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.

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General Information

Each employee must have an assigned Work Schedule in Cardinal. Work Schedules are assigned to employees by either the TL Employee Setup Administrator, the 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

Note: 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

1. Access the **Assign Work Schedule** page.
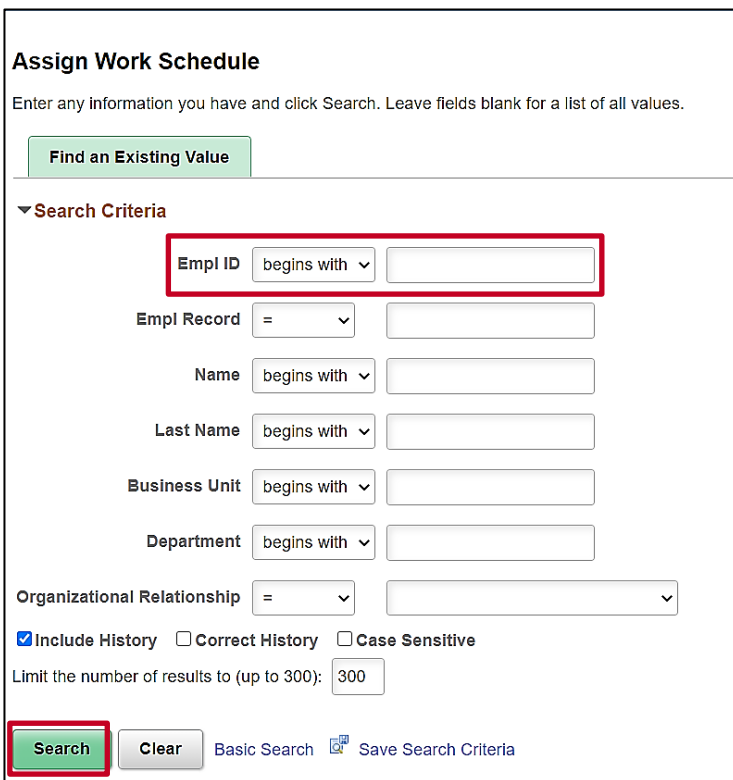
Timekeepers, TL Administrators, and TL Employee Setup Administrators access the **Assign Work Schedule** page using the following path:

> **Navigator > Time & Labor > Enroll Time Reporters > Assign Work Schedule**

TL Supervisors access the **Assign Work Schedule** page using the following path:

> **Navigator > Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule**

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

Assign Work Schedule

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

Find an Existing Value

▼ Search Criteria

Field	Operator	Value
Empl ID	begins with	
Empl Record	=	
Name	begins with	
Last Name	begins with	
Business Unit	begins with	
Department	begins with	
Organizational Relationship	=	

☑ Include History ☐ Correct History ☐ Case Sensitive

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

Search **Clear** Basic Search Save Search Criteria

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

    Note: You 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.

3. Click the **Search** button.

4. If multiple employees match the search criteria entered, the search results will display in the bottom portion of the page and you must click the **Empl ID** link for the applicable employee. If not, proceed to Step 5.

The **Assign Work Schedule** page displays with the **Primary Schedule** tab displayed by default.

5. The **Effective Date** field defaults to the current system date. Update this date using the **Effective Date Calendar** icon as needed.

    Note: 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**.

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

The **Assign Work Schedule** page refreshes.

7. Select the applicable Schedule Group using the **Schedule Group Look Up** icon. 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:

   a. **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 your agency

   b. 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

8. Select the applicable Schedule ID using the **Schedule ID Look Up** icon. Select the Work Schedule that is appropriate for the employee.

   Note: 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.

The **Assign Work Schedule** page refreshes.

9. The **Description** and **Rotation ID** fields default based on the Schedule ID selected. The Rotation ID denotes either:

    a. 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

    b. When a Work Schedule can vary from one week to the next week, you 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

    Note: 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.

10. Click the **Show Schedule** link to view a visual representation of the Work Schedule and confirm that the correct Work Schedule was selected.

The **Schedule Calendar** page displays in a pop-up window.
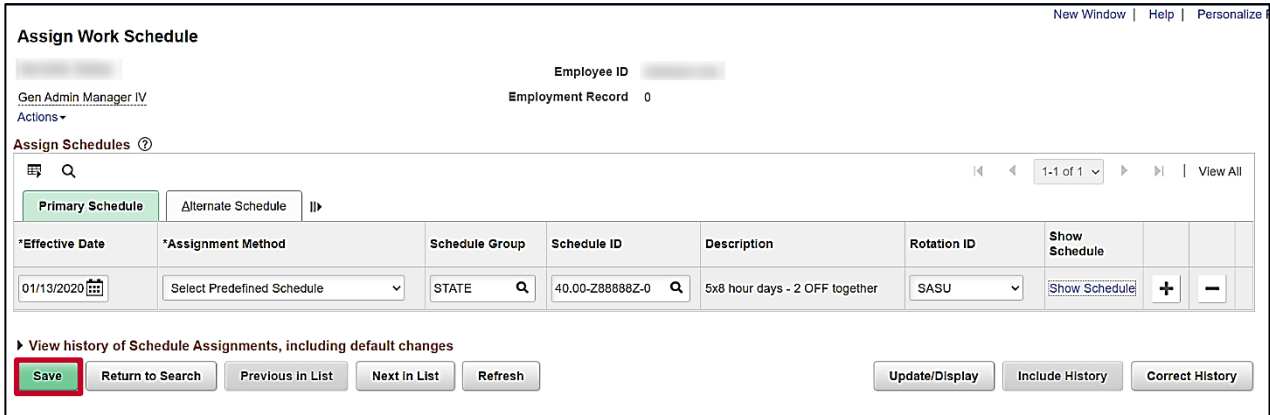
11. Review the Work Schedule information. Once confirmed as correct, click the **OK** button.

The **Assign Work Schedule** page returns.

12.	Click the **Save** button.

Note: If you are attempting to update a historical or current effective dated row, the below error message will display which indicates that you are entering the Work Schedule change on the incorrect effective dated row. Check to be sure you are making the change on the new row, which displays at the top. If there is a historical change or correction that is required, you will need to open a Help Desk ticket to have the Cardinal Post Productive Support (PPS) complete the correction.
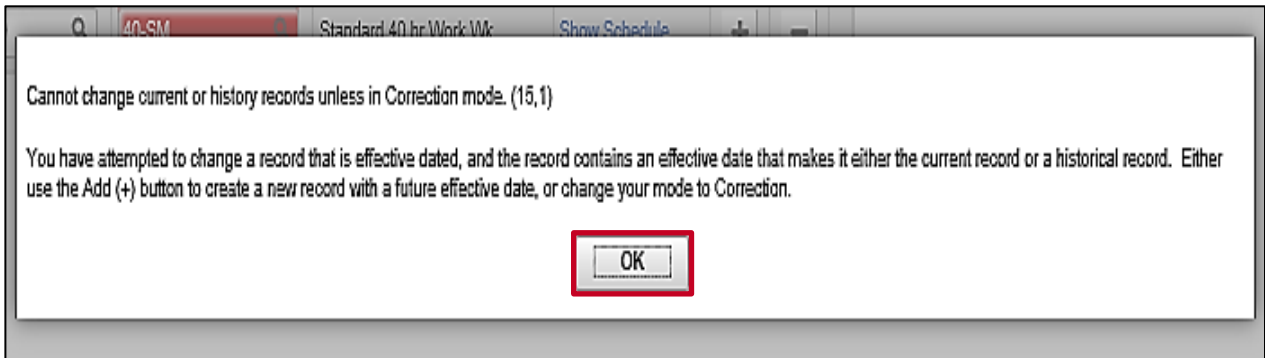
13.	Click the **OK** button to close this message.

Setting Up Multiple Work Schedule Changes

If you need to enter both a normal Work Schedule and a temporary Work Schedule change for an employee, Cardinal allows you to set up a future effective dated Work Schedule change. The **Alternate Schedule** tab is not utilized in Cardinal.

1. Repeat steps 1-12 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.

3. The new row populates with the information from the current row. 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.

   Note: 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**.

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

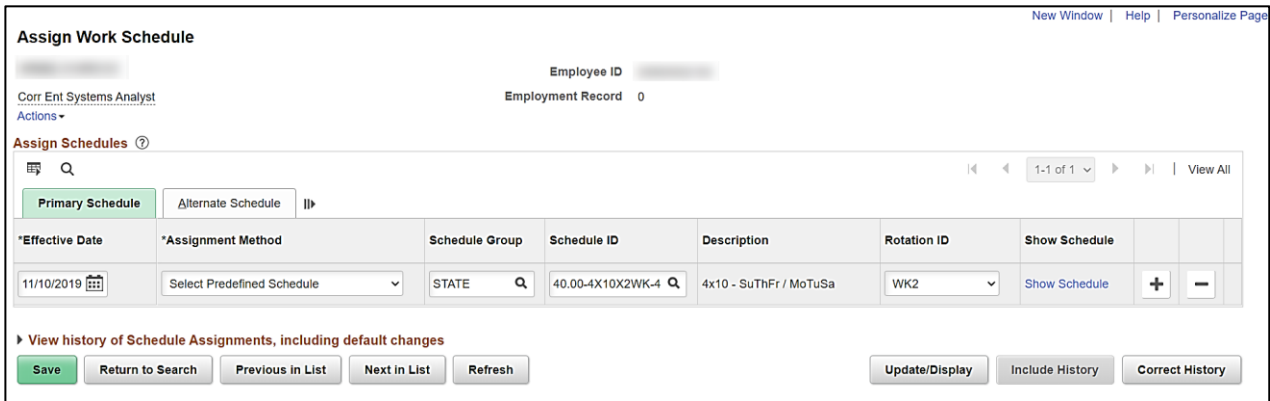The updated **Assign Work Schedule** page displays.

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.

Sample – Rotating Schedule
Assign Work Schedule page:

Note: 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 the correct **Rotation ID** is selected.

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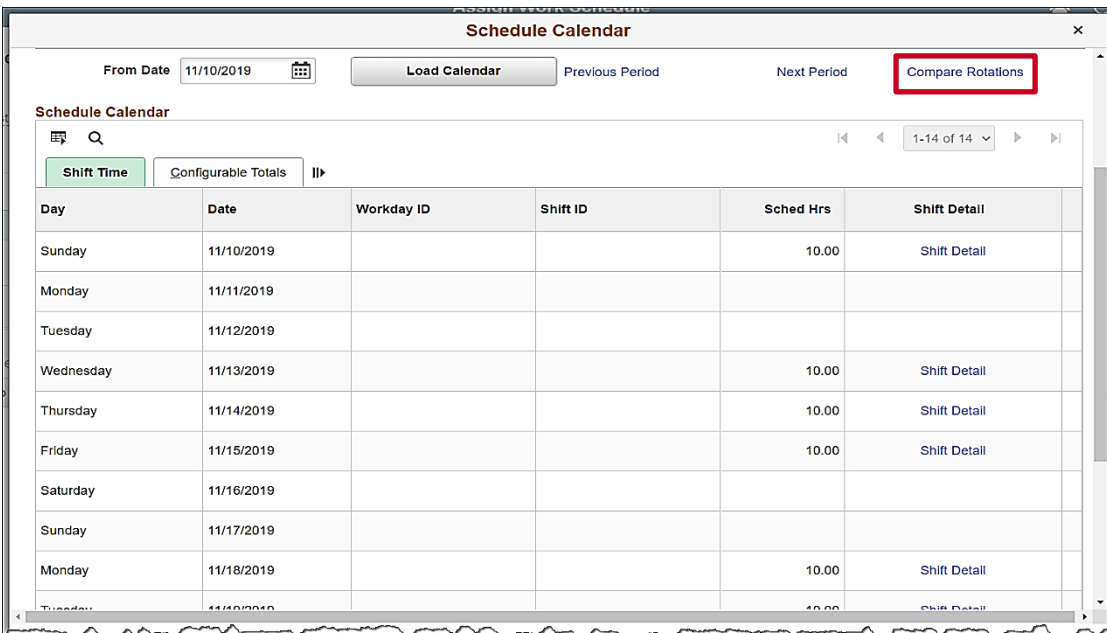
Note: Use the **Compare Rotations** link to identify the week that starts with employee's start date on a Monday as needed (in this example, it is week 2 which begins on Monday, November 18, 2019).

Sample - Variable Schedule
Assign Work Schedule page:

Schedule Calendar page:

Note: 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.