Maintaining Employee Work Schedules Overview

This Job Aid provides key information pertaining to Work Schedules and step-by-step instructions for maintaining employee Work Schedules in Cardinal.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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Revision History

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

General Information

Each employee must have an assigned Work Schedule in Cardinal. Work Schedules are assigned to employees by either a TL Employee Setup Administrator, a TL Administrator, or the employee's TL Supervisor. Timekeepers can only view employee Work Schedules.

Types of Work Schedules:

Hourly – This is a schedule with zero pre-defined hours. Hourly employees must report all hours in order to be paid.

Set Schedule – This is a non-flexible schedule with predictable days and hours. A set Work Schedule could also include a rotating pattern.

Variable Schedule – This is a flexible schedule that is set up in the system as 24 hours a day, 7 days a week. This type of schedule requires an employee to report all hours.

Users with the following TA Roles have the ability to view employee Work Schedules:

- Timekeepers
- TL Administrators
- TL Employee Setup Administrators
- TL Supervisors

Users with the following TA Roles have the ability to assign and maintain employee Work Schedules:

- TL Administrators
- TL Employee Setup Administrators
- TL Supervisors

TA users can run the Employee Schedule Review (RTA717) query to review employee Work Schedule information. For further information about this query, see the Job Aid titled **HCM Reports Catalog**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Work Schedule Naming Convention

Below are some examples of how **Schedule ID**'s are named.

SETID = STATE, 7-Day

Format: NN.NN-AAAAAAA-B, Example: 40.00-Z88888Z-0

Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
AAAAAAA	7-day indicator – first character is Day 1, second character is Day 2, etc.	0-9, A-X: for example: Z – Off Day 0 – If the hours for the day are between 0.01 and 0.99 1 – If the hours for the day are between 1.00 and 1.99 A – If the hours for the day are between 10.00 and 10.99 B – If the hours for the day are between 11.00 and 11.99 X – If the hours for the day are 24.00
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

SETID = STATE, 9X80

Format: 9X80-AAAAAAA-B, Example: 9X80-Z9998ZZ-0

Character	Defines	Value
AAAAAAA	7-day indicator – first character is Day 1, the second character is Day 2, etc.	0-9, A-X: for example: Z – Off Day 0 – If the hours for the day are between 0.01 and 0.99 1 – If the hours for the day are between 1.00 and 1.99 A – If the hours for the day are between 10.00 and 10.99 B – If the hours for the day are between 11.00 and 11.99 X – If the hours for the day are 24.00
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule
ⓘ		9X80 schedules must not be assigned to nonexempt employees. Day 1 in the 14-day schedule will correspond to a Biweekly Pay Period Begin Date in Cardinal – used by Hourly employees.

SETID = <Business Unit>

Format: NN.NN-AAAAAAA-B, Example: 40.00-5X8X3WK-0

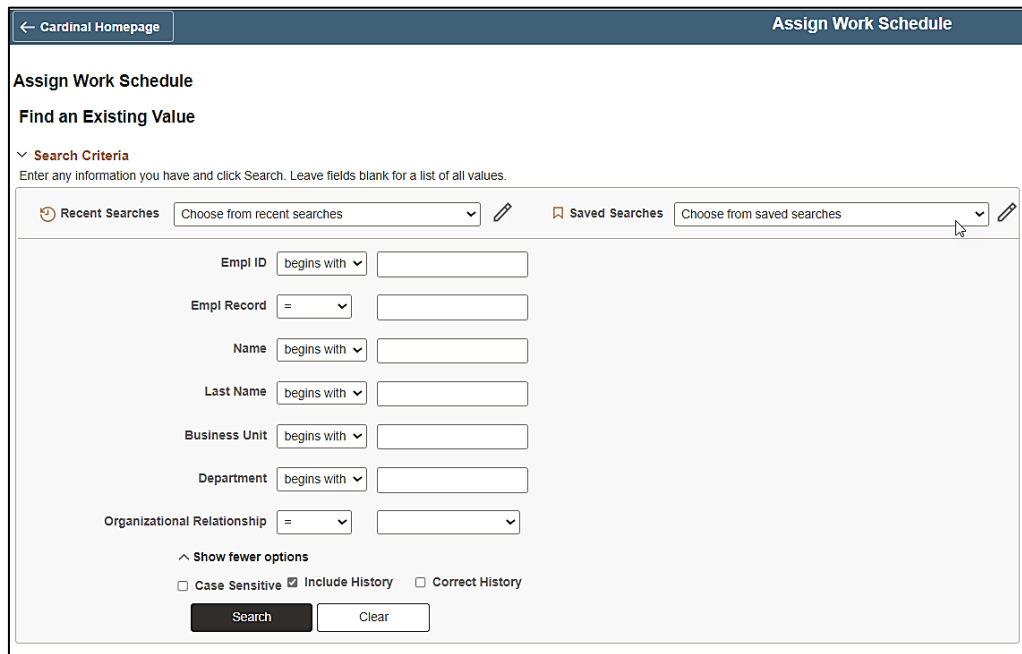| Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
AAAAAAA	7-day indicator – first character is Day 1, the second character is Day 2, etc.	Example: 4X10+5X8 – Week 1 is a 4 day/10-hour work week, and Week 2 is a 5 day/8-hour work week. 4X10X2WK - Week 1 is a 4 day/10-hour work week, and Week 2 is also a 4 day/10-hour work week, however the workdays are not the same for each week. 4X10+OTH – Week 1 is a 4/day/10-hour work week, and Week 2 is some other type of work week that is not 5X8 or 4x10.
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

Assigning an Employee's Work Schedule

Use this process to access the **Assign Work Schedule** page and assign a Work Schedule to an employee.

| Step	Action
1.	Navigate to the **Assign Work Schedule** page using the following path: **NavBar > Menu > Time & Labor > Enroll Time Reporters > Assign Work Schedule**
ℹ	TL Supervisors access the **Assign Work Schedule** page using the following path: **NavBar > Menu > Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule**
	The **Assign Work Schedule Find an Existing Value** 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**.
2.	Enter the employee's Employee ID in the **Empl ID** field.
ℹ	Users can also search by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

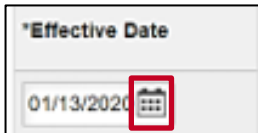| Step	Action
3.	Click the **Search** button.

(i)	If multiple employees match the search criteria entered, the search results will display in the bottom portion of the page, and the user must click the **Empl ID** link for the applicable employee. If not, proceed to Step 4.

The **Assign Work Schedule** page displays with the **Primary Schedule** tab displayed by default.
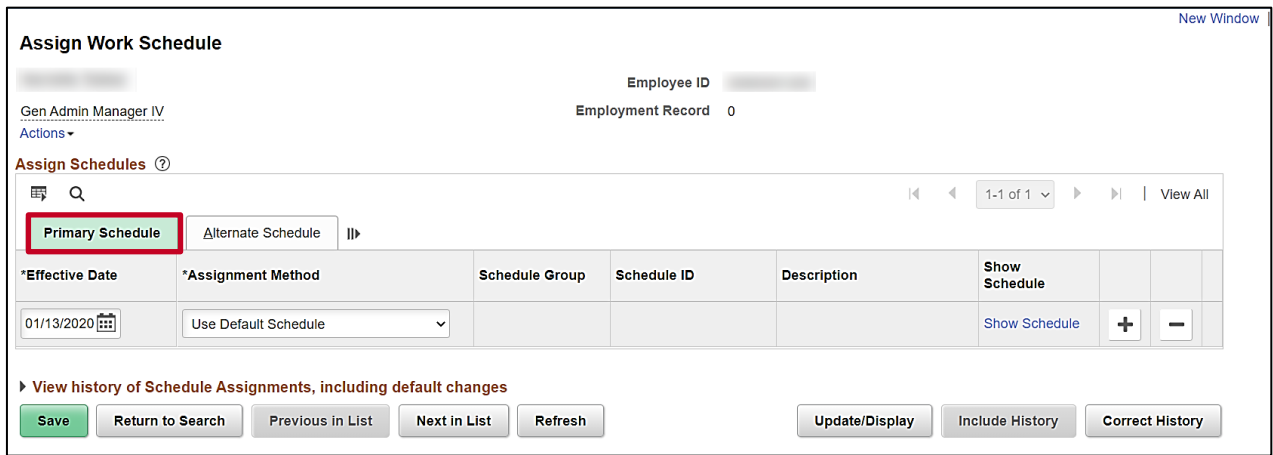
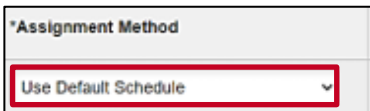| Step	Action
4.	The **Effective Date** field defaults to the current system date. Update this date using the **Effective Date Calendar** icon as needed.

(i)	The effective date should be the actual date for the updates to take effect. For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Step	Action
5.	The **Assignment Method** field defaults to "Use Default Schedule". Change this to "Select Predefined Schedule" using the dropdown button.

Step	Action
	The **Assign Work Schedule** page refreshes. **Assign Work Schedule** Gen Admin Manager IV Employee ID [redacted] Actions ▾ Employment Record 0 Assign Schedules ⓘ [Primary Schedule] [Alternate Schedule] ‖▸ 1-1 of 1 ▾ View All | *Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule		| 01/13/2020 📅 Select Predefined Schedule ▾ [🔍] [🔍] Show Schedule ➕ ➖ ▸ View history of Schedule Assignments, including default changes [Save] [Return to Search] [Previous in List] [Next in List] [Refresh] [Update/Display] [Include History] [Correct History]
6.	Select the applicable Schedule Group using the **Schedule Group Look Up** icon. **Schedule Group** [🔍]
ⓘ	The Schedule Group determines which schedule options (Schedule IDs) are available for selection. There are two types of Schedule Groups available which are listed below: • **STATE Schedule Group** – the Work Schedule options (Schedule IDs) available for selection are used across all state Agencies. Select this option unless there is a Work Schedule that is unique for the Agency • All other **Agency Specific (Business Unit) Schedule Groups** – the Work Schedule options (Schedule IDs) available for selection include weekly Work Schedules that are uniquely configured for the Agency (business unit). The use of a Variable Work Schedule (24 hours/7 days) is only found under the Agency specific Schedule Groups
7.	Select the applicable Schedule ID using the **Schedule ID Look Up** icon. Select the Work Schedule that is appropriate for the employee. **Schedule ID** [🔍]
ⓘ	Schedule IDs are smart coded, start with the applicable number of hours, and incorporate the on/off pattern of workdays for a two-week pay period. See the Work Schedule Naming Convention section of this Job Aid for additional information.

Step	Action
	The **Assign Work Schedule** page refreshes. **Assign Work Schedule** Gen Admin Manager IV Employee ID Actions▾ Employment Record 0 **Assign Schedules** ⓘ Primary Schedule Alternate Schedule ***Effective Date** ***Assignment Method** **Schedule Group** **Schedule ID** **Description** **Rotation ID** **Show Schedule** 01/13/2020 Select Predefined Schedule ▾ STATE 40.00-Z88888Z-0 5x8 hour days - 2 OFF together SASU ▾ Show Schedule + − ▸ View history of Schedule Assignments, including default changes Save Return to Search Previous in List Next in List Refresh Update/Display Include History Correct History
ⓘ	The **Description** and **Rotation ID** fields default based on the Schedule ID selected. The Rotation ID denotes either: • The relative day(s) in the Work Schedule pattern where the employee will be off. In this example, the Rotation ID of "**SASU**" indicates that the 2 days off together each week are Saturday and Sunday OR • When a Work Schedule can vary from one week to the next week, the user must select which of those weeks needs to be the start week. The correct Rotation ID needs to be selected based on the employee's first day in the weekly pattern and that is the effective date for the start of that Work Schedule 	Description	Rotation ID
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5x8 hour days - 2 OFF together	SASU ▾ | The Rotation IDs available for selection will vary based on the Schedule ID. See the Schedule Examples section of this Job Aid for additional information.
8.	Click the **Show Schedule** link to view a visual representation of the Work Schedule and confirm that the correct Work Schedule was selected. | Show Schedule		
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Show Schedule	+	−	

| Step	Action
	The **Schedule Calendar** page displays in a pop-up window.
9.	Review the Work Schedule information and then click the **OK** button.
	The **Assign Work Schedule** page returns.
10.	Click the **Save** button.

| Step	Action
ℹ	If attempting to update a historical or current effective dated row, the below error message will display which indicates that the user is entering the Work Schedule change on the incorrect effective dated row. Check to be sure that the change is being made on the new row, which displays at the top. If there is a historical change or correction that is required, open a Help Desk ticket to have the Cardinal Post Productive Support (PPS) complete the correction. Cannot change current or history records unless in Correction mode. (15,1) You have attempted to change a record that is effective dated, and the record contains an effective date that makes it either the current record or a historical record. Either use the Add (+) button to create a new record with a future effective date, or change your mode to Correction. [OK]
11.	Click the **OK** button to close this message. [OK]

Setting Up Multiple Work Schedule Changes

If both a normal Work Schedule and a temporary Work Schedule need to be changed for an employee, Cardinal allows the user to set up a future effective dated Work Schedule change. The **Alternate Schedule** tab is not utilized in Cardinal.
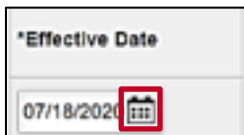
Step	Action
1.	Repeat steps 1-10 from the [Assigning an Employee's Work Schedule](#) section of this Job Aid to create the employee's normal Work Schedule.
2.	Click the **Add a New Row** icon (+).
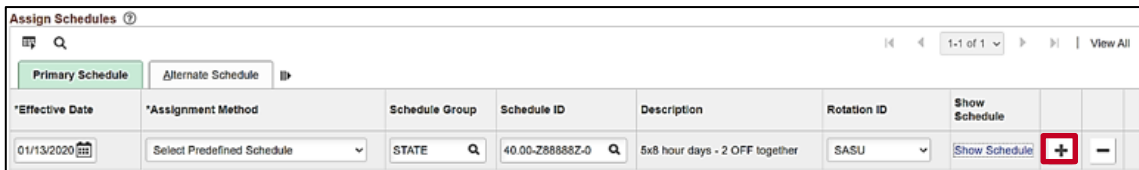
The **Assign Work Schedule** page refreshes with an additional row. The new row displays at the top of the table and populates with the information from the current row.
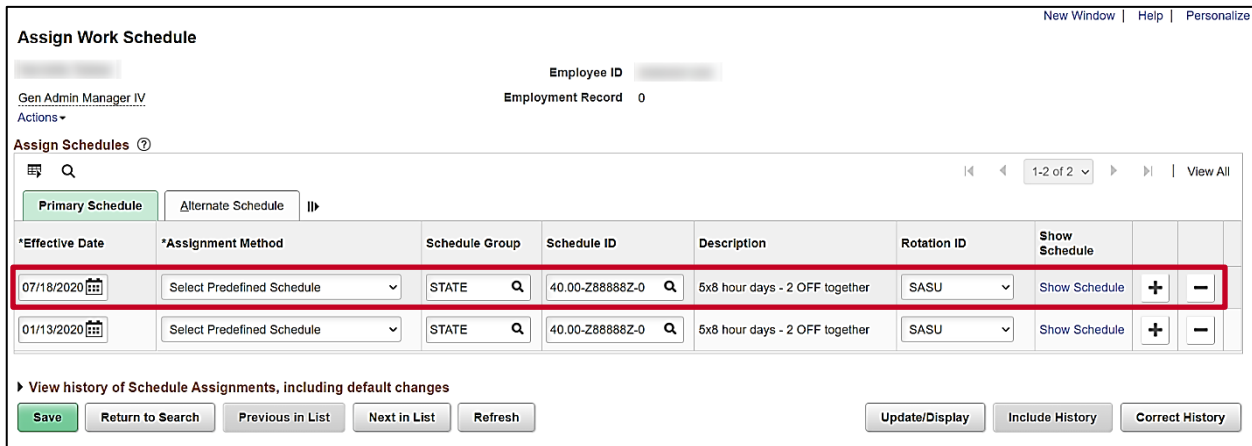
Step	Action
3.	The **Effective Date** field defaults to the current system date. Update this date to the date that the change needs to take effect using the **Effective Date Calendar** icon.
ℹ	The effective date should be the actual date for the updates to take effect. For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Step	Action
4.	Update the **Schedule Group**, **Schedule ID**, and **Rotation ID** fields as needed.
(i)	Refer to the Assigning an Employee's Work Schedule section of this Job Aid as needed for specific data entry requirements and information.

The updated **Assign Work Schedule** page displays.

Step	Action
5.	Click the **Save** button.

Sample Screenshots of Schedules and Schedule Calendar Pages

Below are some examples of Work Schedules and shows the **Assign Work Schedule** page and the **Schedule Calendar** pages for that example.
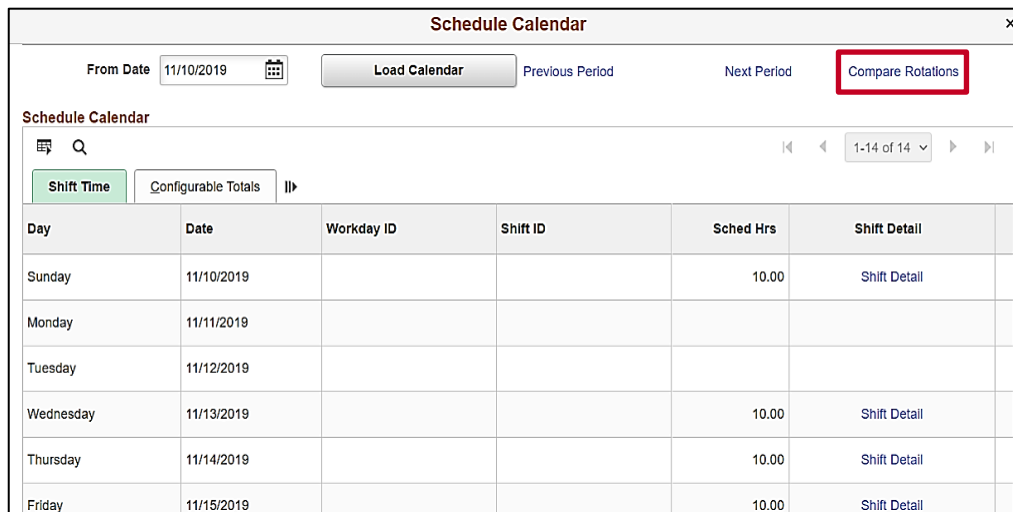
Step	Action
	Sample – **Rotating Schedule Assign Work Schedule** page:

(i)	The correct Rotation ID needs to be selected based on the employee's first day in the weekly pattern and that is the effective date for the start of that Work Schedule.
	For this example, the employee's start date to work falls on the Monday of the second week. Use the **Show Schedule** link to verify that the correct Rotation ID is selected.

Schedule Calendar page:

(i)	Use the **Compare Rotations** link to identify the week that starts with the employee's start date on a Monday as needed (in this example, it is week 2 which begins on Monday, November 18, 2019).

Step	Action

Sample – **Variable Schedule Assign Work Schedule** page:

Assign Work Schedule

Employee ID

Corr Ent Systems Analyst

Employment Record   0

Actions ▾

Assign Schedules ⑦

					1-1 of 1	View All

Primary Schedule | Alternate Schedule | ‖▶

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule	
11/10/2019 📅	Select Predefined Schedule ▾	77700 🔍	VARIABLE 🔍	Variable Schedule	Show Schedule	➕ ➖

▸ **View history of Schedule Assignments, including default changes**

| Save | Return to Search | Previous in List | Next in List | Refresh | | Update/Display | Include History | Correct History |

Schedule Calendar page:

Schedule Calendar   ✕

Help

Employee ID

Employment Record Nbr   0

Schedule Group   77700   Department of Juvenile Justice

Schedule ID   VARIABLE   Variable Schedule

From Date   11/10/2019 📅   [Load Calendar]   Previous Period   Next Period

Schedule Calendar

| | | | | | 1-1 of 1 | |

Shift Time | Configurable Totals | ‖▶

Day	Date	Workday ID	Shift ID	Sched Hrs	Shift Detail	
Sunday	11/10/2019	VARIABLE		24.00	Shift Detail	

| OK | Cancel | Refresh |

ℹ	If an employee has a Variable Schedule, the **Sched Hrs** field displays "24.00". This schedule is used for Positive Time Reporters whose schedule is so varied that they must report all hours.