How do I extract data from Banner Finance into a spreadsheet?

Tell Me

On some key forms, the ability to perform a Data Extract is possible. To determine if a particular form is capable of Data Extract:

1. Go to the desired Banner Form
2. Click on the Help menu icon
3. Look to see if either “Extract Data with Key” or “Extract Data No Key” options are enabled
   a. If so, choose the option desired

The “Key” means the data typically at the top of the form is used in your primary query:
1. "With Key" includes that information
2. "With no Key" doesn't include it

b. If the particular form does not have Data Extract enabled, contact the IT Service Desk to determine if it is possible.

Related FAQs

- How do I verify if a vendor check payment has been cashed in Banner Finance?
- How do I move an entire account balance from one fund to another in Banner Finance?
- How do I look up all related endowment funds in Banner Finance?
- How do I determine the related foundation number to calculate the endowment balance in Banner Finance?
- How do I determine if a discretionary fund has a related foundation fund in Banner?

Popup blockers must be turned off. If you hear a “blip” when you try to extract the data, hold the Ctrl key down at the same time. If you experience any other problems, contact the IT Service Desk.