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 Manager Self Service menu.
3. Click the Budgets menu.
4. Click the Notify Preferences menu.
5. 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.

6. Click the Look up Budget Type button.
7. Click the Look Up button.
8. Click the Appropriations link.
9. Click the Search button.
10. Leave Alert level defaulted to Advanced. Basic Level is not available and should NOT be chosen.
11. Click the Add a Budget Alert button.
12. Click in the desired ChartField Value field(s).
13. Enter the appropriate information into the desired ChartField Value fields (e.g., "85010000" 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.
14. Scroll down, if needed.
15. Click the **Early Warning Alert** option if desired.

Two Alert Types are available:

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

16. 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.

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

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

19. Click the **Save Budget Overrides** button.