Manager Self Service - Notify Preferences

Manager Self Service provides managerial access into several administrative areas, including budgets. Under the Budgets heading, the manager may set Notify Preferences.

This instruction guide provides step-by-step instructions for setting Manager Self Service Notify Preferences.

This guide shows how to set up your preferences to be notified of budget exceptions. You can decide whether and how you are notified of the two types of budget exceptions: exceeds budget tolerance (insufficient funds were available for the transaction) and no funds available. You also can be notified when a percentage of your budget has been spent.

Navigation
Navigate through Nav Bar > Main Menu > Financials > Manager Self-Service > Budgets > Notify Preferences.

Searching
Values may be entered into the ChartFields manually, by using the Look up button or by using the Type Ahead feature.

1. Click the appropriate Budget Type (e.g., Appropriations) link.
2. Click the Search button.
3. Leave Alert level defaulted to Advanced. Basic Level is not available and should NOT be chosen.
4. Click the Add a Budget Alert button. (See figure 1.)
5. Click in each desired ChartField Value field.

6. Enter the appropriate information into the desired ChartField Value fields (e.g., "16010000" in the Department field). **Note:** In this section, the full ChartField value must be entered into at least one of the search fields. The wildcard will not work correctly if combined with any portion of any ChartField value. Leaving all fields with the wildcard may severely delay your search result by ultimately displaying a too broad search result.

7. Enter the desired information into the Percentage field for the Alert Type (e.g., "75"). This number represents the amount of budget to be spent before the alert is sent.

8. Uncheck the Send me Alerts via Worklist option as this feature is unavailable.

9. Click the Return to Alert Listings link.

10. Click the Save Budget Overrides button.
If you need help with...

- **Technical issues**, contact the UF Help Desk:
  - 392-HELP
  - helpdesk@ufl.edu

- **Policies and Directives**, contact the University Budget Office at 392-2402

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