Non-Exempt Employees:

Friendly Name Type S

**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 S.

Only the following departments are permitted/configured to be type S: University Police (FUPOL), Cal performances (KKCAP), Housing and Dining Child Care Services (UJCCS), CITRIS Restaurant (UKCTS), Housing and Dining Services (UKHDS), and Athletics (FNATH)

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 S, the following instructions will guide you through establishing a Type S Friendly Name.

**Friendly Name Type S:**

S = Special. Type S combines an employee’s HR job in HCM with a friendly name, chart-string, and location. An example of an employee that may be assigned a type S is someone that has to record time to different chart strings (distributions) based on a specific location they are working. There may also be different supervisors responsible for approving this employees time depending on the chart string and location the employee worked at.

An employee that is assigned a Type S will likely have to transfer in via a timeclock or PC and select the correct friendly name based on the location they are working at.
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.
SEARCH RESULTS

Find Employee

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>012345678</td>
<td>Oski</td>
<td>Bear</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 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.
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**EMPLOYEE DETAIL**

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

<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>UKHDS</td>
<td>5062C</td>
<td>Active</td>
<td>Data Chg</td>
</tr>
<tr>
<td>Housing &amp; Dining Services</td>
<td>Storekeeper</td>
<td>Leave w/Py</td>
<td>Exp Ret Dt</td>
</tr>
</tbody>
</table>

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, 10/02/17, 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**
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ASSIGN OR CREATE A FRIENDLY NAME FOR A TYPE S:

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 HCM record number.

Type S process Summary:

1. Create Type S Friendly name (If one was not previously created), three step process
   a. Create Friendly Name
   b. Create Location
   c. Assign friendly name to location and chart string
   Note: A Type S friendly name is the only type in which a friendly name must be created prior to searching and assigning to an employee.

2. Search for and select applicable employee

3. Click on friendly name Type S—Special Location

4. Assign friendly name

5. Click save

1. Click on Predefined Friendly Names

2. Search and assign, edit existing friendly name, or create new friendly name

To search for an assign an existing friendly name:

You may search by entering an existing friendly name or department or job code. Once you have entered your search criteria, click Submit. A list of friendly names will appear. If you see one that meets your criteria, you may search for the employee by clicking on Assign Friendly Name (at top of webpage) and assign the existing friendly name to the employee.
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To edit existing friendly name:

Search by entering an existing friendly name or department or job code. Once you have entered your search criteria, click Submit. A list of friendly names will appear. When you see the friendly name that you would like to edit, click the Edit button. Here you have the option of inactivating the existing friendly name or modifying the description.

![Edit Appointment Name](image)
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To create a new friendly name:

Click Add new

**Enter information**

**Friendly Name:** Enter a meaningful friendly name such as job code, department, and location

**Department:** Enter department that the friendly name applies to

**Job Code:** Enter the job code of the employee that will be using the friendly name

**Effective Date:** Enter the effective date that you want this friendly name to be active.

**Effective Status:** You can select **Active** to make this friendly name available or **Inactive** (no longer in use).

**Description:** Enter a description of the friendly name
3. **Create or use an existing location**

Click **Predefined Friendly Names** drop down and click on **Location**

To search for existing location:

Enter location or department and click **Submit** (You may also inactive existing locations by clicking on the Edit button and changing the Eff Status, and Eff date).

To create new location

Click **Add** new button

Complete New Location information

- **Location**: Name of location
- **Dept**: Name of Department
- **Eff Date**: Effective date of change
- **Eff Status**: Select Active to active location
- **Description**: Enter brief description
4. Combine Friendly Name/Location/COA search
   In order to complete this step, you must have the friendly name and the location setup first. See instructions above.

   Click Add New

   Complete all information and click Save

   - The fields are case sensitive, search in caps lock is best.
   - Enter the previous created friendly name.
   - Enter the previously created location
   - Enter effective date of change
   - Enter effective status as Active
   - Enter Supervisor ID of approver of this friendly name
   - Enter Chartstring information
   - Enter distribution percentage
5. **Assign Type S:**
   Once you have created the Friendly Name, Location, and COA combination, you may assign an employee the active Type S friendly Name. Click **Assign Friendly Name** at the top of the webpage. Search for employee (see page 2-4 of this document to review how to search for an employee).

   Once you have the applicable employee’s record open, click on the friendly name type of **S—Special**

6. **Assign existing friendly name**
   Click on the **Click to assign** button

   A list of predefined (previously created) friendly names based the employees department and job code will appear. Click select button next to desired friendly name. If you do not see the friendly name, you will need to create a Type S friendly name (see steps on page 7-9)

7. **Save Changes**
   Once you have assigned the friendly name, 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.