Banner Finance Viewing Access – Connect Lehigh (Finance Self-Service 9)

Follow the steps below to view your Banner Index information through CONNECT LEHIGH:

# 1 – Visit the The Perch <https://onfirstup.com/lehigh/theperch/>

# 2 –Select the “Connect Lehigh” Icon. If prompted, enter your username and password, then click the ‘Login’ button.

# 3 – Search for the ‘Finance Self-Service’ card, and click the ‘Finance Self-Service’ link on the card.

# 4 –Click on "My Finance Query" and then click the "New Query" box at the top right corner of the screen.

# 5 – Click in the Select Query Type box, and choose Budget Status by Account. This will give you the most detail.

# 6 – The Chart field must always be "P". Enter your Index number in the Index field and click the blue highlighted number that appears. The Fund, Organization and Program fields will populate with information from Banner 9.

# 7 – If your index number start with a “2xxxxx”, be sure the checkbox next to Include Revenue Accounts is blank.

# 8 – Scroll down to the next required fields – Fiscal Year and Fiscal Period – the current fiscal year is 2023 and if you choose Period 12, you’ll see all fiscal year activity (Lehigh’s Fiscal year begins on July 1 and ends on June 30, so July is period 01, August is period 02, etc.)

# 9 – You can also fill in the Comparison Fiscal Year and Comparison Fiscal Period fields if you want to compare annual or monthly activity.

# 10 – In the Operating Ledger section, choose any of the check boxes for information you would like to view (the most common boxes are Adjusted Budget, Year to Date, Encumbrance and Available Balance).

# 11 – Click the word "Submit" at the bottom.

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

# 13 – To view the detail for an account code, you can click on the blue highlighted number under the “Year to Date” 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.

# 14 – To view activity on another Index, click the “New Query” box at the top right corner of the screen and go back to step # 5.

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 listed in the drop-down menu under “Select Query Type” mentioned in step # 5 above.

If you have any questions, or need help viewing your information, please contact Cindy Hickman, Assistant Director Fin. Syst. at **cmh3@lehigh.edu**.