Friendly Name Overview for CalTime Process Training

(Non-Timekeepers and Non-HCM Staff)
WHAT ARE CALTIME FRIENDLY NAMES?
Why Friendly Names?

Because some employees have multiple jobs and/or multiple funding sources (chartstrings) they need to track hours to.
How Friendly Names work

CalTime Friendly Names help employees who have multiple jobs and/or multiple funding sources select a transfer that directs the time to be charged to the appropriate department job and/or chartstring.
HOW ARE FRIENDLY NAMES USED?
How employees use Friendly Names

Friendly Names display as a drop-down menu in the CalTime timecard of employees who have multiple jobs and/or chartstrings.

Non-exempt employees choose and track hours worked to the appropriate job and/or chartstring.
How supervisors use Friendly Names

Friendly Names allow supervisors/“fund approvers” of non-exempt employees with multiple jobs to review hours and approve only the hours the employee worked for them (e.g., grants, projects, other funding sources).
Friendly Names can be created in order to support reporting on the number of hours worked by:

- Appointment
- Chartstring
- Location
- Event
- Project (not to be confused with Project Tracking, which is recharge instead of direct charge)

Friendly Names are a field in HCM that will be input by the Departmental HCM user. It will download into CalTime, and employees will select which Friendly Name to charge their hours to.
3 TYPES OF FRIENDLY NAMES

A  C  S
There are three types of Friendly Names:

Type A – Appointment

Type C – Chartstring

Type S – Special (Location / Event)

Friendly Names are chosen depending on the department’s needs and funding method.
Friendly Name Type A – APPOINTMENT

Type A Friendly Name is recorded at the Appointment/Job level. Pay for the job is generated based on the existing chartstring percentages entered in HCM.

The majority of departments will use Type A Friendly Names.
Friendly Name Type C – CHARTSTRING

- Requires a Friendly Name to be recorded for each REG distribution chartstring.
- The employee uses the appropriate Friendly Name to match the time worked with the appropriate funding source.
- Payroll will use this information to calculate pay, based on the hours recorded to each Friendly Name on the timecard, which translates to a specific chartstring to be charged.
- Type C also allows a different “approver” to be added for each chartstring.

Departments and academic groups that use Type C Friendly Names typically have multiple funding sources or projects.
Friendly Name Type S – SPECIAL (LOCATION/EVENT)

Used by a few departments to create a hybrid of Type A Friendly Name + specific location/event. These pre-defined locations and events are kept in a table in HCM.

Departments that use Type S Friendly Names are UCPD, RSSP, Intercollegiate Athletics, and Cal Performances.
CREATING FRIENDLY NAMES
Friendly Name Default

Default Friendly Name in HCM is Type A.

Combination of:

<table>
<thead>
<tr>
<th>Job Department Code (e.g., AZCSS)</th>
<th>Job/Title Code (e.g., 4921U)</th>
<th>HCM Employee Record #</th>
</tr>
</thead>
</table>

Examples:
- EAEDU–4921U–0  School of Education, Student Asst 2
- AZCSS–7397U–0  Campus Shared Services, HR Analyst 2
Customizing the Friendly Name

- Friendly Names can be created as “on the fly” or added to the HCM lookup tables.
- Once a Friendly Name is entered into the HCM lookup tables, it is available for assigning to future appointments.
- Customize using 20-character limit, combination of alphanumeric characters, hyphens, and/or spaces.
- A unique ID must be the first part of the Friendly Name and should be the Department ID at the job level.
- While Type A can be left with the default setting, Type C requires customization.
Friendly Names in the CalTime timecard

The Friendly Name appears in the Transfer column. This drop-down field allows the employee to select which job and/or chartstring to add their hours.
WHO CREATES AND MAINTAINS FRIENDLY NAMES?
Friendly Names are created by a local department team who can identify which Friendly Name type should be associated with each appointment.
For departments supported by CSS

<table>
<thead>
<tr>
<th>TASK</th>
<th>WHO IS RESPONSIBLE?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creates Friendly Names for department and submits Friendly Name info to CSS</td>
<td>Local Department Team</td>
</tr>
<tr>
<td>Works as liaison between department and HRIM team and Payroll &amp; Timekeeping team</td>
<td>Service Delivery (including HR Partners, HR Generalists, and First Contact Resolution Team)</td>
</tr>
<tr>
<td>Enters Friendly Names into HCM</td>
<td>Departmental HCM user</td>
</tr>
<tr>
<td>Audits Friendly Names in CalTime</td>
<td>Employees and supervisors are accountable for ensuring hours have been charged to the correct Friendly Name.</td>
</tr>
</tbody>
</table>