

## **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.

1. Click the **Main Menu** button.
2. Click the **Financials** button.
3. Click the **Manager Self Service** menu.
4. Click the **Budgets** menu.
5. Click the **Notify Preferences** menu.
6. Click the **Advanced Search** link

### **Searching**

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

7. Click the **Look up Budget Type** button.
8. Click the **Look Up** button.
9. Click the **Appropriations** link.
10. Click the **Search** button.
11. Leave Alert level defaulted to **Advanced**. Basic Level is not available and should NOT be chosen.
12. Click the **Add a Budget Alert** button.
13. Click in the desired **ChartField Value** field(s).
14. 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. The wildcard will not work correctly if combined with any portion of any ChartField value and should not be used alone.

15. Scroll down, if needed.

16. Click the **Early Warning Alert** option if desired.

Two Alert Types are available:

- Exception Alert (checked by default)
- Early Warning Alert

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

18. Click the **Send me Alerts via Worklist** option to de-select as this feature is unavailable.

19. Click the **Return to Alert Listings** link.

20. 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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