

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**.

Personal Information Alumni and Friends Student and Financial Aid Employee Finance Athletics
Search Go
Budget Transfer
This form does not allow the completion of documents using rule classes that are not self-balancing.
Two types of templates may be saved. A "Personal" template is retrievable only by the user who created it. A "Sha
Use Save Template As to avoid overwriting an existing template.
You may use the Code Lookup to refine your search using the code or title fields. You may place a percent sign (%
Use template None Retrieve
Transaction Date 23 APR 2007
Journal Type WBD (Budget Between Current and Travel)
Document Amount 0.00
Chart Index Fund Organization Account Program Activity Location D/C From
Description Budget Period 01
Save as Template
Complete

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 None Retrieve
Transaction Date 23 APR 2007
Journal Type WBD (Budget Between Current and Travel)
Transfer Amount 300.00
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 reimbursing for travel expense Budget Period 09
Complete
Code Lookup
Chart of Accounts Code 🛛 🐨
Type account
Code Criteria
Title Criteria
Maximum rows to return 10 🔽
🛓 Done





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