

Purpose of this Job Aid: This job aid will help you establish or update a biweekly paid 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)

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 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:

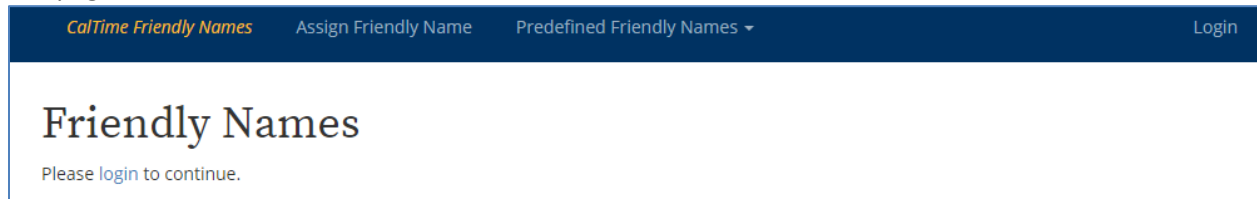
S = Special. Type S combines an employee's HR job in HCM with a friendly name, chart-string, and location. An example of an employee that may be assigned a type S is someone that has to record time to different chart strings (distributions) based on a specific location they are working. There may also be different supervisors responsible for approving this employees time depending on the chart string and location the employee worked at. A type S friendly name requires an HR administrator to setup a friendly name, location, and chartstring in s table in the friendly name application. The friendly name does not use the chartstring setup in the UCPATH systems job position funding. When an employee records time to the friendly name, CalTime will derive the chart strings associated with the friendly name from the chartstring table setup in the friendly name application and transmit this chart string with the time recorded to UCPATH overriding the employees UCPATH job position funding.

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.

Biweekly Employees: Friendly Name Type S

LOGIN/LOG OUT:

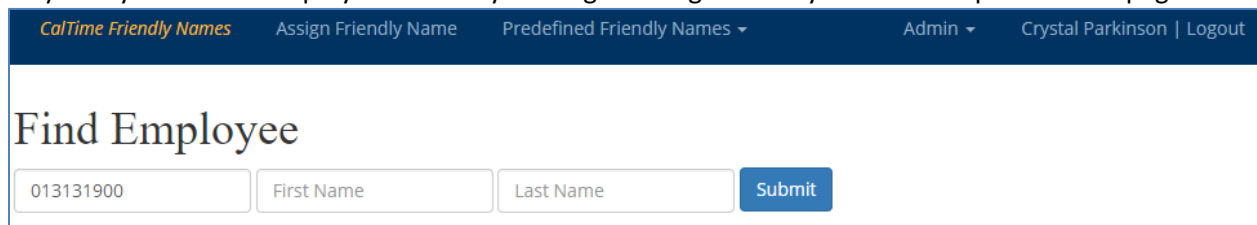
Open your web browser and go to <https://fn.berkeley.edu/>
Click **Login** at upper right corner of the application. You will be prompted to calnet authenticate and may be required to enter your Berkeley [Passcode](#). At the end of your session, click Logout at the top right of the webpage.



The screenshot shows the top navigation bar of the application with the following items: *CalTime Friendly Names*, Assign Friendly Name, Predefined Friendly Names (with a dropdown arrow), and Login. Below the navigation bar, the main heading is "Friendly Names" and the text below it says "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 application with the following items: *CalTime Friendly Names*, Assign Friendly Name, Predefined Friendly Names (with a dropdown arrow), Admin (with a dropdown arrow), and Crystal Parkinson | Logout. Below the navigation bar, the main heading is "Find Employee". There are three input fields: the first contains "013131900", the second is labeled "First Name", and the third is labeled "Last Name". To the right of these fields is a blue "Submit" button.

Biweekly Employees: Friendly Name Type S

SEARCH RESULTS

Find Employee

 A

Search Results

Show entries **B** Search: **D**

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 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 S

EMPLOYEE DETAIL

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

Test One -- 013131900

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

[Return to search results](#)

Rec #0, Effective 02/09/18, Sequence 0

Department Code / Name	Job Code / Title	HR / Payroll Status	Action / Reason
UKHDS Housing & Dining Services	5062C Storekeepe	Active Leave w/Py	Data Chg Exp Ret Dt

Friendly Names

- A -- Appointment
- C -- Chartstring
- S -- Special Location

Type S Friendly Name

DINE1-5062C-STRKPRSR

[Click to assign a new name](#)

[Save](#)

updated July 08, 2016 11:42 AM by unknown user

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**

Biweekly Employees: Friendly Name Type S

ASSIGN OR CREATE A FRIENDLY NAME FOR A TYPE S:

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 UCPATH record number.

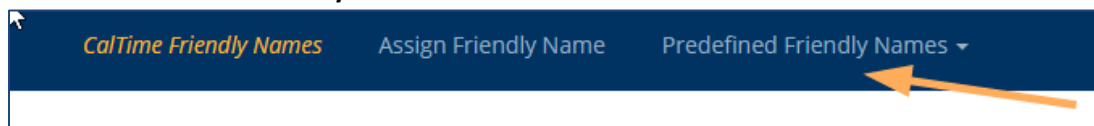
Type S process Summary:

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

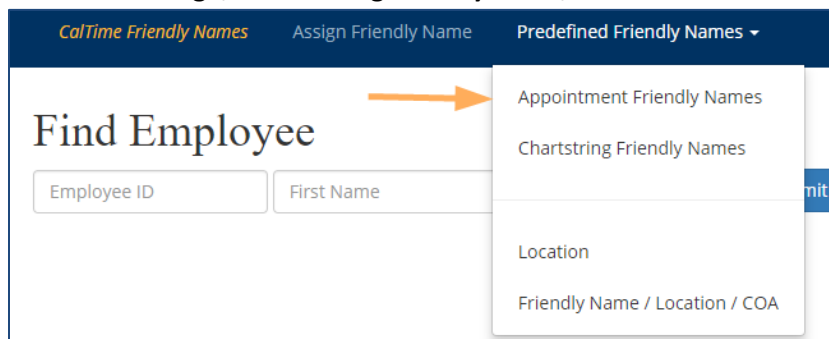
Note: A Type S friendly name is the only type in which a friendly name must be created prior to searching and assigning to an employee.

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.

Biweekly Employees: Friendly Name Type S

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

Friendly Name

Dept

Job Code

Eff Date

Eff Status

Description

Biweekly Employees: Friendly Name Type S

To create a new friendly name:

Click **Add new**

Appointment Friendly Name Search

Friendly Name Department Job Code

Show entries

Friendly Name	Department	Job Code	Eff Dt	Status	Description	Last Edited	Action
FNNEWQA6	UXDSP	4556U	03/21/18	A	FNNEWQA6	03/21/18 11:38 AM	<input type="button" value="Edit"/>

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

New Appointment Name

Friendly Name

Dept

Job Code

Eff Date

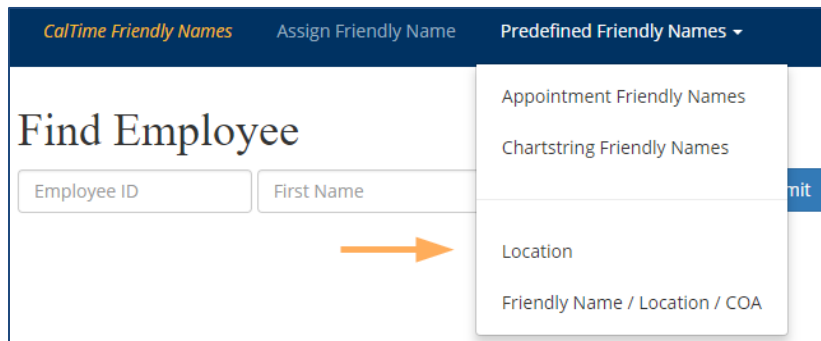
Eff Status

Description

Biweekly Employees: Friendly Name Type S

3. Create or use an existing location

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



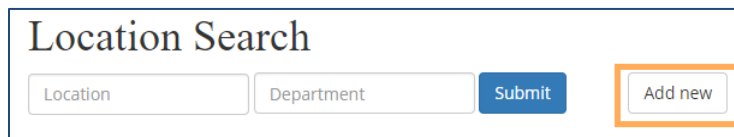
The screenshot shows the 'Find Employee' interface. At the top, there are three tabs: 'CalTime Friendly Names', 'Assign Friendly Name', and 'Predefined Friendly Names'. The 'Predefined Friendly Names' dropdown menu is open, showing options: 'Appointment Friendly Names', 'Chartstring Friendly Names', 'Location', and 'Friendly Name / Location / COA'. An orange arrow points to the 'Location' option. Below the dropdown, there are input fields for 'Employee ID' and 'First Name', and a 'Submit' button.

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).

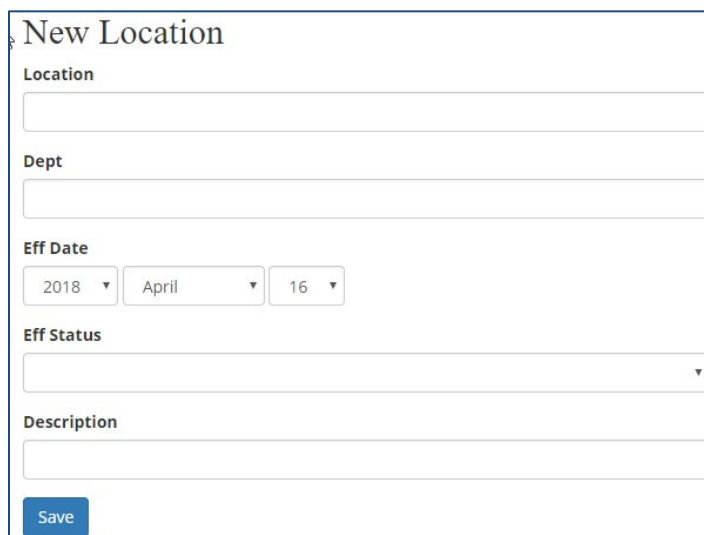
To create new location

Click **Add** new button



The screenshot shows the 'Location Search' form. It has two input fields: 'Location' and 'Department'. There are two buttons: 'Submit' and 'Add new'. The 'Add new' button is highlighted with an orange border.

Complete New Location information



The screenshot shows the 'New Location' form. It has the following fields: 'Location' (text input), 'Dept' (text input), 'Eff Date' (date picker with year, month, and day dropdowns), 'Eff Status' (dropdown menu), and 'Description' (text input). There is a 'Save' button at the bottom left.

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

Biweekly Employees: Friendly Name Type S

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

Friendly Name / Location / COA Search

<input type="text" value="Friendly Name"/>	<input type="text" value="Department"/>	<input type="text" value="Job Code"/>	<input type="button" value="Submit"/>	<input type="button" value="Add new"/>
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Complete all information and click Save

Biweekly Employees: Friendly Name Type S

New Friendly Name / Location / COA

Friendly Name

Dept

Location

* Eff Date
2018 April 16

* Eff Status

* Supervisor ID

Business Unit GL

Fund

Dept ID Org UC

Program

Project ID

Flex ID

Dist %

- 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**

Biweekly Employees: Friendly Name Type S

Friendly Names

A -- Appointment
 C -- Chartstring
 S -- Special Location

6. Assign existing friendly name

Click on the **Click to assign** button

Type S Friendly Name

DINE1-5062C-STRKPRSR

Click to assign a new name

Save

updated July 08, 2016 11:42 AM by unknown user

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)

Type S Friendly Name Assignment

Select a predefined name in Dept **UKHDS** and Job **5062C**

Friendly Name	Location	Eff Dt	Status	Description	Chart String	Supervisor ID	Action
DINE1-5062C-STRKPRSR	CAFE 3	2014-09-06	A	DINE1-5062C-STRKPRSR	1 70100 19160 76	010384250	Select

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.

Save

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