



**WEBER STATE
UNIVERSITY**

Using Lynx Finance

Self Service

At WSU

Budget Transfer

Log into the Faculty/Staff Portal

To get to Budget Transfer, go to **Self-Service**, and click on **Finance**, and then click on **Budget Transfer**.

Fill out the following fields:

- Transaction date: choose the day/month/year from the drop-down list.
- Journal Type: choose from **Between Current and Travel** or **Between Current and Capital**.
- Transfer Amount: type in the amount you wish to transfer.
- Chart: Capital W
- Index (cost code) on accounts you want to transfer money from and to. **From** is the account you wish to transfer money out of and **To** is the account you are moving the money into.
- Description: type in the description of the item you are transferring.
- Budget Period: Must be the current month (remember July is month 1).
- Template: You may save as a template and give the item a name.

After the cost code is entered in the **index** field, click **complete**. The form will fill in the **Fund**, **Organization**, and **Program** fields for you. Next, enter the appropriate code in the **Account** field for the accounts you are transferring money within.

- Expense account code is 71000
- Travel account code is 75000
- Capital account code is 77000

When the **Account** fields are filled out, click on Complete.

You will get a message saying that your document was forwarded to the posting process. Updates occur every day at 1:00 pm. Your transfer will show up on your account at the next update.

Document J0025291 completed and forwarded to the Posting process

Another Transfer

Use template

Transaction Date

Journal Type

Transfer Amount

Document Amount 600.00

	Chart	Index	Fund	Organization	Account	Program	Activity	Location	D/C
From	W		120100	35001	75000	610			-
To			120100	35001	71000	610			+

Description Budget Period

Code Lookup

Chart of Accounts Code

Type

Code Criteria

Title Criteria

Maximum rows to return

