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 employees job is established in the UCPath system, the job information is imported into a 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.

<table>
<thead>
<tr>
<th>UCPATH</th>
<th>FN App</th>
<th>CalTime</th>
</tr>
</thead>
<tbody>
<tr>
<td>• HR Job is created</td>
<td>• Friendly name is created</td>
<td>• Employee can record time to friendly name</td>
</tr>
</tbody>
</table>

Day 1  
Day 2  
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 employees 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.
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.
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.
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.
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

View Friendly Names By Employee

Employee ID  First Name  Last Name  Submit

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

Enter a new friendly name
FN App navigation: Change type

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

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.

Type C: Assign friendly name by chart string and unique supervisor ID
FN App navigation: Change type

**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.

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<thead>
<tr>
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<th>Approver</th>
<th>Start</th>
<th>End</th>
<th>Earn</th>
<th>%</th>
<th>GL Business Unit</th>
<th>Account</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Chartfield1</th>
<th>Chartfield2</th>
<th>PC Project</th>
<th>PC Business Unit</th>
<th>PC Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not assigned</td>
<td>10328658</td>
<td>03/01/21</td>
<td></td>
<td></td>
<td></td>
<td>10000</td>
<td>010000</td>
<td>19900</td>
<td>10537</td>
<td>40</td>
<td>U102A1</td>
<td>BAACC</td>
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**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.
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
- Biweekly employee: CalTime and transfer to friendly name job aid: https://caltime.berkeley.edu/sites/default/files/non-exempt_anytime_time_entry_transfers.pdf
- CalTime information: https://caltime.berkeley.edu/
- Email caltime@Berkeley.edu