

Mass Upload Process Overview

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

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

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

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

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

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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: <ul style="list-style-type: none"> Agencies that use Cardinal Absence Management should use this Mass Upload when uploading monetary recognition. Agencies that do not use Cardinal Absence Management should use this Mass Upload for recognition leave and monetary recognition.
Additional Pay	V_Addlpay_Mass	RPY476_Add_Pay_QRY	Cardinal Interfaces > Mass Uploads > Additional Pay

Run a Query

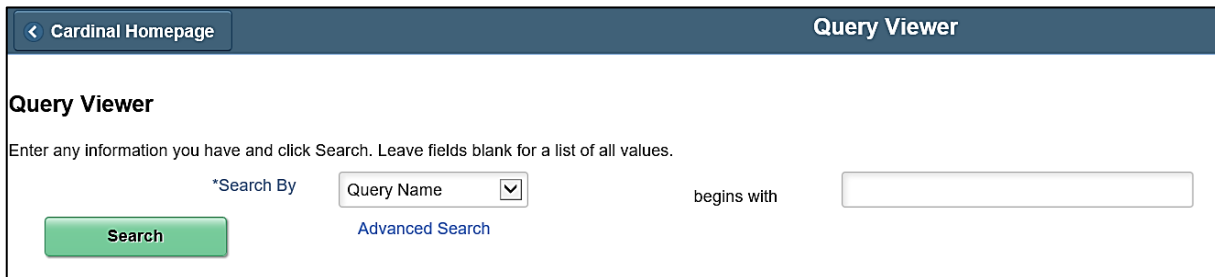
Each Agency runs a query to obtain current Cardinal data.

The below is an example of how to run the query for Dept_Posn Funding Mass Upload.

1. Navigate to the **Query Viewer Search** page using the following path:

Navigator > Reporting Tools > Query > Query Viewer

The **Query Viewer Search** page displays.

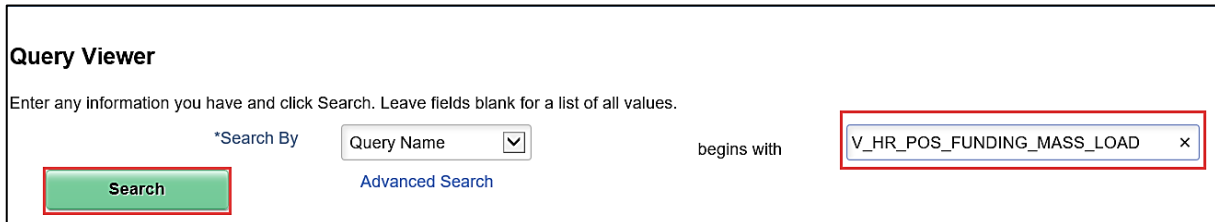


Query Viewer

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

*Search By begins with

[Advanced Search](#)



Query Viewer

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

*Search By begins with

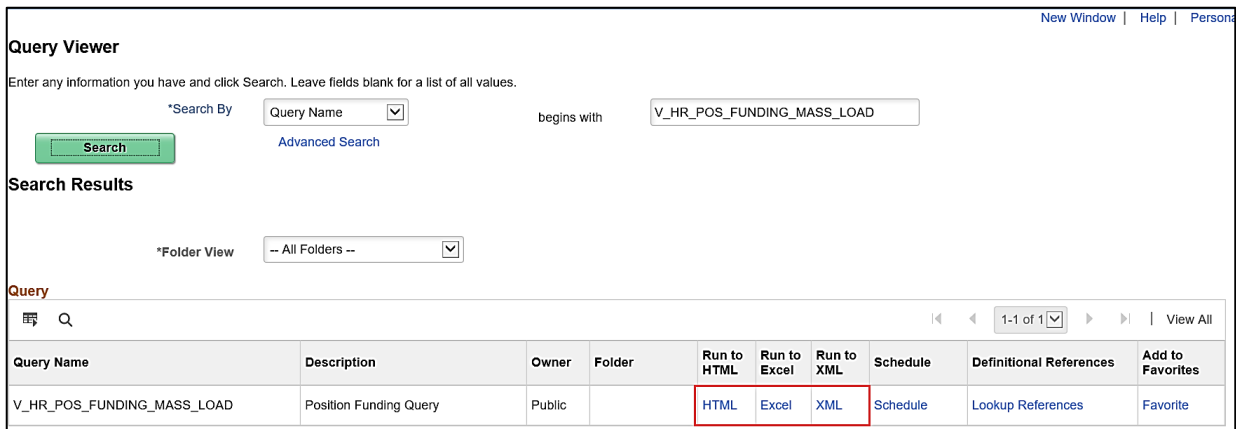
[Advanced Search](#)

2. Enter the Query Name in the **Query Name** field.

Note: 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.



Query Viewer

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

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_HR_POS_FUNDING_MASS_LOAD	Position Funding Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

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

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

V_HR_POS_FUNDING_MASS_LOAD - Position Funding Query

As Of Date

SETID (Leave Blank for All)

DEPTID (Leave Blank for All)

Row	Setid	Deptid	Fiscal Year	Bud Lvl Inc	Effective Date	Eff Status	Position Nbr	Disc_PCT	Fund Code	Chartfield2	Deptid CF	Chartfield1	Product	Class Fid	Operating Unit	Chartfield3	Budget Ref	Business Unit PC	Project ID	Activity ID	Resource Type	Resource Cat	Resource Sub Cat	Affiliate	Affiliate Intra1	Program Code

Note: 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 the As of Date in the **As Of Date** field.
6. Enter the Set ID in the **SETID** field.

Note: Leave the **SETID** field blank if all Business Unit (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 the Department ID in the **DEPTID** field.


Note: 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.

The **Position Funding Query** page refreshes.

V_HR_POS_FUNDING_MASS_LOAD - Position Funding Query

As Of Date 

SETID (Leave Blank for All) 

DEPTID (Leave Blank for All) 

[View Results](#)

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

[View All](#)

Row	Setid	Deptid	Fiscal Year	Bud Lvl Inc	Effective Date	Eff Status	Position Nbr	Disc_PCT	Fund Code	Chartfield2	Deptid CF	Chartfield1
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	

Note: 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.

Prepare the Upload File

10. Click on the following link to navigate to the Cardinal Project Website.
<https://www.cardinalproject.virginia.gov/>

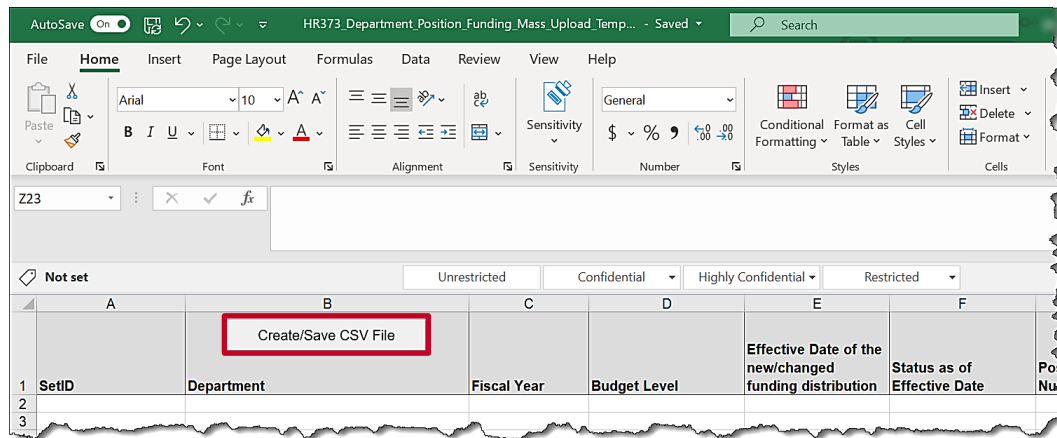
11. Click on **Resources**.

12. Click on **HCM Upload Templates**.

Note: Select the appropriate CSV Template file and download the blank template file.

13. Locate and open the appropriate **CSV Template** file (for this example the name of the file is **HR373_Deparment_Position_Funding_Mass_Upload_Template.xlsm**).

The appropriate template 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.

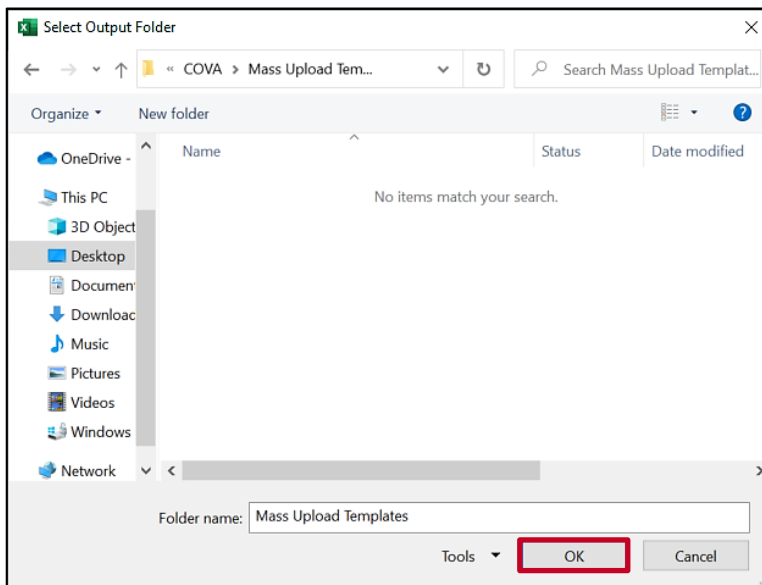
Note: When copying the data from the query and into the applicable excel template, ensure that:

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.

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

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

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



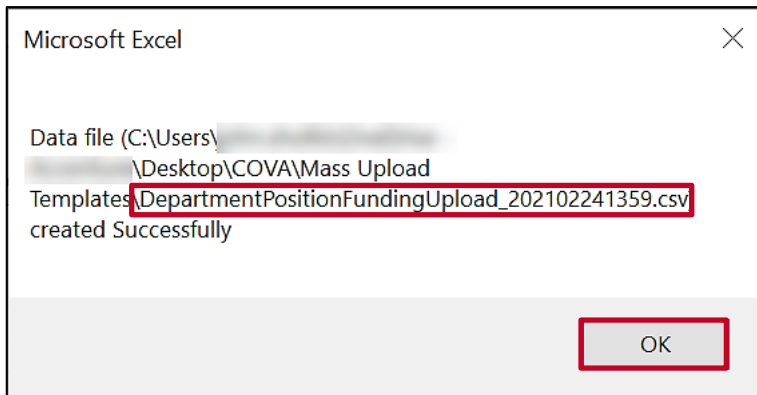
17. Navigate to the desired location.

Note: 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.

Note: 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.

20. Click the **OK** button.

Upload a File

21. Navigate to the appropriate **Mass Upload** page using one of the following paths:

Dept-POS Funding Mass Upload:

Navigator > Cardinal Interfaces > Mass Uploads > Dept-POS Funding Mass Upload

Note: This example follows the Dept-Pos Funding Mass Upload.

Leave Balance Adj Mass Upload:

Navigator > Cardinal Interfaces > Mass Uploads > Leave Balance Adj Mass Upload

Performance Rating Mass Upload:

Navigator > Cardinal Interfaces > HR Interfaces > Mass Uploads > Performance Rating Mass Upload

Reward and Recognition Mass Upload:

Navigator > Cardinal Interfaces > HR Interfaces > Mass Uploads > Reward and Recognition Mass Upload

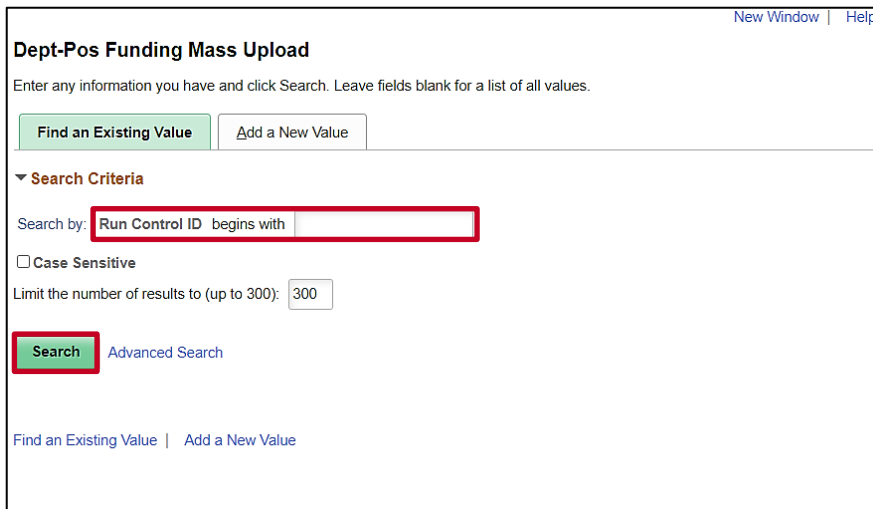
Additional Pay Mass Upload:

Navigator > Cardinal Interfaces > Mass Uploads > Additional Pay

Managing Employee Teleworker Employee Data

Navigator > Cardinal Interfaces > Mass Uploads > HR Interfaces > Mass Uploads > Teleworkers Mass Upload

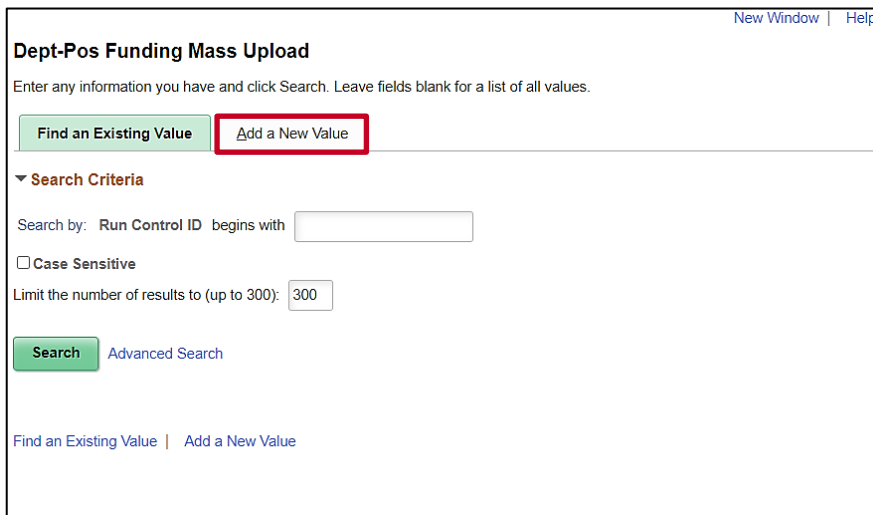
The **Dept-Pos Funding Mass Upload Search** page displays.



22. If an existing Run Control ID is known, proceed to Step 23. If an existing Run Control ID is not known, skip to Step 25.

23. If an existing Run Control ID is known, enter the Run Control ID in the **Run Control ID** field.

24. Click the **Search** button. Skip to Step 28.



Dept-Pos Funding Mass Upload [New Window](#) | [Help](#)

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

[Find an Existing Value](#) **Add a New Value**

▼ Search Criteria

Search by: Run Control ID begins with

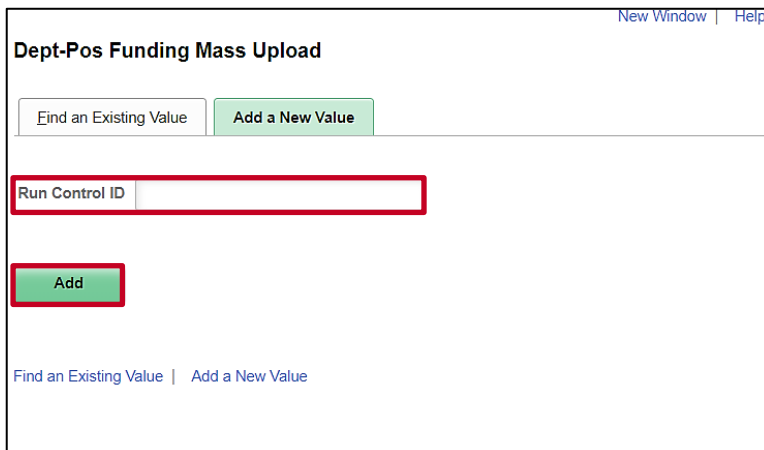
Case Sensitive

Limit the number of results to (up to 300):

[Search](#) [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

25. Click the **Add a New Value** tab.
- The **Add a New Value** tab displays.



Dept-Pos Funding Mass Upload [New Window](#) | [Help](#)

[Find an Existing Value](#) **Add a New Value**

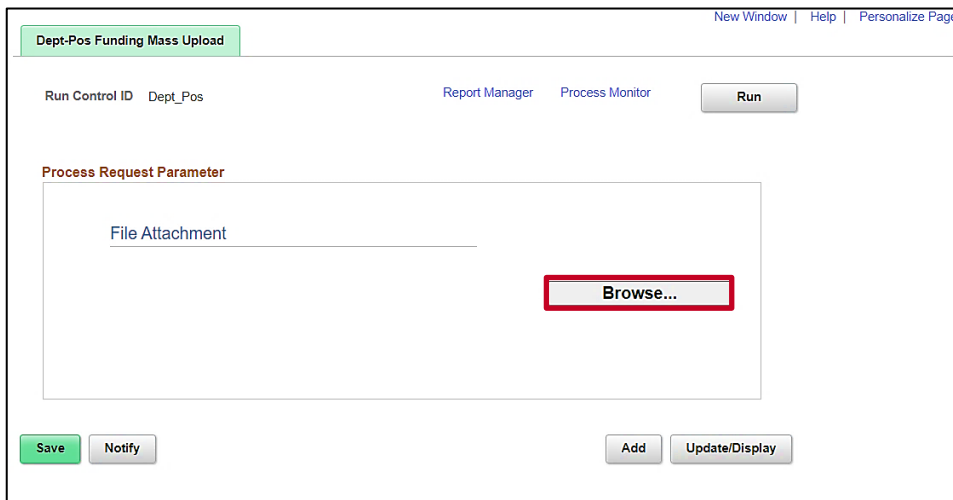
Run Control ID

Add

[Find an Existing Value](#) | [Add a New Value](#)

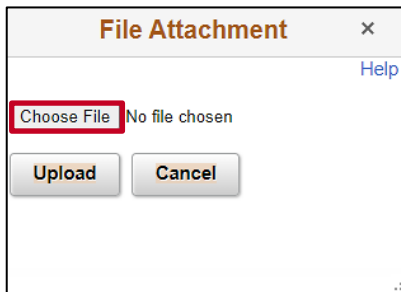
26. Enter the desired Run Control ID in the **Run Control ID** field.
- Note:** A Run Control ID only needs to be added once and can be reused once added.
27. Click the **Add** button.

The **Dept-Pos Funding Mass Upload** page displays.



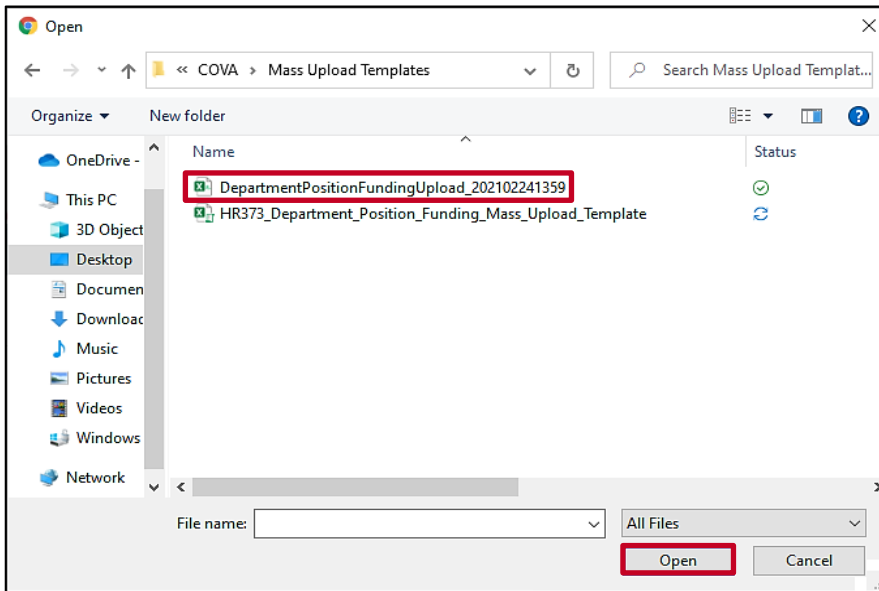
28. Click the **Browse** button.

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



29. Click the **Choose File** button.

The **Open File** window displays.

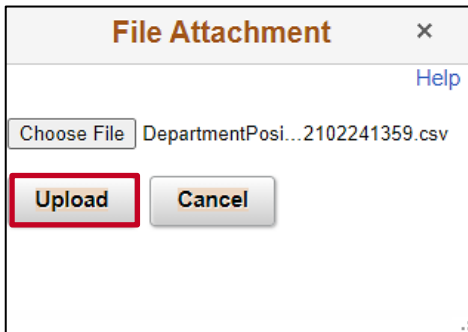


30. Navigate to and select the appropriate Mass Upload file saved during the **Prepare the Upload File** section of this Job Aid.

Note: This example demonstrates the Department Position Funding Mass Upload.

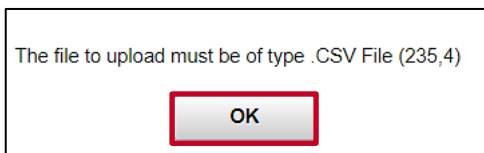
31. Click the **Open** button.

The **File Attachment** page returns.



32. Click the **Upload** button.
33. If an error message does not display, skip to Step 34.

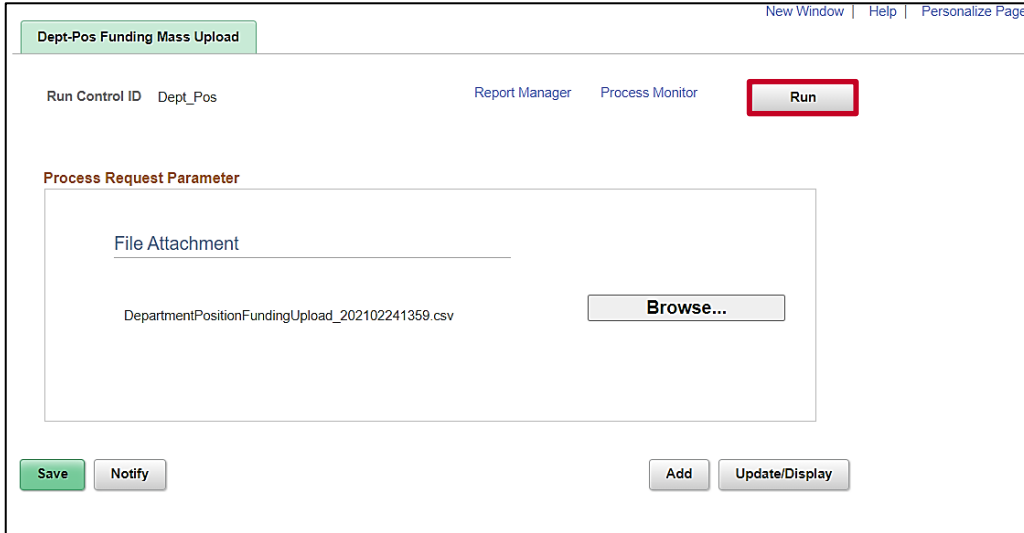
An **Error Message** page displays in a pop-up window if the selected file is not a CSV file.



34. Click the **OK** button.

35. Repeat Steps 26 – 30, ensuring to upload the template saved in a CSV format.

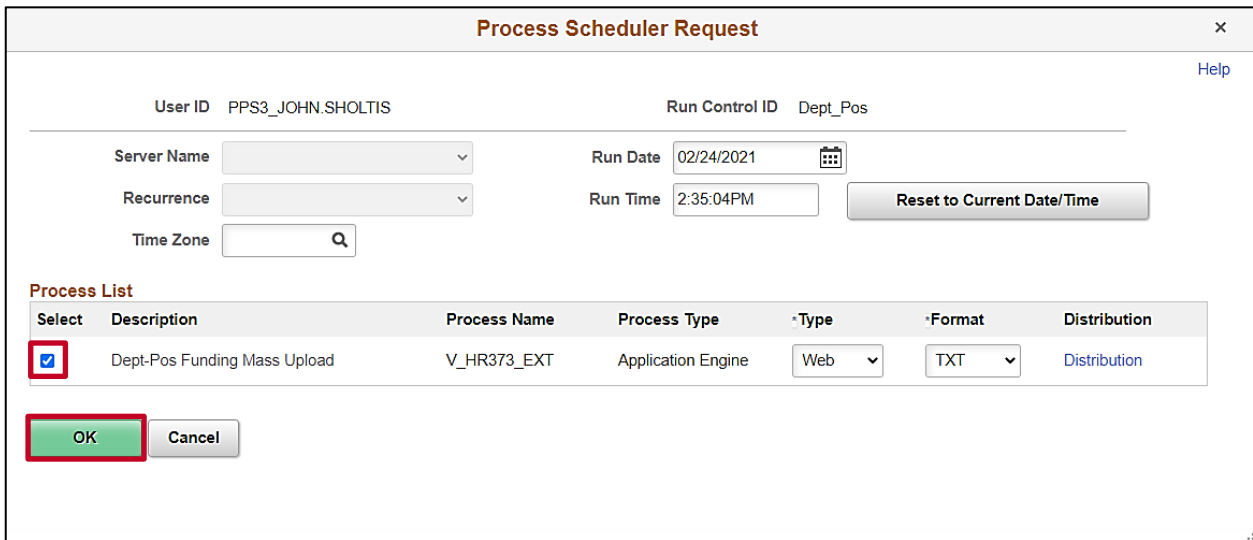
The **Dept-Pos Funding Mass Upload** page refreshes.



36. Click the **Run** button.

Verify the Upload File.

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

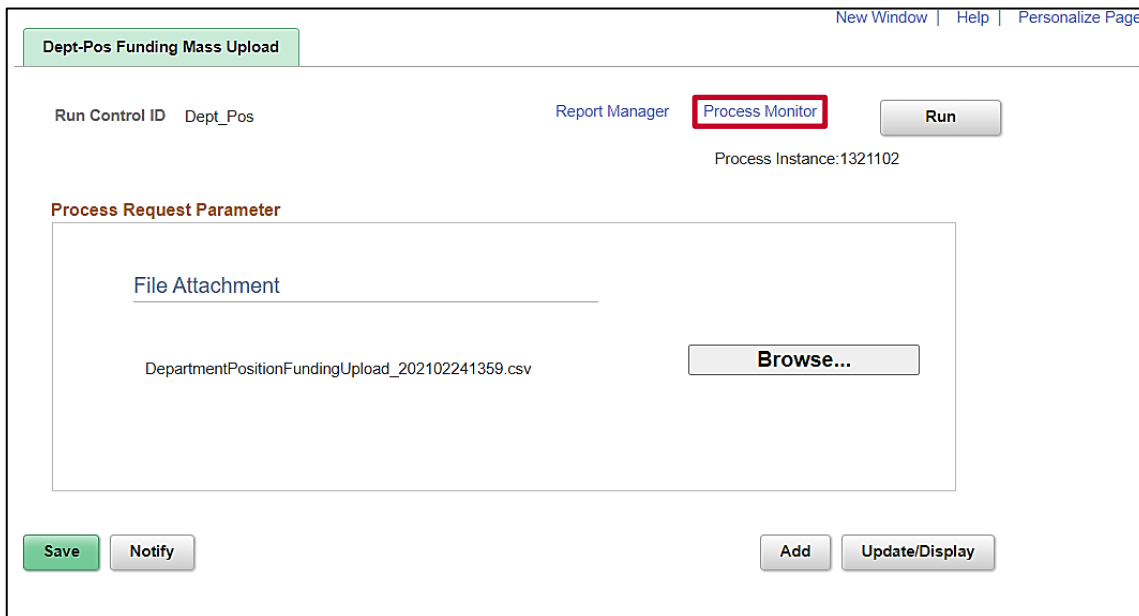


Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Dept-Pos Funding Mass Upload	V_HR373_EXT	Application Engine	Web	TXT	Distribution

37. Verify the **Select** checkbox is selected for the appropriate upload description. (Select the checkbox if it is not already selected).

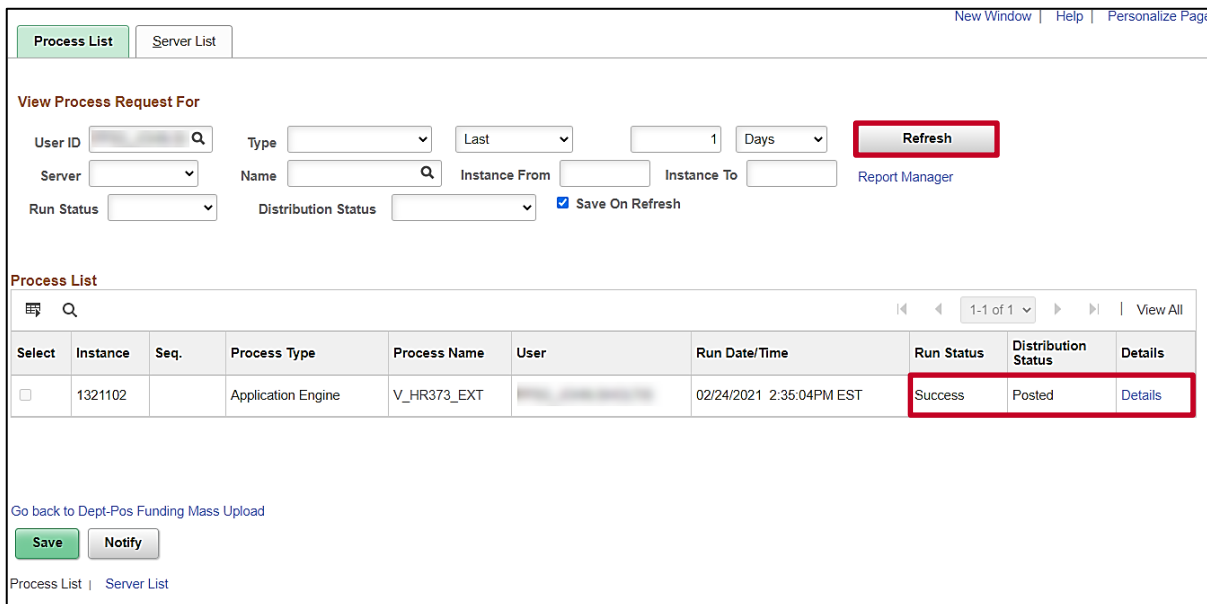
38. Click the **OK** button.

The **Dept-Pos Funding Mass Upload** page returns.



39. Click the **Process Monitor** link.

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

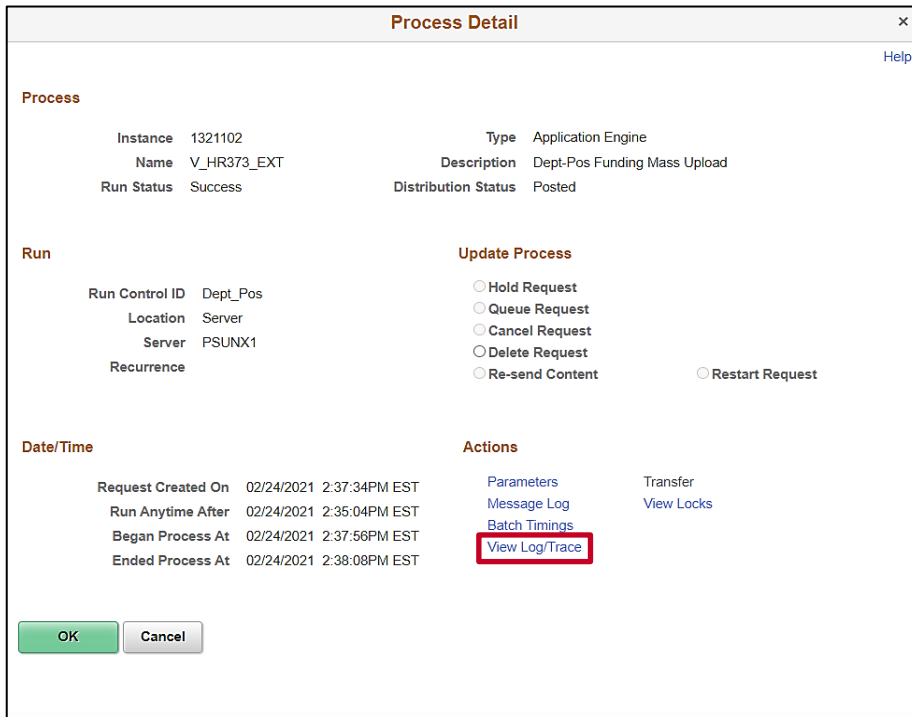


Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1321102		Application Engine	V_HR373_EXT		02/24/2021 2:35:04PM EST	Success	Posted	Details

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

41. Click the **Details** link.

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



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

Run	
Run Control ID	Dept_Pos
Location	Server
Server	PSUNX1
Recurrence	

Update Process	
<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
<input type="radio"/>	Restart Request

Date/Time	
Request Created On	02/24/2021 2:37:34PM EST
Run Anytime After	02/24/2021 2:35:04PM EST
Began Process At	02/24/2021 2:37:56PM EST
Ended Process At	02/24/2021 2:38:08PM EST

Actions	
Parameters	Transfer
Message Log	View Locks
Batch Timings	
View Log/Trace	

OK Cancel

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

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

View Log/Trace 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 hrpytrn 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	

43. Click the link for the file with a “xxxx.log” extension (“AE_V_HR373_EXT_1317850.log” in this example).

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)
(91,37) - Error saving Component Interface. {V_REWARD_DATA_CI} (91,37)
11
12         00900158900 0
12         00900158900 0
    
```


Correct Errors

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

44. Agency Administrators take the necessary actions to correct all identified errors.

Note: The Agency can either correct the errors on Excel and resubmit the upload file or enter the transaction online through an online data entry.

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	HR412_Position_Mass_Upload.xlsm (File is located on the Cardinal Project website under Resources > HCM Update Templates)	

Run a Query

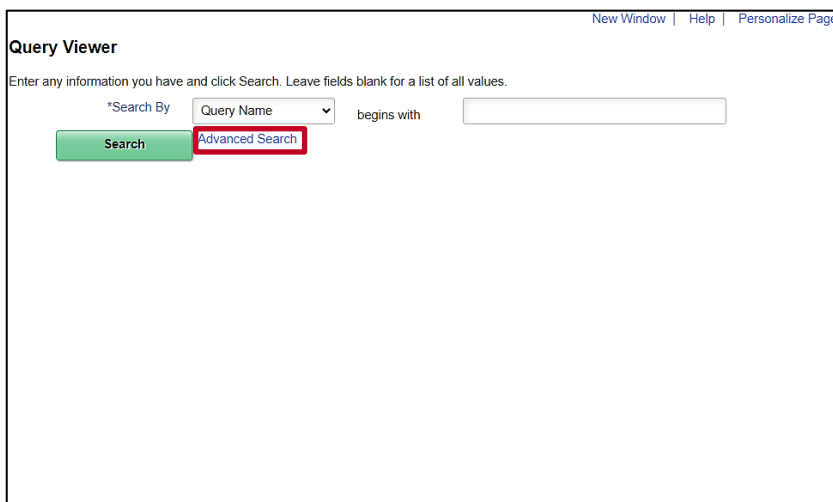
Note: As a reminder, positions cannot be deleted in the Cardinal system. Before adding new positions validate that there are not inactive positions that can be repurposed. DHRM will be checking each position mass upload against the agency’s current vacant positions as a validation.

If applicable, each Agency runs a query to obtain current Cardinal data. The example below provides the steps to run a Job Data Mass Upload query.

1. Navigate to the **Query Viewer Search** page using the following path:

Reporting Tools > Query > Query Viewer

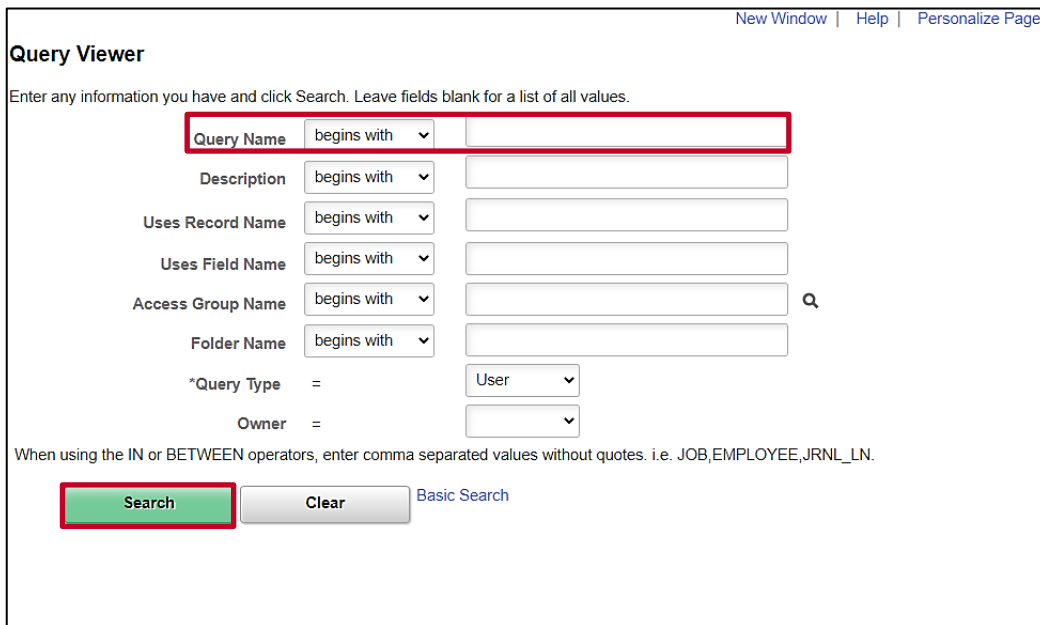
The **Query Viewer Search** page displays.



The screenshot shows the 'Query Viewer' search interface. At the top right, there are links for 'New Window', 'Help', and 'Personalize Page'. Below the title, a prompt says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search area includes a '*Search By' dropdown menu currently set to 'Query Name', followed by the text 'begins with' and an empty text input field. Below these elements are two buttons: a green 'Search' button and a red-bordered 'Advanced Search' link.

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

The **Query Viewer Search** page refreshes.



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

Query Viewer

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

Query Name	begins with	<input type="text"/>
Description	begins with	<input type="text"/>
Uses Record Name	begins with	<input type="text"/>
Uses Field Name	begins with	<input type="text"/>
Access Group Name	begins with	<input type="text"/>
Folder Name	begins with	<input type="text"/>
*Query Type	=	<input type="text" value="User"/>
Owner	=	<input type="text"/>

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

[Basic Search](#)

3. Enter the query's name in the **Query Name** field. In this example, 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

[Advanced Search](#)

Search Results

*Folder View

Query

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

- 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 [ST]

Unit [Q]

Dept ID [Q]

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
-----	---------------	--------	----------	----------------	--------	---------------	--------------	---------	----------------	----------	---------------	--------------	-------------	-------------	-----------------	--------------	---------------------

Note: 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.

- Enter the As of Date in the **As Of Date** field.
- Enter the Business Unit using the **Unit** field look-up icon. (A Business Unit is a 5 digit code such as 50100 or 15100).
- Enter/select the Department ID using the **Dept ID** field look-up icon.
- Click the **View Results** button.

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

V_HR_JOB_MASS_DATA_CHANGE - Job Mass Update query

As of Date:

Unit:

Dept ID:

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

[View All](#)

Row	Business Unit	EmplId	Empl Rcd	Effective Date	Action	Action Reason	Position Nbr	Establish	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

Note: 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.

- If desired, click the corresponding link to download a file version (i.e., Excel, CSV, XML) of the query.

Prepare the Upload File

11. Click on the following link to navigate to the Cardinal Project Website.
<https://www.cardinalproject.virginia.gov/>

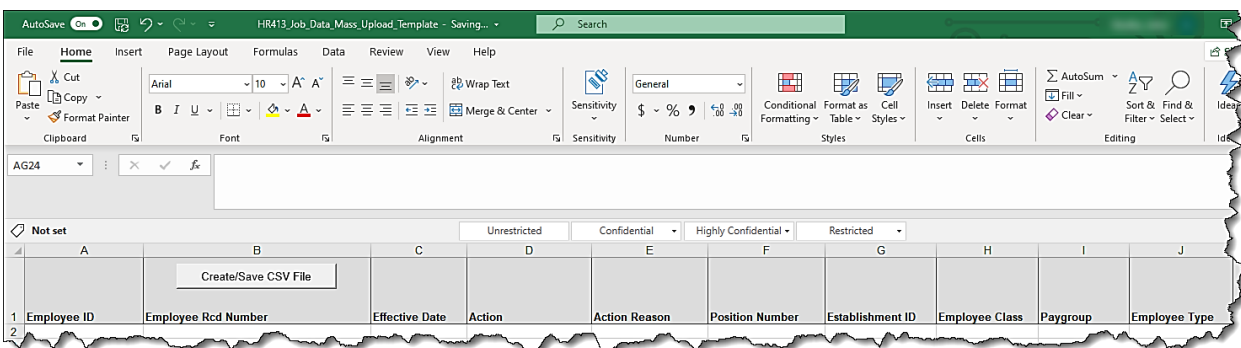
12. Click on **Resources**.

13. Click on **HCM Update Templates**.

Note: Select the appropriate CSV Template file and download the blank template file.

14. Locate and open the **CSV Template** file.

The appropriate template displays in Excel.



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

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

Note: 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.

Note: 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**.

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

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.

18. Send an email to iHelp@dhrm.virginia.gov providing notification that there is a file in the secure file repository for review and approval.

Note: 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

After PPS runs the file, they will provide the error log to the Agency with a copy to DHRM.

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.

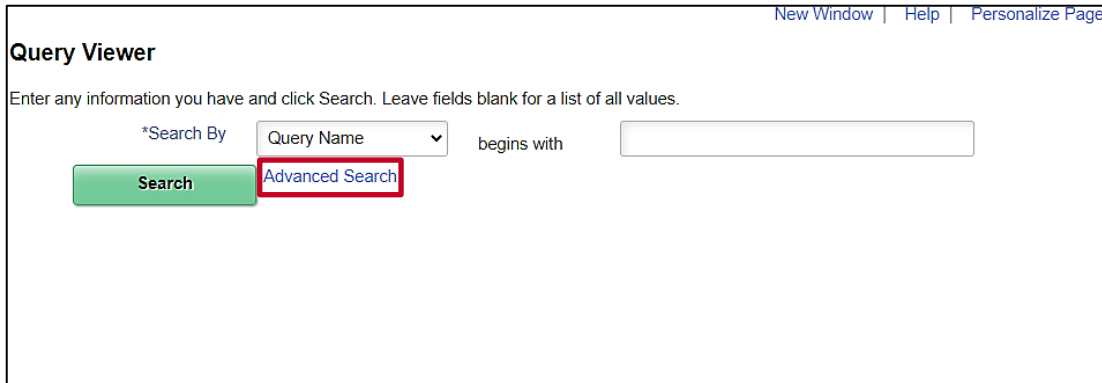
Note: The Agency can either correct the errors on Excel and resubmit the upload file or enter the transaction through an online data entry.

Agency Mass Uploads Loaded into Cardinal by SPO**General Deduction Mass Upload – Run a Query**

1. Navigate to the **Query Viewer Search** page using the following path:

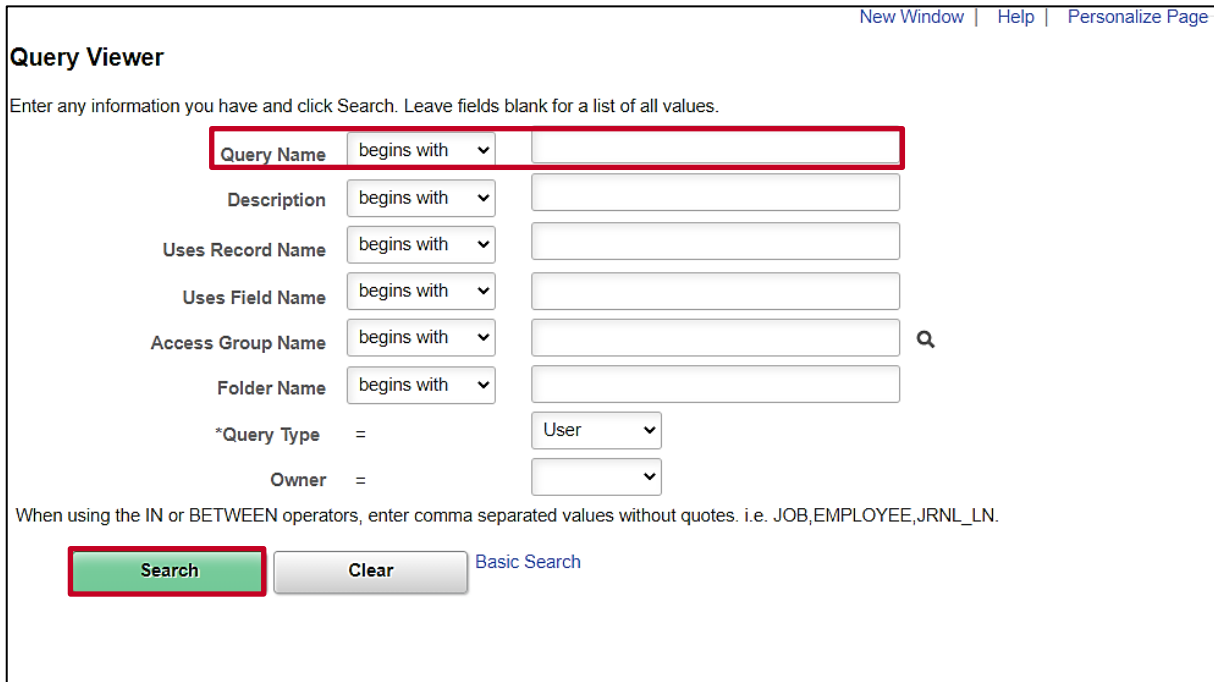
Navigator > Reporting Tools > Query > Query Viewer

The **Query Viewer Search** page displays.



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

The **Query Viewer Search** page refreshes.

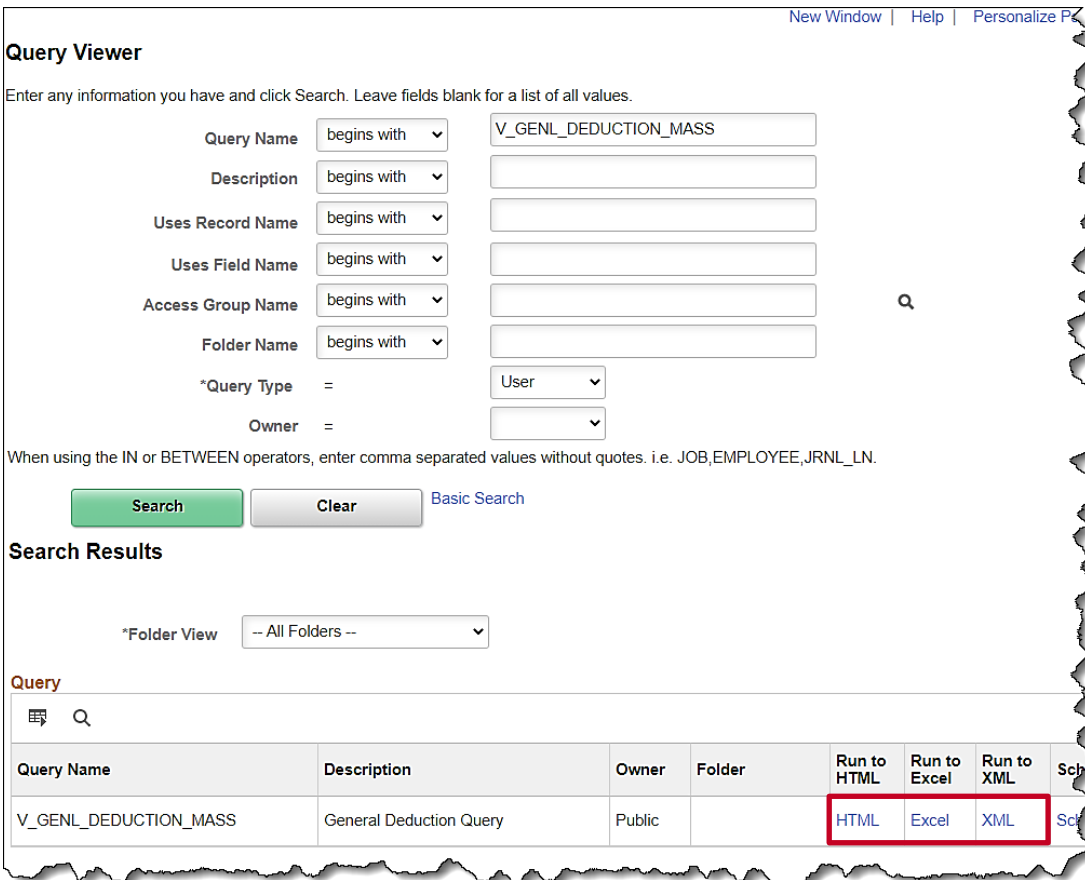


3. Enter the Query Name in the **Query Name** field.

Note: In this example 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

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

Query Name begins with V_GENL_DEDUCTION_MASS

Description begins with

Uses Record Name begins with

Uses Field Name begins with

Access Group Name begins with

Folder Name begins with

*Query Type = User

Owner =

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

Search Clear Basic Search

Search Results

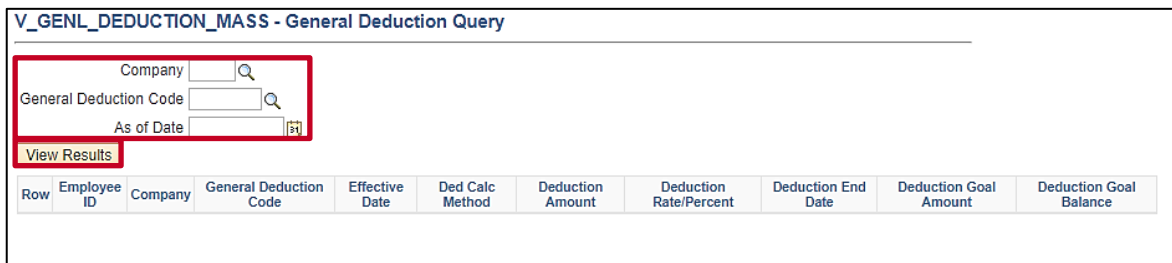
*Folder View -- All Folders --

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Sch
V_GENL_DEDUCTION_MASS	General Deduction Query	Public		HTML	Excel	XML	Sch

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

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



V_GENL_DEDUCTION_MASS - General Deduction Query

Company [look-up icon]

General Deduction Code [look-up icon]

As of Date [calendar icon]

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
-----	-------------	---------	------------------------	----------------	-----------------	------------------	------------------------	--------------------	-----------------------	------------------------

- Enter/select the appropriate Company using the **Company** field look-up icon.
Note: Leave the **Company** field blank to view all Company values. The query only returns the Company values for which the user has security access.
- Enter/select the appropriate General Deduction code using the **General Deduction Code** field look-up icon.
- Enter/select the appropriate As of Date using the **As of Date Calendar** icon.

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

The **General Deduction Query** page refreshes.

V_GENL_DEDUCTION_MASS - General Deduction Query

Company

General Deduction Code

As of Date

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

Note: 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

10. Click on the following link to navigate to the Cardinal Project Website.
<https://www.cardinalproject.virginia.gov/>

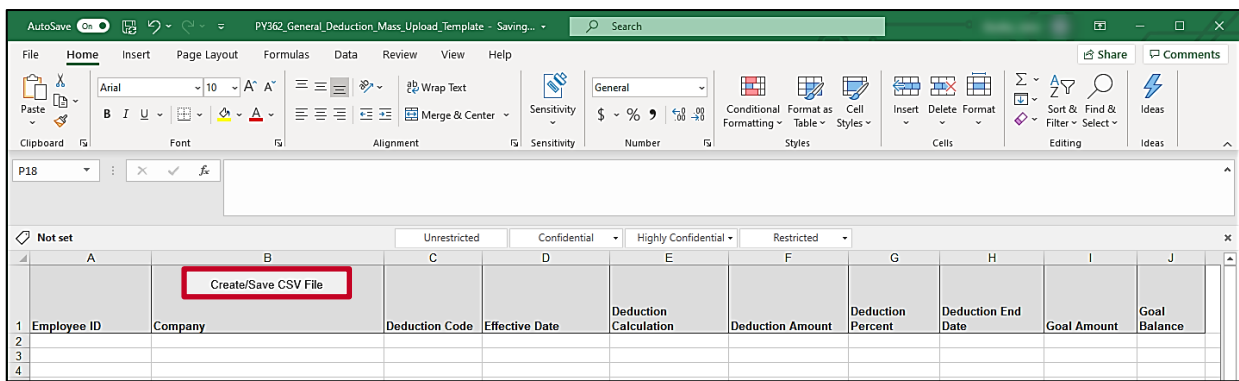
11. Click on **Resources**.

12. Click on **HCM Update Templates**.

Note: Select the appropriate CSV Template file and download the blank template file.

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

The appropriate template displays 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.

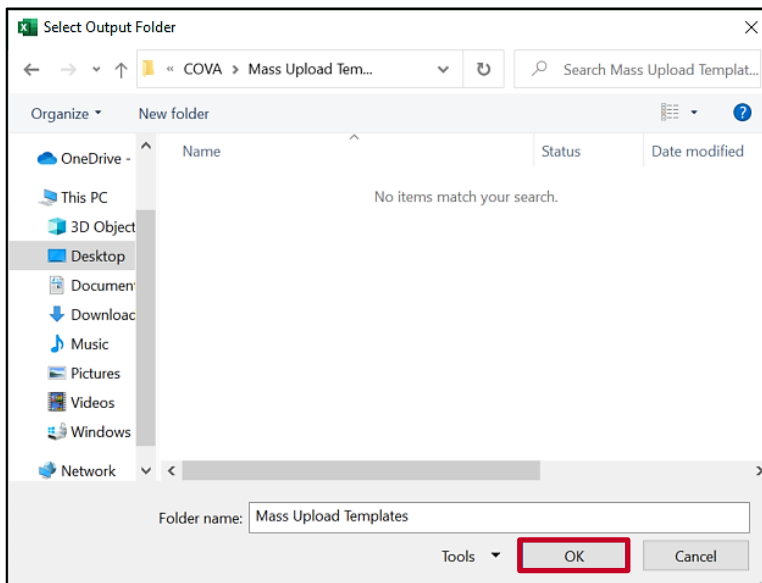
Note: When copying the data from the query and into the applicable excel template, ensure that:
 1. The columns from the query and the template match and are aligned; 2. After copying the data, when pasting into the template, right click cell 2A and hover over the options under Paste Options until you 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.

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

Note: 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.

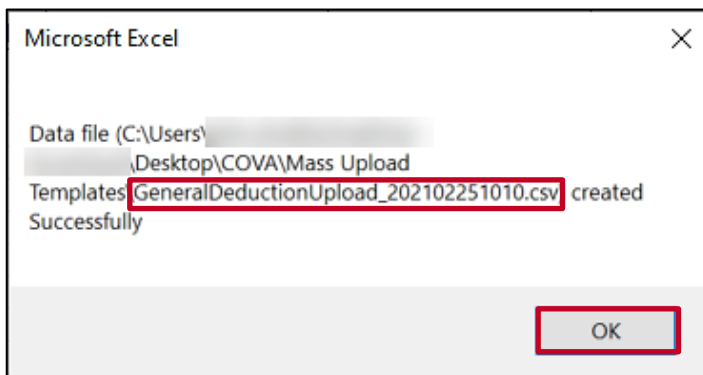


18. Navigate to the desired secure location.

19. Click the **OK** button.

Note: 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

23. 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).

Note: SPO will either correct the errors on Excel and resubmit the upload file or enter the transaction through an online data entry.

Note: Processing rules for each of the mass upload required fields are available in the applicable templates on the Cardinal website.