Exceptions Notification

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.

- Log into the system via the myUFL portal, using your GatorLink user id and password [http://my.ufl.edu](http://my.ufl.edu)
- Navigate to Manager Self Service > Budgets > Notify Preference
- At the “Notify Preference” screen, click “Search”
- Choose the appropriate ledger group (for example, Appropriations)
- Click the “Advanced” radio button to specify the Budgets for which you will be notified
  - Do NOT select the “Basic” radio button
- Click “Add a Budget Alert”
- At the “Budget Alert Selection” screen, enter the complete department ID for which you wish to receive notification of budget exceptions, replacing the percentage sign listed in the Department field
  - You may leave percentage signs in the rest of the fields or use the other fields to tailor your preference list
- Under “Alert Type” on that screen, select as appropriate from the selections:
  - Notify me when Budget Exceptions Occur
  - Notify me when ___% of the budget has been used
    - Enter the percentage if you wish to be provided an “early warning” notification when a percentage of your budget has been spent
- Under “Alert Form” on that screen, select the method by which you wish to be notified:
  - Send me Alerts via the Worklist
  - Send me Alerts via E-mail
- Click “Return to Alerts Listing”
- If desired, click “Add a Budget Alert” to follow this process again for another department
- To complete this setup, click “Save Budget Overrides”