

# Moving a Banner Report to MS Word

## To copy a report into MS Word from Banner:

- Process a Banner report and view the output file
- Select Options on the toolbar
- Select Show Documents (Save & Print File)
- “Yes” to “You have selected to Show File in a browser (a new window). Continue?”
  - you may need to hold down the CTRL key when you click on Yes to disable any Pop-up Blockers
- Select File from the menu on the new browser menu
- Select Save As Is
- Save as a TXT file from the drop down box
- Open file in MS Word
  - Save as a .doc file
  - The file will need some formatting

# Macro for MS Word to view Banner Reports

## To Record:

- Tools
- Macro
- Record New Macro
- Name the macro (Banner Reports)
- Select keyboard
- New shortcut (ALT + B) or other unused shortcut
  - *All your keystrokes are now being recorded*
- File
- Page Setup
- Page Margins set all margins to .3”
- Landscape
- Ok
- File
- Select All
- Font drop down
  - Select Courier New
  - 9 pt font
- Click on STOP macro button to stop recording

Now you can open your txt file in MS Word and then hit your shortcut to format the file into a readable document.

- Save your new file as a .doc Word document

# Extracting Data from Banner into MS Excel

Data may be extracted from Banner forms to MS Excel where you can easily customize it and create reports. This Extract feature does need to be activated for use on a 'form by form' basis. Contact your campus technical staff for access if the form you are extracting from does not have proper access.

**To extract data from a Banner form, do the following:**

- Access the Banner form
- If applicable, display the desired records on the form
- Select one of the following from the Help pull-down menu located at the top of the form, you may need to hold down the CTRL key to override Pop-up Blockers:
  - **Extract Data with Key** (to extract key data and data in the current block)
  - **Extract Data No Key** (to extract data in the current block only)

If you are using Internet Native Banner, the first time you do a data extract, you may be prompted for information on where you want to store the data file.

- If the File Download window is displayed, select **Save** (holding down the CTRL key if necessary)
- Click on the **OK** button
- When the Save File window is displayed, enter the directory and file name you want to save the file to. Be sure the file type is MS Excel comma Separated Values File.
- Click on the **Save** button
- When download is complete click **Open** to open the file in MS Excel, use the CTRL key if needed to override Pop-up Blockers
- Select **File** from the menu
- Select **Save As** and save the file to the desired location as an .xls file

Now you may use format and manipulate data as with any other spreadsheet.