

Research Financial System: Alerts FAQ

Research Financial System (RFS) TechnologyOne will produce alerts based on spend criteria. These alerts will be available to view within TechnologyOne and a text summary of the alert information will be emailed to each Chief Investigator (CI), Head of School and Head of Faculty on a scheduled basis.

What criteria is used to trigger an alert?

There are three alert types – Critical, Warning and Information.

Critical Alerts

- are targeted at the total budget, and Budget Line Item (BLI) levels of a strict grant. They are generated when a project has spent 100% of their total budget or BLI, and again when they have spent over 105% of their total budget. The wording is slightly different for the two levels. Total budget and strict budget BLI overspends result in no further expenses being processed until the situation is resolved.

Warning Alerts

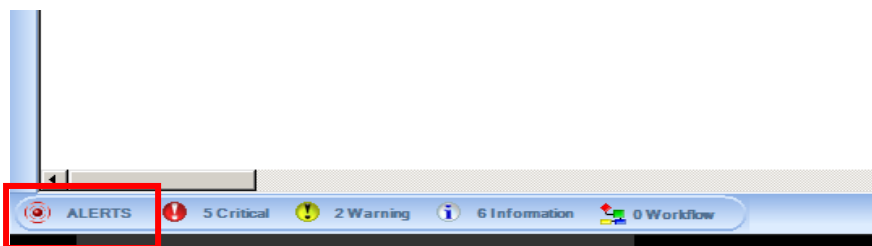
- are targeted at the total budget, and BLI levels of a strict grant. They are generated when there is 5% remaining of the total budget or the strict grant BLI.

Information Alerts

- are targeted at the total budget level only, and are generated for three conditions:
 - The expiry date of the grant is in the past, and the grant is still active.
 - The calculated spend of budget to duration of a grant could result in an overspend (fast spend).
 - The calculated spend of budget to duration of a grant could result in an underspend (slow spend).

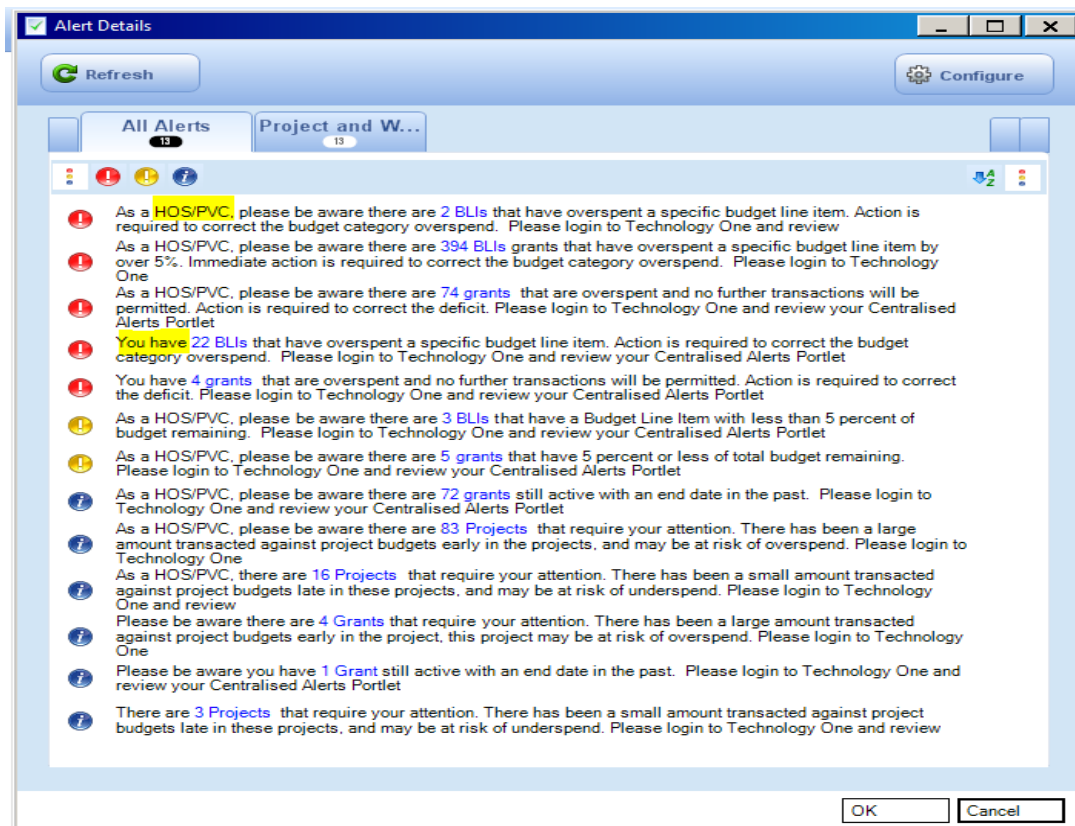
How can I view my alerts in TechnologyOne?

Dashboard Alerts are accessed by the links in the bottom left of your TechnologyOne screen:



Click on the word ALERTS and all of your TechnologyOne alerts will appear in a pop up window. Note that RFS specific alerts will be displayed along with all of your other TechnologyOne alerts, e.g. purchase order alerts.

The screen shot below is an example of the alert window for a person who is a Chief Investigator and a Head of School/Faculty. The alerts highlighted show how the Head of School/Faculty is identified and how their personal alerts are indicated.



Clicking on the hyperlink in the alert message takes you directly to the grants that require attention.

Once the criteria that triggered an alert is remedied, the alert will automatically be removed from the list on a nightly basis.


How will I be notified about new alerts?


Weekly emails are sent from the system containing all of your current alerts. The email alert schedule is:


- Critical alerts will be generated and emailed weekly on a Tuesday.
- Warning alerts will be generated and emailed weekly on a Thursday.
- Information alerts will be generated and emailed weekly on a Thursday.


The email generated from these alerts contains the same information as the Dashboard Alerts, without the hyperlinks. Below is an example of an email alert. The attachments circled at the top are not functional at this time, however we are constrained by the system and cannot remove/hide them.


Research Financial System – Alerts


 Thereare0workflowitem...
532 bytes


 Youhave0ARDDocumentF...
462 bytes

 Thereare0Attachmentso...
644 bytes

 Youhave0DocumentFile...
506 bytes

 Youhavecancelled0Purc...
866 bytes

 Youhave0Purch...
466 bytes

 Show all 31 attachments (29 KB) Download all Save all to OneDrive - The University of Newcastle

Alerts -----

Critical - You have 22 BLIs that have overspent a specific budget line item. Action is required to correct the budget category overspend. Please login to Technology One and review your Centralised Alerts Portlet

Information - Please be aware you have 1 Grant still active with an end date in the past. Please login to Technology One and review your Centralised Alerts Portlet

Information - Please be aware there are 4 Grants that require your attention. There has been a large amount transacted against project budgets early in the project, this project may be at risk of overspend. Please login to Technology One

Warning - As a HOS/PVC, please be aware there are 3 BLIs that have a Budget Line Item with less than 5 percent of budget remaining. Please login to Technology One and review your Centralised Alerts Portlet

Critical - As a HOS/PVC, please be aware there are 2 BLIs that have overspent a specific budget line item. Action is required to correct the budget category overspend. Please login to Technology One and review

Critical - As a HOS/PVC, please be aware there are 394 BLIs grants that have overspent a specific budget line item by over 5%. Immediate action is required to correct the budget category overspend. Please login to Technology One

Information - As a HOS/PVC, please be aware there are 72 grants still active with an end date in the past. Please login to Technology One and review your Centralised Alerts Portlet

Information - As a HOS/PVC, please be aware there are 83 Projects that require your attention. There has been a large amount transacted against project budgets early in the projects, and may be at risk of overspend. Please login to Technology One

Warning - As a HOS/PVC, please be aware there are 5 grants that have 5 percent or less of total budget remaining. Please login to Technology One and review your Centralised Alerts Portlet

Critical - As a HOS/PVC, please be aware there are 74 grants that are overspent and no further transactions will be permitted. Action is required to correct the deficit. Please login to Technology One and review your Centralised Alerts Portlet

Information - As a HOS/PVC, there are 17 Projects that require your attention. There has been a small amount transacted against project budgets late in these projects, and may be at risk of underspend. Please login to Technology One and review

Critical - You have 4 grants that are overspent and no further transactions will be permitted. Action is required to correct the deficit. Please login to Technology One and review your Centralised Alerts Portlet

Information - There are 3 Projects that require your attention. There has been a small amount transacted against project budgets late in these projects, and may be at risk of underspend. Please login to Technology One and review

This email has been generated by the Technology One alert notification agent.
You can configure your alerts via the Alerts Portlet in your workplace.
[Links to the alerts have been attached to this email.](#)