

EXTRACTING DATA TO EXCEL

This process allows you to export the data on the screen to a Comma Separated Value (CSV file) that is ready to import into Excel.

NOTE: Only certain Banner forms allow the Extract. If there is a form that does not allow the Extract and you would like to do so, please contact a Banner Trainer to see if it is possible.

To Extract the Data

1. Open your form; EX: FGIBDST
2. Enter your values; EX: Fund and Org
3. **Next Block** so that you have the data displayed to extract
4. Click **Help** from the Menu Bar
5. Select **Extract Data with Key** or **Extract Data No Key**
NOTE: With Key will save the information in your Key Block as part of the file. Without Key will only produce the data in the Information Block. Some forms will not allow you to extract With Key.
6. Click **Save** from the File Download screen
7. Change the Save in location to where you want to save this file
8. Change the File name to something you will remember and makes sense
9. Click **Save**
10. From the Download complete screen, click **Open**
11. Click **File, Save As** and change the Save as type from CSV to Microsoft Office Excel Workbook
12. Click **Save**
13. Work with the file, make any modifications, etc.
14. Remember to save when you are finished

NOTES:


