

Purpose of this Job Aid: This job aid explains how a friendly name is created and instructions on how an HR administrator may update a biweekly paid employee's **CalTime Type Code** and **Friendly Name**. This job aid will focus on **Type A Friendly Names**. +

Purpose of a Friendly Name

Friendly names are only required for biweekly paid employees and are a short name which ties to the employees HR appointment/job. The friendly name is intended to be a user friendly name in which the employee can record their hours worked and leave taken using the transfer function in CalTime. CalTime uses this friendly name to associate the hours worked and leave taken to the employee's HR job/appointment and chart string(s) in order to send time reporting information to the payroll system.

The following instructions assume HR has already established a new effective dated row for the biweekly paid employee in UCPATH and made any other changes needed to establish/update the job record. Once an employees record (such as a job hire) has been created in UCPATH, the HR administrator may login into the friendly name application. Job information setup in UCPATH will transfer to the friendly name application overnight and be available the following day.

A default friendly name type of A and a friendly name comprised of department code, job code, and record number will automatically be assigned to the employee. The HR administrator will only need to update the friendly name application if the employee is being assigned a friendly type or friendly name other than the default type A.

Friendly name Type A (Default Friendly Name Value):

A = Appointment. A "Type A" friendly name is recorded at the appointment/Job level. Time is charged to the job record and position funding chart-strings and associated percentages entered in the UCPATH system.

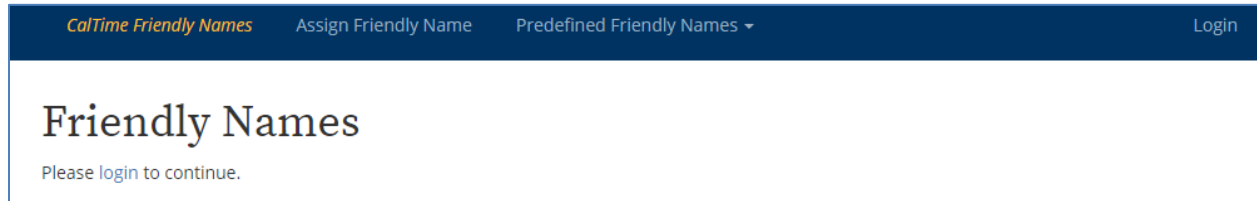
The default **friendly name** for Type A is comprised of the **department code, job code, and UCPATH job record number**. As an example, a typical default Type A would look like this: **UKHDS-8211C-0**. If the HR administrator does not make any changes to the friendly name application, the default friendly name type A will be automatically assigned.

Most employees with a Type A friendly name and one job may not need to know their friendly name, because they have one job and do not need to use the transfer function in CalTime to assign hours worked to a particular friendly name (job). If they have more than one job, they will need to know the friendly name in order to reports hours worked and leave taken in CalTime to different jobs.

Biweekly Employees: Friendly Name Type A

LOGIN/LOG OUT:

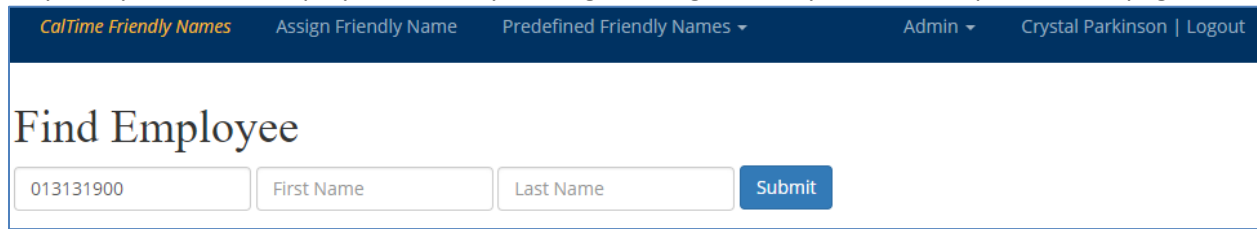
Open your web browser and go to <https://fn.berkeley.edu/>
Click **Login** at upper right corner of the application. You will be prompted to calnet authenticate and may be required to enter your Berkeley [Passcode](#). At the end of your session, click Logout at the top right of the webpage.



The screenshot shows the top navigation bar of the CalTime Friendly Names application. The navigation items are: CalTime Friendly Names, Assign Friendly Name, Predefined Friendly Names (with a dropdown arrow), and Login. The main content area displays the title "Friendly Names" and a message: "Please login to continue."

EMPLOYEE SEARCH

To search for an employee, you may enter the employee ID, first name, or last name and click **Submit**. You may always return to employee search by clicking on Assign Friendly Name the top of the webpage.



The screenshot shows the top navigation bar of the CalTime Friendly Names application. The navigation items are: CalTime Friendly Names, Assign Friendly Name, Predefined Friendly Names (with a dropdown arrow), Admin (with a dropdown arrow), and Crystal Parkinson | Logout. The main content area displays the title "Find Employee" and a search form with three input fields: "013131900", "First Name", and "Last Name", followed by a "Submit" button.

Biweekly Employees: Friendly Name Type A

SEARCH RESULTS

Find Employee

 A

Search Results

Show entries **B** Search:

Employee ID	↕↕ First Name C	↑ Last Name	↕
012345678	Oski	Bear	<input type="button" value="Select"/> E

Showing 1 to 1 of 1 entries

Previous **1** Next

- A.** If you searched by employee ID, the employee with that ID number will appear in the search results. If you search by first or last name, a list of employees will appear in the search result that have that name under Search Results, click **Select** next to the employee to open the employee's record.
- B.** You can click the drop down next to Show to list 10, 25, 50, 100 employees at a time
- C.** Click on the upward and downward to sort by Employee ID, First Name, or Last Name.
- D.** The **Search** field enables the user to narrow the list by entering some key search letters. For example, if you want to view all employees that have Tim in their name, you would enter Tim in the search field. You can also use this field to narrow the search for all employees that might have the numbers 105 in their employee ID number.
- E.** Click on Next to view the next list of employees. You may have multiple pages if your search results are more than 100 entries or less if you have your Show entries set to 10, 25, or 50 entries.

Biweekly Employees: Friendly Name Type A

EMPLOYEE DETAIL

A small portion of appointment information will be imported from UCPATH for the purposes of assigning and/or creating a friendly name.

CalTime Friendly Names Assign Friendly Name Predefined Friendly Names Admin Crystal Parkinson

Test One -- 013131900

- #0, 03/20/18, KNBAM, 4921U

[Return to search results](#)

Rec #0, Effective 03/20/18, Sequence 0

Department Code / Name	Job Code / Title	HR / Payroll Status	Action / Reason
KNBAM	4921U	Active	Hire
Art Mus & Pacific Film Archive	STDT 2	Active	Hire

Friendly Names

A -- Appointment
 C -- Chartstring

Type A Friendly Name
BAMPFA-WS GALL ATT
[Click to assign a new name](#)

[Save](#)

updated March 20, 2018 04:52 PM by Theron Ginn (1085368: 012744354)

The employee name and ID appears at the top. The UCPATH job record number and associated effective date, department code, and title will appear below.

If the employee has multiple records, you will see multiple UCPATH job record numbers listed below the name and ID number. You may view other records by clicking on the blue link.

- #0, 10/01/17, FNATH, 4921U
- #1, 10/02/17, FOREC, 4921U

If the employee has a future dated change associated with a record then you will see two records with the same record number but different effective dates. For example:

- #0, 03/20/18, KNBAM, 4921U
- #0, 04/01/18, KNBAM, 4921U

If the employee has a change that was made using the same effective date as the prior change you will see a sequence number. For example, I hired someone 03/20/18 but then changed their supervisor a few days later and used the same date of 03/20/18.

- #0, 03/20/18, KNBAM, 4921U, **Seq. 1**

Biweekly Employees: Friendly Name Type A

ASSIGN OR CREATE A FRIENDLY NAME FOR A TYPE A:

An existing employee's setup in UCPATH prior to the creation of the friendly name application (April 2017) will show their existing assigned friendly name. New Hires will default to a Type A friendly Name. The default friendly name is comprised of department, title code, and record number.

Friendly Names

A -- Appointment
 C -- Chartstring

Type A Friendly Name

KPADM-6759C-0

Click to assign a new name

Save

updated July 07, 2017 11:36 AM by unknown user

Examples of different Friendly name actions are below:

- **Department prefers default type A and default friendly name:** If an HR administrator or department is fine with the default Type A friendly name then no further action is required. The system will automatically assign the friendly name during the nightly system processing. The friendly name will be the department code, job code, and UCPATH job record number.
- **Department is changing the employee from a type C or S to a type A and default friendly name:** The HR administrator would click on the friendly name type of A—Appointment and click save to accept the default friendly name of department code, job code, and UCPATH Job record number.
- **Department wants to change the employee to a Type A and assign either a predefined department friendly name or a unique friendly name (not the default):**
 1. Click on the friendly name type of A—Appointment
 2. Click the field labeled "Click to assign a new name."
 3. **If there are predefined names** for that department associated with the employee's appointment department, you will see a list of names appear. You may click **Select**, if you see applicable predefined friendly name. A predefined name is a friendly name that the department created in the past.

Type A Friendly Name Assignment

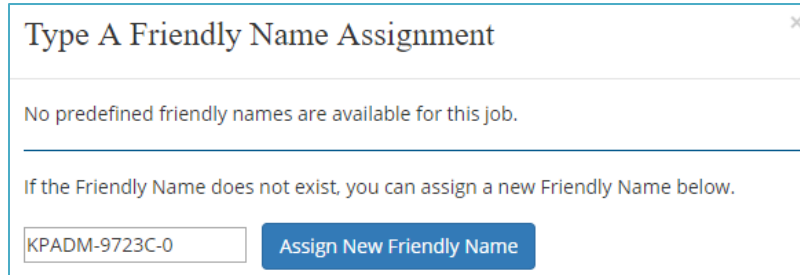
Select a predefined name in Dept **FJPPS** and Job **8193C**

Friendly Name	Dept	Job Code	Eff Dt	Status	Description	Action
FS-STEAMFITTER	FJPPS	8193C	09/06/14	A	FS- Steamfitter	Select

If the Friendly Name does not exist, you can assign a new Friendly Name below.

Biweekly Employees: Friendly Name Type A

If there are no predefined names, you will see this message:



Type A Friendly Name Assignment

No predefined friendly names are available for this job.

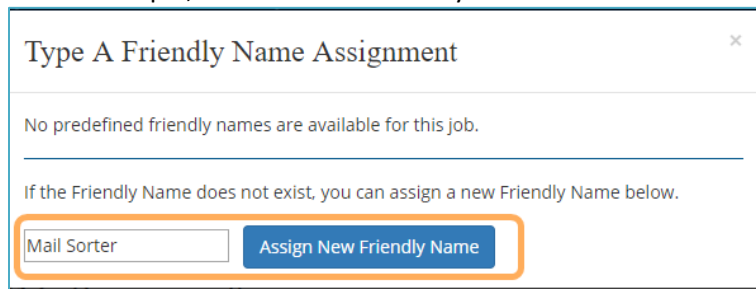
If the Friendly Name does not exist, you can assign a new Friendly Name below.

KPADM-9723C-0

To create a new friendly name

After clicking on the **Click to assign a new name field**, scroll down the list (if there is a list) the entry field. The field will be prepopulated with the default friendly name, however, you can delete that information and then type in the new friendly name. Once you have entered in the information, click **Assign new Friend Name**.

In this example, I renamed the friendly name to Mail Sorter



Type A Friendly Name Assignment

No predefined friendly names are available for this job.

If the Friendly Name does not exist, you can assign a new Friendly Name below.

Mail Sorter

4. Once you have assigned the friendly name and/or friendly name type, remember to save the change.



Friendly Names

A -- Appointment

Type A Friendly Name

AACHO-9902U-0

updated September 06, 2014 01:12 AM by unknown user

Note: Once you have saved, the information directly below the Save button will be updated with the date the change was made and the name, UID, and employee ID of the person that made the change in the friendly name application. In parentheses will be the UID followed by the Employee ID.