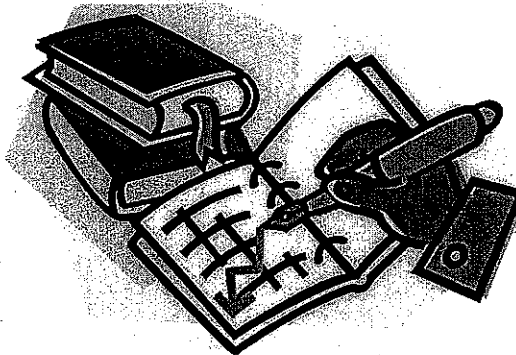


Lesson Four: Extract Data



Lesson 4: Extracting Data with Banner Forms

Various forms within the Banner system allow you to extract data and use within Microsoft Excel spreadsheets. This Banner data can be used for expense tracking, reporting, and graph preparation. By using this method, you are always using the most up-to-date data for your reporting and graphing.

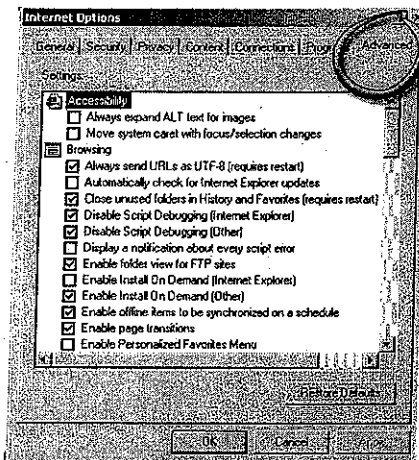
Preparing Your Computer

In order to extract information from Banner and view and manipulate it in Excel, you must make a couple of changes to your internet browser set up. Follow the steps below for this setup:

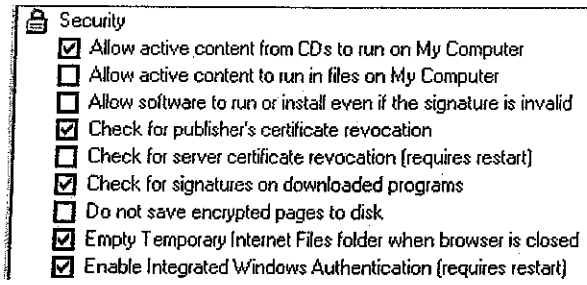
1. Open Internet Explorer, and click the Tools menu.
2. Click Internet Options.



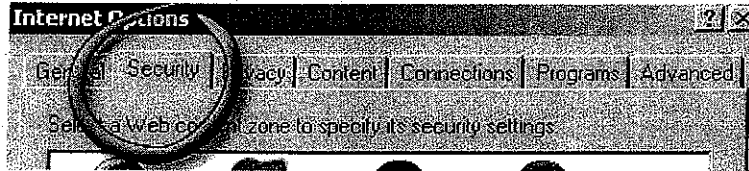
3. Click the Advanced tab.



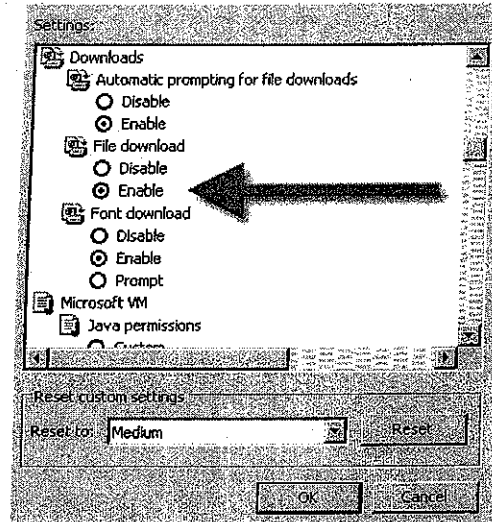
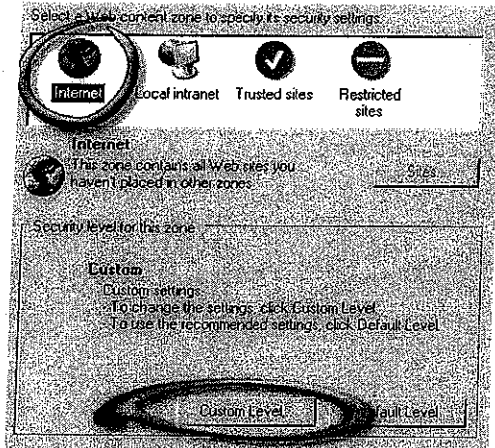
- 4. Scroll down to the Security options area and look for the option highlighted in the image below.



- 5. Make sure there is no checkmark next to the "Do not save encrypted pages to disk option." If there is a checkmark, click the box to remove the checkmark. Click Apply to save the changes if you removed the checkmark.
- 6. Now click the Security tab on the Internet Options Dialog Box.



- 7. Click the Internet icon, and then click Custom Level.

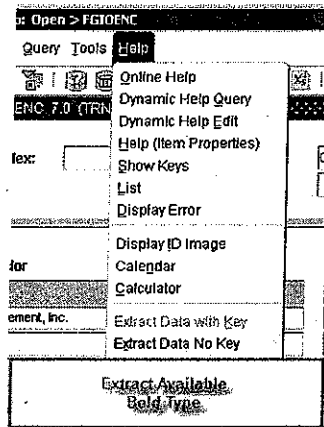


- 8. Scroll down to the Downloads area, and click Enable for the File Download option. Click OK. Close your internet browser. Your computer is now ready to extract data from Banner to view and manipulate in Microsoft Excel.

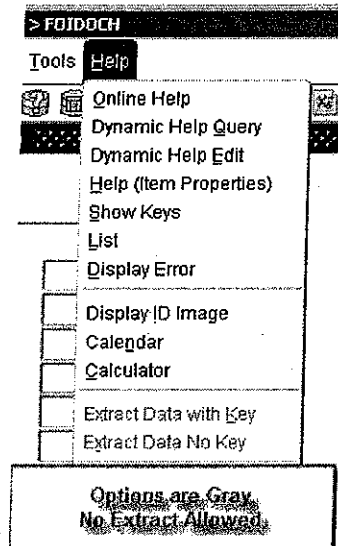
Extracting Data

You can easily determine if a Banner form allows data extractions.

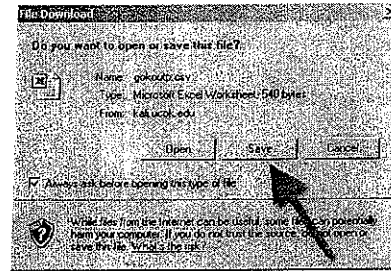
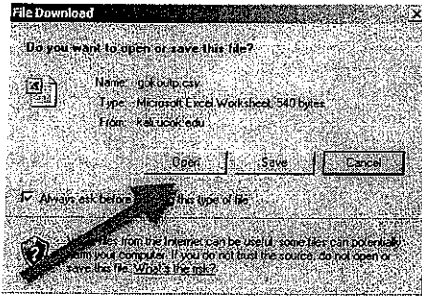
1. Open a form in Banner, and then click the Help Menu. For training, we are opening the FGIOENC form.
2. On the FGIOENC form, the "Extract Data No Key" option is available, so the data from this form can be extracted into Excel.



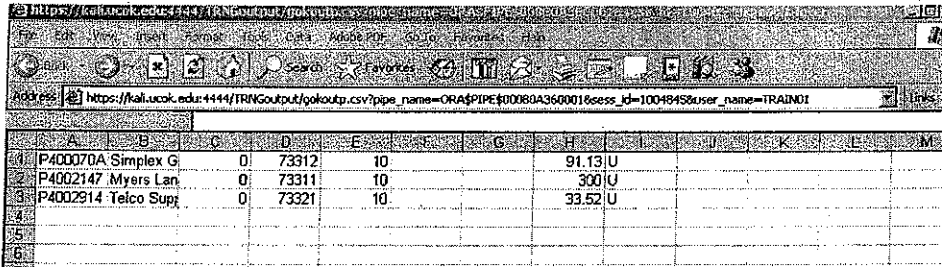
3. Next, open the FOIDOCH form and click the Help Menu. As you can see on this form, no extract options are available so the data cannot be extracted into Excel. Close FOIDOCH and return to FGIOENC.



- Click on Help, Extract Data No Key. A new window will pop up, and two options are available.

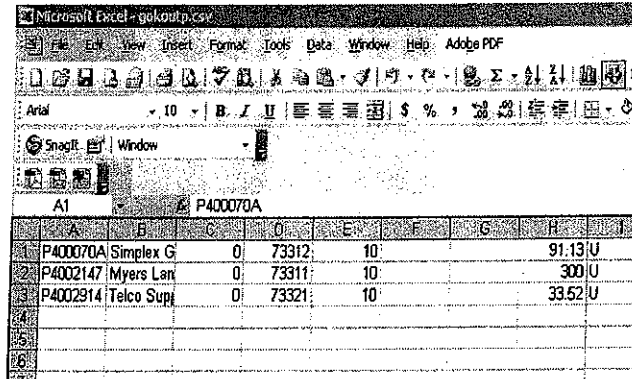
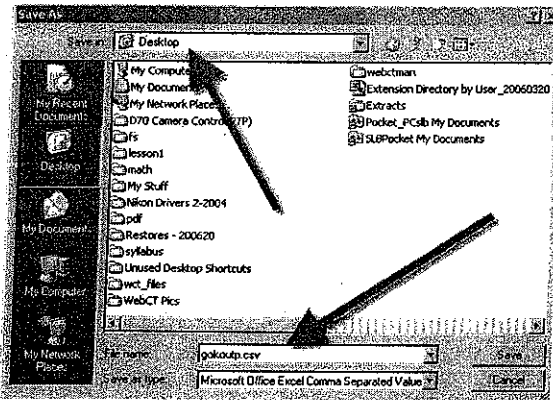


- Open Option:** The Open option opens the data in an Excel-like web based format. You can view the data and use some of the Excel features, but not all features are available. An example of the Open option is below.



Click Open, and the file will automatically open with this format.

- Save Option:** The Save option saves a copy of the file in an Excel compatible format. When you open the file in Excel, you are able to use all of the features. An example of the Save option is below.



Click Save, and you must tell the computer where to save the file. Note the file name can also be changed.

Open the file in Excel, just like regular Excel Files.