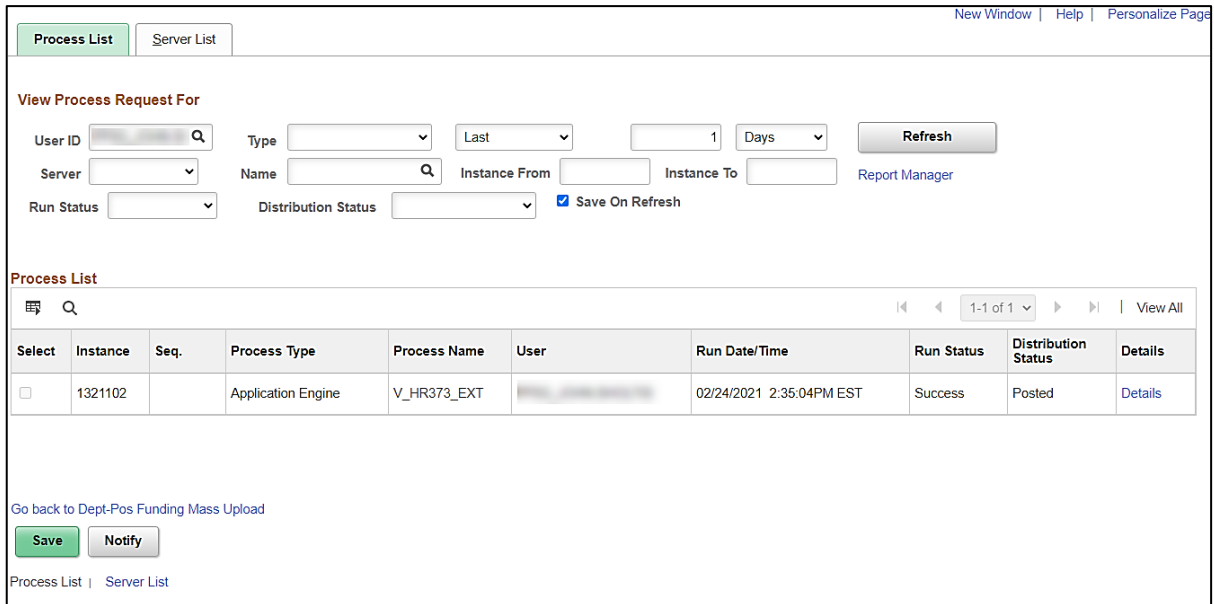


Cross Functional Job Aid

Performing a Mass Upload

Step	Action
38.	Click the Process Monitor link. 

The **Process Monitor** page displays with the **Process List** tab displayed by default.



Process List | Server List

View Process Request For

User ID Type Last 1 Days Refresh

Server Name Instance From Instance To Report Manager

Run Status Distribution Status ☒ Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1321102		Application Engine	V_HR373_EXT		02/24/2021 2:35:04PM EST	Success	Posted	Details

Go back to Dept-Pos Funding Mass Upload

Save Notify

Process List | Server List

39.	Click the Refresh button until the Run Status field updates to “ Success ” and the Distribution Status field updates to “ Posted ”.
-----	---

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1321102		Application Engine	V_HR373_EXT		02/24/2021 2:35:04PM EST	Success	Posted	Details

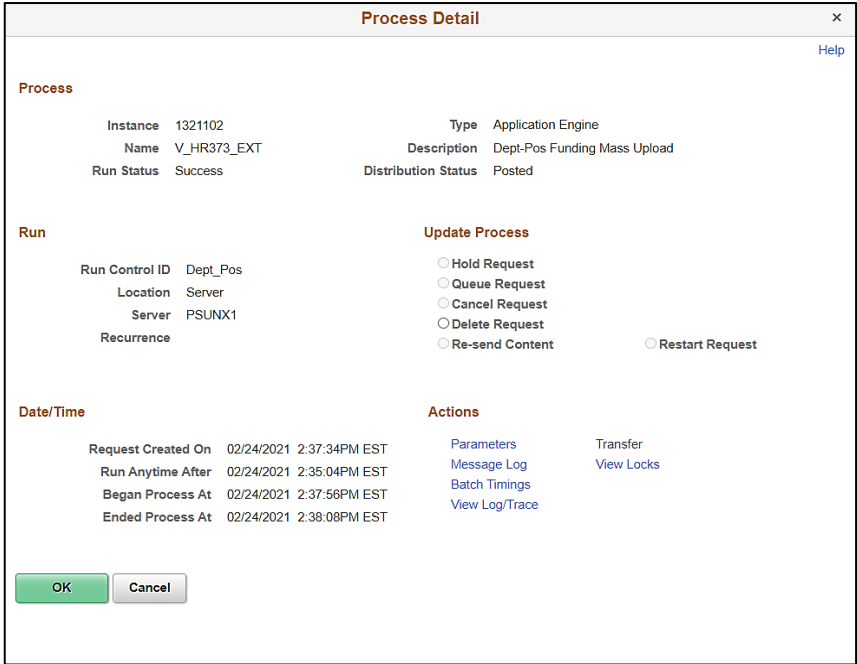

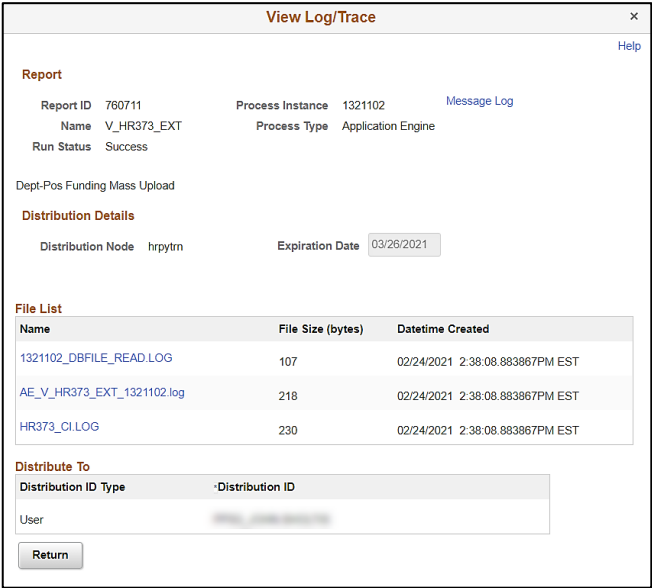
40.	Click the Details link.
-----	--------------------------------

Run Status	Distribution Status	Details
Success	Posted	Details



Cross Functional Job Aid

Performing a Mass Upload

Step	Action
	<p>The Process Detail page displays in a pop-up window.</p> 
41.	<p>Click the View Log/Trace link.</p> 
	<p>The View Log/Trace page displays.</p> 



Step	Action			
42.	<p>Click the link for the file with a “xxxx.log” extension.</p> <p>Scenario: The link is AE_V_HR373_EXT_1317850.log.</p> <table><tr><td>AE_V_HR373_EXT_1321102.log</td><td>218</td><td>02/24/2021 2:38:08.883867PM EST</td></tr></table>	AE_V_HR373_EXT_1321102.log	218	02/24/2021 2:38:08.883867PM EST
AE_V_HR373_EXT_1321102.log	218	02/24/2021 2:38:08.883867PM EST		

The **Error Log** page displays in a new tab. (The screenshots below depict two different error log views).

```
****HR414 New Hire Mass Upload Processing****
```


```
Total Number of Rows: 2
Number of Rows Successfully Processed: 1
Number of Rows with Errors: 1
```

```
****HR409 Rewards and Recognition Mass Upload Error Log****
```

```
Line Number Employee ID Empl_Rcd
2          00012298100 9
2          00012298100 9
3          00021291000 0
3          00021291000 0
3          00021291000 0
11         00900053500 0
11                                     (15,54) - The field {V_REWARD_DATA_CI.V_REWARD_ID(2).V_REWARD_AUTH(1).V_REWARD_PAY(1).AWARD_DATE} is required.
                                           You must enter a value for it before proceeding. (15,54)
11                                     (91,37) - Error saving Component Interface. {V_REWARD_DATA_CI} (91,37)
12         00900158900 0
12         00900158900 0
```


Correct Errors

The Agency that ran the file is notified of any errors through the Error Log.

Step	Action
1.	The Agency can create a new mass upload file with only the corrected lines, or enter the transaction online through an online data entry in Cardinal.
	To avoid duplicate transactions, the original file should not be re-run.



Cross Functional Job Aid

Performing a Mass Upload


Agency Mass Uploads Reviewed by DHRM and Loaded into Cardinal by PPS

Mass Upload Description	Query Name	Template Name	Navigation to Error Report
Job Data Mass Upload	V_HR_JOB_MASS_DATA_CHANGE	HR413_Job_Data_Mass_Upload.xlsm (File is located on the Cardinal Project website under Resources > HCM Update Templates)	
New Hire Mass Upload	There is no query for a New Hire Mass Upload, but the user will go straight to step 11 to download the template.	R1 - HR 414A = New_Hire_Mass_Upload with EEID. R2 - HR 414 = New_Hire_Mass_Upload without EEID. (File is located on the Cardinal Project website under Resources > HCM Update Templates)	
Position Mass Upload	V_HR_POSITION_MASS_DATA_CHANGE	HR411_Position_Mass_Upload.xlsm (File is located on the Cardinal Project website under Resources > HCM Update Templates)	

Run A Query

Step	Action
1.	Navigate to the Query Viewer Search page using the following path: NavBar > Menu > Reporting Tools > Query > Query Viewer

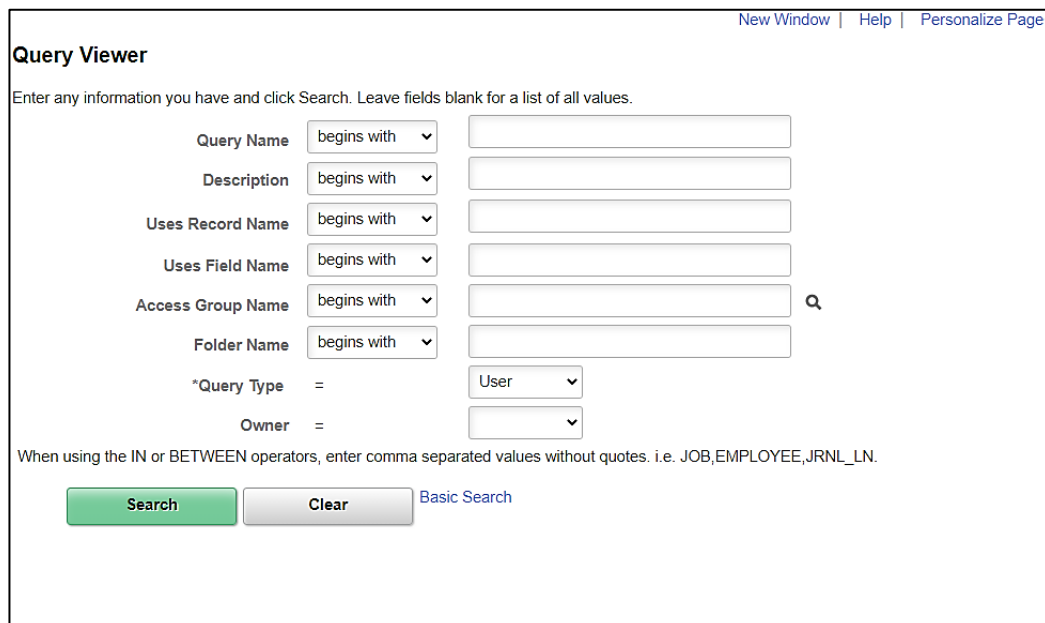
The **Query Viewer Search** page displays.



2.	Click the Advanced Search link.
----	--



The **Query Viewer Search** page refreshes.





Cross Functional Job Aid

Performing a Mass Upload

Step	Action
3.	<p>Enter the query's name in the Query Name field.</p> <p>Scenario: The query's name is "V_HR_JOB_MASS_DATA_CHANGE".</p> <p>Query Name <input type="text" value="begins with"/> <input type="text" value="V_HR_JOB_MASS_DATA_CHANGE"/></p>
4.	<p>Click the Search button.</p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/> Basic Search</p>

The **Query Viewer Search** page refreshes with the Search Results displayed at the bottom.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query

1-1 of 1 [View All](#)

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_HR_JOB_MASS_DATA_CHANGE	Job Mass Update query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

5.	<p>Click the link of the desired query output format (i.e., HTML, Excel or XML).</p> <p><input type="button" value="Run to HTML"/> <input type="button" value="Run to Excel"/> <input type="button" value="Run to XML"/></p> <p>HTML Excel XML</p>
----	--

The **Job Mass Update Query** page is displays in a separate window.






V_HR_JOB_MASS_DATA_CHANGE - Job Mass Update query

As of Date

Unit


Dept ID


Row	Business Unit	EmplId	Empl Rcd	Effective Date	Action	Action Reason	Position Nbr	EstabID	Employee Class	Paygroup	Employee Type	Tax Location	FICA Status	Job Std Hrs	State Comp Rate	ST Comp Freq
-----	---------------	--------	----------	----------------	--------	---------------	--------------	---------	----------------	----------	---------------	--------------	-------------	-------------	-----------------	--------------


Step	Action
	This page displays regardless of the selected output format. The field names may vary based upon the query; this example shows the fields for the V_HR_JOB_MASS_DATA_CHANGE query.
6.	Enter or select the As of Date using the As of Date Calendar icon. 
7.	Enter or select the Business Unit using the Business Unit Look Up icon. (A Business Unit is a 5 digit code such as 50100 or 15100). 
8.	Enter or select the Department ID using the Dept ID Look-Up icon. 
9.	Click the View Results button. 


The **Job Mass Update Query** page refreshes.

V_HR_JOB_MASS_DATA_CHANGE - Job Mass Update query

As of Date 

Unit 

Dept ID 



Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (222 kb)

[View All](#)

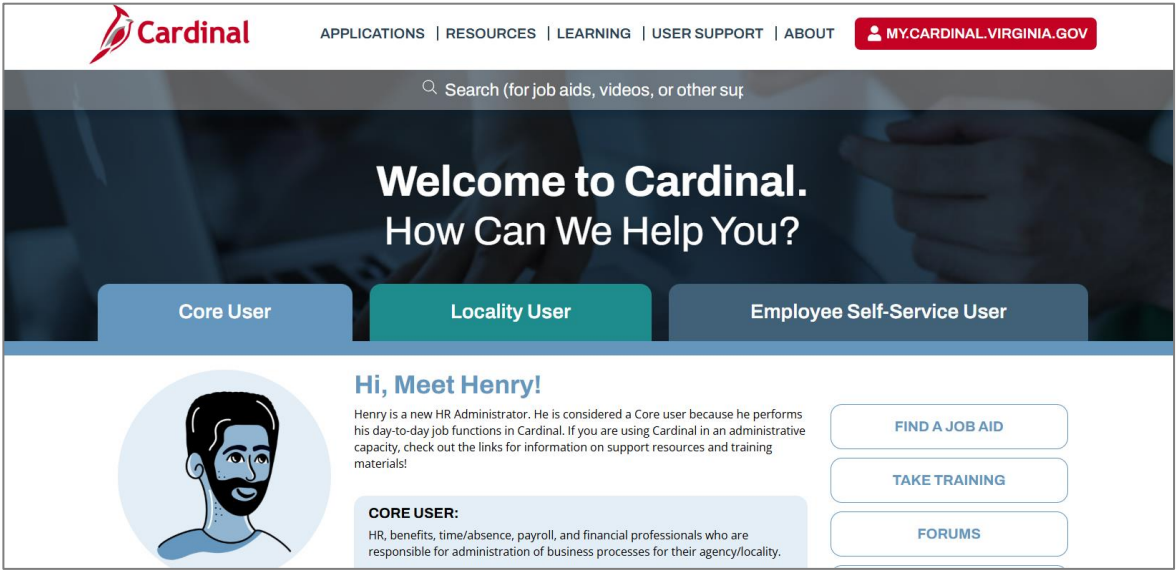

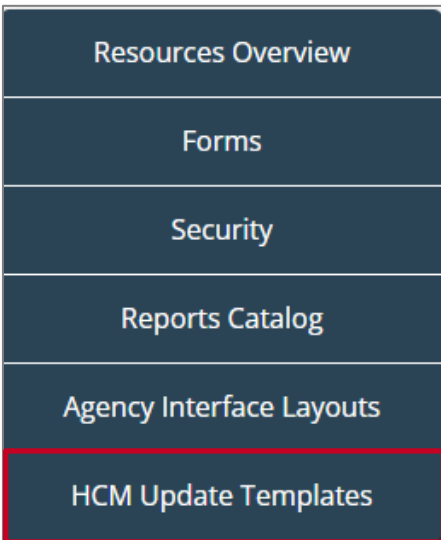
Row	Business Unit	EmplId	Empl Rcd	Effective Date	Action	Action Reason	Position Nbr	EstablD	Employee Class	Paygroup	Employee Type	Tax Location	FICA Status	Job Std Hrs	State Comp Rate	ST Comp Freq	Non State Comp Rate	Non ST Comp Freq	State Ben Comp Rate	State Ben Comp Freq	Hourly Comp Rate
1	10000			01/04/2017	HIR	CNV	SOVAA100	SOV	GNW	BW1	H	760	N	40.00	0.000000		0.000000		0.000000		24.038462
2	10000			10/31/2019	DTA	CNV	SOV90000	SOV	OTO	MTH	S	760	N	40.00	50000.000000	A	0.000000		0.000000		0.000000
3	10000			11/01/1997	HIR	CNV	SOVCLK24	SOV	ONC	MNP	S	760	N	40.00	50000.000000	A	0.000000		0.000000		0.000000
4	10000			07/01/1976	HIR	CNV	SOVWG117	SOV	GNW	BW1	H	760	N	40.00	0.000000		0.000000		0.000000		24.038462
5	10000			11/09/2019	DTA	CNV	SOVCLK29	SOV	ONC	SM1	S	760	N	40.00	50000.000000	A	0.000000		0.000000		0.000000




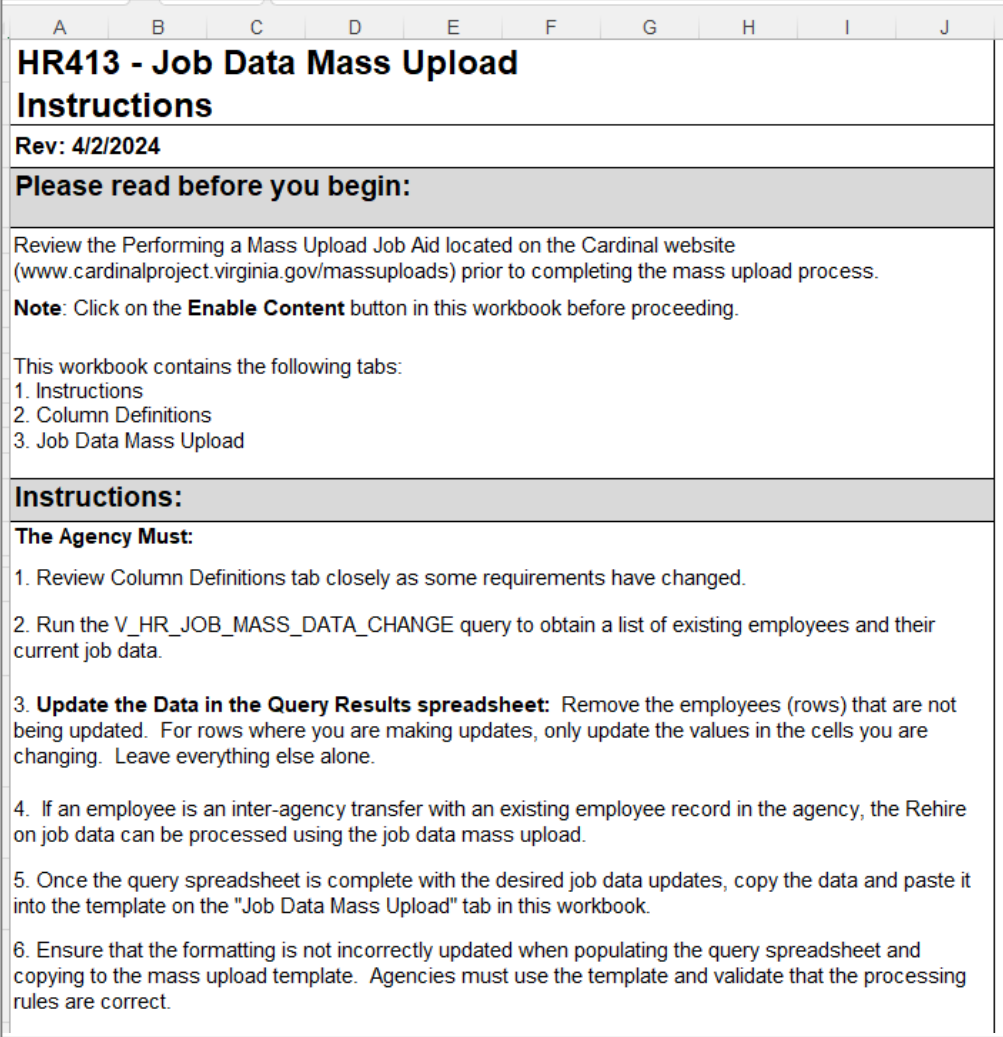
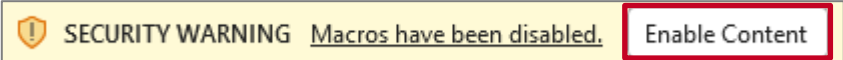
The above screenshot displays if the **HTML Query Output Format** link is selected. A download initiates if the **Excel** or **XML Query Output Format** link is selected. After the file is downloaded, select the file to open and view the query results. The information within the output is used to prepare the Mass Upload file.




Step	Action
10.	<p data-bbox="289 327 1494 394">If desired, click the corresponding link to download a file version (i.e., Excel, CSV, XML) of the query.</p> <div data-bbox="293 411 1300 480"><p data-bbox="305 428 565 464">Download results in :</p><div data-bbox="581 411 1166 480"><a data-bbox="586 428 824 464" href="#">Excel SpreadSheet <a data-bbox="846 428 1013 464" href="#">CSV Text File <a data-bbox="1034 428 1154 464" href="#">XML File</div>(222 kb)</div>

Prepare the Upload File


Step	Action
11.	<p>Navigate to the Cardinal Project Website by clicking the following link:</p> <p>https://www.cardinalproject.virginia.gov/</p>
<p>The Cardinal Project Website displays:</p> 	
12.	<p>Click on Resources.</p> 
13.	<p>Click on the HCM Upload Templates.</p> 

Step	Action																						
	Select the appropriate CSV Template file and download the blank template file.																						
<p>The HCM Update Templates page displays.</p> <div data-bbox="259 495 1369 1407"> <h3>HCM Update Templates</h3> <div> <h4>Find a Template</h4> <input type="text" value="Start typing here..."/> <div> <div>User Group</div> <div>Application</div> <div>Module</div> </div> <div> <div>- Any -</div> <div>- Any -</div> <div>- Any -</div> </div> <div>Filter</div> </div> <h4>Search Results</h4> <table> <tr><td>HR371_Performance Rating Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR373_Department Position Funding Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR409_Rewards and Recognition Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR411_Position Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR413_Job Data Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR414_New Hire Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR520_Teleworker Mass Upload Template</td><td>⬇</td></tr> <tr><td>PY361_Additional Pay Mass Upload Template</td><td>⬇</td></tr> <tr><td>PY362_General Deduction Mass Upload Template</td><td>⬇</td></tr> <tr><td>SPOT Deductions Template</td><td>⬇</td></tr> <tr><td>SPOT Earnings Template</td><td>⬇</td></tr> </table> </div>		HR371_Performance Rating Mass Upload Template	⬇	HR373_Department Position Funding Mass Upload Template	⬇	HR409_Rewards and Recognition Mass Upload Template	⬇	HR411_Position Mass Upload Template	⬇	HR413_Job Data Mass Upload Template	⬇	HR414_New Hire Mass Upload Template	⬇	HR520_Teleworker Mass Upload Template	⬇	PY361_Additional Pay Mass Upload Template	⬇	PY362_General Deduction Mass Upload Template	⬇	SPOT Deductions Template	⬇	SPOT Earnings Template	⬇
HR371_Performance Rating Mass Upload Template	⬇																						
HR373_Department Position Funding Mass Upload Template	⬇																						
HR409_Rewards and Recognition Mass Upload Template	⬇																						
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HR520_Teleworker Mass Upload Template	⬇																						
PY361_Additional Pay Mass Upload Template	⬇																						
PY362_General Deduction Mass Upload Template	⬇																						
SPOT Deductions Template	⬇																						
SPOT Earnings Template	⬇																						
15.	<p>Locate and open the appropriate CSV Template file.</p> <p>Scenario: The name of the file is HR413_Job_Data_Mass_Upload_Template.</p>																						

Step	Action
	<p>The appropriate CSV Template file displays in Excel.</p> 
16.	<p>When the excel file opens, click on Enable Content.</p> 
17.	<p>Enter the required data using the information within the query performed in the Run a Query section of this Job Aid.</p>

Step	Action												
	<p>When copying the data from the query and into the applicable excel template, ensure that:</p> <ol style="list-style-type: none">1. The columns from the query and the template match and are aligned;2. After copying the data, when pasting into the template, right click cell 2A and hover over the options under Paste Options until you find one of the following: Keep Text Only, Match Destination Formatting, or Values (any one of these options will function properly) and select it;3. Ensure that only the rows that are being changed are copied over into the applicable excel template from the query. Providing data that contains no changes will result in the data failing to load into Cardinal. This will impact the error report. <p>When you save the file, the extension of the file for Position Upload, Job Data Upload or New Hire Upload MUST be XLSM. For this example, the name of the file is HR414_Job_Data_Mass_Upload_Template.xlsm.</p>												
18.	<p>Click the Create/Save CSV File.</p> <table><tr><td></td><td>Create/Save CSV File</td><td></td><td></td><td></td><td></td></tr><tr><td>Employee ID</td><td>Employee Rcd Number</td><td>Effective Date</td><td>Action</td><td>Action Reason</td><td>Position Number</td></tr></table>		Create/Save CSV File					Employee ID	Employee Rcd Number	Effective Date	Action	Action Reason	Position Number
	Create/Save CSV File												
Employee ID	Employee Rcd Number	Effective Date	Action	Action Reason	Position Number								
	<p>Mass uploads that require DHRM approval (New hires, job data updates, and position data updates) must be uploaded to DHRM's "File Utility Upload" repository by the agency. If you do not have access to this repository, please submit the DHRM Computer Applications Access Request Form (https://web1.dhrm.virginia.gov/itech/forms/DHRMUserAccessRegistrationform.pdf) to iHelp@dhrm.virginia.gov.</p>												
19.	<p>Send an email to iHelp@dhrm.virginia.gov providing notification that there is a file in the secure file repository for review and approval.</p>												
	<p>After the mass upload has been reviewed by DHRM, DHRM will place the file in a secure folder on the Change Network (CN) SharePoint site. DHRM will create a VCCC ticket for PPS to process the mass upload.</p>												

Correct Errors

Step	Action
1.	After PPS runs the file, they will provide the error log to the Agency with a copy to DHRM.
2.	Agency Administrators take the necessary actions to correct all identified errors. In the event of errors, only the line(s) containing an error(s) will error out.
3.	The Agency can create a new mass upload file with only the corrected lines, or enter the transaction online through an online data entry in Cardinal.
	To avoid duplicate transactions, the original file should not be re-run



Agency Mass Uploads Loaded into Cardinal by SPO

General Deduction Mass Upload – Run a Query

Step	Action
1.	Navigate to the Query Viewer Search page using the following path: NavBar > Menu > Reporting Tools > Query > Query Viewer

The **Query Viewer Search** page displays.

2.	Click the Advanced Search link.
----	--


The **Query Viewer Search** page refreshes.


Step	Action														
3.	<p>Enter the Query Name in the Query Name field.</p> <p>Scenario: The name of the query is V_GENL_DEDUCTION_MASS.</p> <div><div>Query Name</div><div>begins with</div><div></div></div>														
4.	<p>Click the Search button.</p> <div><div>Search</div><div>Clear</div><div>Basic Search</div></div>														
<p>The Query Viewer Search page refreshes with the search results displayed at the bottom.</p> <div><div><div>New Window Help Personalize</div><div><div>Query Viewer</div><div>Enter any information you have and click Search. Leave fields blank for a list of all values.</div><div><div><div>Query Name</div><div>begins with</div><div>V_GENL_DEDUCTION_MASS</div></div><div><div>Description</div><div>begins with</div><div></div></div><div><div>Uses Record Name</div><div>begins with</div><div></div></div><div><div>Uses Field Name</div><div>begins with</div><div></div></div><div><div>Access Group Name</div><div>begins with</div><div></div></div><div><div>Folder Name</div><div>begins with</div><div></div></div><div><div>*Query Type</div><div>=</div><div>User</div></div><div><div>Owner</div><div>=</div><div></div></div></div><div>When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.</div><div><div>Search</div><div>Clear</div><div>Basic Search</div></div><div><div>Search Results</div><div><div>*Folder View</div><div>-- All Folders --</div></div><div><div>Query</div><div><div><div></div><div></div></div><table><tr><th>Query Name</th><th>Description</th><th>Owner</th><th>Folder</th><th>Run to HTML</th><th>Run to Excel</th><th>Run to XML</th></tr><tr><td>V_GENL_DEDUCTION_MASS</td><td>General Deduction Query</td><td>Public</td><td></td><td>HTML</td><td>Excel</td><td>XML</td></tr></table></div></div></div></div></div></div>		Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	V_GENL_DEDUCTION_MASS	General Deduction Query	Public		HTML	Excel	XML
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML									
V_GENL_DEDUCTION_MASS	General Deduction Query	Public		HTML	Excel	XML									
5.	<p>Click the link of the desired query output format (i.e., HTML, Excel, XML).</p> <div><div><div>Run to HTML</div><div>Run to Excel</div><div>Run to XML</div></div><div><div>HTML</div><div>Excel</div><div>XML</div></div></div>														


Step	Action
------	--------

The **General Deduction Query** page is displays in a separate window.

V_GENL_DEDUCTION_MASS - General Deduction Query

Company 

General Deduction Code 

As of Date 

View Results

Row	Employee ID	Company	General Deduction Code	Effective Date	Ded Calc Method	Deduction Amount	Deduction Rate/Percent	Deduction End Date	Deduction Goal Amount	Deduction Goal Balance
-----	-------------	---------	------------------------	----------------	-----------------	------------------	------------------------	--------------------	-----------------------	------------------------


6. Enter or select the appropriate Company using the **Company Look Up** icon.

Company 



Leave the **Company** field blank to view all Company values. The query only returns the Company values for which the user has security access.

7. Enter or select the appropriate General Deduction code using the **General Deduction Code Look Up** icon.

General Deduction Code 

8. Enter or select the appropriate As of Date using the **As of Date Calendar** icon.


As of Date 


9. Click the **View Results** button.


View Results

The **General Deduction Query** page refreshes.

V_GENL_DEDUCTION_MASS - General Deduction Query

Company 

General Deduction Code 


As of Date 

View Results

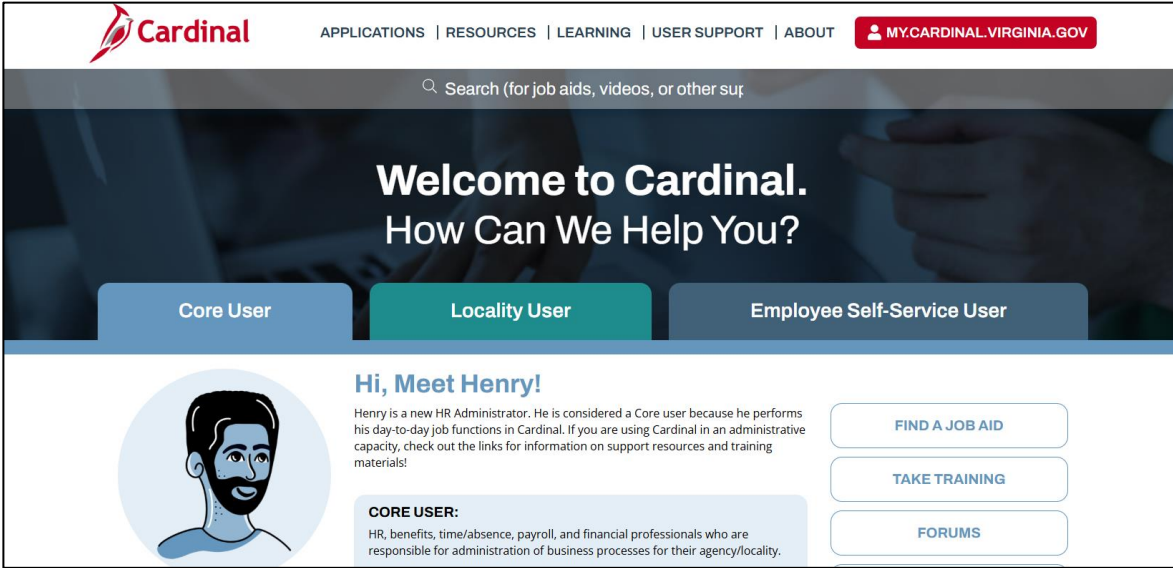
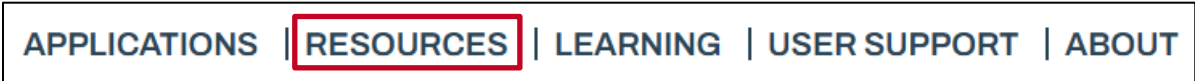
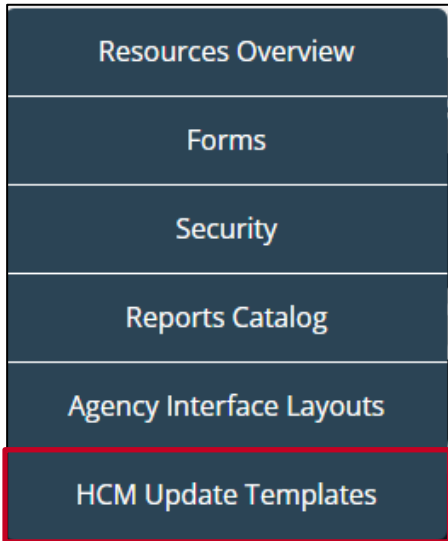
Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)


View All First 1-5 of 5 Last


Row	Employee ID	Company	General Deduction Code	Effective Date	Ded Calc Method	Deduction Amount	Deduction Rate/Percent	Deduction End Date	Deduction Goal Amount	Deduction Goal Balance
1		ABC	OPTLIF	09/01/2019	Flat Amount	16.23	0.000		0.00	0.00
2		ABC	OPTLIF	01/01/2016	Flat Amount	12.08	0.000		0.00	0.00
3		ABC	OPTLIF	11/01/2019	Flat Amount	6.27	0.000		0.00	0.00
4		ABC	OPTLIF	10/25/2019	Flat Amount	8.00	0.000	12/31/2019	0.00	0.00
5		ABC	OPTLIF	10/25/2019	Flat Amount	8.00	0.000		0.00	0.00


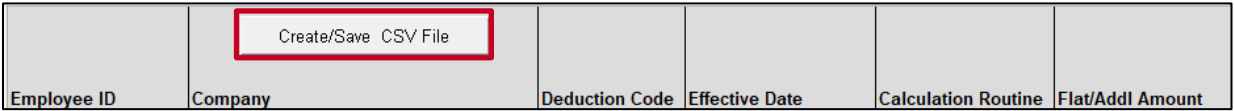

Step	Action
	The above screenshot displays if the HTML Query Output Format link is selected. A download initiates if the Excel or XML Query Output Format link is selected. After the file is downloaded, select the file to open and view the query results. The information within the output is used to prepare the Mass Upload file.

Prepare the Upload File

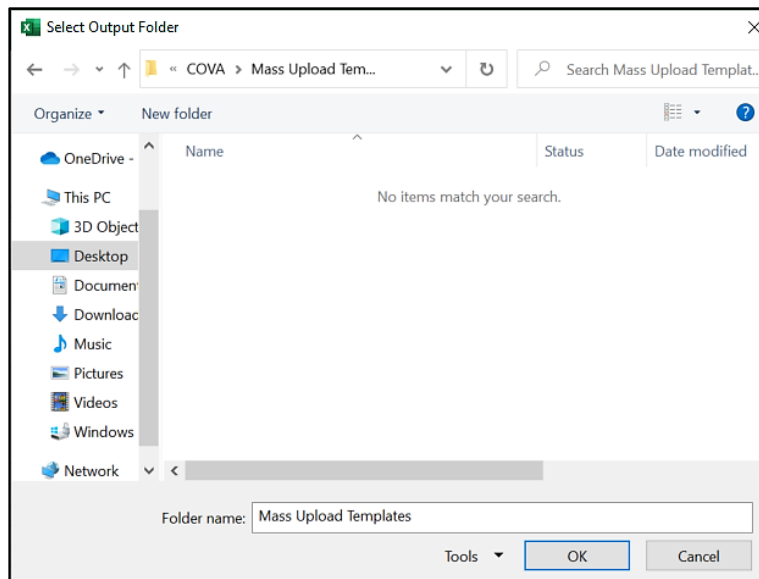
Step	Action
10.	<p>Navigate to the Cardinal Project Website by clicking the following link:</p> <p>https://www.cardinalproject.virginia.gov/</p>
<p>The Cardinal Project Website displays:</p> 	
11.	<p>Click on Resources.</p> 
12.	<p>Click on the HCM Upload Templates.</p> 

Step	Action																						
	Select the appropriate CSV Template file and download the blank template file.																						
<p>The HCM Update Templates page displays.</p> <div data-bbox="259 491 1367 1400"> <h3>HCM Update Templates</h3> <div> <h4>Find a Template</h4> <input type="text" value="Start typing here..."/> <div> <div>User Group</div> <div>Application</div> <div>Module</div> </div> <div> <div>- Any -</div> <div>- Any -</div> <div>- Any -</div> </div> <div>Filter</div> </div> <h4>Search Results</h4> <table> <tr><td>HR371_Performance Rating Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR373_Department Position Funding Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR409_Rewards and Recognition Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR411_Position Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR413_Job Data Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR414_New Hire Mass Upload Template</td><td>⬇</td></tr> <tr><td>HR520_Teleworker Mass Upload Template</td><td>⬇</td></tr> <tr><td>PY361_Additional Pay Mass Upload Template</td><td>⬇</td></tr> <tr><td>PY362_General Deduction Mass Upload Template</td><td>⬇</td></tr> <tr><td>SPOT Deductions Template</td><td>⬇</td></tr> <tr><td>SPOT Earnings Template</td><td>⬇</td></tr> </table> </div>		HR371_Performance Rating Mass Upload Template	⬇	HR373_Department Position Funding Mass Upload Template	⬇	HR409_Rewards and Recognition Mass Upload Template	⬇	HR411_Position Mass Upload Template	⬇	HR413_Job Data Mass Upload Template	⬇	HR414_New Hire Mass Upload Template	⬇	HR520_Teleworker Mass Upload Template	⬇	PY361_Additional Pay Mass Upload Template	⬇	PY362_General Deduction Mass Upload Template	⬇	SPOT Deductions Template	⬇	SPOT Earnings Template	⬇
HR371_Performance Rating Mass Upload Template	⬇																						
HR373_Department Position Funding Mass Upload Template	⬇																						
HR409_Rewards and Recognition Mass Upload Template	⬇																						
HR411_Position Mass Upload Template	⬇																						
HR413_Job Data Mass Upload Template	⬇																						
HR414_New Hire Mass Upload Template	⬇																						
HR520_Teleworker Mass Upload Template	⬇																						
PY361_Additional Pay Mass Upload Template	⬇																						
PY362_General Deduction Mass Upload Template	⬇																						
SPOT Deductions Template	⬇																						
SPOT Earnings Template	⬇																						
13.	<p>Locate and open the appropriate CSV Template file.</p> <p>Scenario: The name of the file is PY362_General Deduction Mass Upload Template.</p>																						



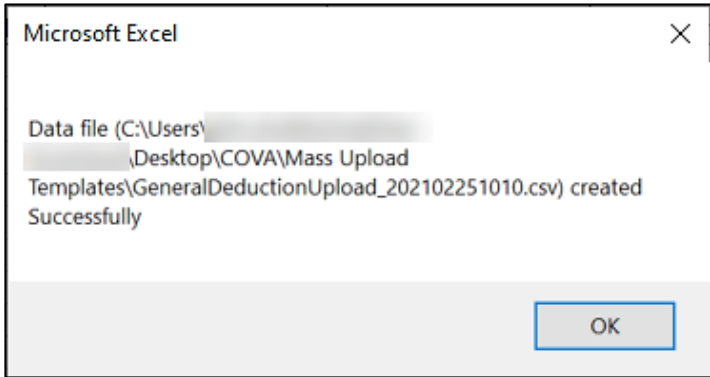

Step	Action
	<p>The appropriate CSV Template file displays.</p> <div data-bbox="290 375 1344 1488"> <p>Print the Instructions and Column Definitions tabs for easy reference.</p> <h3>PY362 - General Deduction Mass Upload</h3> <h4>Instructions</h4> <p>Rev: 3/25/2024</p> <p>Please read before you begin:</p> <p>Review the Performing a Mass Upload Job Aid located on the Cardinal website (www.cardinalproject.virginia.gov/massuploads) prior to completing the mass upload process.</p> <p>Note: Click on the Enable Content button in this workbook before proceeding.</p> <p>This workbook contains the following tabs:</p> <ol style="list-style-type: none"> 1. Instructions 2. Column Definitions 3. General Deduction Upload Template <hr/> <p>Instructions:</p> <ol style="list-style-type: none"> 1. The agency should run the V_GENL_DEDUCTION_MASS query to obtain a list of employees and their general deductions. 2. The agency updates the query spreadsheet with the applicable general deduction information. Make sure to remove the sample row provided. 3. Once the query spreadsheet is complete, copy the data and paste it into the template on the "General Deduction Upload" tab in this workbook. Agencies must use the template and validate that the processing rules are correct. <p>Note: DO NOT change the format on the template when you copy and paste. When copying the data from the query and into the applicable excel template, ensure that:</p> <ol style="list-style-type: none"> a. The columns from the query and the template match and are aligned; b. After copying the data, when pasting into the template, right click cell 2A and hover over the options under Paste Options until you find one of the following: Keep Text Only, Match Destination Formatting, or Values (any one of these options will function properly) and select it; c. Ensure that only the rows that are being changed are copied over into the applicable excel template from the query. Providing data that contains no changes will result in the data failing to load into Cardinal. This will impact the error report. </div>
14.	<p>When the excel file opens, click on Enable Content.</p> <div data-bbox="263 1575 1101 1635">  SECURITY WARNING <u>Macros have been disabled.</u> Enable Content </div>
15.	<p>Enter the required data using the information within the query performed in the Run a Query section of this Job Aid.</p>

Step	Action
	<p>When copying the data from the query and into the applicable excel template, ensure that: 1. The columns from the query and the template match and are aligned; 2. After copying the data, when pasting into the template, right click cell 2A and hover over the options under Paste Options until you find one of the following: Keep Text Only, Match Destination Formatting, or Values (any one of these options will function properly) and select it; 3. Ensure that only the rows that are being changed are copied over into the applicable excel template from the query. Providing data that contains no changes will result in the data failing to load into Cardinal. This will impact the error report.</p> <p>When you save the file, the extension of the file for Position Upload, Job Data Upload or New Hire Upload MUST be XLSM. For this example, the name of the file is PY362_GeneralDeduction_MassUploadTemplate</p>
16.	<p>Click the Create/Save CSV File.</p> 
	<p>The naming of the file can't be altered before uploading it to Cardinal and it will overwrite the previous upload document.</p>
17.	<p>Load the saved CSV file to SPO SharePoint in the General Deduction Mass Upload Requests folder. Once the file has been loaded the appropriate SPO staff will be automatically alerted that a file exists.</p>



The **Select Output Folder** pop-up window displays.



18.	Navigate to the desired secure location.
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Step	Action
19.	<p>Click the OK button.</p> 
	<p>The file is automatically named and saved in a CSV format after the OK button is clicked. Do not attempt to rename the file.</p>
<p>A message displays.</p> 	
20.	Copy the file name for future use.
21.	<p>Click the OK button.</p> 
22.	SPO uploads the file.

Correct Errors

Step	Action
1.	SPO will take the necessary actions to correct all identified errors. In the event of errors, the entire file does not error out, only the lines containing an error(s).
2.	The Agency can create a new mass upload file with only the corrected lines, or enter the transaction online through an online data entry in Cardinal.
	To avoid duplicate transactions, the original file should not be re-run
	Processing rules for each of the mass upload required fields are available in the applicable templates on the Cardinal website.