Purpose of this Job Aid: This job aid will explain how a friendly name is established and provide instructions on how an HR administrator may update a biweekly paid employee’s CalTime Type Code and Friendly Name to a Type C.

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.

Default Friendly Name Value:

A Type A default friendly name consisting of department code, job code, and UCPATH record number (ex. UKHDS-8211C-0) is automatically assigned. However, if you need to change the default friendly name type code from Type A to Type C, the following instructions will guide you through establishing a Type C Friendly Name.

Friendly Name Type C:

C = Chartstring. Type C requires a friendly name and an approver to be created/assigned for each chart-string (distribution chart strings imported from the position funding record associated with the employees job setup UCPATH). An example of an employee that may be assigned a type C is someone that has to record time to different chart strings (distributions) on their HR job depending on which contract and grant or project they are working on. There may also be different supervisors responsible for approving this employees time depending on the chart string that is used.

A Type C employee that has three distribution chart strings in UCPATH will have an approver and unique friendly name assigned to each of the three distributions in the friendly name application. The same friendly name may not be assigned to more than one chartstring and or job.

Once the employee has recorded time and leave using different friendly names, CalTime will transmit these hours and the chartstring associated with the Type C friendly name in a mass time file (known as the I181) to UCPath to be processed and paid.
**LOGIN/LOG OUT:**

Open your web browser and go to [https://fn.berkeley.edu/](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.

<table>
<thead>
<tr>
<th>CallTime Friendly Names</th>
<th>Assign Friendly Name</th>
<th>Predefined Friendly Names</th>
<th>Login</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Friendly Names</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Please login to continue.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>CallTime Friendly Names</th>
<th>Assign Friendly Name</th>
<th>Predefined Friendly Names</th>
<th>Admin</th>
<th>Crystal Parkinson</th>
<th>Logout</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Find Employee</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>013131900</td>
<td>First Name</td>
<td>Last Name</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 arrows enable you 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.
EMPLOYEE DETAIL

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

<table>
<thead>
<tr>
<th>ColTim Friendly Names</th>
<th>Assign Friendly Name</th>
<th>Predefined Friendly Names</th>
<th>Admin</th>
<th>Crystal Parkinson</th>
</tr>
</thead>
</table>

**Test One -- 013131900**

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

Return to search results

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

<table>
<thead>
<tr>
<th>Department Code / Name</th>
<th>Job Code / Title</th>
<th>HR / Payroll Status</th>
<th>Action / Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>KNBAM</td>
<td>4921U</td>
<td>Active</td>
<td>Hire</td>
</tr>
<tr>
<td>Art Mus &amp; Pacific Film Archive</td>
<td>STDT 2</td>
<td>Active</td>
<td>Hire</td>
</tr>
</tbody>
</table>

**Friendly Names**

- **A** -- Appointment
- **C** -- Chartstring

**Type A Friendly Name**

BAMPPA-WS GALL ATT

[Click to assign a new name]

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

**If the employee has multiple records**, you will see multiple UCPATH record numbers listed below the name and ID number. You click 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 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

**ASSIGN OR CREATE A FRIENDLY NAME FOR A TYPE C:**

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.

Type C process summary:

1. Search for desired employee (Click on Assign Friendly name at top of webpage)
2. Click on Type C friendly name Type
3. Assign friendly name and approver for each chart string
4. Click save

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1. Search for desired employee (see page 3 for detail)
2. **Assign Type C**: Click on the friendly name type of C—Chartstring

3. **Create or assign existing friendly name**:
   - Click on the **Click to assign** button under the Friendly name column.

A list of predefined (previously created) friendly names based on the employees department will appear. If there are predefined names for the department associated with the employee’s appointment department, you will see a list of names appear. You may click **Select**, if you see an applicable predefined friendly name.
If there are no predefined names set up, you will see the message “no predefined names matched the selected distribution.”

To create a new friendly name

There is a blank field next to the Assign New Friendly Name button. The field may be prepopulated with a 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

4. Assign an approver

An approver must be assigned to each chart string. The default approver is the employee’s supervisor that is assigned in UCPATH. However you can select the approver field to assign a different approver.
A new screen will appear enabling you to search for a supervisor by first name, last name, or employee id. Once you have selected the applicable supervisor, click Select.

5. **Save Changes**

Once you have assigned the friendly name and/or friendly name type for each applicable chart string, remember to save the change. 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.