

Banner Viewing Access – LU Campus Portal (Finance Self-Service)

Follow the steps below to view your Banner Index information using the LU Campus Portal :

1 – Log on to the Lehigh University Campus Portal (top left corner of Inside Lehigh website <http://www3.lehigh.edu/insidelehigh/default.asp>) using your Email ID and password.

2 – Click on the "Banner" icon and then click the yellow "Finance" tab.

3 – Click on "Budget Queries" and then click the "Create Query" box under Create a New Query Type - Budget Status by Account. This will give you the most detail.

4 – You can choose any of the check boxes for information you would like to view (usual boxes to check are Adjusted Budget, Year to Date, Encumbrances and Available Balance). Click the "Continue" box.

5 – To view Fiscal Year to Date activity, fill in the **Fiscal Year**, **Period**, and **Index** fields to view all activity. Chart of Accounts must always be "P". You can also fill in the Comparison Fiscal Year and Comparison Fiscal Period fields. (Since Lehigh's Fiscal year begins on July 1 and ends on June 30, July is period 01, August is period 02, etc.)

6 – To view Inception to Date activity for Grant and Plant Fund indexes, leave the Index field blank and enter **only** the Grant or Plant Fund Index in the **Grant** field. Chart of Accounts must always be "P".

7 – Click the "Submit Query" box. (You will need to click the "Submit Query" box again for Index queries, but not for Grant or Plant Fund queries.) This will bring you back to the same query screen, but the related fields (for the index number you entered) will be populated, such as Fund, Organization and Program.

8 – The query will show you the activity of the Index or Grant by account code. Beginning and Current Fund Balances will display for indexes that maintain a fund balance.

9 – To view the detail for an account code, you can click on the orange highlighted number under the "Year to Date" or "Encumbrances" column. Use the Back button on the web page to go back to the query and choose another account code to view that specific detail.

10 – To view activity on another Index or Grant, click the "Another Query" box at the bottom of the page and go back to Create a New Query under step # 3.

For Index queries, populate the Index field – once you click the 'Submit Query' box, the other fields will update themselves (don't worry about deleting numbers from any other fields).

For Grant queries, populate only the Grant field – delete the information from all other fields – then click the 'Submit Query' box.

There are other types of queries you can run, but these directions are for the most general query that shows the complete picture of an index. Other query types are displayed in the drop down menu under "Create a New Query Type" mentioned in step 3 above.

If you have any questions, or need help viewing your information, please contact the Accounting Operations Supervisor, Cindy Hickman, at 8-3204 or email cmh3@lehigh.edu.