WebDFS – Creating Personnel Document

1. Start Internet Explorer
2. In the browser address bar type **www.webdfs.uga.edu**.
3. On the logon page type your TSO/IMS userid and password and click on the ‘Logon’ button.

4. On the WebDFS Application Menu click on the “BA/Personnel System” link.
5. The following Bulletin Board page provides the user with helpful notices and coming events. Click on the “Continue” button when you are ready to proceed.

![WebDFS Bulletin Board]

6. On the WebDFS Main Menu click on “Add a new Personnel Document”.

![WebDFS Main Menu]

NOTE: If a user begins a Personnel Document and comes back to the WebDFS Main Menu, then select “List of Documents” and then user will be able to select that document and continue with it.
Personnel Document Header Page

7. On the Personnel Document Header page key in the following fields on the screen:
   a. Department
   b. Source
   c. Sequence optional – if blank then WebDFS will assign the sequence#
   d. Grayed out fields are completed by the application
   e. UGAID label is a link to a “pop-up” page of employees to which the user is authorized - authorization based on user’s Payroll department access; (see next page)
   f. Position fields consist of 3-digit Department, Short Title, Position Number, and Occurrence (example 552 CLRMN 99 A)
   g. Department/Project optional – if left blank and the system will get the description based on the Department Number
   h. Users can leave the Department Phone blank if a phone number saved on the Sequence Number page. If unsure, leave it blank and system will give error message if phone number is not found
   i. Complete the required fields and click the “Create” button to create a new personnel document
   j. View the System Messages to confirm that the document was successfully created

The UGAID Number and Position cannot be changed after the document has been created. If the user typed the incorrect UGAID or Position and the document was created, the user would need to purge the document and begin a new document with the correct information.
Personnel Document Header – Pop-up List of Employees

- Users can search the list by last name, first name, or move page-by-page through the list.
- Click the radio button next to the UGAID, which causes this window to close, and the UGAID of the selected person to be filled in on the Personnel Document Header page.
- Note-if it is a brand new employee and they are not in the Payroll/HR database, then they will not be in this list and user needs to manually key in their UGAID on the Personnel Document Header page.

Moving from page screen to another screen:

- At the top left of the screen, click the “Go Where?” pull-down handle and select (highlight) the page you wish to go to and click the “GoTo” button located to the right.
- Example to go from the Personnel Document Header page to Employee Information:
Employee Information page
8. Employee Information page contains data that was added when the document was created.
9. Users must verify that the data is accurate and fill in any missing data fields. Users can make any necessary changes and then click the “Save” button.
10. Make sure user gets System Message at top of page “Employee has been save successfully”, if not then attend to any errors.

11. There are a number of “pop-up” links on this page, which are underlined in Blue, to assist the user with the code lookups such as Highest Degree, Primary Department, Payroll Dist Code, Building Number and Room Number.

12. If user needs to change the employee’s name then that has to be done on the Reason Code page using the following reason codes:
   a. LF-Change First Name
   b. LM-Change Middle Name
   c. LN-Change Last Name
   d. LS-Change Suffix

Filled Position page:
- The Filled Position “Entry List” section contains position(s) that were added to the document.
- The “Entry Detail” section used to add new positions or modify data from the Entry List.
- Additional existing positions can be added to the document by typing the position in the Entry Detail and clicking the “Add” button. Then check the radio button in the Entry List to bring that record down to the Entry Detail, make changes, and click “Save”.
- There are a number of “pop-up” links on this page, which are underlined in Blue, to assist the user with the code lookups such as Job Class, Faculty Rank, Work County and Special Chair.
13. Select the position from the “Entry List” by clicking the radio button to the left of the position, which will bring it down to the “Entry Detail” section where user can modify it.
14. Make sure user gets System Message at top of page “Filled Position has been updated successfully”, if not then attend to any errors.
Pay Authorization page:

15. To get to the Pay Authorization page, select the “PayAuth” link from the “Entry List” section of the Filled Position page.

16. At the top of the Pay Authorization page it contains Document Number, Position Information and Salary Information data that is used in calculating Revised EFT and Revised Budget.

17. To add an account go to the first vacant Account line in the “Entry Detail” section and key in the account number, object code, Pay Auth1 From Date/ Hour End Date/ Hour and Rate. If there are more pay column dates then continue with the next Pay Auth column filling in the data.

18. If there is more than one account for this position, then go down to the next available line and key in the account and the information that goes with it.

19. To have the system calculate the Revised Budget and Revised EFT, the user needs to leave the “Calculation Method” set to “System”. If a user wants to manually calculate Revised Budget and Revised EFT then change the “Calculation Method” to “Manual”.
20. After all data has been entered, then click the “Save” button Make sure user gets the System Message “Pay Authorizations have been updated successfully”.

21. To modify pay authorizations, just make the changes that needs to be made and click “Save”.

22. To add account, just go to the next available account line and key in the account and data and then click “Save”.

**Reason Codes page:**

23. The Reason Codes “Entry List” section displays reason codes that were added to the document.

24. To add a reason code to your document:
   a. In the Reason Code box in the Entry Detail section, click the arrow next to the words “Select from the following”. Scroll down the list to select the reason code that applies to your situation.
   b. If additional information is required on the Personnel form, the appropriate section in the “Additional Information” area highlighted.
   c. Key in any additional information that is required and click “Save”.

25. A personnel document can have more than one reason code.

26. If an incorrect reason code has been added to the document, the user will need to:
   o Select that reason code from the “Entry List” bringing it down to the “Entry Detail” section.
   o Then click the “Delete” button.
   o Pop-up box will appear “You are about to delete this record; Continue with the delete?” so click the “OK” button.
Personnel Remarks:
27. On the Personnel Remarks, page type in the remarks for this document and click “Save”.
28. If user needs to correct personnel remarks just key in correction or type in addition remark and click “Save” again.
Budget Amendment page:
- On the Budget Amendment page, there may be one or more entries in the Entry List section that do not have a radio button next to them. Based on the information that is contained in the Pay Authorization page these entries were automatically created by the program.
- Entries created by the program cannot be modified. The user must modify the Pay Authorization data to cause the automatic Budget Amendment entries to change.

29. To add new entries go to the “Entry Detail” section and key in the information and click “Save”. The system will calculate the Chg EFT for you.

30. If user received an error “Position XXXXXXX does not exist” then go to the Vacant Position page and create the new vacant position there. (See next section below.)
31. Funding Sources, Departmental Income or Contingency entries are also added on this page. The WebDFS program will determine if it is a budget amendment entry or a funding source, departmental income, or contingency entry and print it in the proper section of the document form.

32. Entries in the Entry List will be in the following order:
   - Automatically created entries
   - Budget Amendment entries
   - Funding source entries

33. “Total Change EFT” and “Total Change Amount” are listed below the Entry List section.

**Budget Amendment Remarks:**
34. On the Personnel Remarks, page type in the remarks for this document and click “Save”.
35. If user needs to correct personnel remarks just key in correction or type in addition remark and click “Save” again.

**Vacant Position page:**
- Use the Vacant Position page to create a new vacant position or lump sum position or to modify information for an existing vacant or lump sum position.

36. In the “Entry Detail” section key in the new vacant position information and click “Save”.
37. If you need to modify a Vacant position that you added, just select the vacant position from the “Entry List” by clicking the radio button to the left it, which will bring it down to the “Entry Detail” section make your changes and then click the “Save” button.

Validate:
The Validation process checks the entire document for completeness and accuracy. Printed documents will contain the word “Draft” across the signature lines until the document has been successfully validated and marked as Finished.

38. Click the “Validate” button, which is located next to the Document Information section on almost every page of the document. A separate browser window opens and the results of the validation are displayed to the user.
39. Any errors detected during the Validation process must be corrected before the document can be marked Finished.

40. To correct errors:
   - Click the “Edit Document” button to return to the WebDFS application.
   - Select the necessary page from the “Go Where?” dropdown menu and click “GoTo”.
   - Make the necessary change or changes and click “Save”
   - Repeat as many times as necessary to correct all errors.
   - Perform the Validation process again in order to mark the document Finished.
   - Validation can be done multiple times.

41. Possible validation errors and where to go to correct them:
   - The all personnel errors below are to be corrected on the “Employee Information” page.
   
<table>
<thead>
<tr>
<th>PERSONNEL ERRORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERROR: Payroll Status is a required employee field</td>
</tr>
<tr>
<td>ERROR: Gender is a required employee field</td>
</tr>
<tr>
<td>ERROR: Marital Status is a required employee field</td>
</tr>
<tr>
<td>ERROR: Wage Type is a required employee field</td>
</tr>
<tr>
<td>ERROR: Citizenship is a required employee field</td>
</tr>
<tr>
<td>ERROR: Primary Department is a required employee field</td>
</tr>
<tr>
<td>ERROR: Building number is a required employee field</td>
</tr>
<tr>
<td>ERROR: Pay Distribution Code is a required employee field</td>
</tr>
</tbody>
</table>

   - These personnel warnings need to be corrected on the “Filled Position” page or the “Pay Authorization page”.
     - On the Pay Authorization page verify the pay column rates to make sure the rates and time periods are correct.
o These personnel errors need to be corrected on the “Filled Position” page and “Pay Authorization” page.

**PERSONNEL ERRORS**
- ERROR: Position 552LBCLRL A has no Pay Authorization Entries
- ERROR: Paytype was not set for this document
- ERROR: At least one pay authorization entry is required on every personnel document

o This personnel error needs to be corrected on the “Reason Code” page by adding at least one reason code to the document.

**PERSONNEL ERRORS**
- ERROR: At least one reason code entry is required on every personnel document

o Usually to correct this budget amendment error all is need is for the user to go to the “Budget Amendment” page.

**PERSONNEL ERRORS**
- ERROR: At least one reason code entry is required on every personnel document

o These budget amendment errors need to be corrected on the “Budget Amendment Page”.

**BUDGET AMENDMENT ERRORS**
- ERROR: Contingency account is required for personal services
- ERROR: Budget Amendment Entries Do Not Balance to Zero

42. After all Errors are corrected, click the “Validate” button again and click the “Mark Document as Finished”.
43. If the user select “Mark Personnel as Finished”, the word Draft will be removed from the Personnel form but will remain on the Budget Amendment form.
Electronic Approval:
Using rules established by the Budget Office and by the Division represented in the document, the system determines the userids that need to sign this document. The document is removed from the Budget Amendment System and placed into the Electronic Approval side of the system. The first signer is notified, if they opted to receive email notifications. The document appears in the approver’s “List of Documents Awaiting Approval”.

44. On the Submit page, the user can also print the document by clicking the “Document Form” link above the Optional Comments, but the user still has to submit the document after they print it.
45. If the user is ready to submit their document into the Electronic Approval System, click the “Submit” button. If not, then click the “Close” button and the document will not be submitted.
46. User can key in an “Optional Comment” before they click the Submit button, but beware this comment stays with the document and anyone who approves it or has access to it will see this comment.

47. After clicking the “Submit” button the user will a system message that the document was successfully submitted into the Electronic Approval System and who the document is awaiting approval upon. If user does not see a message that a “new waiting item was created” then please contact the WebDFS support line at 706-542-6763.

48. The initiator, the person responsible for creating this document, is now ready to create and process more documents. This document has moved into the Electronic Approval system and will be routed throughout the various administrative offices involved.
View/Print the HTML Forms:

- When a user selects “View/Print HTML Forms” from the dropdown menu and clicks “GoTo” a separate browser window will open.
- Click the “Employee Personnel Form” or “Budget Amendment Form” links to switch between the reports. Click the “Print” button to print it.
List of Documents:

- List of Documents contains documents that the user created or that contain accounts to which the user is authorized.
- In the “Doc View” column click on the radio button next to the document to select that document.
- The user is taken to one of two places depending on the type of document:
  - Budget Amendment Only documents – taken to the Budget Amendment page
  - Personnel document (those with UGAID) – taken to the Filled Position page
- Users can limit the number of documents listed by typing in a partial document number and clicking the Search button or by typing in the last name of the employee on the document.