Lamar University
Creating a Self-Service Budget Transfer

1. Log in to Self Service Banner

2. After logging in, click the Finance Tab at the top in gray. Then click on the NEW Finance Self-Service hyper link.
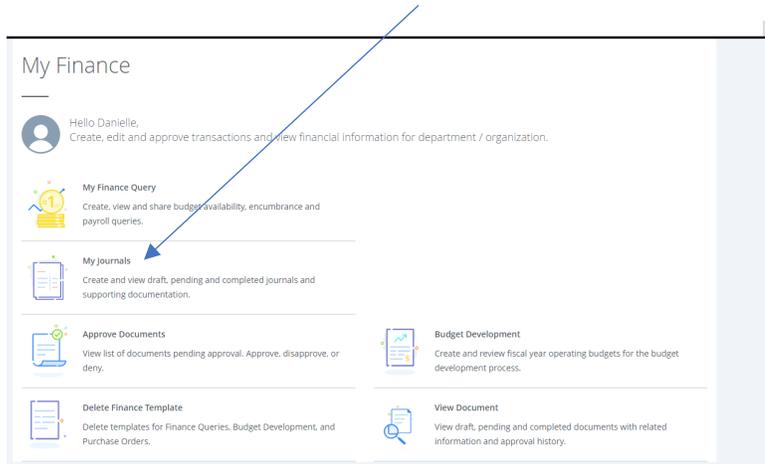

3. If you have not logged into New Self Service before it will ask you to log in with your LEA log in and password. Once logged in, your home screen should look something like this:

4. Click on My Journals:

5. In the top right corner, click on the **BLUE** 'Create Journal' button.
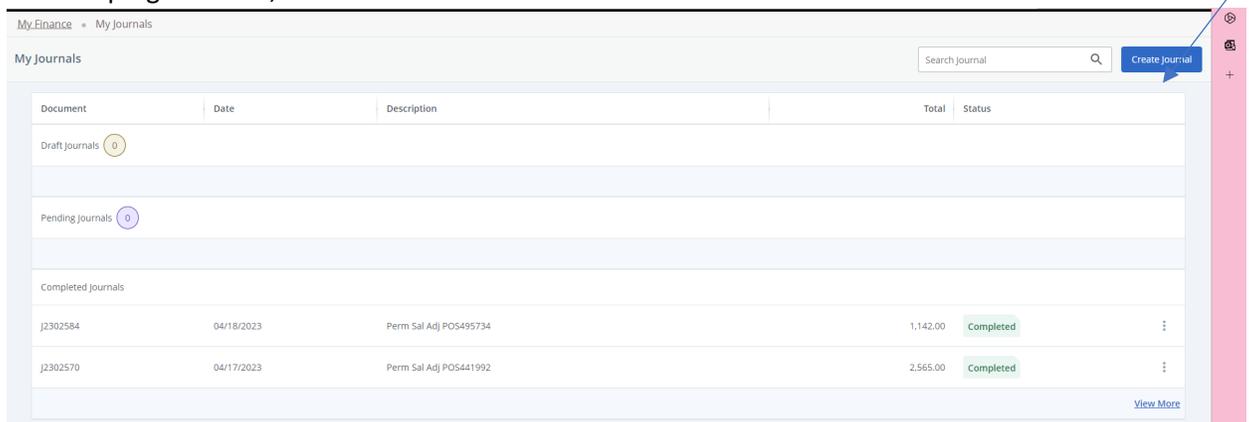
*This screen will also show you any entries you have ever done and pending entries that have yet to be approved. Under Drafts it will also let you see any entries that have been disapproved by the Budget Office. *

6. The Create Journal pop-up screen will appear. On this screen fill out the following:

a. **Distribution Total**: Should be doubled. Ex. If you are trying to move 100.00,

your Distribution Total would be 200.00.

b**. Journal Type:** Type in DEPT in the drop down

c**. Description:** What you are trying to do. Ex- Move Budget for Summer Conference

d. **Budget Period:** Lamar's Fiscal Year runs from September (01)-August (12). Example: April

would be Budget period 08.

f. Hit **create.**

7. Sequence Number 1: screen will appear.

Fill out the following:
   a. Journal Type: DEPT – Tempt Budget Adjustment
   b. Chart: L (always L)
   c. Index: Click the drop-down arrow and either type in the index or scroll down to the index you are wanting. Once selected, it will populate the Fund, Org, and Program for you.
   d. Account: This is where you are going to choose or type in the pool you want to move it to. Ex. 71000-Travel Pool.
   e. Amount: Put the amount you want to move. Ex. 100.00
   f. Debit/Credit: choose **+PLUS**
   g. Click **ADD ACCOUNTING**

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Sequence Number : 1

Status : ✓ Postable

Chart *	Index
L Lamar University × ∨	430001 VP for Finance and Operations × ∨

Fund

140001 Designated Tuition

Organization

30001 VP for Finance and Operations

Account

71000 Travel Pool × ∨

Program	Location
600 Institutional Support	Choose Location

Activity	Project
Choose Activity	Choose Project ∨

Percent

Amount *	Debit/Credit *
100.00	+ Plus × ∨

| SAVE | ADD ACCOUNTING |

8. Sequence Number 2: Screen will appear.

Fill out the following:
   a. Journal Type: DEPT – Tempt Budget Adjustment
   b. Chart: L (always L)
   c. Index: Click the drop-down arrow and either type in the index or scroll down to the index you are wanting. Once selected it will populate the Fund, Org, and Program for you.
   d. Account: This is where you are going to choose or type in the pool you want to take it from. Ex. 72000-Other Expenditure Pool.
   e. Amount: Put the amount you want to move. Ex. 100.00
   f. Debit/Credit: choose **-MINUS**
   g. Click **SAVE**

Add accounting   ×

Sequence Number : 2	Status :

Chart *	Index
L Lamar University × ∨	430001 VP for Finance and Operations × ∨

Fund

140001 Designated Tuition

Organization

30001 VP for Finance and Operations

Account

72000 Other Expenditures Pool × ∨

Program	Location
600 Institutional Support	Choose Location

Activity	Project
Choose Activity	Choose Project ∨

Percent

Amount *	Debit/Credit *
100.00	- Minus × ∨

| SAVE | ADD ACCOUNTING |

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9. Click **Submit Journal** - Button in the bottom right corner.

10. After submit journal, it will ask you if you want to submit J23*****. Click **Yes.**

11. The My Journals screen will come back and show you that Budget Entry you just submitted is now pending. That means it is in the Budget queue to review, approve and/or disapprove.
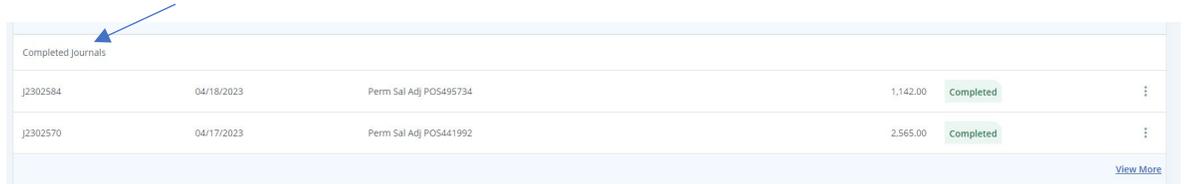
12. Once an entry is approved by Budget, it will show up in the Completed Journals section at the bottom.

Completed Journals					
J2302584	04/18/2023	Perm Sal Adj POS495734	1,142.00	Completed	⋮
J2302570	04/17/2023	Perm Sal Adj POS441992	2,565.00	Completed	⋮

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If an entry you put in is disapproved, it will show back up under Draft Journals.

Document	Date	Description	Total	Status	
Draft Journals ①					
J2302589	04/18/2023	Move Budget for Summer Conference	200.00	Disapproved ⓘ	⋮