Using Lynx Finance
Self Service
At WSU
Budget Transfer
Logging into Lynx Finance, Budget Transfers

To log into the Lynx Finance Self Service area:

- Log in to the E-Weber Portal.
- Select the Staff or Faculty tab.
- Find the LYNX Self-Service channel.
  - If this channel is missing, you may need to manually add it.
  - Contact extension 7777 for assistance.
- Click on the LYNX Self-Service Main Menu link.

Figure 1
Log into the Lynx Finance Self Service area (continued):

- Click on the Finance tab to access Budget Transfer.
- Select Budget Transfer.

![Lynx Self Service](image)

Figure 2
Fill out the following fields:

- **Transaction Date**: choose the day/month/year from the drop-down list.
- **Journal Type**: choose either **Budget Between Current and Travel** or **Budget Between Capital and Current**.
- **Transfer Amount**: enter the amount you wish to transfer.
- **Chart**: capital W
- **Index (cost code)**: enter the accounts you want to transfer money from and to.
  - **From** is the account you wish to transfer money out of.
  - **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 above information has been entered, 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.

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

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

![Figure 3](image-url)
A message will display indicating 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.

Figure 4