

# Friendly Names

An overview of friendly names and how it is necessary for a biweekly paid employee to record time to their friendly name.

# What is a friendly name?


A friendly name is typically a short name comprised of department code, job code, and HCM record number and represents a biweekly paid employee's HCM appointment/job. Many biweekly have one job and do not need to know their friendly name. However employees with multiple jobs (such as students) have to transfer and record time to a friendly name in CalTime depending on the job they are working at.

CalTime uses the friendly name to join a biweekly paid employee's time recorded in CalTime to their HR job. The friendly name enables CalTime to send time worked and leave taken to the UCPath payroll system with the employees correct job and chartstring information.

# How is a friendly name created?

When an employee's job is established in the UCPath system, the job information is imported into an application known as the Friendly Name application or FN App. A default friendly name is created comprised of department, job code, and a sequence number.

FSPAY-4921-0



Dept. Job code record

Once the default friendly name is established in the FN App, the friendly name administrator (typically Berkeley regional services HR) may change the default friendly name to a different name (i.e. "LEAD TECH") up to 20 characters with all capital letters.

# Roles and responsibilities

**Berkeley Regional Services:** Maintain and update friendly names in the FN App and communicate friendly name assigned to HR job to employee.

**Employee:** Record hours worked and leave taken to the correct friendly name especially if the employee has more than one job and multiple friendly names

**Supervisor:** Review and ensure employee is recording hours worked and leave taken to the correct friendly name, especially if the employee has more than one job and multiple friendly names. Assist employee as needed with timecard and friendly name updates. Contact Berkeley Regional Services if needed to assist with changes to the employees assigned friendly name.

**CalTime:** Provision friendly name update access for HR and Payroll administrators, troubleshoot friendly name and system issues, and manage system change requests.

# Timing

It takes three business days before a new employee can begin recording time worked and leave taken to a friendly name in CalTime.

## UCPath

- HR Job is created

Day 1

## FN App

- Friendly name is created

Day 2

## CalTime

- Employee can record time to friendly name

Day 3

# Friendly Name types

There are three types of friendly names which determine how an employee's time is tracked and recorded in the general ledger for financial purposes.

## **Type A: Appointment (92% of the population)**

Once friendly name is assigned to a job, the employee's hours recorded in CalTime are charged to the position funding set up in UCPATH. This is the default and most common friendly name type.

## **Type C: Chartstring (7% of the population)**

Multiple friendly names are assigned to one job. More than one chart string is assigned to an employee's job position funding in UCPATH. In the FN App each chart string is assigned a unique friendly name and supervisor, allowing the employee to record hours worked by chart string and multiple supervisors to approve time by chart string associated with job. This function allows an employee to record time by an individual chart string (i.e. friendly name). CalTime will send hours recorded and a chart string to UCPATH.

## **Type S: Special (1% of the population)**

Type S is limited to six campus departments (UCPD, RSSP, Intercollegiate Athletics, Rec Sports, Cal Performances) and combines friendly name, chart string and specified location. Type S relies on a special table of chart strings that is maintained in the FN App. The employee's position funding chart string setup in UCPATH is not used. When an employee records time to the friendly name, CalTime will derive the chart strings associated with the friendly name and location from the chartstring table setup in the FN App and transmit this chart string with the time recorded to UCPATH overriding the employee's UCPATH job position funding.

# Did you know...

- The same friendly name cannot be used for more than one employee's job or chart string
- Job data and position changes can cause the friendly name to change.
- All Type C chartstrings should be assigned a friendly name
- It takes at least 2 business days before a job data change which impacts the friendly name will appear in the FN App and 3 days before it appears in CalTime
- CalTime does not run interfaces on Saturday and Sunday night so any friendly names will not appear in CalTime until Tuesday(after Monday night interfaces have successfully completed)
- The FN App imports job data daily around 8am.

# UCPath Job data/Position updates

An employee is initially assigned a default friendly name of Type A which is department, job title, and record number (i.e. FSPAY-004921-0). If the department changes the friendly name to a unique friendly name such as “SWIMLEAD” or changes this employee to a Type C, the system will maintain that unique friendly name unless a job data or position funding change occurs.

When a job data or position funding change occurs, if a match can be found on certain data elements, the unique friendly name will be retained, if no match can be found, the unique friendly name will revert back to the type A default or if Type C, the friendly name will need to be reassigned and will show as “blank”.

## **Type A Matching Criteria:**

If the prior effective dated job row has an FN assigned and the employee is working in the same department, job code, and employee record, the same friendly name will be carried forward.

If the department, job title, or job record has changed, the employees type A unique friendly name such as swim lead will change to the default friendly name “Department-job title-record number”

## **Type C Matching Criteria:**

Current job data must match most recent job data below to carry forward the type C friendly name

- employee ID
- employee record number
- effective date
- effective seq
- position number
- Acct\_cd

If an employee has 4 distribution rows and one of the row values was changed then 3 rows will carry the previous FN value and the fourth one will have blank FN value. If all the distribution rows are changed then we default C type employees FN to type A where FN value =deptid || jobcode | | empl\_rcd



# Employee: Recording time to a friendly name in CalTime

Employees that record time AnyTime click on the transfer column to select a friendly name after the in punch only.

Employees that record time in RealTime click on the transfer field in the My Timestamp box when punching in only. Transfers recorded on an out punch will create missing punches.

Note: Employees may only access friendly names assigned to their job(s). If an employee has multiple jobs but does not transfer in to a job and select a friendly name, CalTime will automatically record hours worked to the employees primary job. The primary job is determined by the HR job in the UCPath system.

## AnyTime

	Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily
+	Sun...			8:00AM		5:00PM						
+	Mon...				RS-LIFEGUARD CALM RS-LIFEGUARD GBRC RS-LIFEGUARD HEAR RS-LIFEGUARD SCRA RS-LIFEGUARD SPIER RS-LIFEGUARD TRAIN Search...							
+	Tue...											
+	Wed...											
+	Thu...											

## RealTime

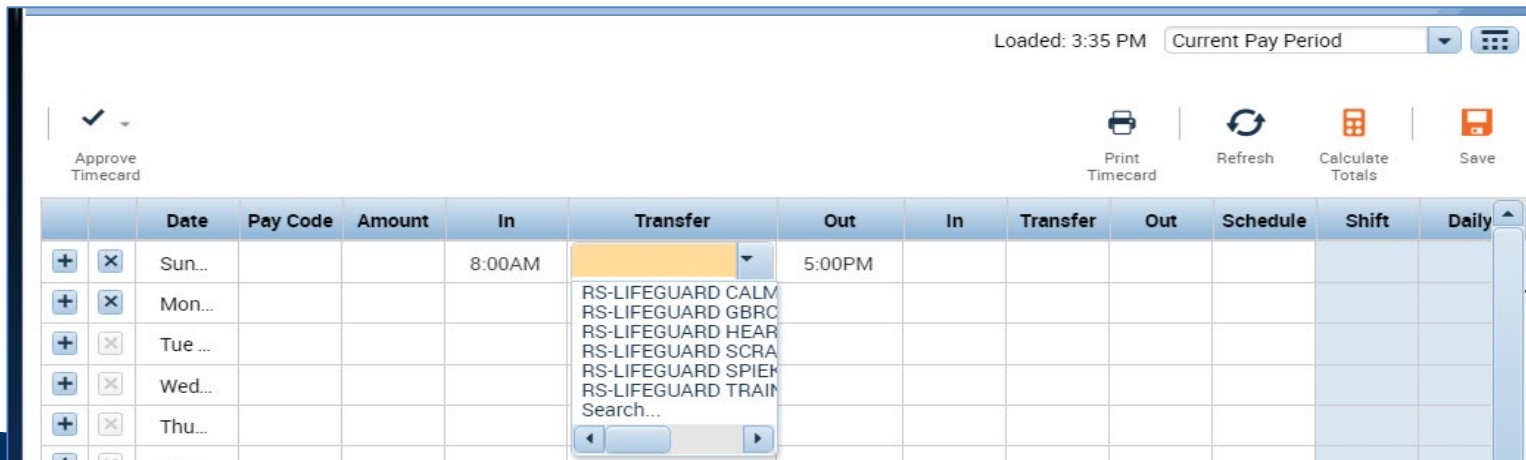
Transfer

Last Timestamp:

Record Timestamp

# Supervisors: Edit and update

Supervisors also have access to record time and leave taken to a friendly name on behalf of their employee. It is important to know that supervisors have access to all friendly names and not just the list of friendly names assigned to the employee they are viewing in CalTime. **The supervisor should verify the friendly name assigned to the employee by logging into <https://fn.berkeley.edu/> and looking up the employee by employee id or name. Once the supervisor has confirmed the friendly name assigned to the employee, they can click on the in punch transfer column and click on search to insert the friendly name. Supervisors should not assume that the friendly name that appears in the transfer column in the employees timecard is correct. The system will retain the most recent friendly name the supervisor selected and not necessarily the friendly name assigned to the employee.**



The screenshot displays the CalTime interface. At the top right, it shows "Loaded: 3:35 PM" and a "Current Pay Period" dropdown menu. Below this are four icons: "Approve Timecard" (checkmark), "Print Timecard" (printer), "Refresh" (refresh), "Calculate Totals" (calculator), and "Save" (save). The main area is a table with columns: Date, Pay Code, Amount, In, Transfer, Out, In, Transfer, Out, Schedule, Shift, and Daily. The first row shows "Sun..." with an "In" time of 8:00AM and an "Out" time of 5:00PM. A dropdown menu is open for the "Transfer" column, listing several friendly names: RS-LIFEGUARD CALM, RS-LIFEGUARD GBRC, RS-LIFEGUARD HEAR, RS-LIFEGUARD SCRA, RS-LIFEGUARD SPIEK, RS-LIFEGUARD TRAIN, and a "Search..." option.

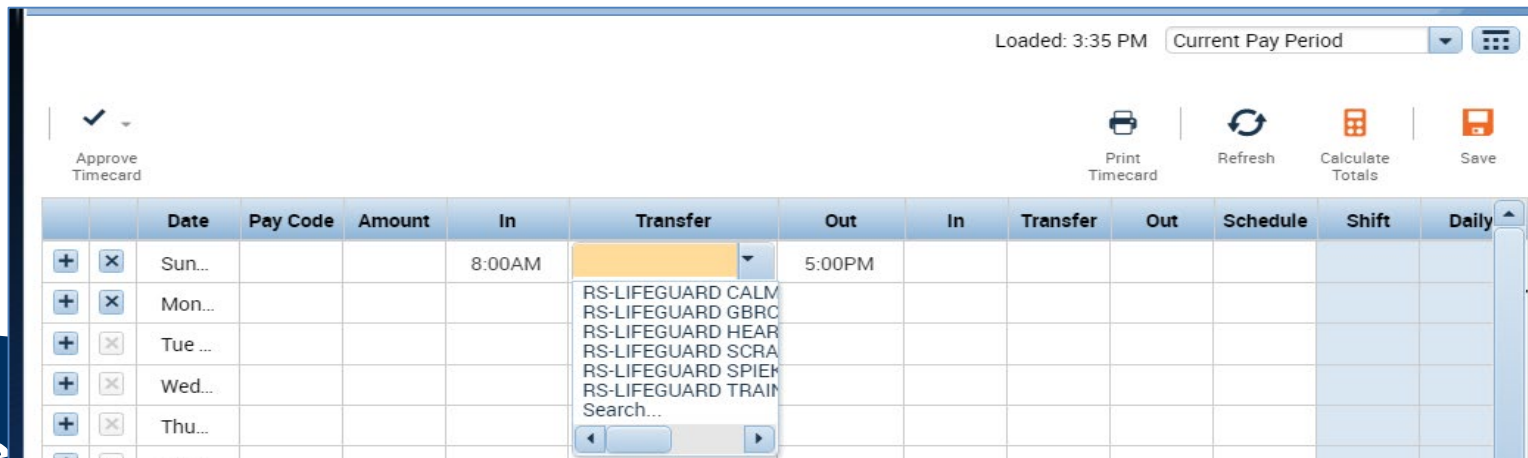
		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily
+ x		Sun...			8:00AM		5:00PM						
+ x		Mon...											
+ x		Tue ...											
+ x		Wed...											
+ x		Thu...											

# Incorrect friendly name assigned

Because supervisors and timekeepers have access to all friendly names, an incorrect friendly name can be assigned to employees hours worked and leave taken.

When a friendly name is assigned in CalTime and does not match the friendly name currently assigned to the employee in the FN App, CalTime is unable to determine and assign the hours on the timecard to the employee's HR job.

Therefore, the hours are not transmitted to the UCPath system and are unable to be paid. When this occurs, the hours that were not able to be transmitted to UCPath are provided on a CalTime reconciliation report emailed to the Berkeley Regional Services Payroll teams for correction and manual pay.



The screenshot shows the CalTime interface with a timecard entry for Sunday. The 'Transfer' dropdown menu is open, displaying a list of friendly names: RS-LIFEGUARD CALM, RS-LIFEGUARD GBRC, RS-LIFEGUARD HEAR, RS-LIFEGUARD SCRA, RS-LIFEGUARD SPIEK, RS-LIFEGUARD TRAIN, and Search... The interface includes a top bar with 'Loaded: 3:35 PM' and 'Current Pay Period', and a toolbar with 'Approve Timecard', 'Print Timecard', 'Refresh', 'Calculate Totals', and 'Save' buttons.

		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily
+	×	Sun...			8:00AM	RS-LIFEGUARD CALM	5:00PM						
+	×	Mon...				RS-LIFEGUARD GBRC							
+	×	Tue ...				RS-LIFEGUARD HEAR							
+	×	Wed...				RS-LIFEGUARD SCRA							
+	×	Thu...				RS-LIFEGUARD SPIEK							
+	×					RS-LIFEGUARD TRAIN							
						Search...							

# FN App Limited Access: Any user

## There are different access roles in the Friendly Name Application:

Any campus employee may use their Calnet ID and passphrase to login to the FN App to view an employee's assigned friendly name and job.

The user may search by employee ID and name.

**CalTime Friendly Names** View Friendly Names

## View Friendly Names By Employee

Employee ID  First Name  Last Name

If you believe the friendly name displayed is incorrect or have further questions on an employee's assigned friendly name, you may open a ticket with the [HR service desk](#) (select timekeeping).

Show  entries Search:

Empl Record	↑↓	Last Name	↑↓	First Name	↑↓	Effective Date	↑↓	Department	Type	↑↓	Friendly Name
0		Bear		Oski		2020-10-04		UKHDS	A		UKHDS-005116-0

# FN App Full Access: View/update

**Update Access** is limited to Berkeley Regional HR and Payroll teams

- Global Update or Update by department\*
  - Can view and edit employee FN assignment
  - Can view and edit predefined names
  - Can view reporting (missing friendly names, and recent friendly name updates)

\*Access by department will limit user to edit or update for only a specific department

**View Access** is limited to Berkeley Regional HR and Payroll teams

- Global View or View by department\*
  - Can view employee FN assignment
  - Can view predefined names
  - Can view reporting (missing friendly names, and recent friendly name updates)

\*Access by department will limit user to view for only a specific department

# FN App navigation: Search

**CalTime Friendly Names**

Assign Friendly Name

Predefined Friendly Names ▾

Reports ▾

View Friendly Names

A

## View Friendly Names By Employee

If you believe the friendly name displayed is incorrect or have further questions on an employee's assigned friendly name, you may open a ticket with the [HR service desk](#) (select timekeeping).

# FN App navigation: Assign

Park: Parkinson -- 10477611

- #0, 02/23/21, BAHSB, 002850, Seq. 0, 40789088

[Return to search results](#)

Rec #0, Effective 02/23/21, Sequence 0, 40789088

Department Code / Name	Job Code / Title	HR / Payroll Status	Action / Reason
BAHSB	002850	Active	Hire
Haas Core Programs	BAHSB-002850-0	Active	Hire - No Prior UC Affiliation

## Friendly Names

- A -- Appointment
- C -- Chartstring

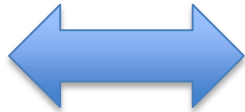
### Type A Friendly Name

BAHSB-002850-0

Click to assign a new name

Save

updated March 03, 2021 12:03 AM by unknown user



## Type A Friendly Name Assignment



No predefined friendly names are available for this job.

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

BAHSB-002850-0

Assign New Friendly Name



Enter a new friendly name

# FN App navigation: Change type

Rec #0, Effective 02/23/21, Sequence 0, 40789088

Department Code / Name	Job Code / Title	HR / Payroll Status	Action / Reason
BAHSB	002850	Active	Hire
Haas Core Programs	BAHSB-002850-0	Active	Hire - No Prior UC Affiliation

## Friendly Names

- A -- Appointment
- C -- Chartstring

## New Distribution Records

These job distributions were recently added to your employment records. Please provide new friendly names. The save button will not be enabled until all chart strings are assigned a unique friendly name.

Friendly Name	Approver	Start	End	Earn	%	GL Business Unit	Account	Fund	Dept	Program	Chartfield1	Chartfield2	PC Project	PC Business Unit	PC Activity
Not assigned Click to assign	10328658 Click to assign	03/01/21				10000	010000	19900	10537	40	U102A1	BAACC			
Not assigned Click to assign	10328658 Click to assign	03/01/21				10000	010000	19900	10537	40	U102A2	BAACC			

Type C: Assign friendly name by chart string and unique supervisor ID



# FN App navigation: Change type

Rec #0, Effective 02/23/21, Sequence 0, 40789088

Department Code / Name	Job Code / Title	HR / Payroll Status	Action / Reason
BAHSB	002850	Active	Hire
Haas Core Programs	BAHSB-002850-0	Active	Hire - No Prior UC Affiliation

## Friendly Names

- A -- Appointment
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← Type S only appears for six departments on campus

## New Distribution Records

These job distributions were recently added to your employment records. Please provide new friendly names. The save button will not be enabled until all chart strings are assigned a unique friendly name.

Friendly Name	Approver	Start	End	Earn	%	GL Business Unit	Account	Fund	Dept	Program	Chartfield1	Chartfield2	PC Project	PC Business Unit	PC Activity
Not assigned Click to assign	10328658 Click to assign	03/01/21				10000	010000	19900	10537	40	U102A1	BAACC			
Not assigned Click to assign	10328658 Click to assign	03/01/21				10000	010000	19900	10537	40	U102A2	BAACC			

← Type C: Assign friendly name by chart string and unique supervisor ID

# FN App navigation:

## Predefined Friendly names

The predefined friendly name tab has four options to choose from

**Appointment Friendly Names (Type A):** Allows a department to create a friendly name (in advance without hire) by department and job code. Once this is created, when a new employee in that department and title code is hired in UCPATH, if you click on the change friendly name option to set a unique friendly name, a list of predefined friendly names you setup in advance will appear.

**Chartstring friendly names (Type C):** Allows a department to create a friendly name in advance without hire by department, job code, and chart string. Once this is created, when a new employee in that department and title code is hired in UCPATH, if you click on the change friendly name option to set a unique friendly name, a list of predefined friendly names you setup in advance will appear.

### Applicable to Type S setup only

Type S requires location to be created first and then you create a friendly name to assign to that location

**Location:** Assign a location and department where an employee may work

**Friendly Name/Location/COA:** Create a friendly name, chart string and assign it to the location that was setup on the location tab.

The concept is that the employees friendly name is not based on their job but tracks the hours worked and charges to a chartstring based on where the employee is actually working. For example, employees in food service may work at different dining locations (Crossroads, unit 1). This allows the department to track the hours this employee is working at the different dining facilities.

# Reporting:

Two reports are available for review by Berkeley Regional Services. The expectation is that BRS review and update employee records as needed.

**Missing Friendly Name Report:** Each employee is assigned a default friendly name. However if a department assigned an employee as a Type C and then a job update occurs, the system is unable to determine if the prior friendly name should be carried forward. As a result, the friendly name is unassigned and requires BRS to review this report and update the friendly name. This report may be downloaded to Excel.

**Changed friendly name report:** This report allows BRS to identify any recent changes to friendly names for employees and see what the prior and current friendly name is. This report can be downloaded to Excel.

# Best Practices:

- Verify the employees friendly name by logging into <https://fn.berkeley.edu/>
- Request friendly name update access by completing the google form  
<https://docs.google.com/forms/d/e/1FAIpQLSeWgUGusFQ-IPRA0lhT9iwLj9BipvuyGnTddQbq2Uz6iQoiCw/viewform>

# Resources:

- Friendly Name Application Access: <https://fn.berkeley.edu/>
- Friendly Name job aids: <https://caltime.berkeley.edu/friendly-names-and-tracking-time-caltime>
- Supervisor: CalTime and transfer to friendly name job aid: [https://caltime.berkeley.edu/sites/default/files/supervisor\\_-\\_time\\_entry\\_transfers.pdf](https://caltime.berkeley.edu/sites/default/files/supervisor_-_time_entry_transfers.pdf)
- Biweekly employee: CalTime and transfer to friendly name job aid: [https://caltime.berkeley.edu/sites/default/files/non-exempt\\_anytime\\_-\\_time\\_entry\\_transfers.pdf](https://caltime.berkeley.edu/sites/default/files/non-exempt_anytime_-_time_entry_transfers.pdf)
- CalTime information: <https://caltime.berkeley.edu/>
- Email [caltime@Berkeley.edu](mailto:caltime@Berkeley.edu)