



Cross Functional Job Aid

Performing a Mass Upload (HCM)

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 Mass Upload	Agency	N/A	Agency
Department Position Funding Mass Upload	Agency	N/A	Agency
Leave Balance Adjustment Mass Upload	Agency	N/A	Agency
Teleworker 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
Tax Balance Adjustment 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](#) to iHelp@dhrm.virginia.gov.



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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
6/1/2026	Updated screenshots for Cardinal website Mass Upload Templates listed under Resources.
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.



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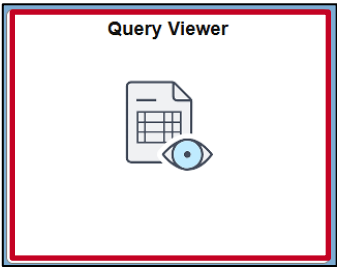
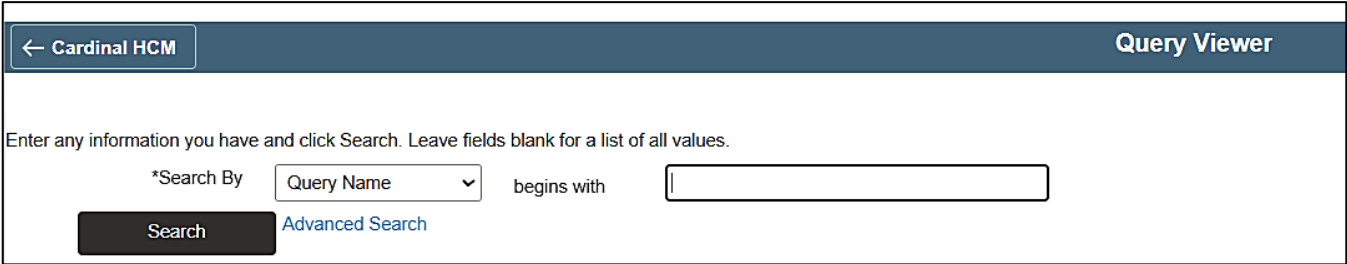
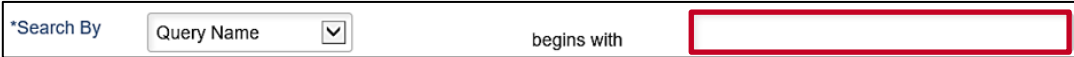
Agency Mass Uploads Loaded into Cardinal by the Agency

All files are located on the Cardinal website under **Resources > Mass Upload Templates**.

Mass Upload Description	Query Name	Template Name	Navigation to Upload File
Department-Position Funding	V_HR_POS_FUNDING_MASS_LOAD	HR373 Department Position Funding Mass Upload Template	Cardinal Interfaces > Mass Uploads > Dept-Pos Funding Mass Upload
Leave Balance Adjustment	V_TA_LEAVE_BAL_ADJ	TA792 Leave Balance Adjustment Mass Upload Template	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.
Teleworkers	V_HR_TELEWORK_MASS_UPLOAD	HR520 Teleworker Mass Upload Template	Cardinal Interfaces > HR Interfaces > Mass Uploads > Teleworkers Mass Upload
Performance Rating	V_HR_PERFORMANCE_RATING	HR371 Performance Rating Mass Upload Template	Cardinal Interfaces > HR Interfaces > Mass Uploads > Performance Rating Mass Upload
Rewards & Recognition	V_HR_REWARD_RECOGN_MASS_DATA	HR409 Reward and Recognition Mass Upload Template	Cardinal Interfaces > HR Interfaces > Mass Uploads > Reward and Recognition Mass Upload Note: 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	PY361 Additional Pay Mass Upload Template	Cardinal Interfaces > Mass Uploads > Additional Pay Mass Upload
TL Eligibility	V_TA_ELIGIBILITY_ADJ	TA826 TL Eligibility Mass Upload Template	Cardinal Interfaces > Mass Uploads > TL Eligibility Mass Upload
Personal Data	V_HR_PERSONAL_MASS_DATA_CHANGE	HR558 Personal Data Mass Upload Template	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.

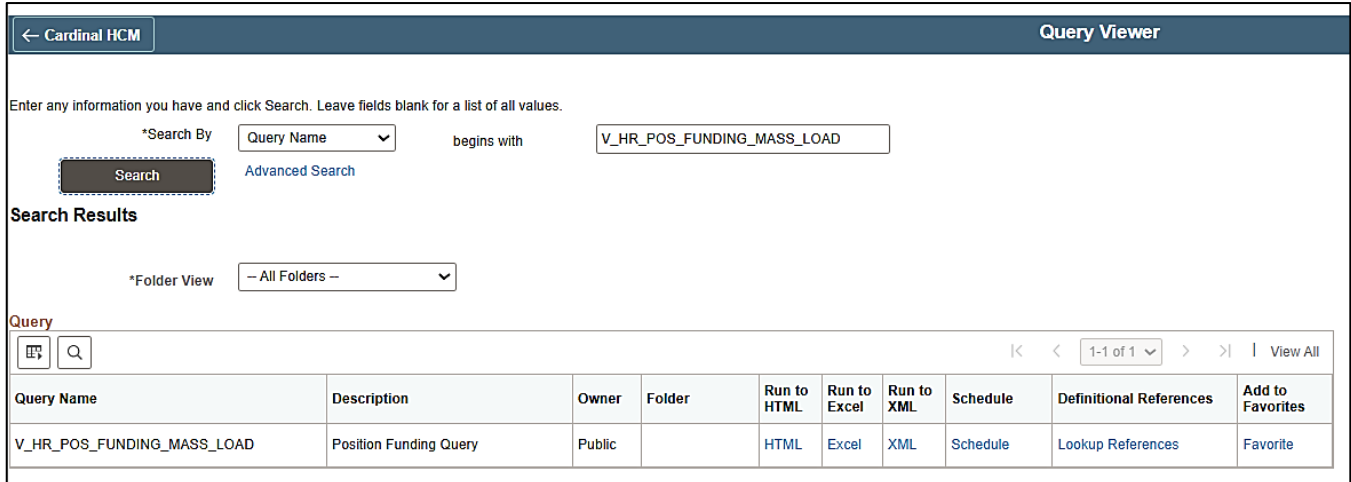
Run a Query

Each Agency runs a query to obtain current Cardinal data. Below is an example of how to run the query for Dept-Pos Funding Mass Upload.

Step	Action
1.	Navigate to the Query Viewer page by clicking the Query Viewer tile on the Cardinal Homepage. 
	Users can also access the Query Viewer page using the following navigation path: NavBar > Menu > Reporting Tools > Query > Query Viewer
The Query Viewer Search page displays. 	
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. 

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

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



← Cardinal HCM Query Viewer

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

*Search By Query Name begins with V_HR_POS_FUNDING_MASS_LOAD

Search [Advanced Search](#)

Search Results

*Folder View -- All Folders --

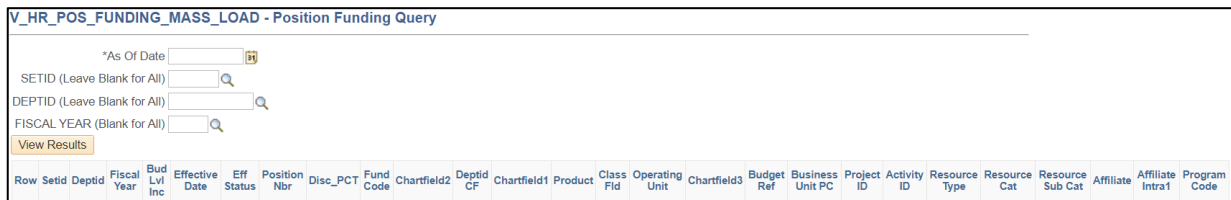
Query

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 for the desired query output format (HTML, Excel, XML).

Run to HTML	Run to Excel	Run to XML	Schedule
HTML	Excel	XML	Schedule

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



V_HR_POS_FUNDING_MASS_LOAD - Position Funding Query

*As Of Date 29

SETID (Leave Blank for All) Q

DEPTID (Leave Blank for All) Q

FISCAL YEAR (Blank for All) Q

View Results

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 Intra1	Program Code
-----	-------	--------	-------------	-------------	----------------	------------	--------------	----------	-----------	-------------	-----------	-------------	---------	-----------	----------------	-------------	------------	------------------	------------	-------------	---------------	--------------	------------------	------------------	--------------



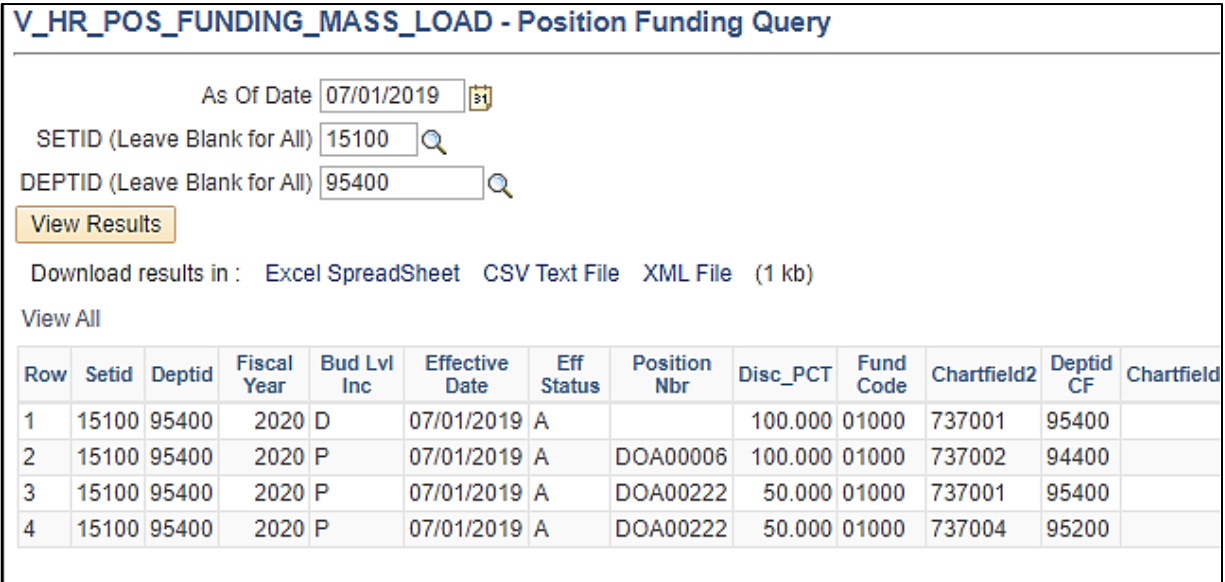
This page displays regardless of the selected output format. The field names may vary based upon the query; this example shows the fields for the **V_HR_POS_FUNDING_MASS_LOAD** query.

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

*As Of Date 31

6. Enter or select the SETID using the **SETID Look up** icon.

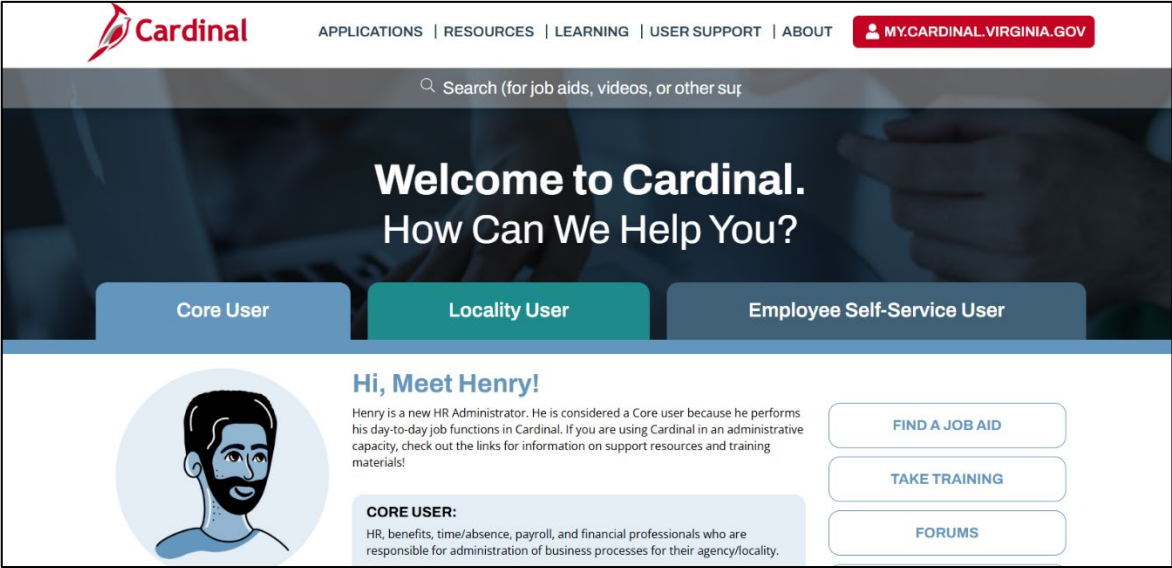
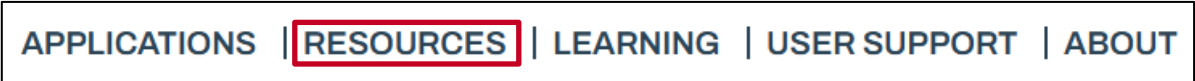
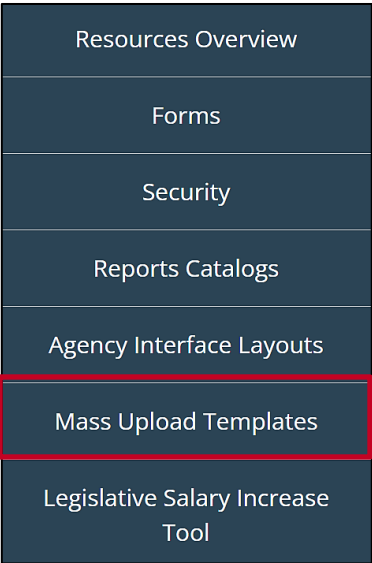
SETID (Leave Blank for All) Q

Step	Action
	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. 
	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. 	
	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. 



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	Action
10.	Navigate to the Cardinal website by clicking the following link: https://www.cardinalproject.virginia.gov/ The Cardinal website displays: 
11.	Click on Resources. 
12.	Click on Mass Upload Templates. 

	Action
	The link to the Legislative Salary Increase Tool may only be available during the time period when this tool is utilized.

The **Cardinal Mass Upload Templates** page displays.

Cardinal Mass Upload Templates

Find a Template

Start typing here...

User Group

Application

Module

- Any -

- Any -

- Any -

Filter

Search Results

Budget Journal Spreadsheet Upload Excel Template

MAY 6, 2026

Download

Budget Journal Spreadsheet Upload XLA Macro File (After download, rename as BudMcro3.xla)

MAY 6, 2026

Download

Funding Source Spreadsheet Upload Excel Template (VDOT Only)

MAY 6, 2026

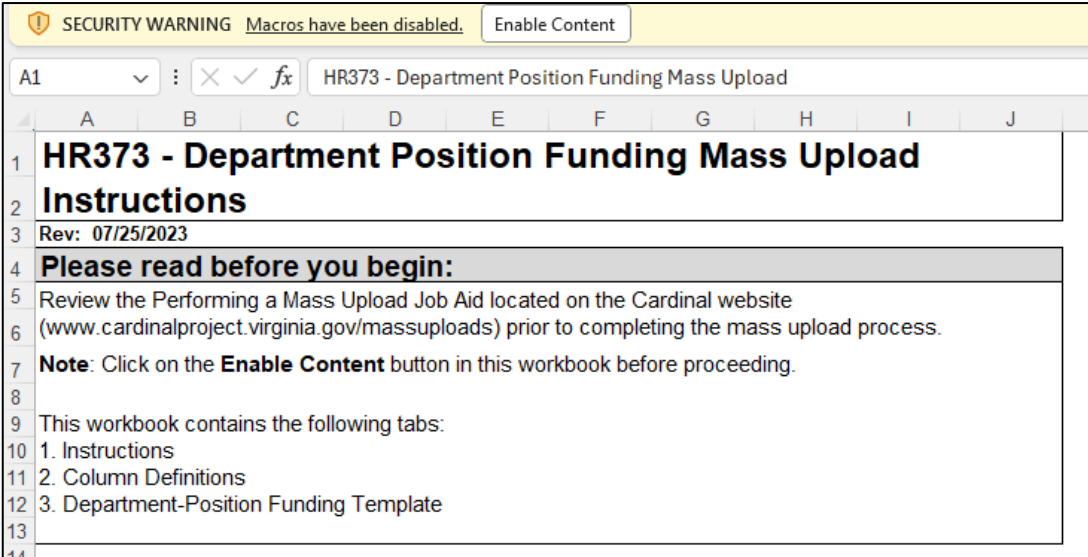
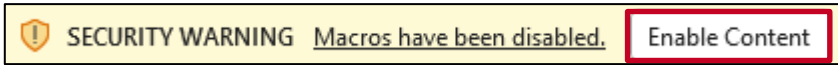
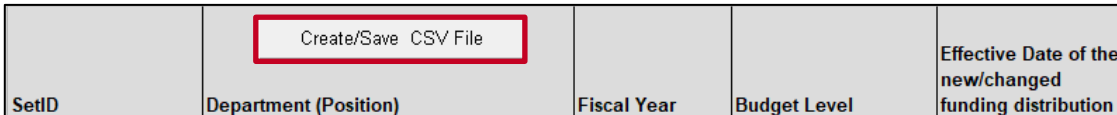
Download

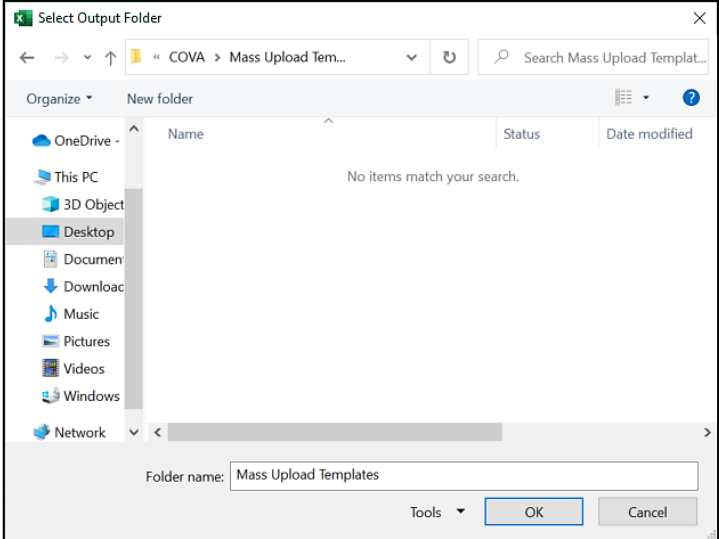
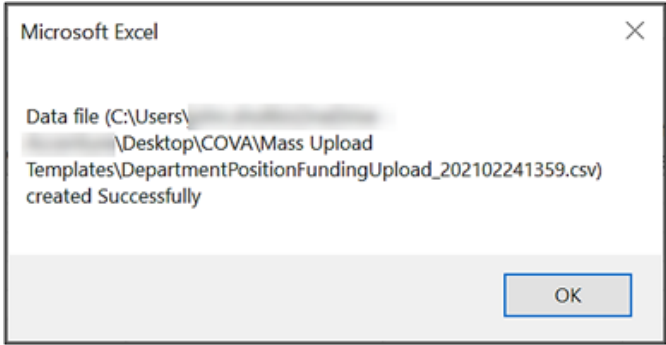
Funding Source Spreadsheet Upload XLA Macro File (VDOT Only) (After download, rename as vfsallcmcro.xla)

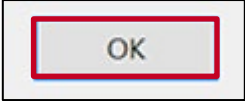
MAY 6, 2026

Download

13.	Locate, download, and open the applicable CSV Template file (blank template file). Scenario: The name of the file is HR373 Department Position Funding Mass Upload Template .
-----	---

	Action
	The applicable CSV Template file opens in Excel. 
14.	When the excel file opens, click the Enable Content button. 
15.	Enter the required data using the information within the query performed in the Run a Query section of this Job Aid.
	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. 
	The naming of the file cannot be altered before uploading it to Cardinal and it will overwrite the previous upload document.

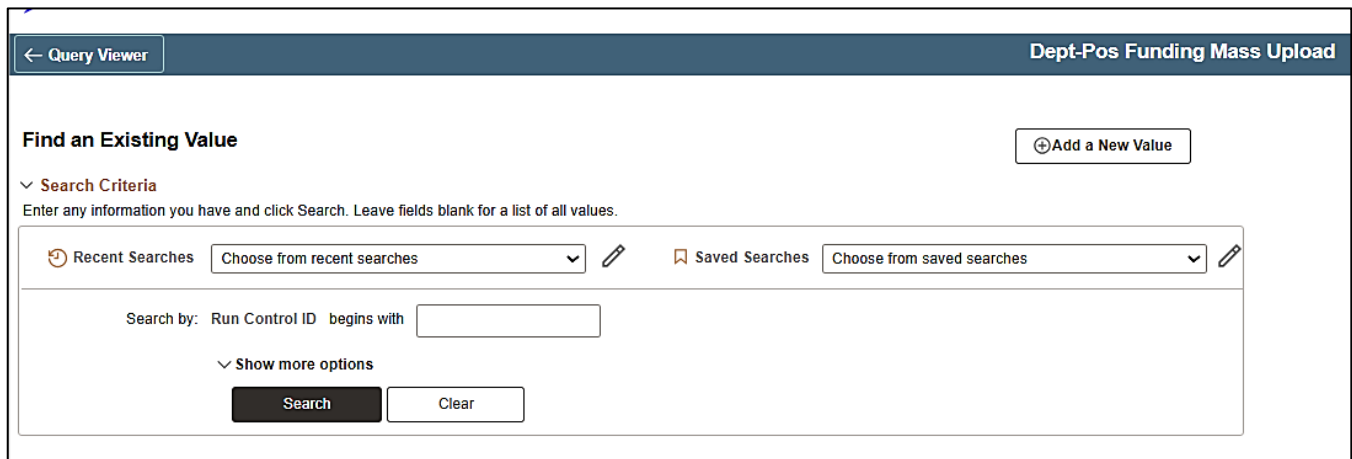
	Action
	The Select Output Folder pop-up window displays. 
17.	Navigate to the desired location.
	If the file contains Personal Information (e.g., Performance Ratings, Employee ID, Compensation) ensure the file is saved to a secure local folder.
18.	Click the OK button. 
	The file is automatically named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

	Action
20.	Click the OK button. 

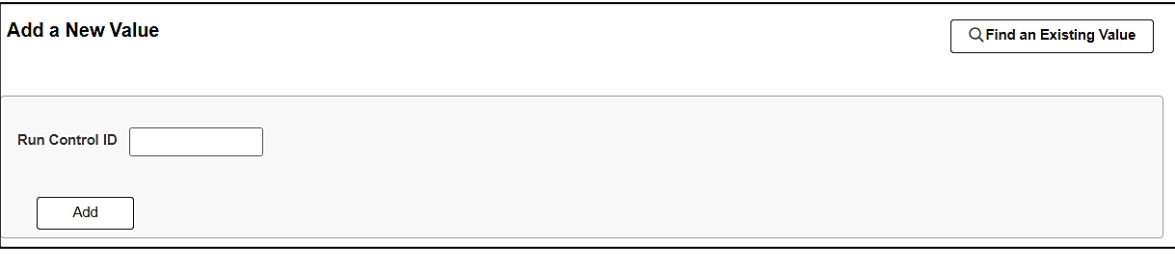
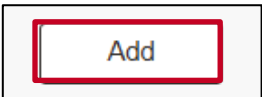
Upload a File

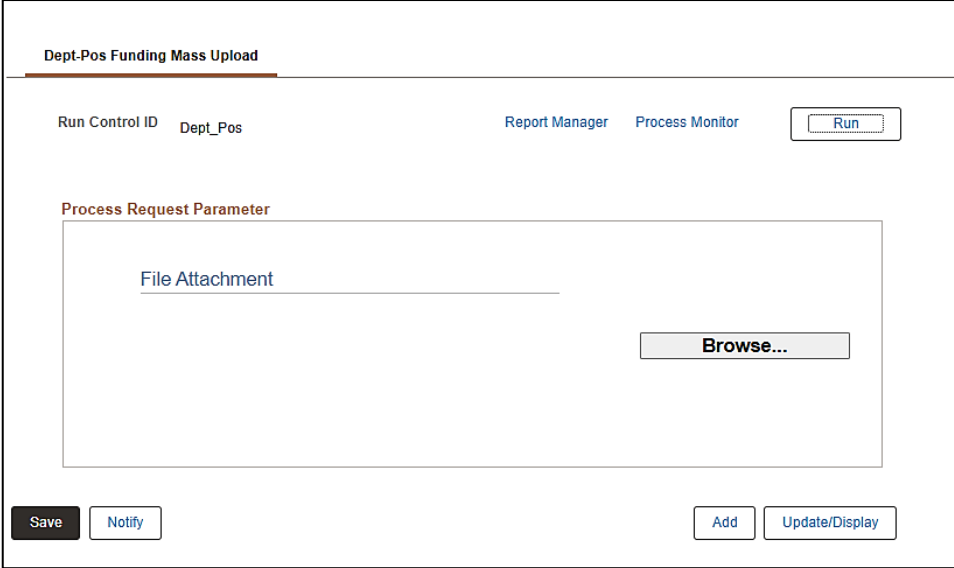
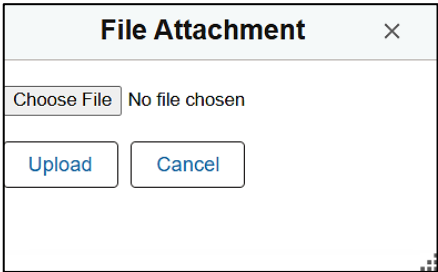
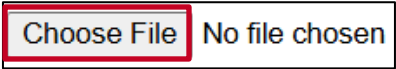
Step	Action
21.	Navigate to the appropriate Mass Upload page. Scenario: This example follows the Dept-Pos Funding Mass Upload. NavBar > Menu > Cardinal Interfaces > Mass Uploads > Dept-POS Funding Mass Upload
	For a list of all mass upload navigation paths, see the Agency Mass Uploads Loaded into Cardinal by the Agency section of this Job Aid.

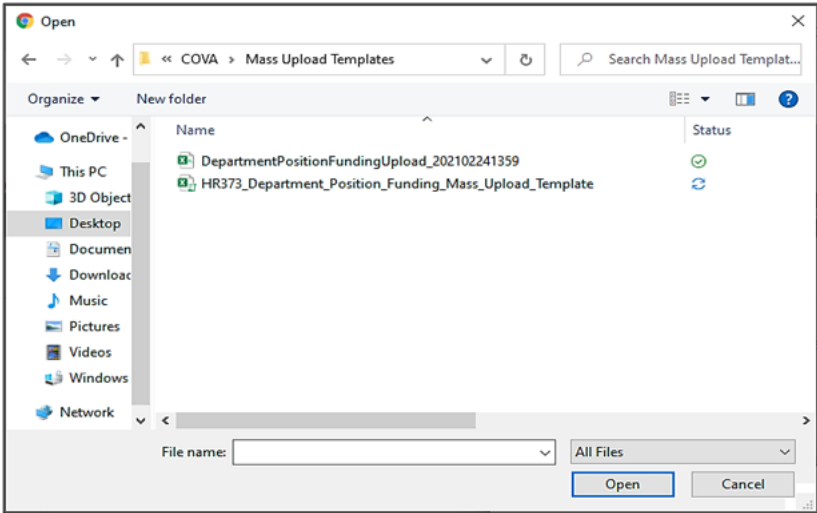
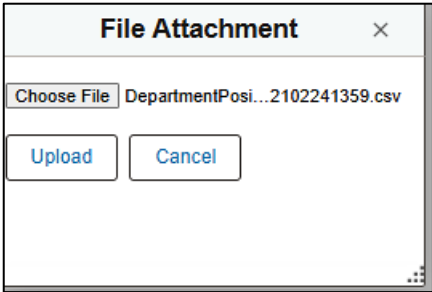
The **Dept-Pos Funding Mass Upload Find an Existing Value Search** page displays.



	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages located on the Cardinal Website in Job Aids under Learning.
	If an existing Run Control ID is known, proceed to the next step. If an existing Run Control ID is not known, proceed to Step 24.
22.	If an existing Run Control ID is known, enter the Run Control ID in the Run Control ID field. Search by: Run Control ID begins with
23.	Click the Search button and proceed to Step 29. If a new value needs to be added, proceed to the next step. Search Clear

Step	Action
24.	Click the Add a New Value button. 
The Dept-Pos Funding Mass Upload Add a New Value page displays. 	
25.	Enter a Run Control ID in the Run Control ID field based on the following guidelines: - The Run Control ID must be unique and should be descriptive enough to help locate for future use (once created Run Control IDs cannot be deleted) - Up to 30 characters are allowed - No blank spaces can be used; however, an underscore can be used in lieu of spaces - Do not use wildcard symbols (%) 
	A Run Control ID only needs to be added once and can be reused once added.
26.	Click the Add button. 

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

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

Step	Action
	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) OK
33.	Click the OK button. OK
34.	Repeat Steps 25 – 29, ensuring to upload the template saved in a CSV format. The Dept-Pos Funding Mass Upload page refreshes. Dept-Pos Funding Mass Upload Run Control ID Dept_Pos Report Manager Process Monitor Run Process Request Parameter File Attachment DepartmentPositionFundingUpload_202102241359.csv Browse... Save Notify Add Update/Display
35.	Click the Run button. Report Manager Process Monitor Run



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Verify the Upload File

Step	Action														
	The Process Scheduler Request page displays in a pop-up window. Process Scheduler Request User ID Run Control ID Dept_Pos Server Name Run Date 05/26/2026 Recurrence Run Time 4:13:57PM Reset to Current Date/Time Time Zone Process List <table><thead><tr><th>Select</th><th>Description</th><th>Process Name</th><th>Process Type</th><th>Type</th><th>Format</th><th>Distribution</th></tr></thead><tbody><tr><td>☒</td><td>Dept-Pos Funding Mass Upload</td><td>V_HR373_EXT</td><td>Application Engine</td><td>Web</td><td>TXT</td><td>Distribution</td></tr></tbody></table> OK Cancel	Select	Description	Process Name	Process Type	Type	Format	Distribution	☒	Dept-Pos Funding Mass Upload	V_HR373_EXT	Application Engine	Web	TXT	Distribution
Select	Description	Process Name	Process Type	Type	Format	Distribution									
☒	Dept-Pos Funding Mass Upload	V_HR373_EXT	Application Engine	Web	TXT	Distribution									
36.	Verify the Select checkbox is selected for the appropriate upload description. Select the checkbox if it is not already selected. Process List <table><thead><tr><th>Select</th><th>Description</th><th>Process Name</th><th>Process Type</th><th>Type</th><th>Format</th><th>Distribution</th></tr></thead><tbody><tr><td>☒</td><td>Dept-Pos Funding Mass Upload</td><td>V_HR373_EXT</td><td>Application Engine</td><td>Web</td><td>TXT</td><td>Distribution</td></tr></tbody></table>	Select	Description	Process Name	Process Type	Type	Format	Distribution	☒	Dept-Pos Funding Mass Upload	V_HR373_EXT	Application Engine	Web	TXT	Distribution
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 redisplay. Dept-Pos Funding Mass Upload Run Control ID Dept_Pos Report Manager Process Monitor Run Process Instance:4917361 Process Request Parameter File Attachment DepartmentPositionFundingUpload_202102241359.csv Browse... Save Return to Search Notify Add Update/Display														



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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.

Process List

Server List

View Process Requests

User IDPPS1_DANA.SI

Type

Last

1

Days

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

Save On Refresh

Report Manager

Reset

Process List

1-1 of 1

<

>

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
☐	4917361		Dept_Pos	Application Engine	V_HR373_EXT	PPS1_DANA.SMITH	06/28/2026 9:21:35PM EDT	Success	Posted	Details	Actions

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”.

Process List

1-1 of 1

<

>

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
☐	4917361		Dept_Pos	Application Engine	V_HR373_EXT	PPS1_DANA.SMITH	06/28/2026 9:21:35PM EDT	Success	Posted	Details	Actions

40.

Click the **Details** link.

Run Status

Distribution Status

Details

Success

Posted

Details



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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 browser tab. The screenshots below depict two different error log views. <pre> ****HR414 New Hire Mass Upload Processing**** Total Number of Rows: 2 Number of Rows Successfully Processed: 1 Number of Rows with Errors: 1 </pre> <pre> ****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 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) 12 00900158900 0 12 00900158900 0 </pre>	

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.



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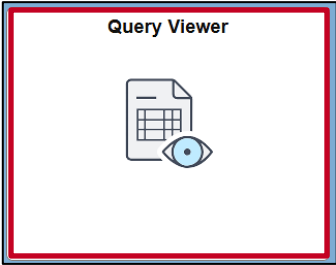
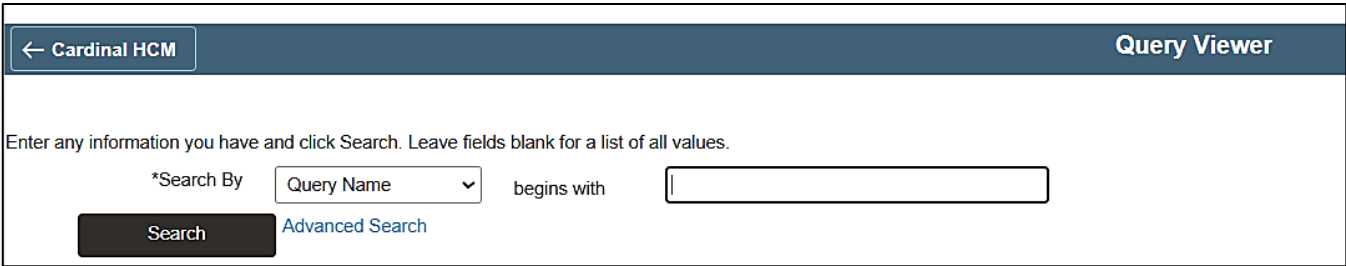
Performing a Mass Upload (HCM)

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

Mass Upload Description	Query Name	Template Name	Navigation to Upload File
Job Data Mass Upload	V_HR_JOB_MASS_DATA_CHANGE	HR413 Job Data Mass Upload Template	Cardinal Interfaces > HR Interfaces > Mass Uploads > Job Data Mass Upload
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.	HR414 New Hire Mass Upload Template	Cardinal Interfaces > HR Interfaces > Mass Uploads > New Hire Mass Upload
Position Mass Upload	V_HR_POSITION_MASS_DATA_CHANGE	HR411 Position Mass Upload Template	Cardinal Interfaces > HR Interfaces > Mass Uploads > Position Mass Upload

Run a Query

Each Agency runs a query to obtain current Cardinal data. Below is an example of how to run the query for Job Data Mass Upload.

Step	Action
1.	Navigate to the Query Viewer page by clicking the Query Viewer tile on the Cardinal Homepage. 
	Users can also access the Query Viewer page using the following navigation path: NavBar > Menu > Reporting Tools > Query > Query Viewer
The Query Viewer Search page displays. 	
2.	Click the Advanced Search link. 



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Step	Action
	The Query Viewer Search page refreshes. ← Process List Query Viewer Enter any information you have and click Search. Leave fields blank for a list of all values. Query Name begins with ▾ 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
3.	Enter the query's name in the Query Name field. Scenario: The query's name is "V_HR_JOB_MASS_DATA_CHANGE". Query Name begins with ▾
4.	Click the Search button. Search Clear



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Performing a Mass Upload (HCM)

Step	Action																				
	The Query Viewer Search page refreshes with the search results displayed at the bottom. ← Process List Query Viewer Enter any information you have and click Search. Leave fields blank for a list of all values. Query Name begins with V_HR_JOB_MASS_DATA_CHANGE 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 1-1 of 1 < > View All <table><thead><tr><th>Query Name</th><th>Description</th><th>Owner</th><th>Folder</th><th>Run to HTML</th><th>Run to Excel</th><th>Run to XML</th><th>Schedule</th><th>Definitional References</th><th>Add to Favorites</th></tr></thead><tbody><tr><td>V_HR_JOB_MASS_DATA_CHANGE</td><td>Job Mass Update query</td><td>Public</td><td></td><td>HTML</td><td>Excel</td><td>XML</td><td>Schedule</td><td>Lookup References</td><td>Favorite</td></tr></tbody></table>	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
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												

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

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

V_HR_JOB_MASS_DATA_CHANGE - Job Mass Update query

As of Date 

Unit 

Dept ID 



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

[View All](#)

Row	Business Unit	EmplId	Empl Rcd	Effective Date	Action	Action Reason	Position Nbr	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			01/04/2017	HIR	CNV	SOVAA100	SOV	GNW	BW1	H	760	N	40.00	0.000000		0.000000		0.000000		24.038462
2	10000			10/31/2019	DTA	CNV	SOV90000	SOV	OTO	MTH	S	760	N	40.00	50000.000000	A	0.000000		0.000000		0.000000
3	10000			11/01/1997	HIR	CNV	SOVCLK24	SOV	ONC	MNP	S	760	N	40.00	50000.000000	A	0.000000		0.000000		0.000000
4	10000			07/01/1976	HIR	CNV	SOVWG117	SOV	GNW	BW1	H	760	N	40.00	0.000000		0.000000		0.000000		24.038462
5	10000			11/09/2019	DTA	CNV	SOVCLK29	SOV	ONC	SM1	S	760	N	40.00	50000.000000	A	0.000000		0.000000		0.000000



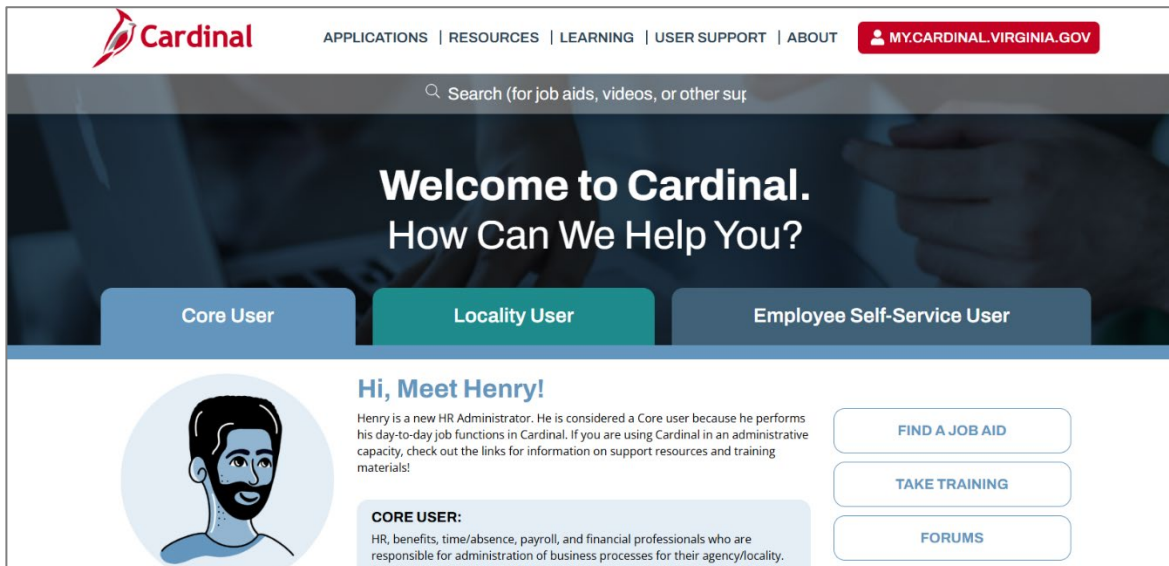
The above screenshot displays if the **HTML Query Output Format** link is selected. A download initiates if the **Excel** or **XML Query Output Format** link is selected. After the file is downloaded, select the file to open and view the query results. The information within the output is used to prepare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

Step	Action
10.	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)

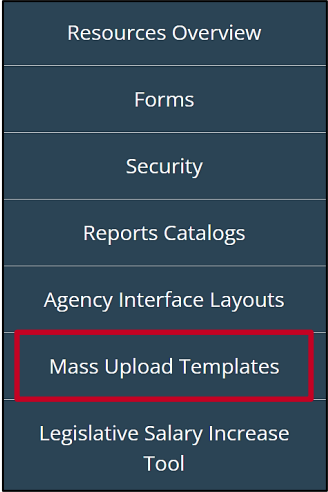
Prepare the Upload File

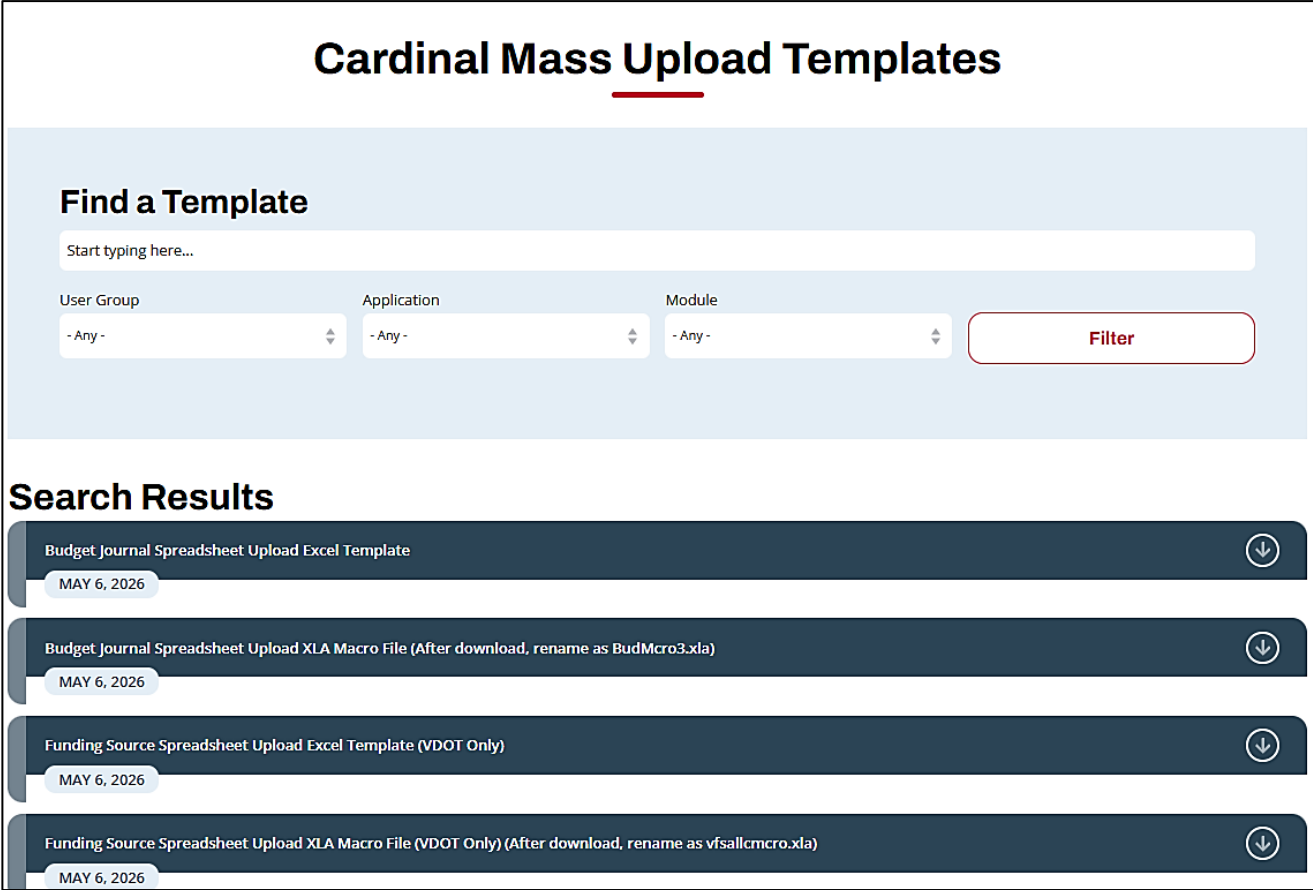
Step	Action
11.	Navigate to the Cardinal website by clicking the following link: https://www.cardinalproject.virginia.gov/

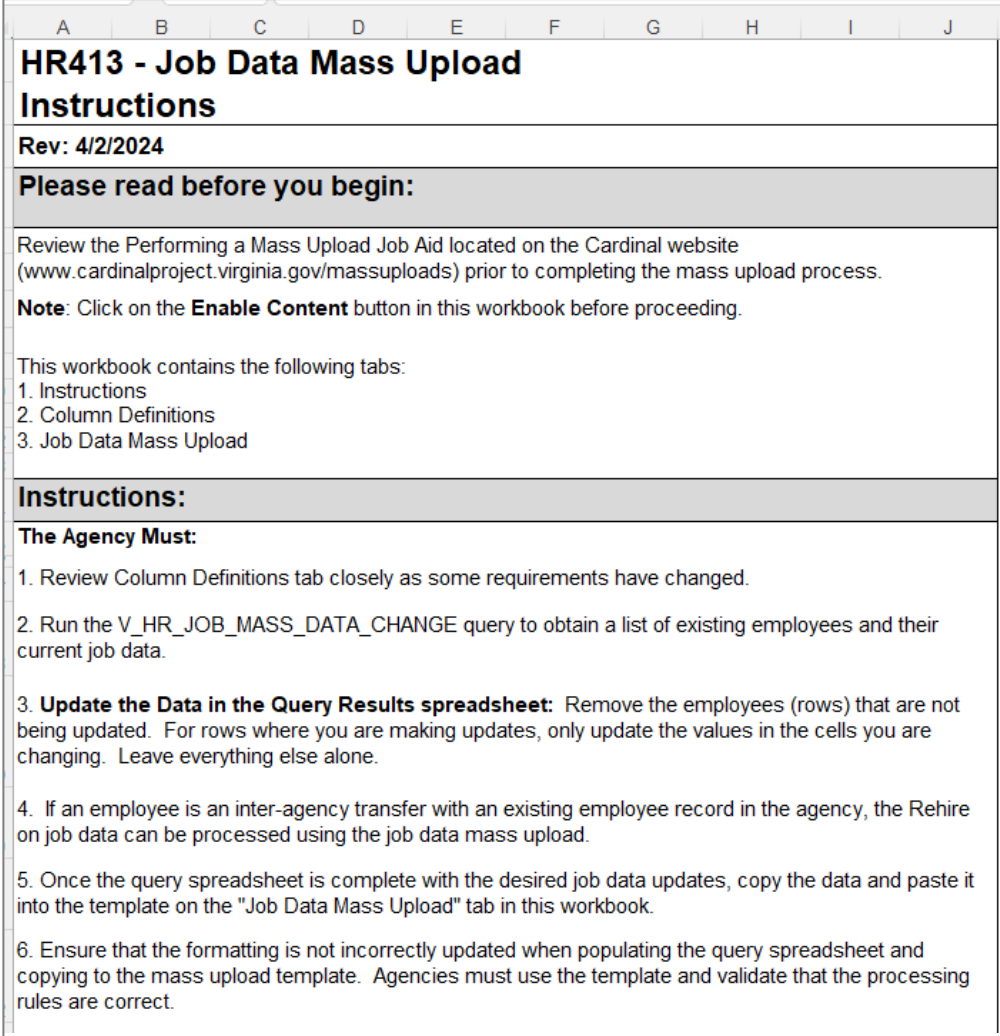
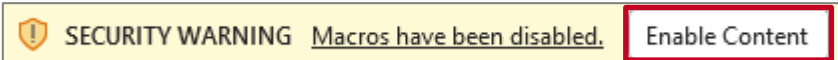
The Cardinal website displays:



12.	Click on Resources. APPLICATIONS RESOURCES LEARNING USER SUPPORT ABOUT
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Step	Action
13.	Click on Mass Upload Templates.  The screenshot shows a vertical list of menu items: Resources Overview, Forms, Security, Reports Catalogs, Agency Interface Layouts, Mass Upload Templates (highlighted with a red box), and Legislative Salary Increase Tool.
	The link to the Legislative Salary Increase Tool may only be available during the time period when this tool is utilized.

Step	Action
	The Cardinal Mass Update Templates page displays. 
15.	Locate, download, and open the applicable CSV Template file (blank template file). Scenario: The name of the file is HR413 Job Data Mass Upload Template.

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

Step	Action												
	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><tr><td></td><td>Create/Save CSV File</td><td></td><td></td><td></td><td></td></tr><tr><td>Employee ID</td><td>Employee Rcd Number</td><td>Effective Date</td><td>Action</td><td>Action Reason</td><td>Position Number</td></tr></table>		Create/Save CSV File					Employee ID	Employee Rcd Number	Effective Date	Action	Action Reason	Position Number
	Create/Save CSV File												
Employee ID	Employee Rcd Number	Effective Date	Action	Action Reason	Position Number								
	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 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.												
	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.
	To avoid duplicate transactions, the original file should not be re-run.



Cross Functional Job Aid

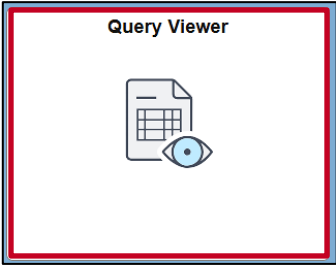
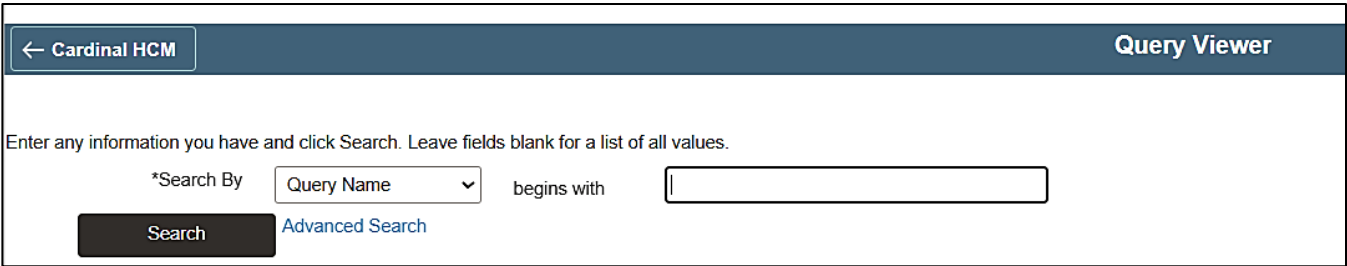
Performing a Mass Upload (HCM)

Agency Mass Uploads Loaded into Cardinal by SPO

Mass Upload Description	Query Name	Template Name	Navigation to Upload File
General Deduction	V_GENL_DEDUCTION_MASS	PY362 General Deduction Mass Upload Template	Cardinal Interfaces > Mass Uploads > General Deduction Mass Upload
Tax Balance Adjustment	There is no query for a Tax Balance Adj Mass Upload, so the user will go straight to Step 10 to download the template.	PY556 Tax Balance Adjustment Mass Upload Template	Cardinal Interfaces > Mass Uploads > Tax Balance Adj Mass Upload

General Deduction Mass Upload – Run a Query

Each Agency runs a query to obtain current Cardinal data. Below is an example of how to run the query for General Deduction Mass Upload.

Step	Action
1.	Navigate to the Query Viewer page by clicking the Query Viewer tile on the Cardinal Homepage. 
	Users can also access the Query Viewer page using the following navigation path: NavBar > Menu > Reporting Tools > Query > Query Viewer
The Query Viewer Search page displays. 	
2.	Click the Advanced Search link. 

Step	Action
	The Query Viewer Search page refreshes. ← Process List Query Viewer Enter any information you have and click Search. Leave fields blank for a list of all values. Query Name begins with 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



Cross Functional Job Aid

Performing a Mass Upload (HCM)

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

[← Process List](#)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

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_GENL_DEDUCTION_MASS	General Deduction Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

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

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

V_GENL_DEDUCTION_MASS - General Deduction Query

Company

General Deduction Code

As of Date

View Results

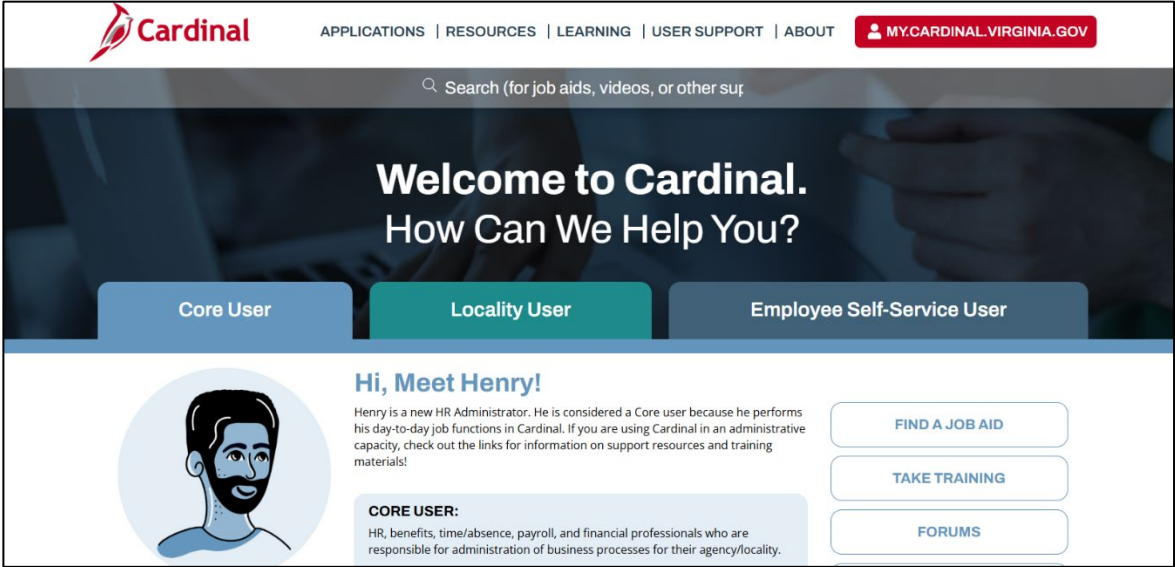
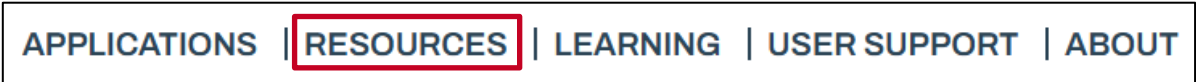
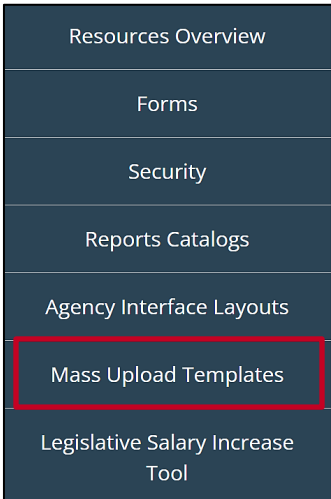
Row	Employee ID	Company	General Deduction Code	Effective Date	Ded Calc Method	Deduction Amount	Deduction Rate/Percent	Deduction End Date	Deduction Goal Amount	Deduction Goal Balance
-----	-------------	---------	------------------------	----------------	-----------------	------------------	------------------------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

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

Company

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

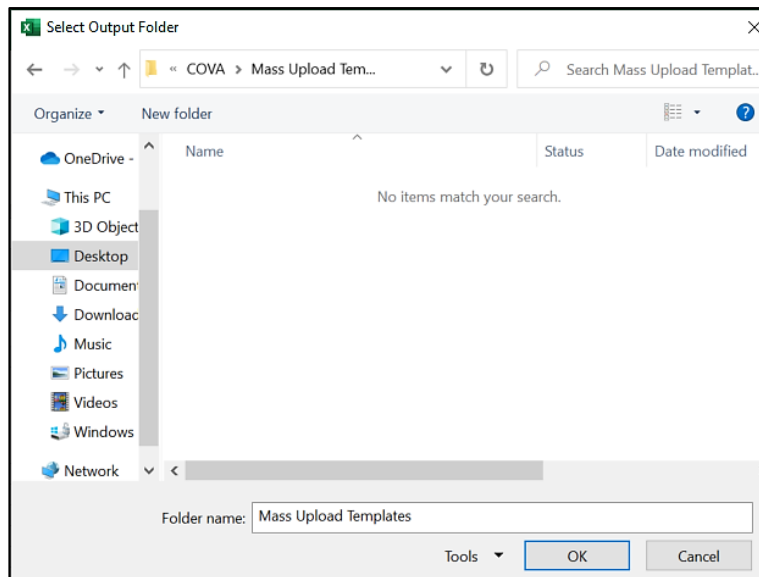
Step	Action
10.	Navigate to the Cardinal website by clicking the following link: https://www.cardinalproject.virginia.gov/
The Cardinal website displays: 	
11.	Click on Resources. 
12.	Click on the Mass Upload Templates. 

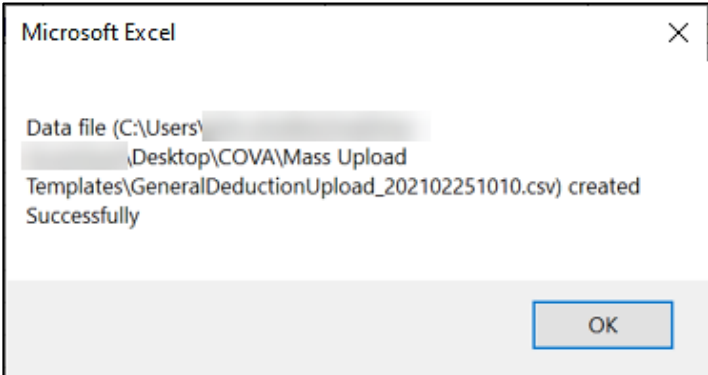
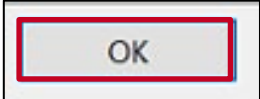
Step	Action
	The link to the Legislative Salary Increase Tool may only be available during the time period when this tool is utilized.
The Cardinal Mass Update Templates page displays. Cardinal Mass Upload Templates Find a Template Start typing here... User Group Application Module - Any - - Any - - Any - Filter Search Results Budget Journal Spreadsheet Upload Excel Template MAY 6, 2026 Download Budget Journal Spreadsheet Upload XLA Macro File (After download, rename as BudMcro3.xla) MAY 6, 2026 Download Funding Source Spreadsheet Upload Excel Template (VDOT Only) MAY 6, 2026 Download Funding Source Spreadsheet Upload XLA Macro File (VDOT Only) (After download, rename as vfsallcmcro.xla) MAY 6, 2026 Download	
13.	Locate, download, and open the applicable CSV Template file (blank template file). Scenario: The name of the file is PY362 General Deduction Mass Upload Template.

Step	Action
	The applicable 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.
14.	When the excel file opens, click the Enable Content button.  SECURITY WARNING <u>Macros have been disabled.</u> 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												
	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 General Deduction Mass Upload Template.												
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>Deduction Code</td><td>Effective Date</td><td>Calculation Routine</td><td>Flat/Addl Amount</td></tr></table>		Create/Save CSV File					Employee ID	Company	Deduction Code	Effective Date	Calculation Routine	Flat/Addl Amount
	Create/Save CSV File												
Employee ID	Company	Deduction Code	Effective Date	Calculation Routine	Flat/Addl Amount								
	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. 	
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.