

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
TL Eligibility Mass Upload	Agency	N/A	Agency
Personal Data 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
7/18/2025	Updated the Mass Upload Templates table in the overview section and Section 1 to add the new TL Eligibility Mass Upload Template.
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

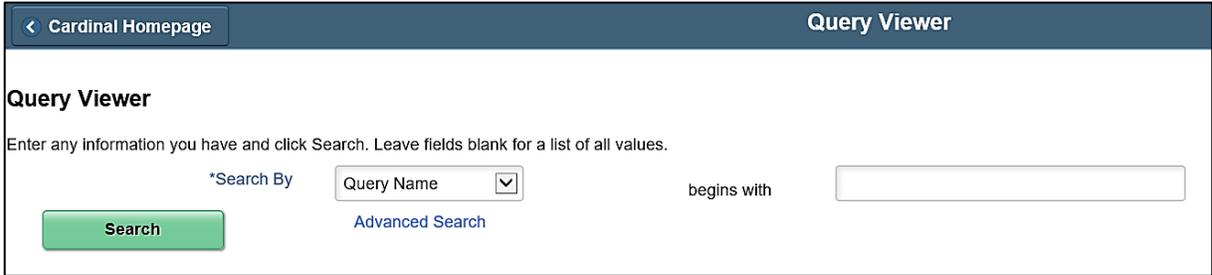
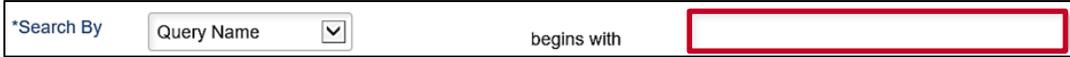
Mass Upload Description	Query Name	Template Name	Navigation to Upload File
Rewards & Recognition Mass Upload	V_HR_Reward_Recogn_Mass_Data	HR409_Reward and Recognition_Mass_Upload.xlsm	<p>Cardinal Interfaces > HR Interfaces > Mass Uploads > Reward and Recognition Mass Upload</p> <p>Note:</p> <p>Agencies that use Cardinal Absence Management should use this Mass Upload when uploading monetary recognition.</p> <p>Agencies that do not use Cardinal Absence Management should use this Mass Upload for recognition leave and monetary recognition.</p>
Additional Pay	V_Addlpay_Mass	RPY476_Add_Pay_QRY	Cardinal Interfaces > Mass Uploads > Additional Pay
TL Eligibility	V_TA_ELIGIBILITY_ADJ	TA826 - TL Eligibility Mass Upload	Cardinal Interfaces > Mass Uploads > TL Eligibility Mass Upload



Mass Upload Description	Query Name	Template Name	Navigation to Upload File
Personal Data	V_HR_Personal_Mass_Data_Change	HR558 Personal Data Mass Upload	Cardinal Interfaces > HR Interfaces > > Mass Uploads > > Personal Data > Mass Upload Note: Any uploaded information will overwrite existing data. A change to an employee's preferred email address may impact the employee's ability to access Cardinal.

Run a Query

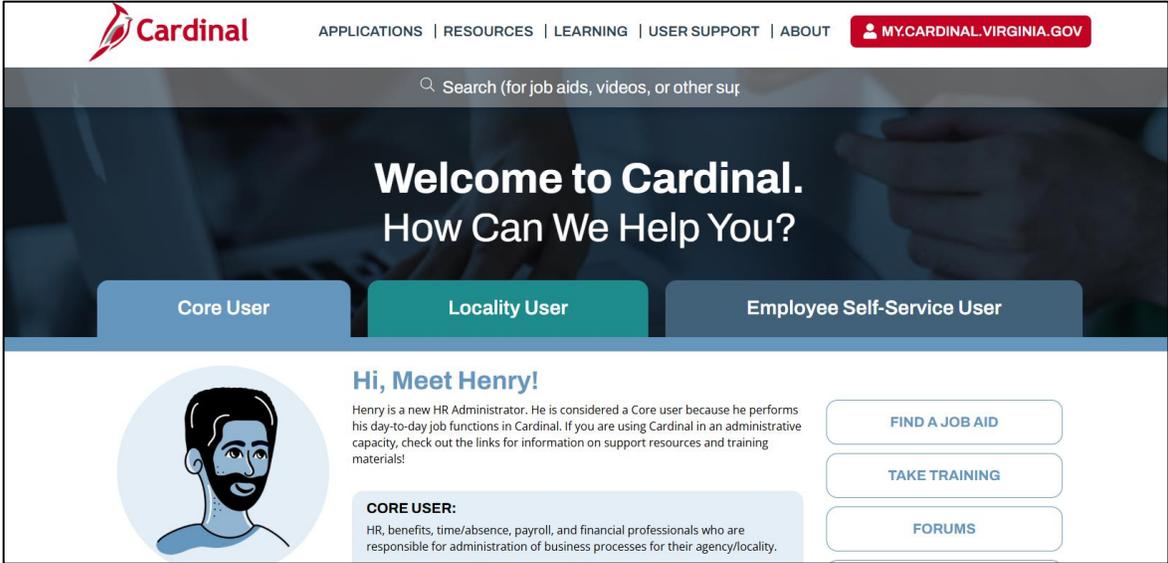
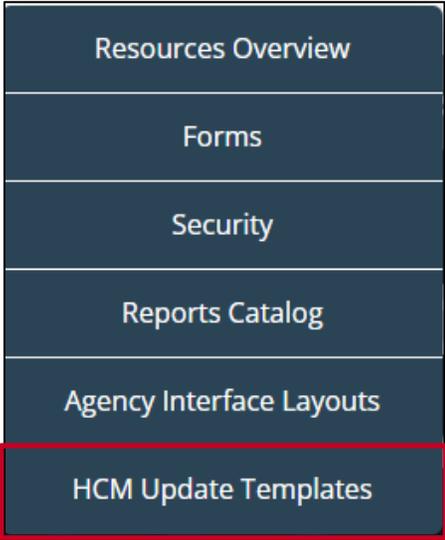
Each Agency runs a query to obtain current Cardinal data. The below is an example of how to run the query for Dept_Posn Funding Mass Upload.

Step	Action
1.	Navigate to the Query Viewer Search page using the following path: NavBar > Menu > Reporting Tools > Query > Query Viewer
<p>The Query Viewer Search page displays.</p> 	
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 .
	
3.	Click the Search button.
	
<p>The Query Viewer Search page refreshes with the search results displayed at the bottom.</p> 	

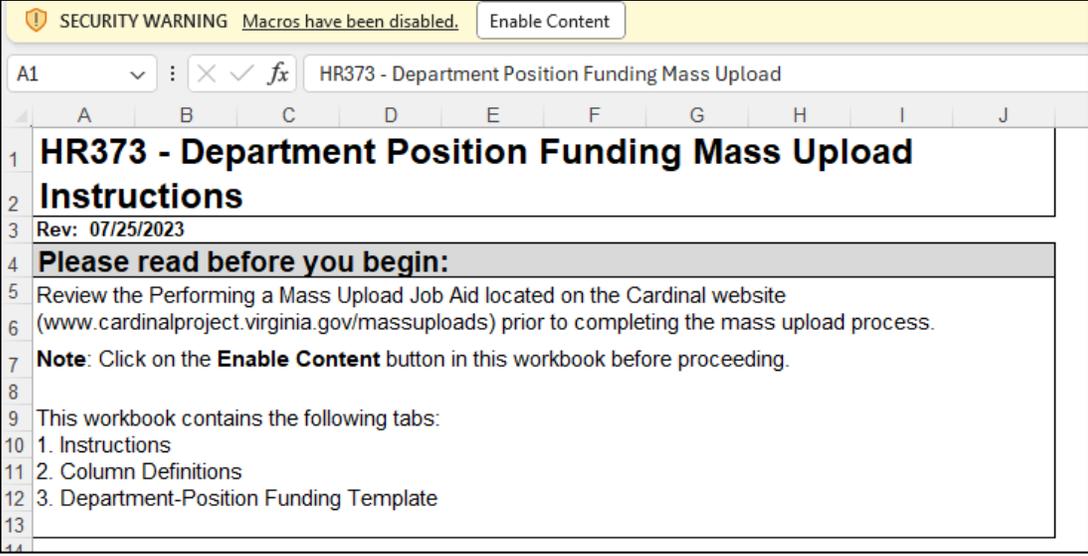
Step	Action																											
4.	<p>Click the link for the desired query output format (i.e., HTML, Excel, XML).</p> <table border="1" data-bbox="290 378 667 493"> <tr> <td>Run to HTML</td> <td>Run to Excel</td> <td>Run to XML</td> <td>Schedule</td> </tr> <tr> <td>HTML</td> <td>Excel</td> <td>XML</td> <td>Schedule</td> </tr> </table>	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																									
<p>The Position Funding Query page is displays in a separate window.</p> <div data-bbox="206 575 1429 774" style="border: 1px solid black; padding: 5px;"> <p>V_HR_POS_FUNDING_MASS_LOAD - Position Funding Query</p> <p>*As Of Date <input type="text"/> </p> <p>SETID (Leave Blank for All) <input type="text"/> </p> <p>DEPTID (Leave Blank for All) <input type="text"/> </p> <p>FISCAL YEAR (Blank for All) <input type="text"/> </p> <p>View Results</p> <table border="1" style="width: 100%; font-size: small;"> <thead> <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>Chartfield1</th> <th>Product</th> <th>Class Flid</th> <th>Operating Unit</th> <th>Chartfield3</th> <th>Budget Ref</th> <th>Business Unit PC</th> <th>Project ID</th> <th>Activity ID</th> <th>Resource Type</th> <th>Resource Cat</th> <th>Resource Sub Cat</th> <th>Affiliate</th> <th>Affiliate Intra1</th> <th>Program Code</th> </tr> </thead> </table> </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 Flid	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 Flid	Operating Unit	Chartfield3	Budget Ref	Business Unit PC	Project ID	Activity ID	Resource Type	Resource Cat	Resource Sub Cat	Affiliate	Affiliate Intra1	Program Code		
	<p>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.</p>																											
5.	<p>Enter or select the As of Date using the As of Date Calendar icon.</p> <div data-bbox="290 997 678 1052" style="border: 1px solid black; padding: 2px;"> <p>*As Of Date <input style="border: 1px solid red;" type="text"/> </p> </div>																											
6.	<p>Enter or select the SETID using the SETID Look Up icon.</p> <div data-bbox="290 1138 844 1192" style="border: 1px solid black; padding: 2px;"> <p>SETID (Leave Blank for All) <input style="border: 1px solid red;" type="text"/> </p> </div>																											
	<p>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.)</p>																											
7.	<p>Enter or select the Department ID using the DEPTID Look Up icon.</p> <div data-bbox="290 1413 917 1467" style="border: 1px solid black; padding: 2px;"> <p>DEPTID (Leave Blank for All) <input style="border: 1px solid red;" type="text"/> </p> </div>																											
	<p>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.</p>																											
8.	<p>Click the View Results button.</p> <div data-bbox="290 1669 506 1732" style="border: 1px solid black; padding: 2px;"> <p>View Results</p> </div>																											

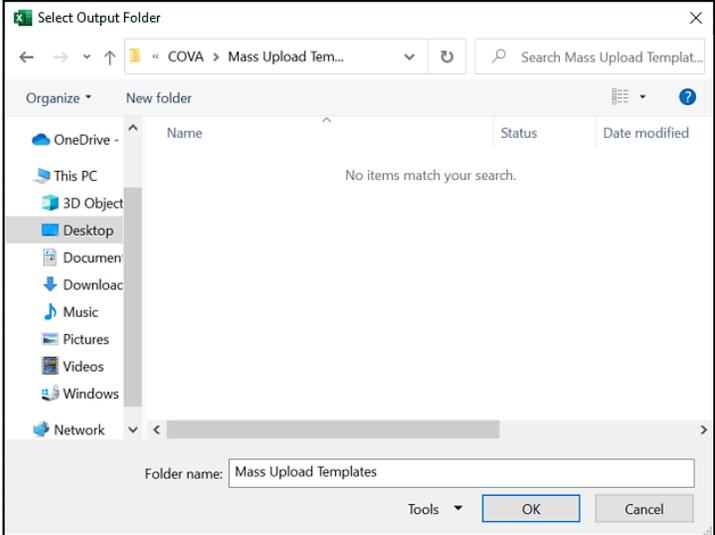
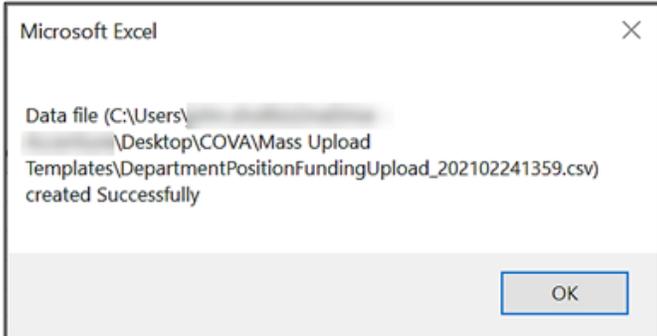
Step	Action																																																																	
	<p>The Position Funding Query page refreshes.</p> <div data-bbox="207 373 1425 951" style="border: 1px solid black; padding: 10px;"> <p>V_HR_POS_FUNDING_MASS_LOAD - Position Funding Query</p> <p>As Of Date <input type="text" 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 border="1" data-bbox="224 714 1425 913"> <thead> <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> </thead> <tbody> <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> </tbody> </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>																																																																	
<p>9.</p>	<p>If desired, click the corresponding link to download a file version (i.e., Excel, CSV, XML) of the query.</p> <div data-bbox="289 1245 1380 1308" style="border: 1px solid black; padding: 5px;"> <p>Download results in : Excel SpreadSheet CSV Text File XML File (1 kb)</p> </div>																																																																	

Prepare the Upload File

Step	Action
10.	Navigate to the Cardinal Project Website by clicking the following link: https://www.cardinalproject.virginia.gov/
	<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="261 378 1377 1289" style="border: 1px solid black; padding: 10px;"> <h3 style="text-align: center; margin: 0;">HCM Update Templates</h3> <div style="background-color: #e6f2ff; padding: 10px; margin-bottom: 10px;"> <h4>Find a Template</h4> <input style="width: 100%; margin-bottom: 5px;" type="text" value="Start typing here..."/> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 20%;"> <p>User Group</p> <div style="border: 1px solid #ccc; padding: 2px;">- Any -</div> </div> <div style="width: 20%;"> <p>Application</p> <div style="border: 1px solid #ccc; padding: 2px;">- Any -</div> </div> <div style="width: 20%;"> <p>Module</p> <div style="border: 1px solid #ccc; padding: 2px;">- Any -</div> </div> <div style="width: 20%; text-align: right;"> <div style="border: 1px solid #ccc; padding: 5px; color: red; font-weight: bold; border-radius: 5px;">Filter</div> </div> </div> </div> <h4>Search Results</h4> <ul style="list-style-type: none"> <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR371_Performance Rating Mass Upload Template ⌵ <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR373_Department Position Funding Mass Upload Template ⌵ <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR409_Rewards and Recognition Mass Upload Template ⌵ <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR411_Position Mass Upload Template ⌵ <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR413_Job Data Mass Upload Template ⌵ <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR414_New Hire Mass Upload Template ⌵ <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR520_Teleworker Mass Upload Template ⌵ <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> PY361_Additional Pay Mass Upload Template ⌵ <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> PY362_General Deduction Mass Upload Template ⌵ <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> SPOT Deductions Template ⌵ <li style="background-color: #2c4e64; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> SPOT Earnings Template ⌵ </div>
13.	<p>Locate and open the appropriate CSV Template file</p> <p>Scenario: The name of the file is HR373_Department_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.	Click the OK button. 

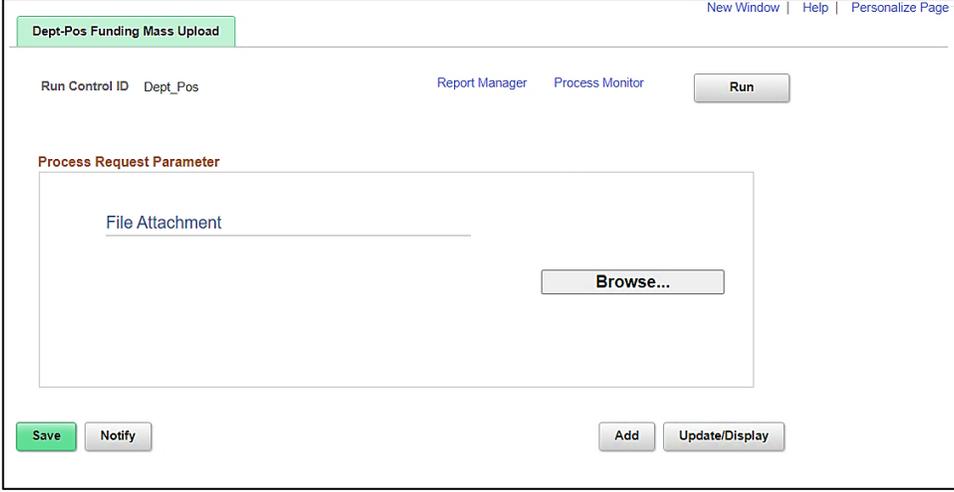
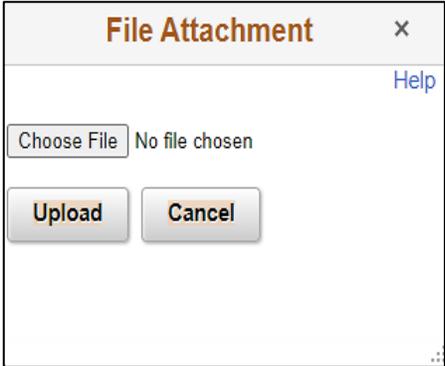
Upload a File

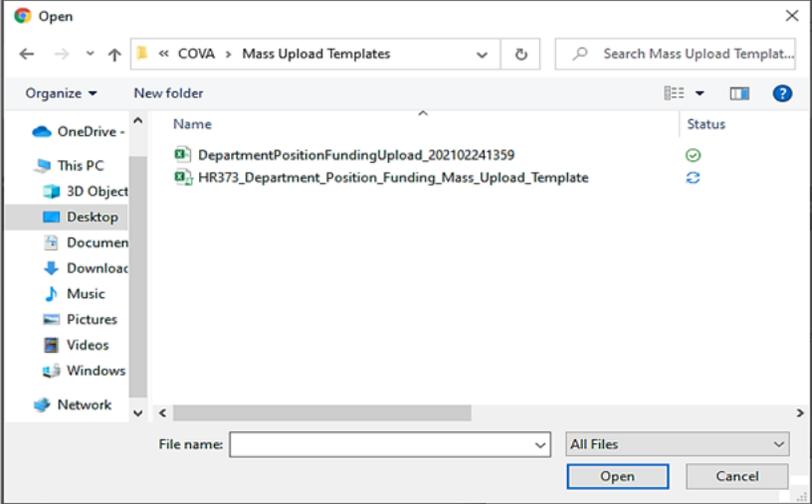
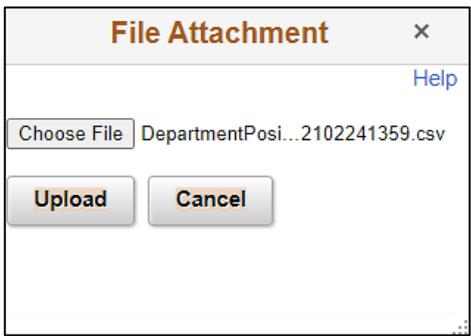
Step	Action
21.	<p>Navigate to the appropriate Mass Upload page using one of the following paths:</p> <p>Scenario: This example follows the Dept-Pos Funding Mass Upload.</p> <p>Dept-POS Funding Mass Upload: NavBar > Menu > Cardinal Interfaces > Mass Uploads > Dept-POS Funding Mass Upload</p> <p>Leave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

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



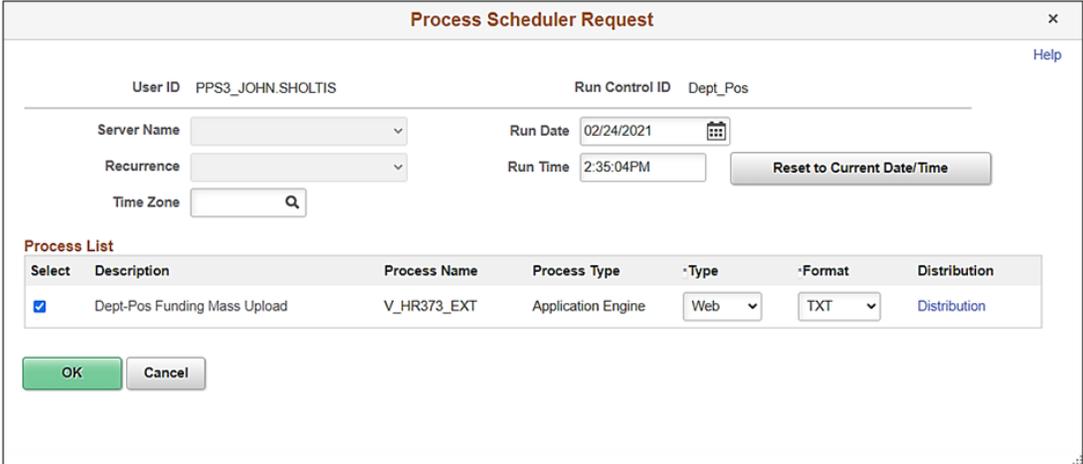
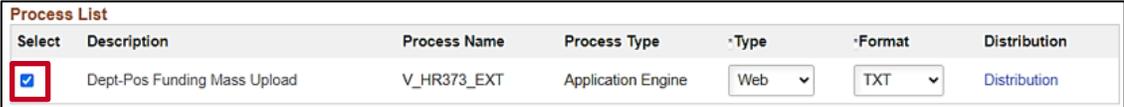
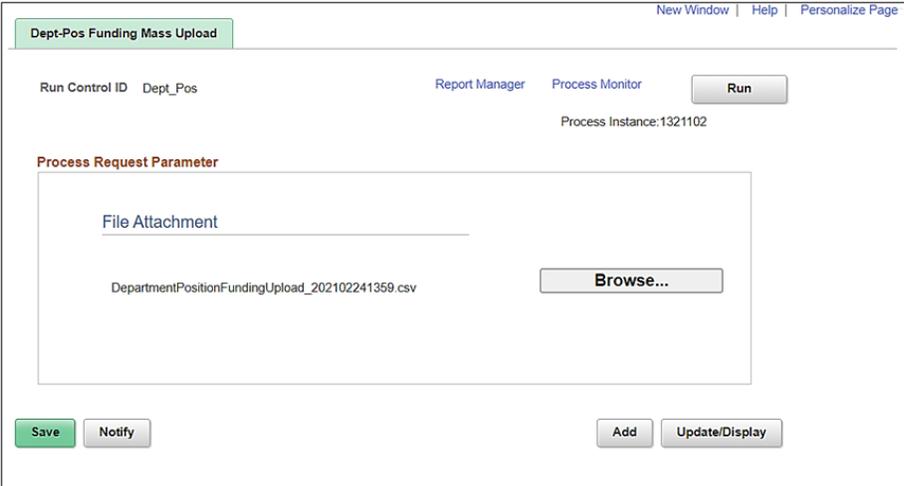
Step	Action
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
	If an existing Run Control ID is known, proceed to Step 22. If an existing Run Control ID is not known, skip to Step 24.
22.	If an existing Run Control ID is known, enter the Run Control ID in the Run Control ID field. <div data-bbox="293 630 1174 699" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Search by: Run Control ID begins with <input style="border: 2px solid red; width: 150px; height: 20px;" type="text"/> </div>
23.	Click the Search button. Skip to Step 29. <div data-bbox="293 787 708 856" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Search Advanced Search </div>
24.	Click the Add a New Value tab. <div data-bbox="293 945 959 1024" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Find an Existing Value Add a New Value </div>
<p>The Add a New Value tab displays.</p> <div data-bbox="436 1113 1203 1560" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <div style="display: flex; justify-content: flex-end; font-size: small;"> New Window Help </div> <p>Dept-Pos Funding Mass Upload</p> <div style="display: flex; justify-content: space-between; margin-bottom: 10px;"> Find an Existing Value Add a New Value </div> <hr/> <p>Run Control ID <input style="width: 150px;" type="text"/></p> <div style="text-align: center; margin: 10px 0;"> Add </div> <div style="font-size: small; margin-top: 10px;"> Find an Existing Value Add a New Value </div> </div>	
25.	Enter the desired Run Control ID in the Run Control ID field. <div data-bbox="293 1648 902 1732" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Run Control ID <input style="border: 2px solid red; width: 200px; height: 25px;" type="text"/> </div>
	A Run Control ID only needs to be added once and can be reused once added.

Step	Action
26.	Click the Add button. <div data-bbox="292 378 516 457" style="border: 2px solid red; padding: 5px; display: inline-block; margin-top: 10px;"> Add </div>
<p>The Dept-Pos Funding Mass Upload page displays.</p> <div data-bbox="341 541 1295 1033" style="border: 1px solid gray; padding: 10px;">  </div>	
27.	Click the Browse button. <div data-bbox="292 1123 657 1186" style="border: 2px solid red; padding: 5px; display: inline-block; margin-top: 10px;"> Browse... </div>
<p>The File Attachment page displays in a pop-up window.</p> <div data-bbox="597 1276 1042 1642" style="border: 1px solid gray; padding: 10px; width: fit-content; margin: 10px auto;">  </div>	
28.	Click the Choose File button. <div data-bbox="292 1732 771 1806" style="border: 2px solid red; padding: 5px; display: inline-block; margin-top: 10px;"> Choose File No file chosen </div>

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>

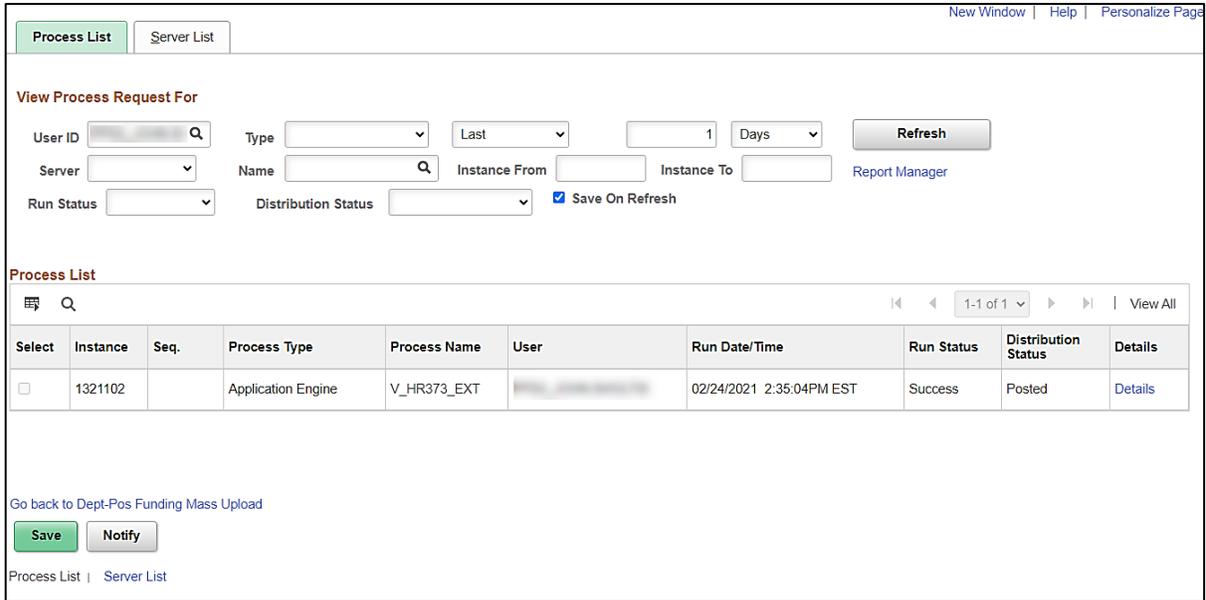
Step	Action
	<p>An Error Message page displays in a pop-up window if the selected file is not a CSV file.</p> <div data-bbox="578 380 1062 527" style="border: 1px solid gray; padding: 10px; text-align: center;"> <p>The file to upload must be of type .CSV File (235,4)</p> <p>OK</p> </div>
33.	<p>Click the OK button.</p> <div data-bbox="293 615 548 716" style="border: 1px solid gray; padding: 5px; text-align: center;"> <p>OK</p> </div>
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> <div data-bbox="305 873 1330 1402" style="border: 1px solid gray; padding: 10px;"> <div style="display: flex; justify-content: flex-end; font-size: small;"> New Window Help Personalize Page </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> Dept-Pos Funding Mass Upload </div> <div style="display: flex; justify-content: space-between; align-items: center;"> Run Control ID Dept_Pos Report Manager Process Monitor Run </div> <div style="margin-top: 10px;"> <p>Process Request Parameter</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>File Attachment</p> <p>DepartmentPositionFundingUpload_202102241359.csv</p> <p style="text-align: right;">Browse...</p> </div> </div> <div style="display: flex; justify-content: space-between; align-items: center; font-size: small;"> Save Notify Add Update/Display </div> </div>
35.	<p>Click the Run button.</p> <div data-bbox="293 1497 1044 1577" style="border: 1px solid gray; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> Report Manager Process Monitor Run </div>

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> 

Step	Action
38.	Click the Process Monitor link. 

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



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” . 
-----	--

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

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

The **Process Detail** page displays in a pop-up window.

x
Help

Process

Instance	1321102	Type	Application Engine
Name	V_HR373_EXT	Description	Dept-Pos Funding Mass Upload
Run Status	Success	Distribution Status	Posted

Run

Run Control ID	Dept_Pos	Update Process	
Location	Server	<input type="radio"/> Hold Request <input type="radio"/> Queue Request <input type="radio"/> Cancel Request <input type="radio"/> Delete Request <input type="radio"/> Re-send Content	
Server	PSUNX1	<input type="radio"/> Restart Request	
Recurrence			

Date/Time

Request Created On	02/24/2021 2:37:34PM EST	Parameters	Transfer
Run Anytime After	02/24/2021 2:35:04PM EST	Message Log	View Locks
Began Process At	02/24/2021 2:37:56PM EST	Batch Timings	
Ended Process At	02/24/2021 2:38:08PM EST	View Log/Trace	

41. Click the **View Log/Trace** link.

View Log/Trace

The **View Log/Trace** page displays.

x
Help

Report

Report ID	760711	Process Instance	1321102	Message Log
Name	V_HR373_EXT	Process Type	Application Engine	
Run Status	Success			

Dept-Pos Funding Mass Upload

Distribution Details

Distribution Node	hpytn	Expiration Date	03/26/2021
-------------------	-------	-----------------	------------

File List

Name	File Size (bytes)	Datetime Created
1321102_DBFILE_READ.LOG	107	02/24/2021 2:38:08.883867PM EST
AE_V_HR373_EXT_1321102.log	218	02/24/2021 2:38:08.883867PM EST
HR373_CI.LOG	230	02/24/2021 2:38:08.883867PM EST

Distribute To

Distribution ID Type	•Distribution ID
User	PSUNX1

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> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> AE_V_HR373_EXT_1321102.log 218 02/24/2021 2:38:08.883867PM EST </div>

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.



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.



Query Viewer [New Window](#) | [Help](#) | [Personalize Page](#)

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

*Search By begins with

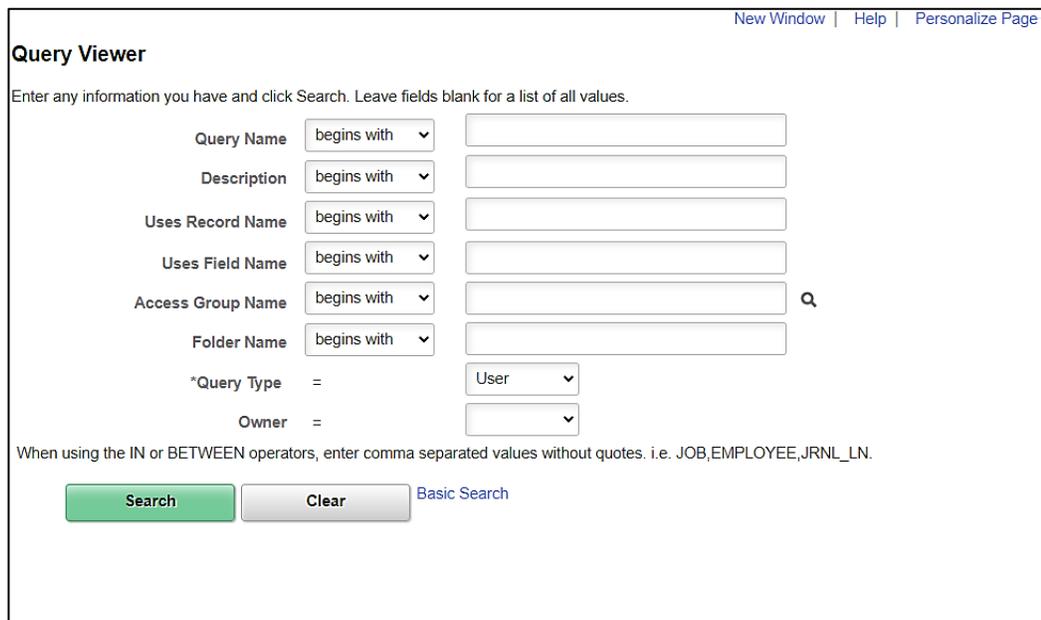
[Advanced Search](#)

2. Click the **Advanced Search** link.



[Advanced Search](#)

The **Query Viewer Search** page refreshes.



Query Viewer [New Window](#) | [Help](#) | [Personalize Page](#)

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

Query Name

Description

Uses Record Name

Uses Field Name

Access Group Name

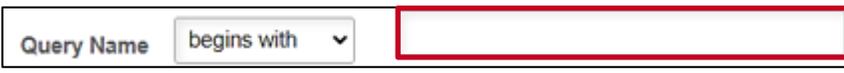
Folder Name

*Query Type =

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

Step	Action
3.	Enter the query's name in the Query Name field. Scenario: The query's name is "V_HR_JOB_MASS_DATA_CHANGE". 
4.	Click the Search button. 

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

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.	Click the link of the desired query output format (i.e., HTML, Excel or XML). 
----	--

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 

[View Results](#)

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

View All

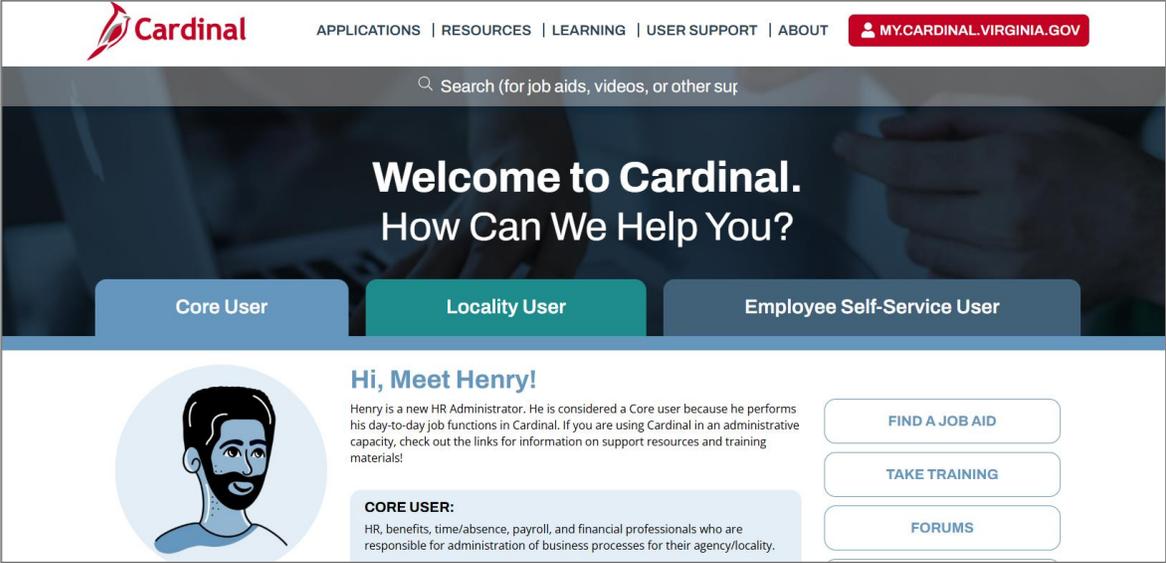
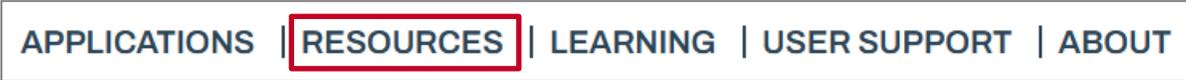
Row	Business Unit	EmplId	Empl Rcd	Effective Date	Action	Action Reason	Position Nbr	EstablID	Employee Class	Paygroup	Employee Type	Tax Location	FICA Status	Job Std Hrs	State Comp Rate	ST Comp Freq	Non State Comp Rate	Non ST Comp Freq	State Ben Comp Rate	State Ben Comp Freq	Hourly Comp Rate
1	10000		0	01/04/2017	HIR	CNV	SOVAA100	SOV	GNW	BW1	H	760	N	40.00	0.000000		0.000000		0.000000		24.038462
2	10000		0	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		0	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		0	07/01/1976	HIR	CNV	SOVWG117	SOV	GNW	BW1	H	760	N	40.00	0.000000		0.000000		0.000000		24.038462
5	10000		0	11/09/2019	DTA	CNV	SOVCLK29	SOV	ONC	SM1	S	760	N	40.00	50000.000000	A	0.000000		0.000000		0.000000



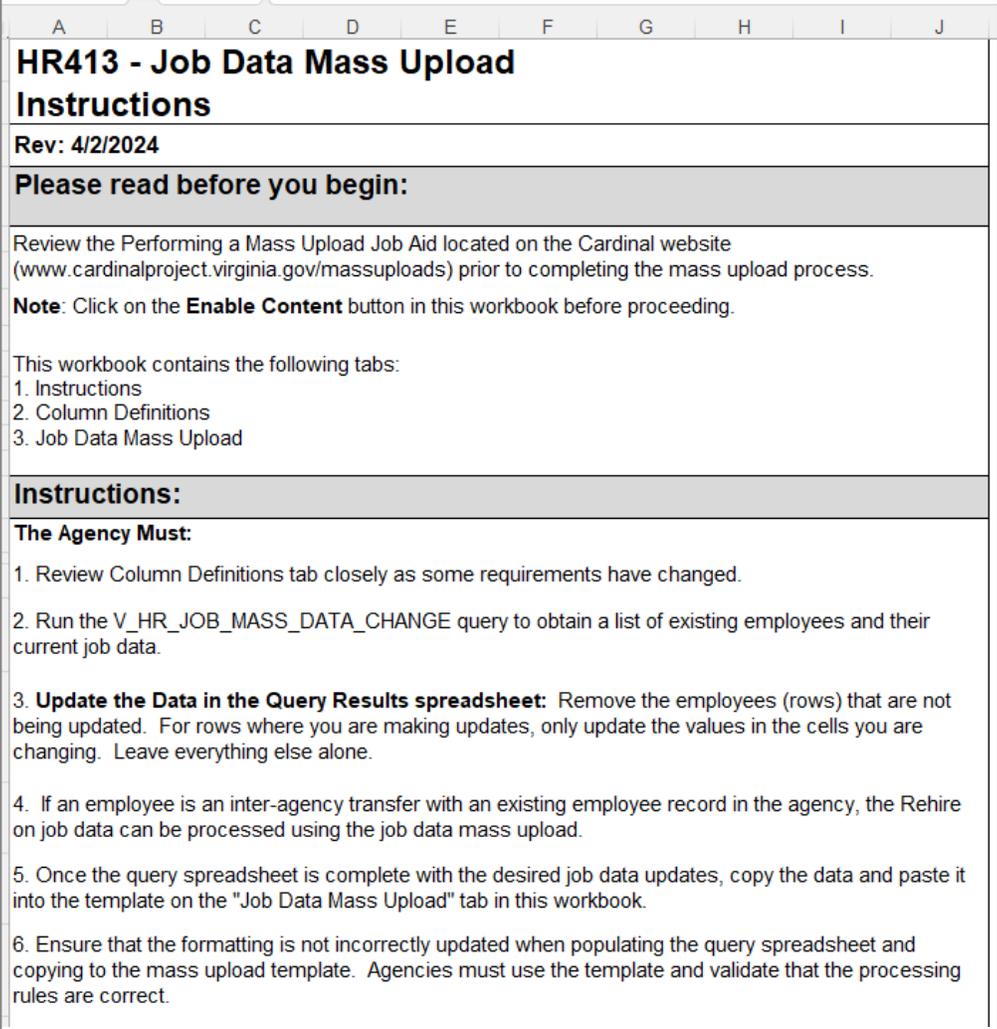
The above screenshot displays if the **HTML Query Output Format** link is selected. A download initiates if the **Excel** or **XML Query Output Format** link is selected. After the file is downloaded, select the file to open and view the query results. The information within the output is used to prepare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

Step	Action
10.	<p data-bbox="289 327 1495 394">If desired, click the corresponding link to download a file version (i.e., Excel, CSV, XML) of the query.</p> <div data-bbox="293 415 1300 480" style="border: 1px solid #ccc; padding: 5px;"><p data-bbox="305 428 1289 468">Download results in : Excel SpreadSheet CSV Text File XML File (222 kb)</p></div>

Prepare the Upload File

Step	Action
11.	Navigate to the Cardinal Project Website by clicking the following link: https://www.cardinalproject.virginia.gov/
	<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="261 499 1377 1409" style="border: 1px solid black; padding: 10px;"> <h3 style="text-align: center;">HCM Update Templates</h3> <div style="background-color: #e0f0ff; padding: 10px; margin-bottom: 10px;"> <h4>Find a Template</h4> <input style="width: 100%; margin-bottom: 5px;" type="text" value="Start typing here..."/> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 20%;"> User Group <input style="width: 90%; border: 1px solid #ccc;" type="text" value="- Any -"/> </div> <div style="width: 20%;"> Application <input style="width: 90%; border: 1px solid #ccc;" type="text" value="- Any -"/> </div> <div style="width: 20%;"> Module <input style="width: 90%; border: 1px solid #ccc;" type="text" value="- Any -"/> </div> <div style="width: 20%; text-align: right;"> <input style="border: 1px solid #f00; padding: 2px 10px;" type="button" value="Filter"/> </div> </div> </div> <h4>Search Results</h4> <ul style="list-style-type: none"> <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR371_Performance Rating Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR373_Department Position Funding Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR409_Rewards and Recognition Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR411_Position Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR413_Job Data Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR414_New Hire Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR520_Teleworker Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> PY361_Additional Pay Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> PY362_General Deduction Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> SPOT Deductions Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> SPOT Earnings Template ⌵ </div>	
15.	Locate and open the appropriate CSV Template file. Scenario: The name of the file is HR413_Job_Data_Mass_Upload_Template .

Step	Action
	<p>The appropriate CSV Template file displays in Excel.</p>  <p>The screenshot shows an Excel spreadsheet with the following content:</p> <ul style="list-style-type: none"> HR413 - Job Data Mass Upload Instructions Rev: 4/2/2024 Please read before you begin: 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. Note: Click on the Enable Content button in this workbook before proceeding. This workbook contains the following tabs: <ol style="list-style-type: none"> 1. Instructions 2. Column Definitions 3. Job Data Mass Upload Instructions: The Agency Must: <ol style="list-style-type: none"> 1. Review Column Definitions tab closely as some requirements have changed. 2. Run the V_HR_JOB_MASS_DATA_CHANGE query to obtain a list of existing employees and their current job data. 3. Update the Data in the Query Results spreadsheet: Remove the employees (rows) that are not being updated. For rows where you are making updates, only update the values in the cells you are changing. Leave everything else alone. 4. If an employee is an inter-agency transfer with an existing employee record in the agency, the Rehire on job data can be processed using the job data mass upload. 5. Once the query spreadsheet is complete with the desired job data updates, copy the data and paste it into the template on the "Job Data Mass Upload" tab in this workbook. 6. Ensure that the formatting is not incorrectly updated when populating the query spreadsheet and copying to the mass upload template. Agencies must use the template and validate that the processing rules are correct.
16.	<p>When the excel file opens, click on Enable Content.</p>  <p>The screenshot shows a yellow warning box with a shield icon containing an exclamation mark. The text reads: "SECURITY WARNING Macros have been disabled." To the right of the text is a button labeled "Enable Content" which is highlighted with a red border.</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 border="1" data-bbox="293 800 1401 894"> <tr> <td></td> <td style="border: 2px solid red;">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

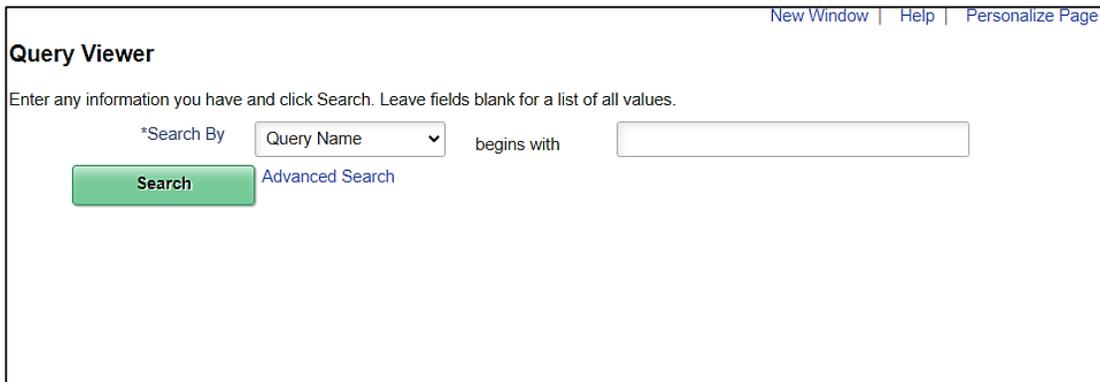
Step	Action
1.	After PPS runs the file, they will provide the error log to the Agency with a copy to DHRM.
2.	Agency Administrators take the necessary actions to correct all identified errors. In the event of errors, only the line(s) containing an error(s) will error out.
3.	The Agency can create a new 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

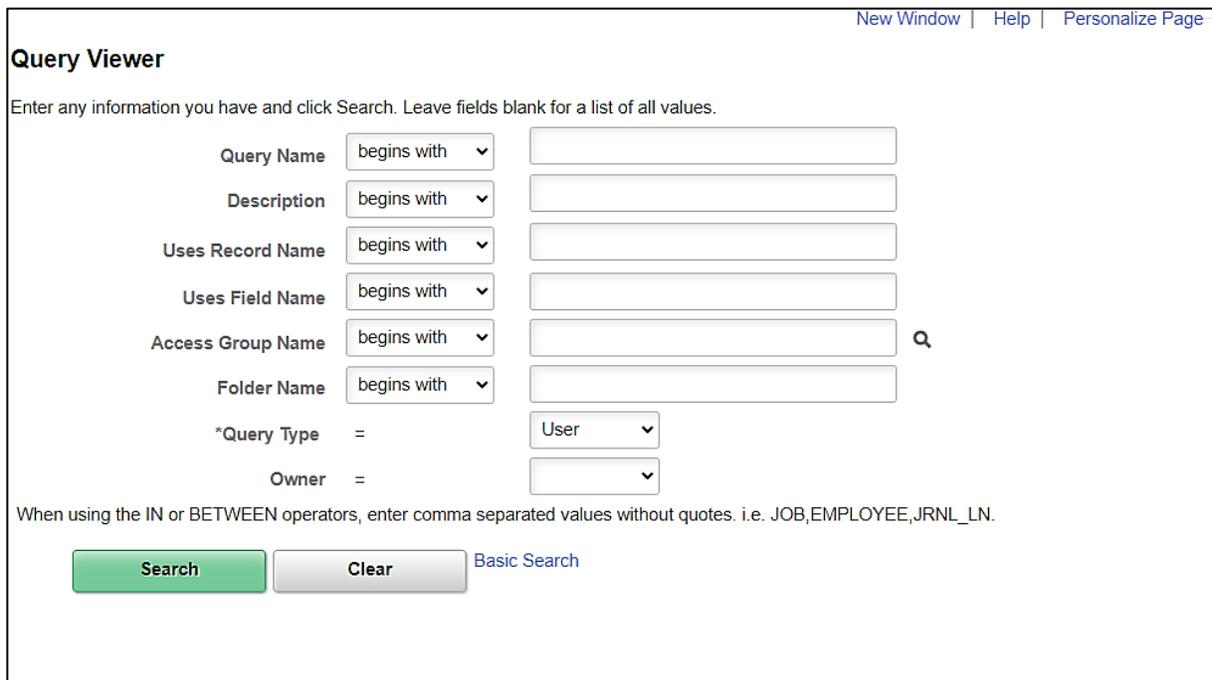
The **Query Viewer Search** page displays.



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

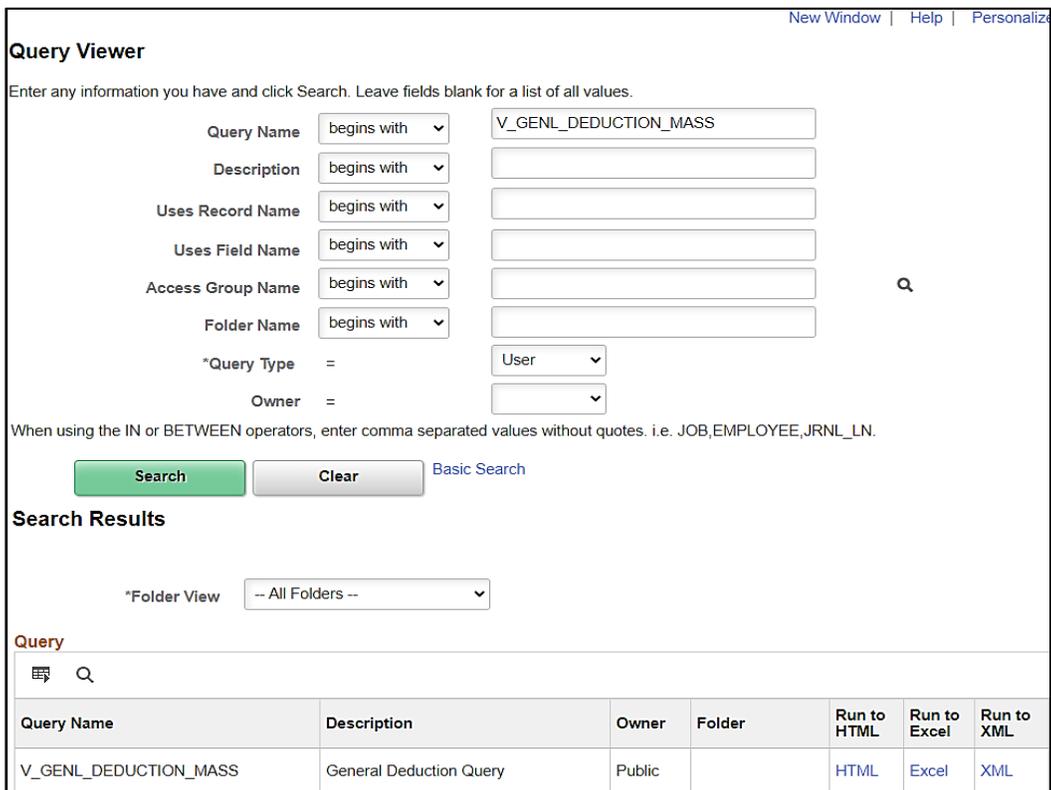


The **Query Viewer Search** page refreshes.



Step	Action
3.	Enter the Query Name in the Query Name field. Scenario: The name of the query is V_GENL_DEDUCTION_MASS . 
4.	Click the Search button. 

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



Query Viewer New Window | Help | Personalize

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

Query Name
 Description
 Uses Record Name
 Uses Field Name
 Access Group Name
 Folder Name
 *Query Type =
 Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

Search Results

*Folder View

Query

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.	Click the link of the desired query output format (i.e., HTML, Excel, XML). 
----	--

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

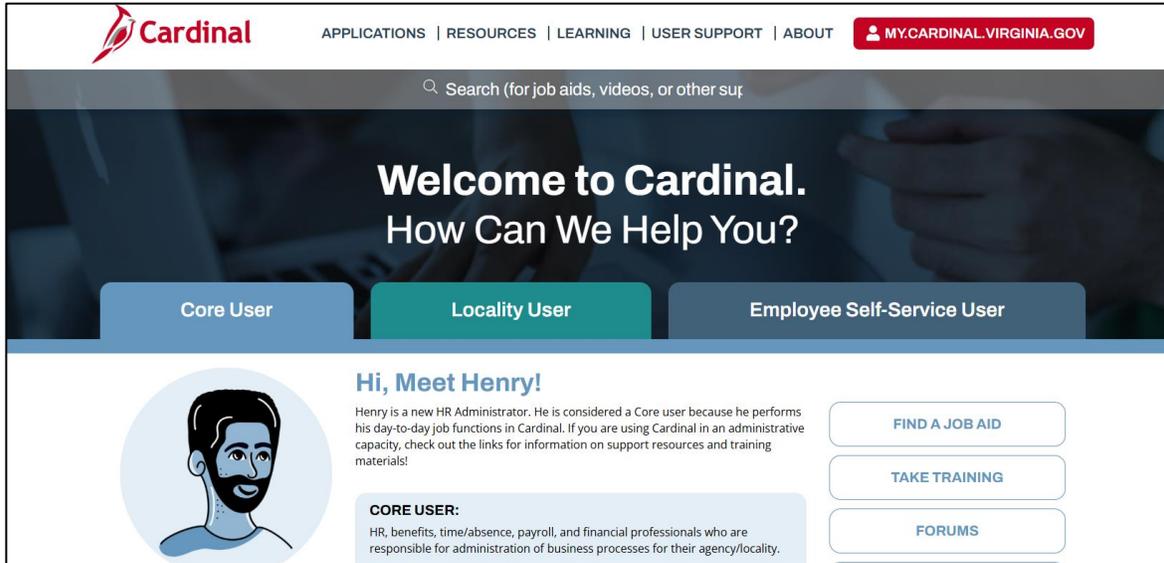
Row	Employee ID	Company	General Deduction Code	Effective Date	Ded Calc Method	Deduction Amount	Deduction Rate/Percent	Deduction End Date	Deduction Goal Amount	Deduction Goal Balance
1		ABC	OPTLIF	09/01/2019	Flat Amount	16.23	0.000		0.00	0.00
2		ABC	OPTLIF	01/01/2016	Flat Amount	12.08	0.000		0.00	0.00
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.

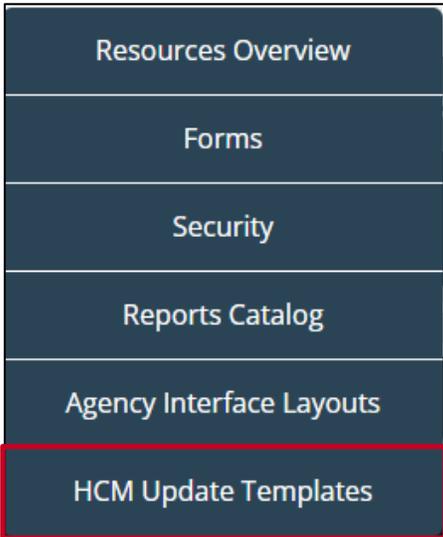
Prepare the Upload File

Step	Action
10.	Navigate to the Cardinal Project Website by clicking the following link: https://www.cardinalproject.virginia.gov/

The Cardinal Project Website displays:

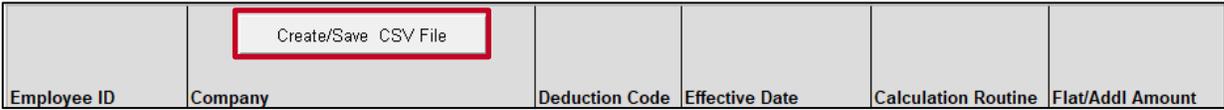


11.	Click on Resources . 
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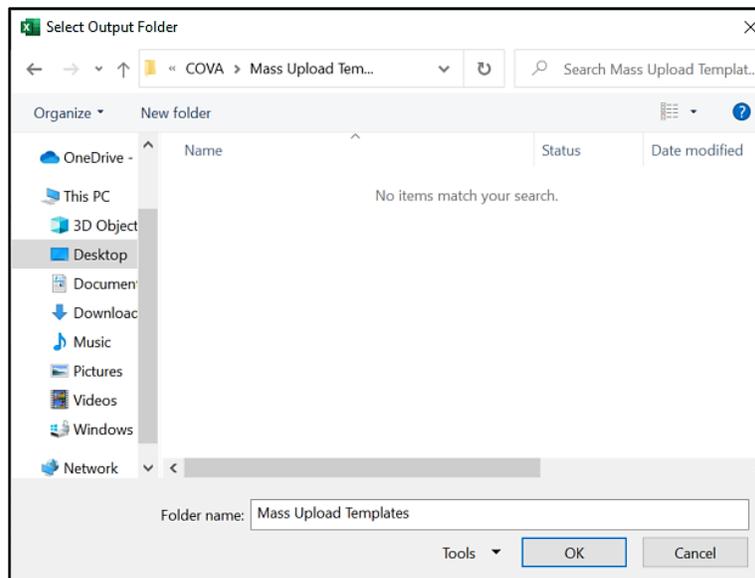
12.	Click on the HCM Upload Templates . 
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Step	Action
	Select the appropriate CSV Template file and download the blank template file.
	<p>The HCM Update Templates page displays.</p> <div data-bbox="261 493 1377 1404" style="border: 1px solid black; padding: 10px;"> <h3 style="text-align: center;">HCM Update Templates</h3> <div style="background-color: #e0f0ff; padding: 10px; margin-bottom: 10px;"> <h4>Find a Template</h4> <p>Start typing here...</p> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 20%;"> <p>User Group</p> <p>- Any -</p> </div> <div style="width: 20%;"> <p>Application</p> <p>- Any -</p> </div> <div style="width: 20%;"> <p>Module</p> <p>- Any -</p> </div> <div style="width: 20%; text-align: right;"> <p style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; color: red; font-weight: bold;">Filter</p> </div> </div> </div> <h4>Search Results</h4> <ul style="list-style-type: none"> <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR371_Performance Rating Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR373_Department Position Funding Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR409_Rewards and Recognition Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR411_Position Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR413_Job Data Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR414_New Hire Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> HR520_Teleworker Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> PY361_Additional Pay Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> PY362_General Deduction Mass Upload Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> SPOT Deductions Template ⌵ <li style="background-color: #2c3e50; color: white; padding: 5px; margin-bottom: 2px; display: flex; justify-content: space-between; align-items: center;"> SPOT Earnings Template ⌵ </div>
13.	Locate and open the appropriate CSV Template file. Scenario: The name of the file is PY362_General Deduction Mass Upload Template .

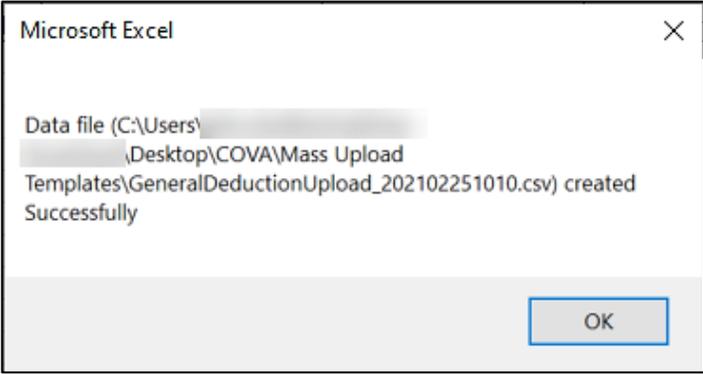
Step	Action
	<p>The appropriate CSV Template file displays.</p> <div data-bbox="293 380 1344 1493" style="border: 1px solid black; padding: 5px;"> <p>Print the Instructions and Column Definitions tabs for easy reference.</p> <h3>PY362 - General Deduction Mass Upload</h3> <h4>Instructions</h4> <p>Rev: 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="264 1577 1101 1640" style="border: 1px solid black; padding: 5px;">  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>i 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>i 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.	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.
A message displays.	
20.	Copy the file name for future use.
21.	Click the OK button. 
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.