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) to iHelp@dhrm.virginia.gov.

Table of Contents

Revision History

Revision Date	Summary of Changes
8/6/2025	Updated the Mass Upload Templates table in the overview section and Section 1 to add the new Personal Data Mass Upload Template.
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_Deparment-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
Rewards & Recognition Mass Upload	V_HR_Reward_Recogn_Mass_Data	HR409_Reward and Recognition_Mass_Upload.xlsm	Cardinal Interfaces > HR Interfaces > Mass Uploads > Reward and Recognition Mass Upload **Note:**

Mass Upload Description	Query Name	Template Name	Navigation to Upload File
			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
TL Eligibility	V_TA_ELIGIBILITY_ADJ	TA826 - TL Eligibility Mass Upload	Cardinal Interfaces > Mass Uploads > TL Eligibility Mass Upload
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.
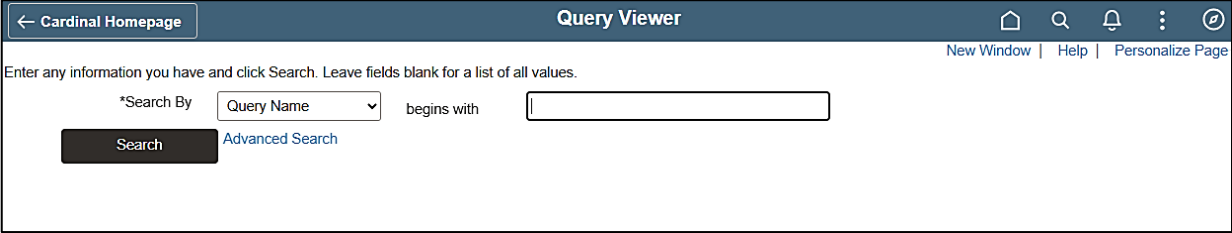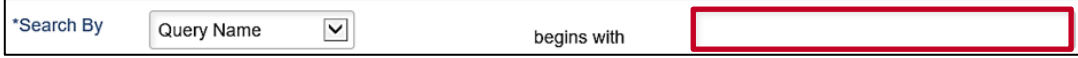
Run a Query

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**

The **Query Viewer Search** page displays.

Step	Action
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.**

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

Step	Action
4.	Click the link for the desired query output format (i.e., HTML, Excel, XML).

The **Position Funding Query** page is displays in a separate window.

ℹ	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.
5.	Enter or select the As of Date using the **As of Date Calendar** icon.
6.	Enter or select the SETID using the **SETID Look Up** icon.
ℹ	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.)
7.	Enter or select the Department ID using the **DEPTID Look Up** icon.
ℹ	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.
8.	Click the **View Results** button.

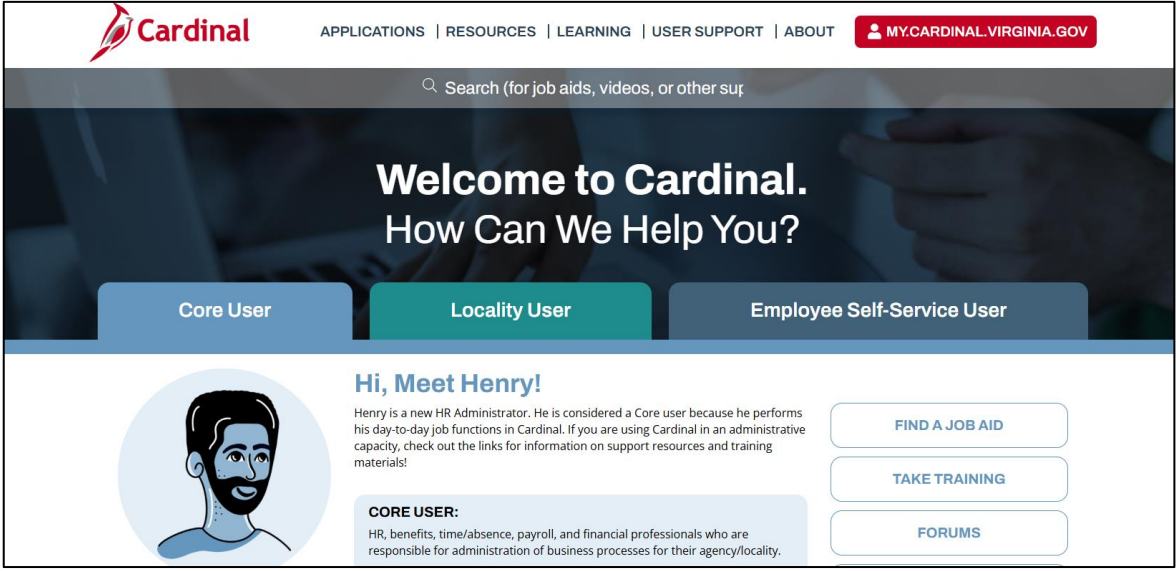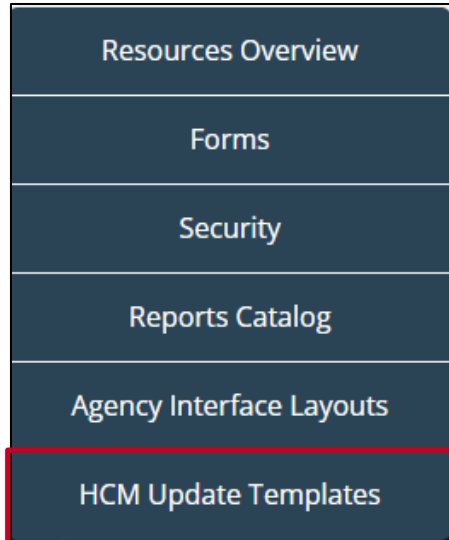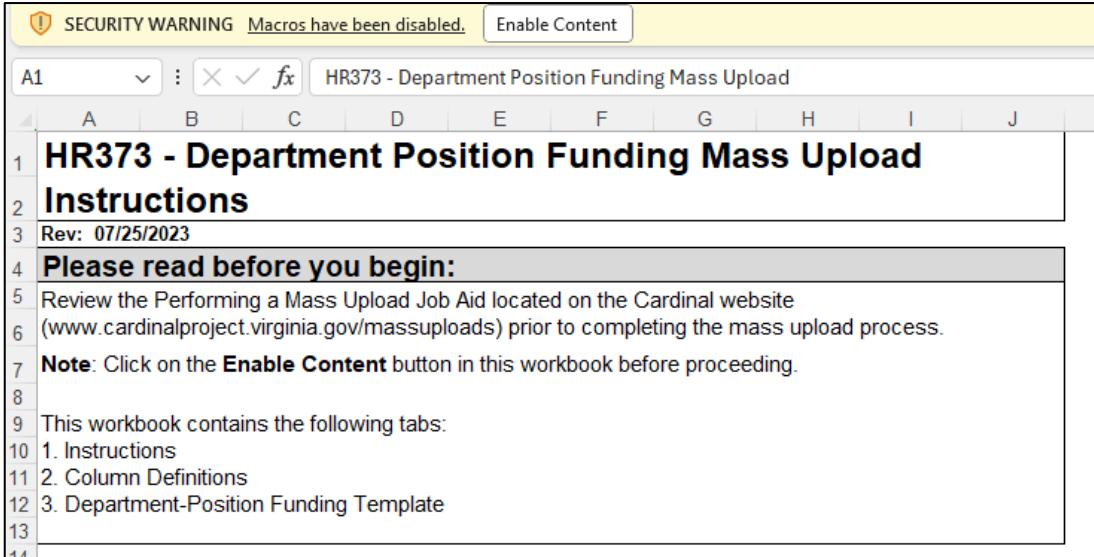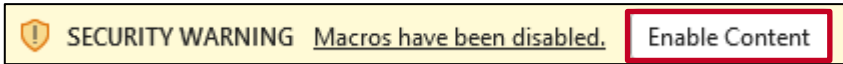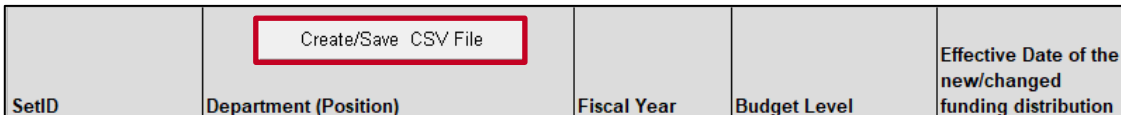| Step	Action
	The **Position Funding Query** page refreshes. **V_HR_POS_FUNDING_MASS_LOAD - Position Funding Query** As Of Date 07/01/2019 SETID (Leave Blank for All) 15100 DEPTID (Leave Blank for All) 95400 [View Results] Download results in : Excel SpreadSheet CSV Text File XML File (1 kb) View All <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>
ℹ	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.
9.	If desired, click the corresponding link to download a file version (i.e., Excel, CSV, XML) of the query. Download results in : **Excel SpreadSheet CSV Text File XML File** (1 kb)
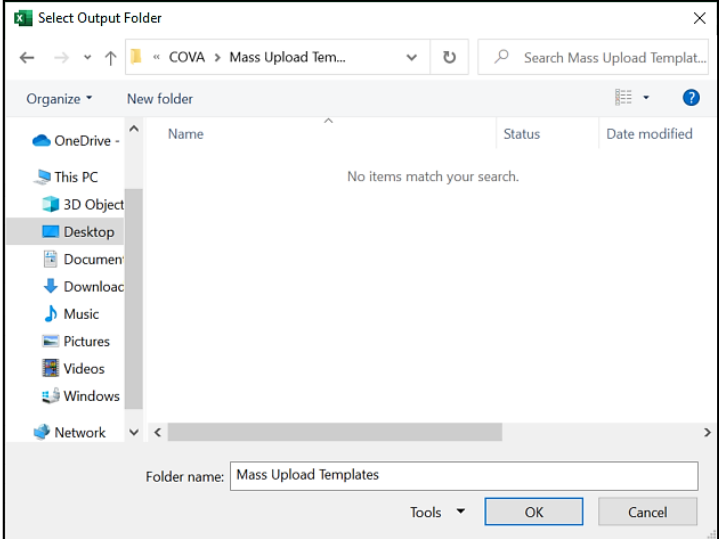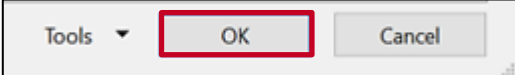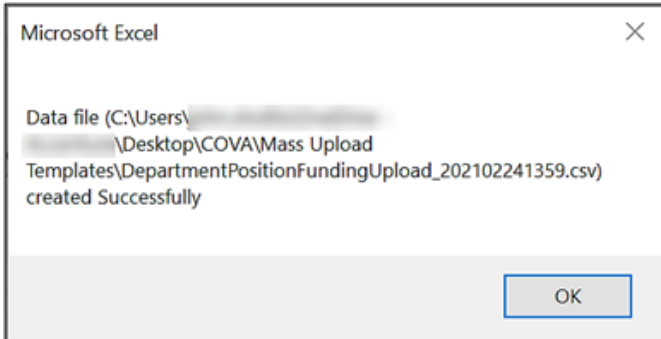
	Action
10.	Navigate to the Cardinal Project Website by clicking the following link: https://www.cardinalproject.virginia.gov/

The Cardinal Project Website displays:

11.	Click on **Resources.**
	APPLICATIONS | RESOURCES | LEARNING | USER SUPPORT | ABOUT

12.	Click on **HCM Upload Templates**.
	Resources Overview Forms Security Reports Catalog Agency Interface Layouts HCM Update Templates

Action
The **HCM Update Templates** page displays.

<table>
<tr><td colspan="2">

HCM Update Templates

Find a Template

Start typing here...

User Group	Application	Module	
- Any -	- Any -	- Any -	**Filter**

Search Results

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	⊕

</td></tr>
</table>

13.	Locate and open the appropriate **CSV Template** file **Scenario**: The name of the file is **HR373_Deparment_Position_Funding_Mass_Upload_Template.xlsm**.
ℹ	Select the appropriate CSV Template file and download the blank template file.

	Action
	The appropriate CSV Template file opens in Excel.

14.	When the excel file opens, click on **Enable Content**.

15.	Enter the required data using the information within the query performed in the **Run a Query** section of this Job Aid.

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 in 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.	Click the **Create/Save CSV File**.

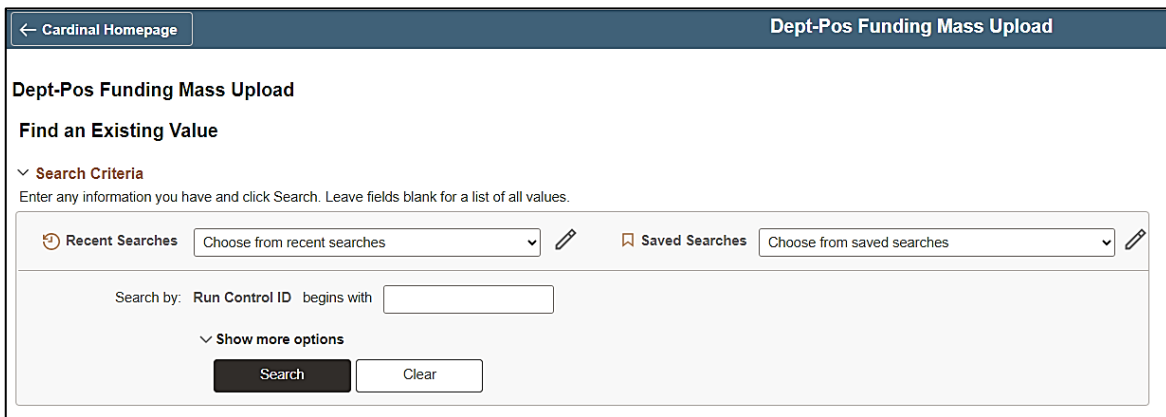| ℹ	The naming of the file can't be altered before uploading it to Cardinal and it will overwrite the previous upload document.

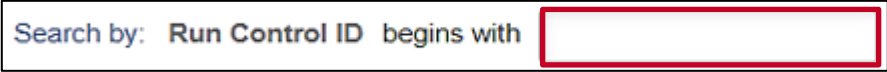|	Action
	The **Select Output Folder** pop-up window displays.
17.	Navigate to the desired location.
ℹ	If the file contains **Personal Information** (i. e. Performance Ratings, Employee ID, Compensation) ensure the file is saved to a local **secure** folder.
18.	Click the **OK** button.
ℹ	The file is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

	Action
20.	Click the **OK** button. OK

Upload a File

Step	Action
21.	Navigate to the appropriate **Mass Upload** page. **Scenario:** This example follows the Dept-Pos Funding Mass Upload. **NavBar > Menu > Cardinal Interfaces > Mass Uploads > Dept-POS Funding Mass Upload**
ℹ	For a list of all mass upload navigation paths, see the **Agency Mass Uploads Loaded into Cardinal by the Agency** section of this job aid.
	The **Dept-Pos Funding Mass Upload Find an Existing Value Search** page displays.
ℹ	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**.
ℹ	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.
23.	Click the **Search** button. Skip to Step 29.
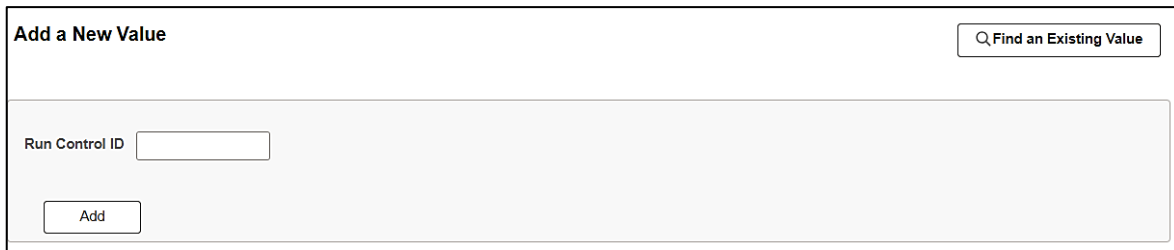
Step	Action
24.	Click the **Add a New Value** button. ⊕ Add a New Value
	The **Add a New Value** page displays. **Add a New Value** 🔍 Find an Existing Value Run Control ID [_____] Add
25.	Enter the desired Run Control ID in the **Run Control ID** field. Run Control ID [_____]
ℹ	A Run Control ID only needs to be added once and can be reused once added.
26.	Click the **Add** button. Add
	The **Dept-Pos Funding Mass Upload** page displays. New Window | Help | Personalize Page Dept-Pos Funding Mass Upload Run Control ID Dept_Pos Report Manager Process Monitor Run Process Request Parameter File Attachment Browse... Save Notify Add Update/Display
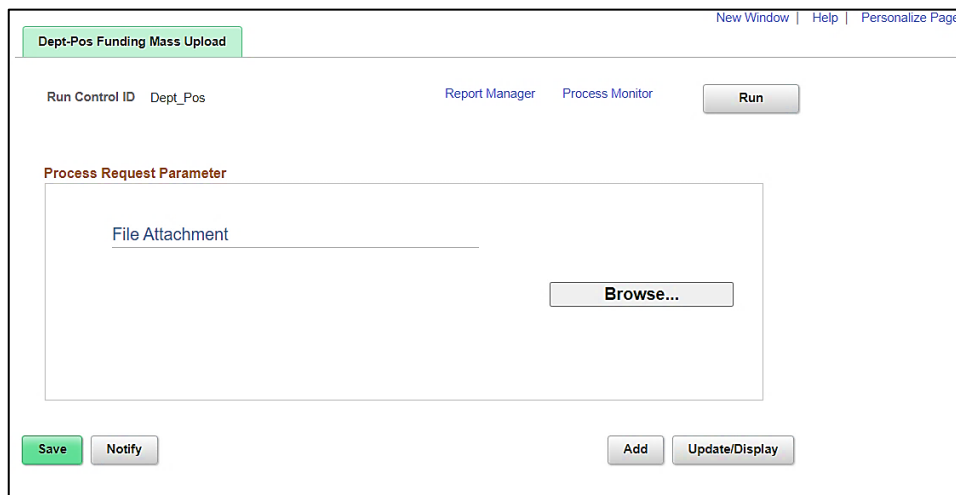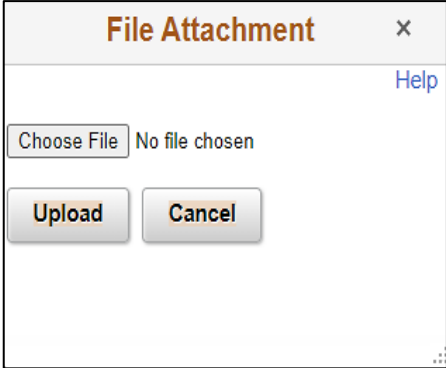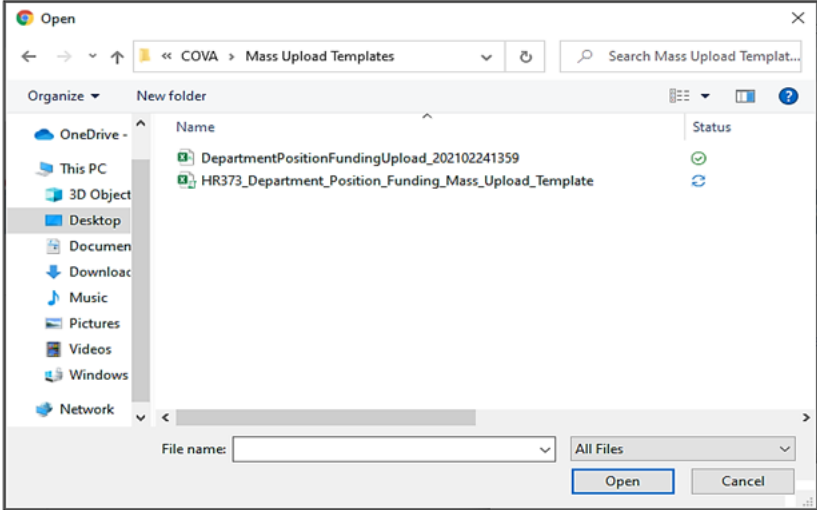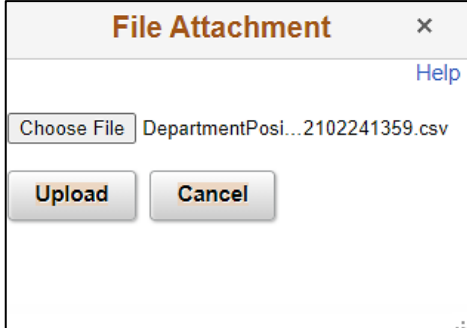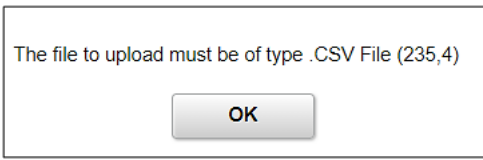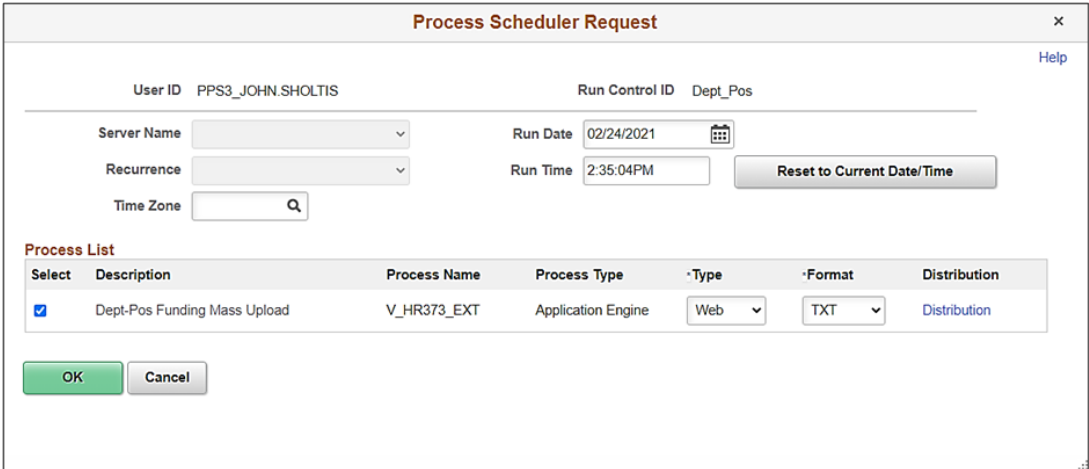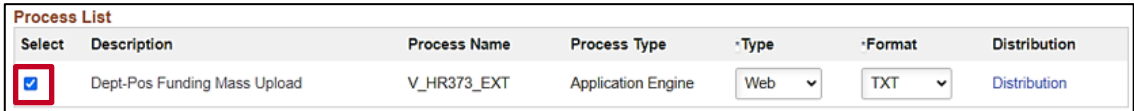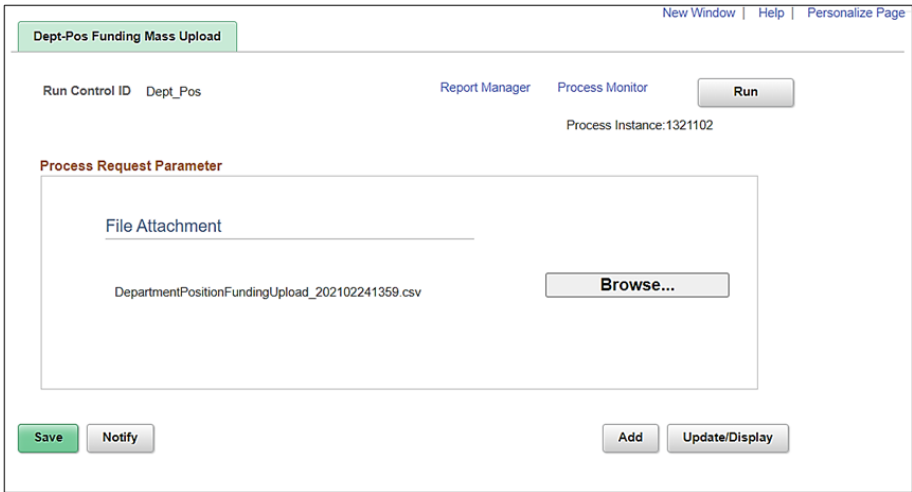
Step	Action
27.	Click the **Browse** button. Browse...

The **File Attachment** page displays in a pop-up window.

File Attachment ✕

Help

Choose File | No file chosen

Upload   Cancel

Step	Action
28.	Click the **Choose File** button. Choose File	No file chosen

The **Open File** window displays.

Open ✕

← → ∨ ↑ 📁 « COVA › Mass Upload Templates   ∨ ↻   🔍 Search Mass Upload Templat...

Organize ▼   New folder   ▦ ▼   ▢   ❓

☁ OneDrive -   Name   Status
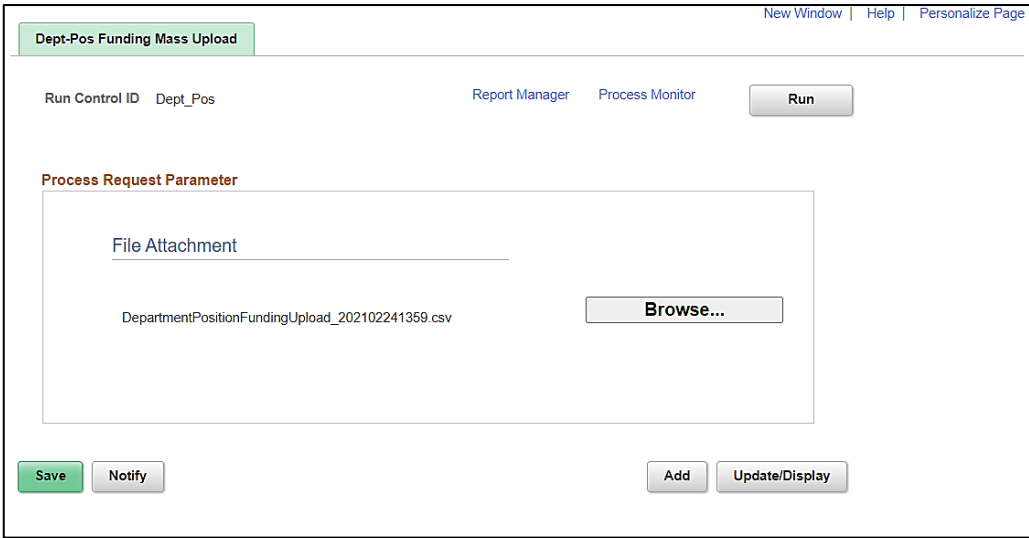💻 This PC   📊 DepartmentPositionFundingUpload_202102241359   ⊘
🟦 3D Object   📊 HR373_Department_Position_Funding_Mass_Upload_Template   ⟳
🖥 Desktop
📄 Documen
⬇ Downloac
🎵 Music
🖼 Pictures
🎞 Videos
🪟 Windows
🖧 Network   ∨ <   >

File name: ∨   All Files   ∨
                                            Open   Cancel

Step	Action
29.	Navigate to and select the appropriate Mass Upload file saved during the <u>Prepare the Upload File</u> section of this Job Aid. **Scenario**: This example demonstrates the Department Position Funding Mass Upload.

Step	Action
30.	Click the **Open** button.
	The **File Attachment** page returns.
31.	Click the **Upload** button.
32.	If an error message does not display, skip to Step 34.
	An **Error Message** page displays in a pop-up window if the selected file is not a CSV file. The file to upload must be of type .CSV File (235,4)
33.	Click the **OK** button.
34.	Repeat Steps 25 – 29, ensuring to upload the template saved in a CSV format.

Step	Action
	The **Dept-Pos Funding Mass Upload** page refreshes.
35.	Click the **Run** button.

Verify the Upload File

Step	Action
	The **Process Scheduler Request** page displays in a pop-up window. ![Process Scheduler Request pop-up window showing User ID PPS3_JOHN.SHOLTIS, Run Control ID Dept_Pos, Run Date 02/24/2021, Run Time 2:35:04PM, and Process List with Dept-Pos Funding Mass Upload V_HR373_EXT Application Engine Web TXT selected] Process Scheduler Request User ID PPS3_JOHN.SHOLTIS Run Control ID Dept_Pos Server Name ___ Run Date 02/24/2021 Recurrence ___ Run Time 2:35:04PM Reset to Current Date/Time Time Zone ___ **Process List** Select / Description / Process Name / Process Type / *Type / *Format / Distribution ☑ Dept-Pos Funding Mass Upload / V_HR373_EXT / Application Engine / Web / TXT / Distribution OK Cancel
36.	Verify the **Select** checkbox is selected for the appropriate upload description. (Select the checkbox if it is not already selected). **Process List** Select / Description / Process Name / Process Type / *Type / *Format / Distribution ☑ Dept-Pos Funding Mass Upload / V_HR373_EXT / Application Engine / Web / TXT / Distribution
37.	Click the **OK** button. OK Cancel
	The **Dept-Pos Funding Mass Upload** page returns. New Window | Help | Personalize Page Dept-Pos Funding Mass Upload Run Control ID Dept_Pos Report Manager Process Monitor Run Process Instance:1321102 **Process Request Parameter** File Attachment DepartmentPositionFundingUpload_202102241359.csv Browse... Save Notify Add Update/Display
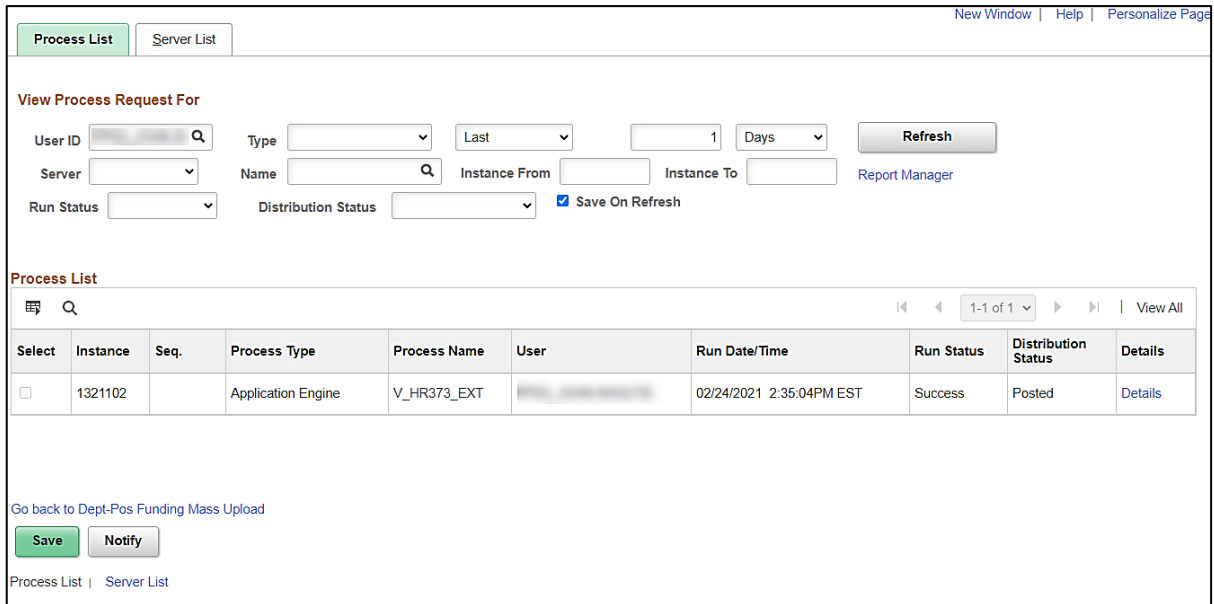
Step	Action
38.	Click the **Process Monitor** link. Report Manager Process Monitor [Run]

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

New Window | Help | Personalize Page

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
☐	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

Step	Action
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
☐	1321102		Application Engine	V_HR373_EXT		02/24/2021 2:35:04PM EST	Success	Posted	Details
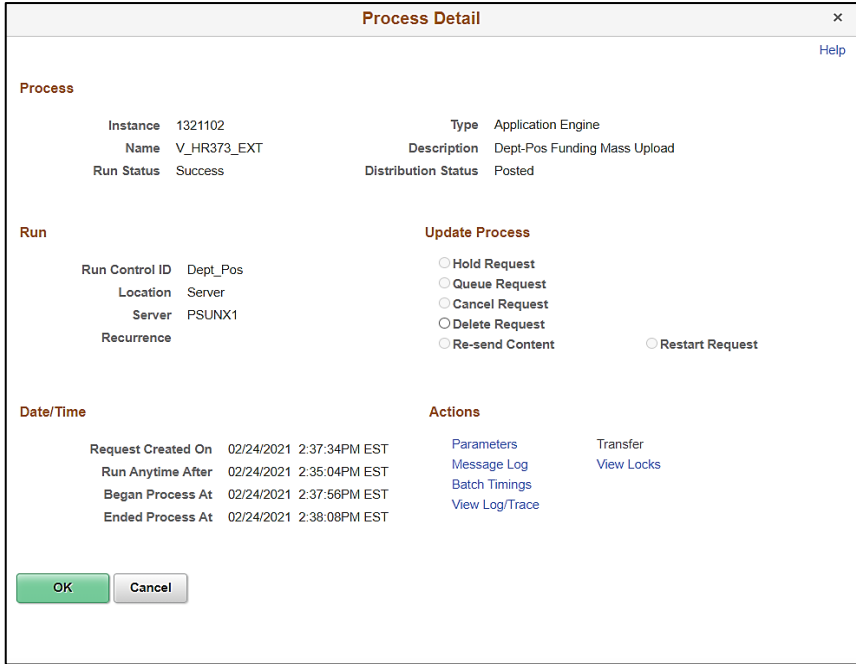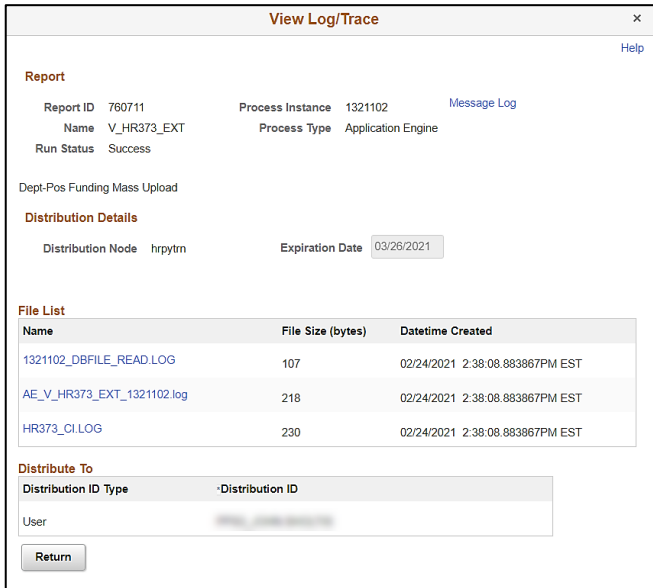
|

| 40. | Click the **Details** link.

Run Status	Distribution Status	Details
Success	Posted	Details

|

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

Step	Action
42.	Click the link for the file with a "**xxxx.log**" extension. **Scenario**: The link is **AE_V_HR373_EXT_1317850.log.** 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.
ℹ	To avoid duplicate transactions, the original file should not be re-run.
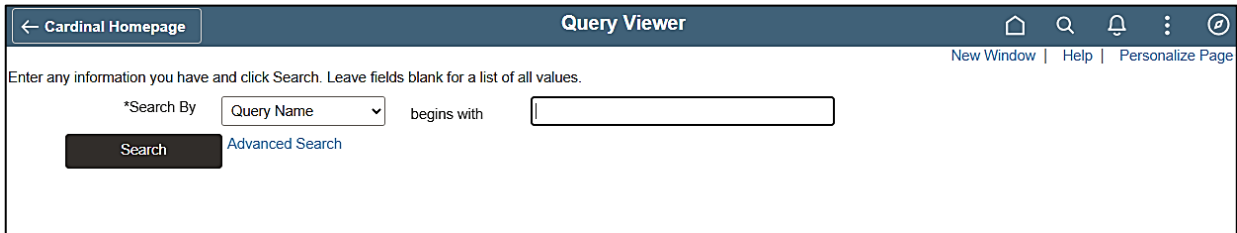
Agency Mass Uploads Reviewed by DHRM and Loaded into Cardinal by PPS

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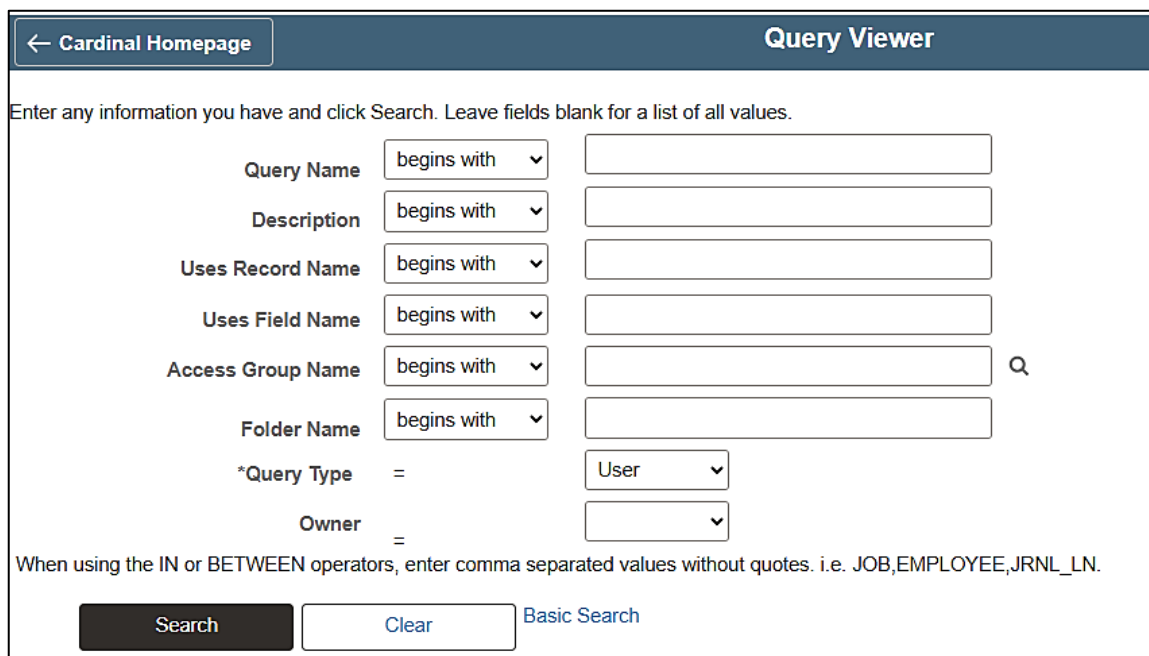
Step	Action
2.	Click the **Advanced Search** link.

The **Query Viewer Search** page refreshes.

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**".

Step	Action
4.	Click the **Search** button.

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

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

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

Step	Action
ℹ	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. As of Date [ ] 📅
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). Unit [ ] 🔍
8.	Enter or select the Department ID using the **Dept ID Look-Up** icon. Dept ID [ ] 🔍
9.	Click the **View Results** button. View Results

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

V_HR_JOB_MASS_DATA_CHANGE - Job Mass Update query

As of Date 11/09/2019 📅
Unit 10000 🔍
Dept ID [ ] 🔍
View Results

Download results in :   Excel SpreadSheet   CSV Text File   XML File   (222 kb)
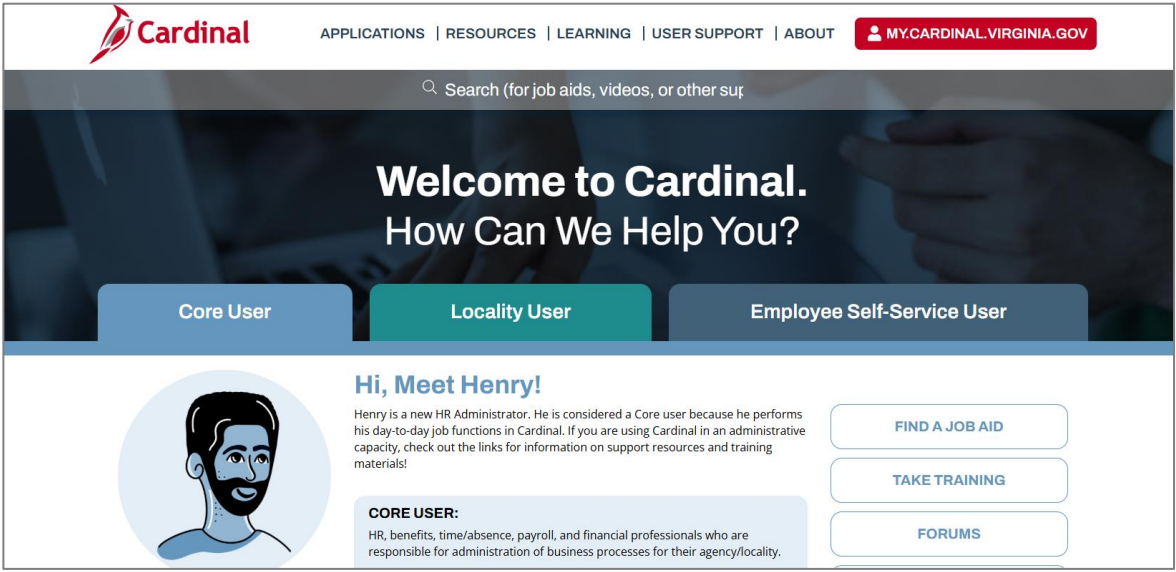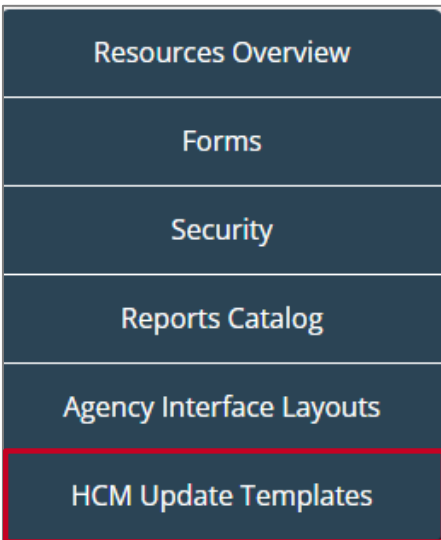
View All

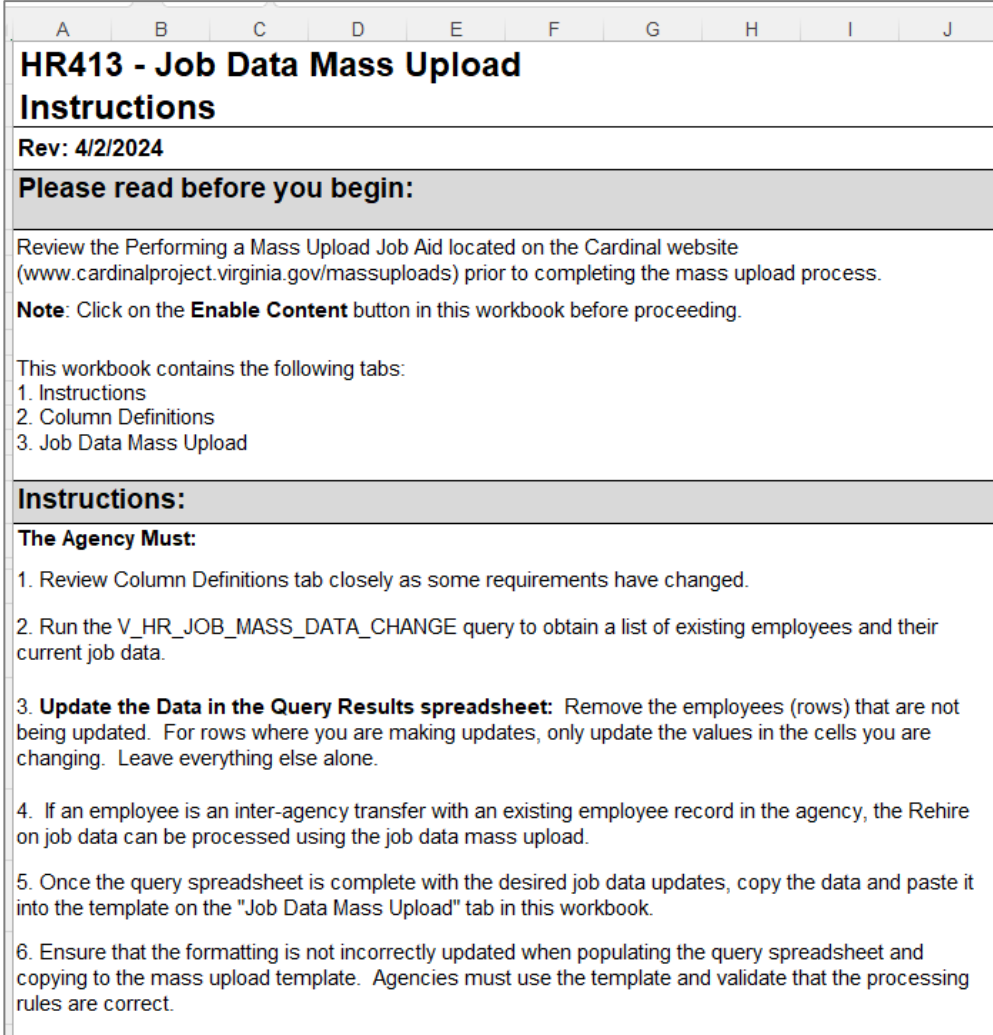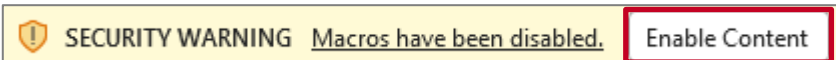| Row	Business Unit	EmplId	Empl Rcd	Effective Date	Action	Action Reason	Position Nbr	EstabID	Employee Class	Paygroup	Employee Type	Tax Location	FICA Status	Job Std Hrs	State Comp Rate	ST Comp Freq	Non State Comp Rate	Non ST Comp Freq	State Ben Comp Rate	State Ben Comp Freq	Hourly Comp Rate
1	10000		0	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

| ℹ | 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.	If desired, click the corresponding link to download a file version (i.e., Excel, CSV, XML) of the query. Download results in : **Excel SpreadSheet CSV Text File XML File** (222 kb)

Prepare the Upload File

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

The Cardinal Project Website displays:

Step	Action
12.	Click on **Resources.**

Step	Action
13.	Click on the **HCM Upload Templates**.

Step	Action
(i)	Select the appropriate CSV Template file and download the blank template file.

The **HCM Update Templates** page displays.

| 15. | Locate and open the appropriate **CSV Template** file.
Scenario: The name of the file is **HR413_Job_Data_Mass_Upload_Template.** |

Step	Action
	The appropriate CSV Template file displays in Excel.

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:
1. Instructions
2. Column Definitions
3. Job Data Mass Upload

Instructions:

The Agency Must:

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.

Step	Action
16.	When the excel file opens, click on **Enable Content**.
	SECURITY WARNING Macros have been disabled. **Enable Content**
17.	Enter the required data using the information within the query performed in the Run a Query section of this Job Aid.

Step	Action
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 in 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.
	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**.
18.	Click the **Create/Save CSV File**. ![Table header row with Create/Save CSV File button highlighted, columns: Employee ID, Employee Rcd Number, Effective Date, Action, Action Reason, Position Number]
ℹ	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.
19.	Send an email to iHelp@dhrm.virginia.gov providing notification that there is a file in the secure file repository for review and approval.
ℹ	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.

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.
ℹ	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**. Query Name [begins with ▼] [_____]
4.	Click the **Search** button. [Search] [Clear]

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

Step	Action
5.	Click the link of the desired query output format (i.e., HTML, Excel, XML). Run to HTML / Run to Excel / Run to XML HTML / Excel / XML

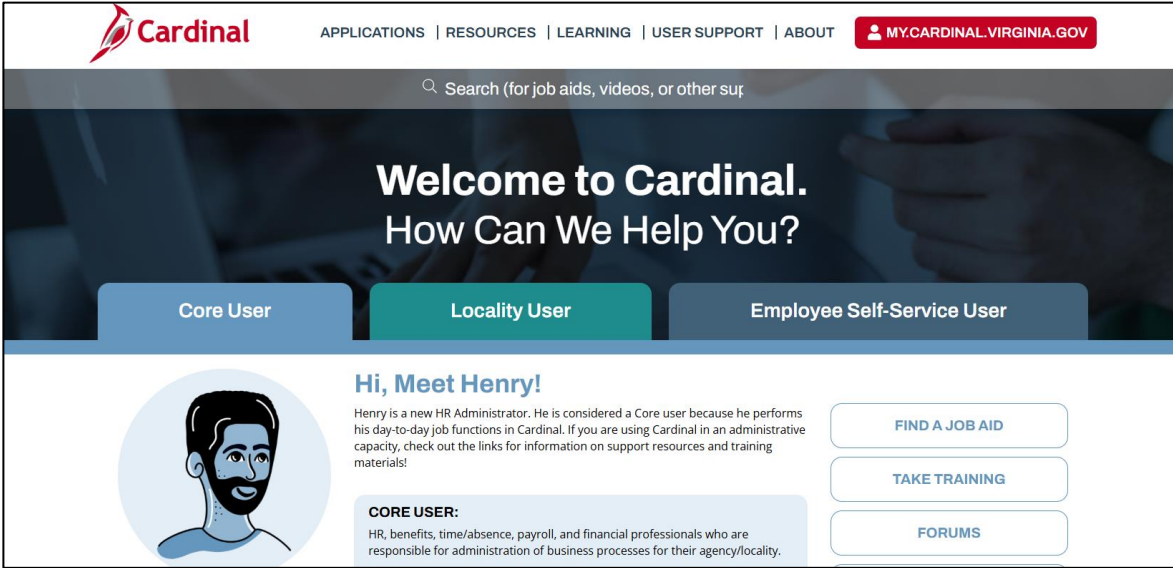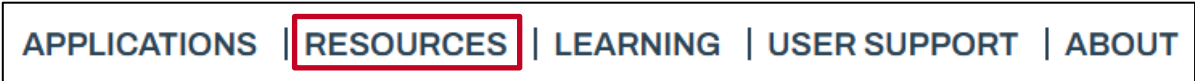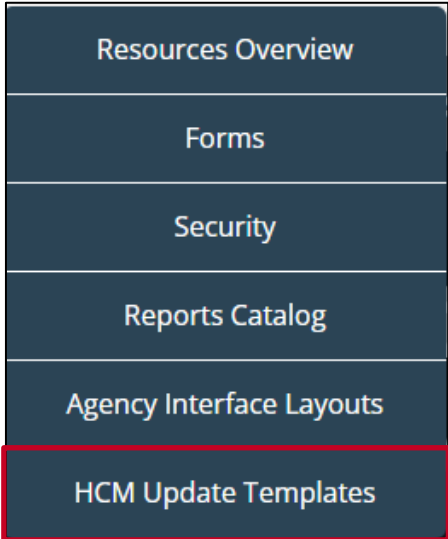| Step	Action
	The **General Deduction Query** page is displays in a separate window. **V_GENL_DEDUCTION_MASS - General Deduction Query** Company [ ] 🔍 General Deduction Code [ ] 🔍 As of Date [ ] 📅 [View Results] Row / Employee ID / Company / General Deduction Code / Effective Date / Ded Calc Method / 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 [ ] 🔍
ℹ	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 [ABC] 🔍 General Deduction Code [OPTLIF] 🔍 As of Date [11/01/2019] 📅 [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

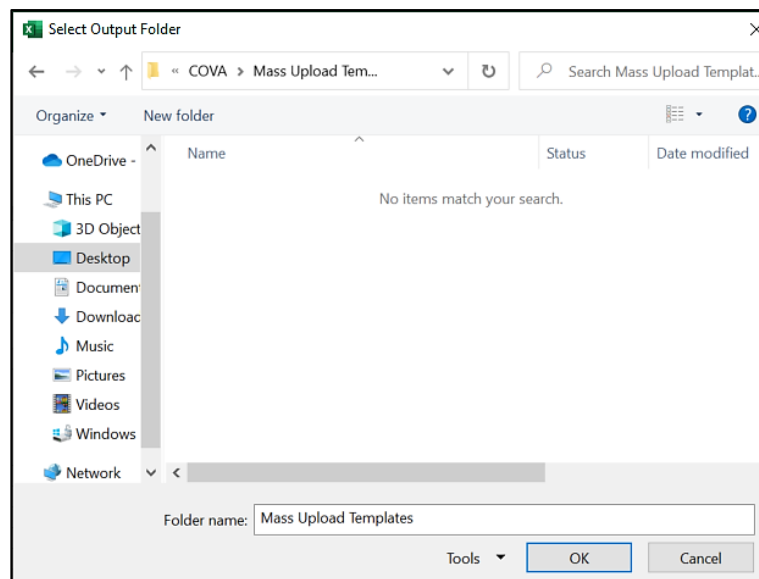| Step	Action
ℹ️	The above screenshot displays if the **HTML Query Output Format** link is selected. A download initiates if the **Excel** or **XML Query Output Format** link is selected. After the file is downloaded, select the file to open and view the query results. The information within the output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

Step	Action
11.	Click on **Resources**.

Step	Action
12.	Click on the **HCM Upload Templates**.

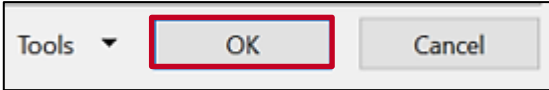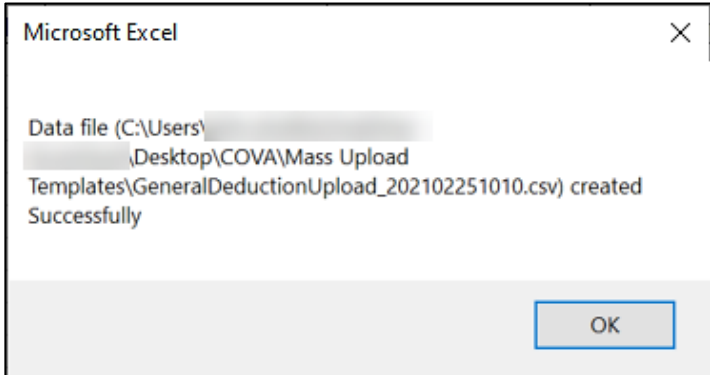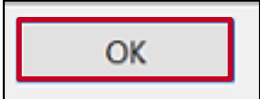| Step	Action
ℹ️	Select the appropriate CSV Template file and download the blank template file.

The **HCM Update Templates** page displays.

HCM Update Templates

Find a Template

Start typing here...

User Group	Application	Module	
- Any -	- Any -	- Any -	**Filter**

Search Results

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. | Locate and open the appropriate **CSV Template** file.

 Scenario: The name of the file is **PY362_General Deduction Mass Upload Template.** |

![Cardinal logo]

Step	Action
	The appropriate CSV Template file displays.

Print the Instructions and Column Definitions tabs for easy reference.

PY362 - General Deduction Mass Upload

Instructions
Rev: 3/25/2024

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:
1. Instructions
2. Column Definitions
3. General Deduction Upload Template

Instructions:

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.
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:
   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.

Step	Action
14.	When the excel file opens, click on **Enable Content**.
	⚠ SECURITY WARNING Macros have been disabled. Enable Content
15.	Enter the required data using the information within the query performed in the Run a Query section of this Job Aid.

Step	Action
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 in 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. 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**
16.	Click the **Create/Save CSV File**. <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>Company</td><td></td><td>Deduction Code</td><td>Effective Date</td><td>Calculation Routine</td><td>Flat/Addl Amount</td></tr></table>
ℹ	The naming of the file can't be altered before uploading it to Cardinal and it will overwrite the previous upload document.
17.	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.

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

Step	Action
18.	Navigate to the desired secure location.
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.

Step	Action
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.
ℹ	To avoid duplicate transactions, the original file should not be re-run
ℹ	Processing rules for each of the mass upload required fields are available in the applicable templates on the Cardinal website.