Non-Exempt Employees:

Friendly Name Type C

Purpose of this Job Aid: This job aid will help you establish or update a Non-Exempt employee’s CalTime Type Code and Friendly Name to a Type C.

The following instructions assume you have already established a new effective dated row for the non-exempt employee in HCM and made any other changes needed to establish/update the job record. Once you have updated or created an employee record in HCM (such as a job hire), you may login into the friendly name application. Information from HCM will interface to the friendly name application immediately.

Purpose of a Friendly Name

Friendly names are only required for non-exempt employees (with at least one REG distribution assigned in HCM) 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. CalTime uses this friendly name to associate the hours worked and leave taken to the HR job/appointment and chart strings in order to send time reporting information to the payroll system.

Default Friendly Name Value:

A Type A default friendly name consisting of department code, job code, and HCM 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 HCM). 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 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 HCM will have an approver and friendly name assigned to each of the three distributions in the friendly name application.
Non-Exempt Employees:
Friendly Name Type C

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.

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.
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.
Non-Exempt Employees:
Friendly Name Type C

EMPLOYEE DETAIL

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

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

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

- #0, 03/20/18, KNBAM, 4921U
- #1, 10/02/18, 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
Non-Exempt Employees:

Friendly Name Type C

ASSIGN OR CREATE A FRIENDLY NAME FOR A TYPE C:

An existing employee’s setup in HCM 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

---

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 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.
Non-Exempt Employees:  
**Friendly Name Type C**

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 HCM. 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.