

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 (<u>Section 3</u> , 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-AAAAAAAB, Example: 40.00-Z88888Z-0

Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
ΑΑΑΑΑΑ	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
В	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

SETID = STATE, 9X80

Format: 9X80-AAAAAAAB, Example: 9X80-Z9998ZZ-0

Character	Defines	Value		
AAAAAA	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		
В	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule		
İ	9X80 schedules must not be as Day 1 in the 14-day schedule wi Cardinal – used by Hourly emplo	nust not be assigned to nonexempt employees. ay schedule will correspond to a Biweekly Pay Period Begin Date in y Hourly employees.		



SETID = <Business Unit>

Format: NN.NN-AAAAAAAB, Example: 40.00-5X8X3WK-0

Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
ΑΑΑΑΑΑ	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.
В	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				
1	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 Ass	ign Work Schedule Find an Existing Value page displays.				
	← Cardinal Homepage Assign Work Schedule				
	Assign Work Schedule				
	Find an Existing Value				
	 ✓ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. 				
	3 Recent Searches Choose from recent searches				
	Empl ID begins with V				
	Empl Record =				
	Name begins with				
	Last Name begins with 🗸				
	Business Unit begins with 🗸				
	Department begins with				
	Organizational Relationship =				
	Case Sensitive 🖾 Include History 🔅 Correct History				
	Search Clear				
ĺ	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.				
	Empl ID begins with ~				
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	ı					
3.	Click the Search button.						
	Clear Clear						
j	If mult bottom employ	iple employees match t n portion of the page, a yee. If not, proceed to \$	he search nd the usei Step 4.	criteria enter must click th	ed, the search ne Empl ID link	results will for the ap	display in the plicable
The Ass	sign Wo	ork Schedule page disp	plays with t	he Primary S	Schedule tab c	lisplayed b	y default.
Assig	n Work Sch	nedule					New Window
Gen Adı	min Manager IV		Emp	Employee ID loyment Record 0			
Actions Assign	• Schedules (?)					
₽ rin	Q nary Schedule	Alternate Schedule			I4	1-1 of 1 🗸 🕨	▶ View All
*Effecti	ve Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule	
01/13/2	2020 🛄	Use Default Schedule				Show Schedule	+ -
► View Save	> 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						
4.	The Effect	ffective Date field defa ive Date Calendar icon ative Date	ults to the n as neede	current syste d.	m date. Updat	e this date	using the
1	The ef inform This Jo	fective date should be ation on effective datin ob Aid can be found on	the actual o g, see the the Cardir	date for the u Job Aid titled nal website in	pdates to take HR351_Overv Job Aids und	effect. Fo /iew of Eff ler Learnir	r further ective Dating. ıg.
5.	The A Predef *Assignm Use Def	ssignment Method fie fined Schedule" using t hent Method ault Schedule	ld defaults he dropdov	to "Use Defa vn button.	ult Schedule".	Change th	nis to "Select



Step	Action
The Ass	ign Work Schedule page refreshes.
Assigr	Work Schedule
Gen Adm	Employee ID in Manager IV Employment Record 0
Assign S	Achedules ⑦ A I
Prim	ary Schedule Alternate Schedule
*Effectiv	e Date Assignment Method Schedule Group Schedule ID Description Show Schedule
01/13/20	20 III Select Predefined Schedule Q Q A Show Schedule + -
► View f	istory of Schedule Assignments, including default changes 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.
i	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 Groups
7.	Select the applicable Schedule ID using the Schedule ID Look Up icon. Select the Work Schedule that is appropriate for the employee.
i	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 <u>Work Schedule Naming</u> <u>Convention</u> section of this Job Aid for additional information.



Step	Action
The Ass	gn Work Schedule page refreshes.
Assign	Work Schedule
Gen Adm Actions •	Employee ID Manager IV: Employment Record 0
Assign S	hedules (?)
Prima	Attended Schedule III
Ellective	Assignment metrical scriedule group scriedule of oup scriedule oup scriedule of oup scriedule oup scriedu
01/13/20	Select Predefined Schedule v STATE Q 40.00-Z88888Z-0 Q 5x8 hour days - 2 OFF together SASU v Show Schedule + -
► View h	story of Schedule Assignments, including default changes Return to Search Previous in List Next in List Refresh Update/Display Include History Correct History
1	 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 savailable 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 + -



Step	Action						
The Sch	edule Calen	dar page displ	ays in a p	oop-up wind	ow.		
				Schedule Calenda	r		×
		ate 01/13/2020	Load Cal	andar Provious	Pariad Navt Pari	od Compare Potatio	
	Schedule Calend	lar	Loud Out	Frevious		Compare Rotation	13
	₽₽ Q					I	
	Shift Time	<u>C</u> onfigurable Totals ▶					
	Day	Date	Workday ID	Shift ID	Sched Hrs	Shift Detail	
	Monday	01/13/2020			8.00) Shift Detail	
	Tuesday	01/14/2020			8.00) Shift Detail	
	Wednesday	01/15/2020			8.00) Shift Detail	
	Thursday	01/16/2020			8.00) Shift Detail	
	Friday	01/17/2020			8.00	D Shift Detail	
	Saturday	01/18/2020					
	Guiday	01/10/2020					
0.	ок	Cancel Refresh					
he Ass	ign Work Sc	hedule page	eturns.				
Gen Adm Actions -	nin Manager IV		Empl	Employee ID			
E, (۹					I∢	f 1 🗸 🕨 🕨 View All
Prim	ary Schedule Alternate	Schedule >	Debe dada Desam	Defendule ID	R	Setution ID Sho	w
01/13/20	Assignmen			40.00-7888887-0 Q	5x8 hour days - 2 OFE together	SASU Show	vedule
			· · ·		,		
View I Save	history of Schedule Assig	nments, including default cha Previous in List Next in	List Refresh		U	pdate/Display Include H	listory Correct History
10.	Click the Sa	IVE button.	cluding default	changes	7		
	Save	n to Search Previous	n List Next	in List Refresh]		



Step	Action
1	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.
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 <u>Assigning an Employee's Work Schedule</u> 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.

en Admin Manager IV ctions -		Emplo	oyment Record 0					
ssign Schedules ⑦	Alternate Schedule	Schedule Group	Schedule ID	Description	Rotation ID	1-2 of 2 V	▶	View All
07/40/2020	Select Predefined Schedule	STATE Q	40.00-Z88888Z-0 Q	5x8 hour days - 2 OFF together	SASU ~	Show Schedule	+	-1
07/18/2020								

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.

*Effective Date

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**.

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Step	Action									
4.	Update the Schedule Group, Schedule ID, and Rotation ID fields as needed.									
	Schedule Group	Schedule ID	De	scription	Rotation ID					
	STATE Q	40.00-4X10+5X	8-0 Q 4x	10 TuSaSu OFF / 5x	8 TuFr OFF WK1	~				
i	Refer to the specific data	Assigning a a entry requi	n Employ rements	vee's Work S and informat	chedule section ion.	of this Jol	b Aid as n	eed	led for	
The updat	ted Assign W	ork Schedu	lle page	displays.						
Assign W	ork Schedule						New Window F	ielp P	ersonalize	
Gen Admin M Actions→ Assign Sche I Q Primary S	anager IV edules ⑦ Schedule Alternate Sche	dule }	Emş	Employee ID		id 4	1-2 of 2 🗸 🕨	▶ \	/iew All	
*Effective Da	te *Assignment Met	hod	Schedule Group	Schedule ID	Description	Rotation ID	Show Schedule			
07/18/2020	Select Predefined	i Schedule 🗸	STATE Q	40.00-4X10+5X8-0 Q	4x10 TuSaSu OFF / 5x8 TuFr OFF	WK1 ~	Show Schedule	+	-	
01/13/2020	Select Predefined	l Schedule 🗸	STATE Q	40.00-Z88888Z-0 Q	5x8 hour days - 2 OFF together	SASU -	Show Schedule	+	-	
View histo Save	Click the Sa	ts, including default cha rious in List Next in i ve button. Schedule Assignmurn to Search Pr	ents, including	default changes	Ur Refresh	Indate/Display	Clude History C	orrect H	istory	



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.

Sample – Rotating Schedule Assign Work Schedule page:

Corr Ent Systems Analys Actions -	st	Emplo	yment Record 0				
ssign Schedules ⑦							
₽rimary Schedule	Alternate Schedule				14 4	1-1 of 1 🗸 🕨	View All
Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Rotation ID	Show Schedule	
11/10/2019 📰	Select Predefined Schedule	STATE Q	40.00-4X10X2WK-4 Q	4x10 - SuThFr / MoTuSa	₩К2 ✓	Show Schedule	+ -

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.

		Sched	ule Calendar			×
From Date	11/10/2019	Load Calendar	Previous Period	Next Period	Compare Rotations	
Schedule Calendar						
BF Q				∢		[
Shift Time	Configurable Totals II►					
Day	Date	Workday ID	Shift ID	Sched Hrs	Shift Detail	
Sunday	11/10/2019			10.00	Shift Detail	
Monday	11/11/2019					
Tuesday	11/12/2019					
Wednesday	11/13/2019			10.00	Shift Detail	
Thursday	11/14/2019			10.00	Shift Detail	
Friday	11/15/2019			10.00	Shift Detail	

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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).



	ble Schedule Ass		ieuuie page.			
Assign Work Sch	iedule					
			Employee ID			
Corr Ent Systems Analy	st	Emp	loyment Record 0			
Assign Schedules ⑦	J					
₽, Q				I.	1-1 of 1 🗸 🕨	View All
Primary Schedule	Alternate Schedule			1		
*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule	
11/10/2019 🗰	Select Predefined Schedule	▼ 77700 Q	VARIABLE Q	Variable Schedule	Show Schedule	+ -
View history of Sch	edule Assignments, including defa	ult changes		Undate/Diaplay	Include History	Correct History
Save		Kellesi		Opuate/Display	Include History	Confect History
equie Cale	ndar page:					
		Sche	dule Calendar			×
	Employee ID Employment Record Nbr 0 Schedule Group 77 Schedule ID V/	700 Departı RIABLE Variabl	ment of Juvenile Justice le Schedule			
From	Date 11/10/2019	Load Calendar	Previous Period	Next Perio	d	
Schedule Cale	ndar					
Schedule Cale	ndar				∢ √ 1-1 c	of 1 🖌 🕨 🕅
Schedule Cale	endar				I¶ ¶ 1-1 c	of 1 ∨ ▶ ▶
Schedule Cale Q Shift Time Day	endar Configurable Totals	kday ID	Shift ID	Sched Hrs	Shift De	of 1 v b b
Schedule Cale Q Shift Time Day Sunday	endar Configurable Totals II+ Date Wor 11/10/2019 VAR	kday ID IIABLE	Shift ID	Sched Hrs 24.00	Shift Do	etail
Schedule Cale Q Shift Time Day Sunday OK	Configurable Totals III Date Wor 11/10/2019 VAR	kday ID IIABLE	Shift ID	Sched Hrs 24.00	Shift D	etail