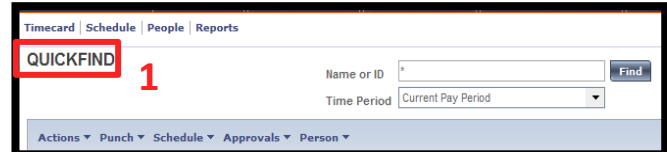


## Friendly Name Historical Edit

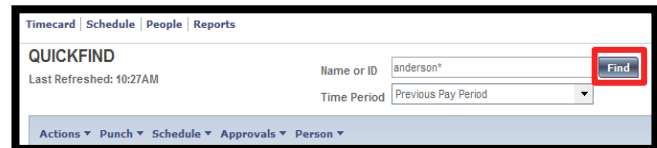
Historical Edits can only be entered in signed-off time periods.

A Retroactive Pay Historical Edit must be performed whenever signed-off timecard Friendly Name data needs to be corrected. A typical situation is when an employee has entered an incorrect Friendly Name, and the error was not caught and corrected by the supervisor before sign-off by the Timekeeper.

1. Log in to CalTime. CalTime will open to **QUICKFIND**.

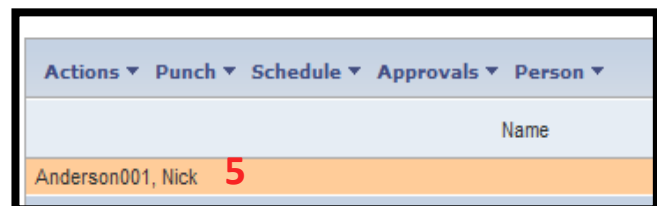


2. Enter the last name or ID of the employee needing a historical edit into the **Name or ID** Field.
3. Select the appropriate **Time Period** in the **Time Period** field. In this example, **Previous Pay Period** is chosen.
4. Click the **Find** button.

A list of matching employees will be displayed—in this example, **Anderson001 Nick**.

5. Double-click on the desired employee name to navigate to their timecard in the defined time period.



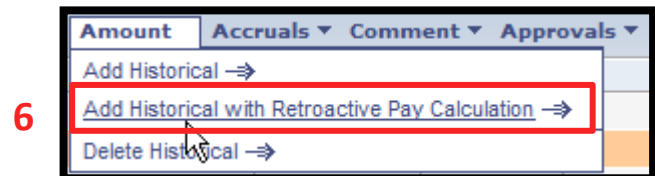
Name
Anderson001, Nick

## Friendly Name Historical Edit

In this example, Nick Anderson (who usually works in the Doe Library) accidentally chose his usual Friendly Name (Doe Library) on Friday 8/22. He was actually working at Moffitt library that day. A retroactive pay calculation historical edit must be performed to change the chart string from Doe Library to Moffitt Library.

Thu 8/21		7:00AM		3:30PM
Fri 8/22		7:00AM	;LIBRARIAN-DOE/////	3:30PM
Sat 8/23				

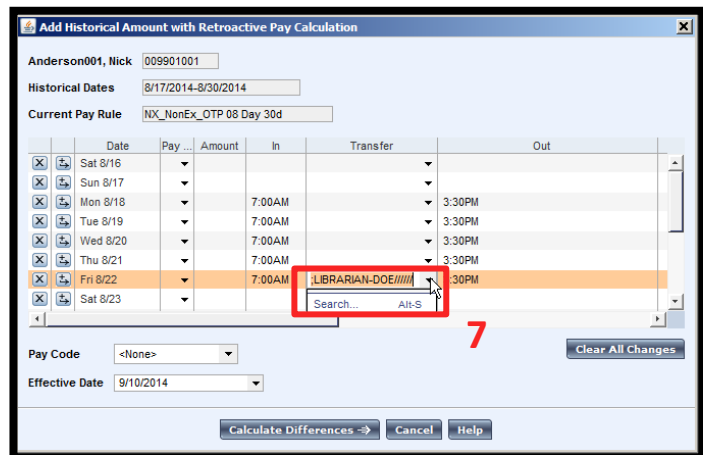
- Click the **Amount** menu and select the **Add Historical with Retroactive Pay Calculation** item to navigate to the **Add Historical with Retroactive Pay Calculation** screen.



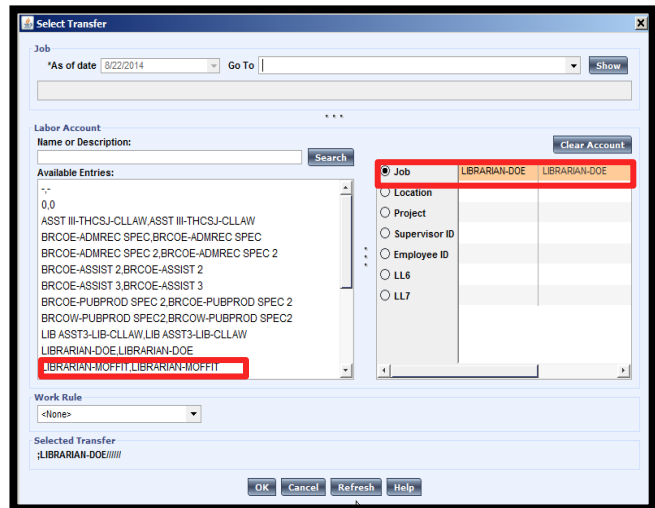
The **Add Historical Amount with Retroactive Pay** window will display.

The needed correction can now be added to the appropriate cell in the timecard.

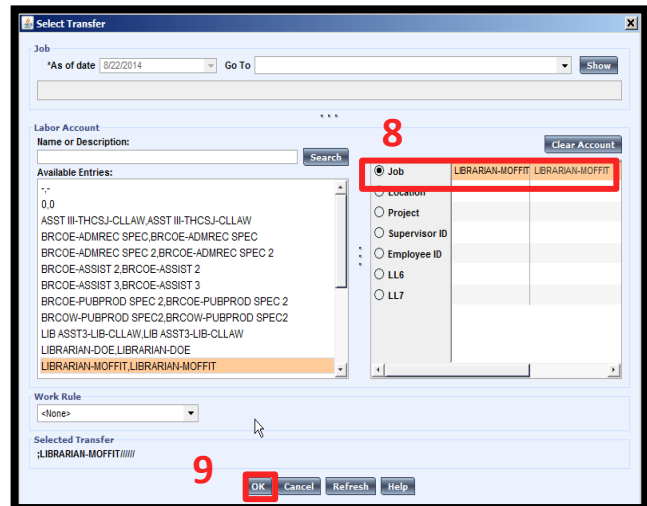
- Click the cell that needs editing in the **Transfer** column, and click the **Search** button.



The **Select Transfer** window will open. Notice the **Job** code option button is selected, and **Library-Doe** is displayed. This is the current state of the timecard record. We need to change the record from Doe to Moffitt. **LIBRARIAN MOFFIT** is an option in the **Available Entries:** window.

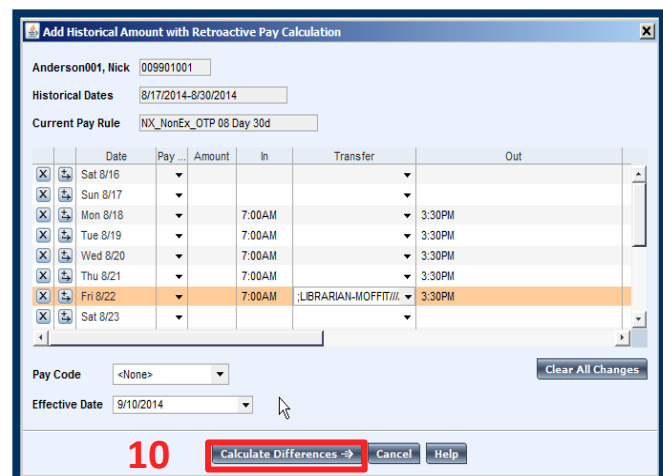


8. Click the desired **Available Entry**, and the entry will display in the **Job** line. In this example **LIBRARIAN DOE** is replaced by **LIBRARIAN MOFFIT**.
9. Click the **OK** button to return to the **Historical Edit with Retroactive Pay Calculation** window.



The **Add Historical Amount with Retroactive Pay Calculation** window will appear with the Friendly Name chosen in the previous step.

10. Click the **Calculate Differences** button to navigate to the next **Add Historical Amount with Retroactive Pay Calculation** window.

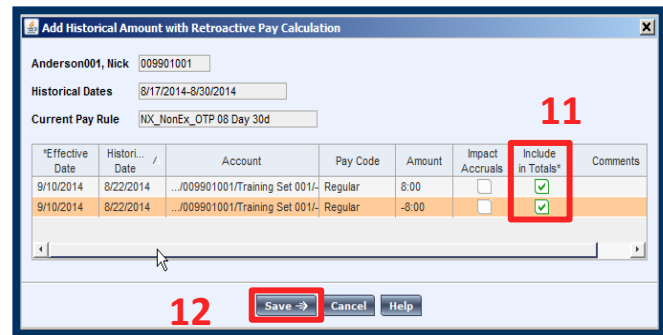


Two lines will appear in this window, one indicating a charge to the new Friendly Name (*positive number*) and one indicating a reversal of charge to the original Friendly Name (*negative number*).

**11.** If the historical edit should be passed to PPS check both **Include in Totals\*** checkboxes.

If the historical edit should not be passed to PPS do not check these boxes.

**12.** Click the **Save** button.



CalTime will have added two additional lines with grey backgrounds to **Friday 8/22** indicating a reversal of charge to the original Friendly Name (LIBRARIAN DOE in this example), and a charge to the new Friendly Name (LIBRARIAN MOFFIT in this example).

Thu 8/21			7:00AM	
Fri 8/22	Regular	-8.00		;LIBRARIAN-DOE/-/009915001/009901001/Training Set 001/-
Fri 8/22	Regular	8.00		;LIBRARIAN-MOFFIT/-/009915001/009901001/Training Set 001/-
Fri 8/22			7:00AM	;LIBRARIAN-DOE/////

This Friendly Name Historical Edit process is complete.