

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.

Biweekly Employees: Friendly Name Type C

LOGIN/LOG OUT:

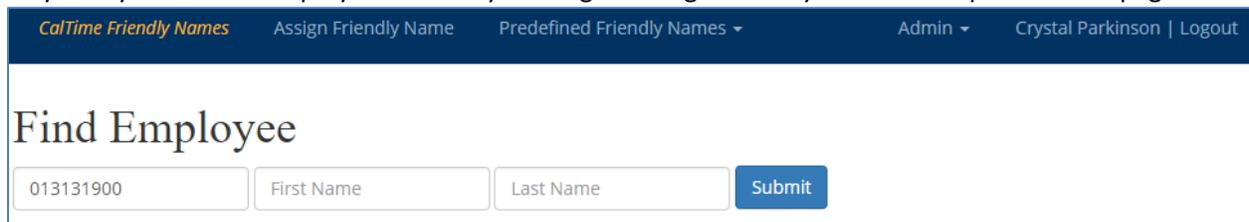
Open your web browser and go to <https://fn.berkeley.edu/>
Click **Login** at upper right corner of the application. You will be prompted to calnet authenticate and may be required to enter your Berkeley [Passcode](#). At the end of your session, click Logout at the top right of the webpage.



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 heading "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 heading "Find Employee" and a search form with three input fields: "013131900", "First Name", and "Last Name", followed by a blue "Submit" button.

Biweekly Employees: Friendly Name Type C

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 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.

Biweekly Employees: Friendly Name Type C

EMPLOYEE DETAIL

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

The screenshot shows the 'CalTime Friendly Names' interface. At the top, there is a navigation bar with 'CalTime Friendly Names', 'Assign Friendly Name', 'Predefined Friendly Names', 'Admin', and 'Crystal Parkinson'. The main content area displays the employee name 'Test One -- 013131900' and a list of records: '#0, 03/20/18, KNBAM, 4921U'. Below this is a 'Return to search results' link. A section titled 'Rec #0, Effective 03/20/18, Sequence 0' contains a table with the following data:

Department Code / Name	Job Code / Title	HR / Payroll Status	Action / Reason
KNBAM	4921U	Active	Hire
Art Mus & Pacific Film Archive	STD2	Active	Hire

Below the table is a 'Friendly Names' section with radio buttons for 'A -- Appointment' (selected) and 'C -- Chartstring'. A red box highlights the 'Type A Friendly Name' input field containing 'BAMPFA-WS GALL ATT' and a 'Click to assign a new name' button. A 'Save' button is located below the input field. At the bottom, it says 'updated March 20, 2018 04:52 PM by Theron Ginn (1085368: 012744354)'.

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

Biweekly Employees: Friendly Name Type C

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

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

Friendly Names

A -- Appointment

C -- Chartstring

3. **Create or assign existing friendly name:**

Click on the **Click to assign** button under the Friendly name column.

Type C Friendly Name														
Dist	Friendly Name	Approver	Start	End	Earn	%	Pay	GL	Account	Fund	Dept	Program	Chartfield1	Chartfield2
11	Not assigned Click to assign	012345678 Crystal Parkinson Click to assign	02/21/18	02/19/19	REG	10.0	0.0	1	51231	20300 UNEX- FEE I	29902 EXADM DIRECTORS OFFICE	61 University		

Save

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.

Biweekly Employees: Friendly Name Type C

Type C Friendly Name Assignment

Select a predefined name in Dept **KPADM**, Job **4921U**, and Chart String **1 19900 15864 60**

Friendly Name	Dept	Job Code	Eff Dt	Status	Description	Chart String	Action
LIB-ACCS-BARNETT	KPADM	4921U	2015-08-16	A	4921 - 13 rate	1 19900 15864 60	Select
LIB-ACCS-BARNETT-L	KPADM	4921U	2015-03-11	A	Barnette, workleader rate	1 19900 15864 60	Select

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

Type C Friendly Name Assignment

No predefined names match the selected distribution

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

[Assign New Friendly Name](#)

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.

Type C Friendly Name

Dist	Friendly Name	Approver	Start	End	Earn %	Pay	GL	Account	Fund	Dept	Program	Chartfield1	Chartfield2
23	MAIL SORTER Click to assign	0123456789 Crystal Parkinson Click to assign	07/16/17		REG 50.0	0.5	1	51210	19900 GENERAL FU	15944 KTEDU Social Sciences Ops	60 Libraries		

[Save](#)

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

Biweekly Employees: Friendly Name Type C

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.

Type C Friendly Name Approver

Employee ID	First Name	parkinson	Submit
-------------	------------	-----------	--------

Employee ID	First Name	Last Name	
012345678	Crystal	Parkinson	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.

Save

updated April 16, 2018 10:50 AM by Crystal Parkinson (123456:012345678)