Request for Banner Access

Access to Banner includes granting permission to pages in Banner Application Navigator to view and/or edit data or granting permission to link to Banner tables for reporting from Banner. Below are the instructions for requesting each.

Banner Application Navigator

The employee’s supervisor determines the Banner pages needed to perform the job. The supervisor also determines if the employee should have view only access (query) or have data entry (maintenance) access to the pages. (The employee is granted access to User Classes, each of which include pages related to a specific function).

Access is requested by submitting a ticket to Lehigh.edu/help. Select Enterprise Systems, then select Banner access/training. Describe the Banner access needed or request access be the same as another person (Name/userID) who already has the access needed.

When approval is granted, Banner navigation and searching training will be scheduled. The Banner password, if needed, will be provided at the training. If not previously completed, FERPA training will also need to be completed.

Banner Reporting Access

Some employees also need access to run reports from Banner by linking to Banner tables and/or views. Similar to user classes, Banner reporting roles include the tables needed for reporting from a functional area. Follow the procedure above to request reporting access (tables or reporting roles) for an individual.

Banner Finance including Desktop Finance Reporting Database

The Controller's Office must approve the indexes to which access is needed. Download the Request For Electronic Finance/Payroll Access Form from the General Accounting Forms page. Follow the instructions on the form.

A Microsoft Access database was designed to provide user-friendly access to Banner Finance and related reports and financial data. This database is available to all Banner Financial Managers and their designees. To request access, submit a request to Lehigh.edu/help. Select Enterprise Systems, then select Banner access/training as the product/area.

When access has been approved, the database may be copied from the directory J:\banner\DesktopFinance. A user manual is also available at that location. The database naming convention is “Desktop_Finance_dmt_mmddyy.mdb” where mmddyy indicates the date of revision. The database is updated periodically and users are notified by email when enhancements are made.

To request enhancements to the database or to report any issues, submit a ticket to Lehigh.edu/help. Select Enterprise Systems, then select Access Database Support as the product/area.

Anyone given access to the Desktop Finance Reporting Database will also be given access to the Finance reports in the reporting tool Argos. More information is available under Resources on the Finance and Administrative Systems web page.