



Exporting Banner 8 Form Query Results to Excel

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Learning Objectives

This tutorial will help you perform the following Banner actions:

1. Verify the presence of the pre-required “temp” Windows folder
2. Create the “temp” Windows folder if it is not present in the directory structure
3. Export a Banner 8 form query result to an Excel compatible CSV text file

Note

Once extracted/exported, the CSV (*Comma Separated Values*) file can be opened and manipulated in a spreadsheet program such as Excel 2007.



Banner 8 Forms Known to Support this Feature

The following Banner 8 forms are known to support this feature:

- SSAMATX - BUILDING/ROOM SCHEDULE FORM
- SLQMEET - AVAILABLE CLASS ROOM QUERY FORM
- SFASLST - CLASS ROSTER FORM
- SIAASGQ - FACULTY SCHEDULE QUERY FORM
- SSASECQ - SCHEDULE SECTION QUERY FORM
- SLARUSE - DORM ROOM QUERY FORM
- SLABQRY - BUILDING QUERY FORM
- SLALMFE - ROOM/MEAL/PHONE RATE CODE RULES FORM
- SLASGNQ - AVAILABLE DORM ROOM QUERY FORM



Prerequisite : Verifying “Temp” Folder Presence

Before attempting to export a form query’s content, make sure that your computer has a **temp** folder created under **C:**. This letter may change if your operating system was not installed on the C drive for some reason but this is by far the most common setup on a Windows computer. Banner exports the query results to the **C:\temp** folder.

Warning

The export process will not work if the “temp” folder is not present on your machine.

Verify the folder’s existence in your directory structure by doing the following:

1. In Windows XP, click on the **Start** icon in the bottom left-hand corner of your screen.
2. Go to All **Programs** > **Accessories** > **Windows Explorer**.
3. Click on the little + sign next to the **My Computer** icon.

A list of all your drives will appear in alphabetical order.

4. Click on the **C:** drive and the folders and files in the drive should appear on the right-hand side of your screen.

Do you see a folder named **temp** in the list of folders that appears?

If you do, skip down to the **Export to Excel Instructions** section.



Prerequisite : Creating the Required “Temp” Folder in Windows

If the folder does not exist, follow the instructions below to create it:

1. In **Windows Explorer**, click on **File > New > Folder** in the menu bar.
2. Now you will see a folder appear on the right-hand side of your screen with the name generic “**New Folder**” name highlighted.
3. Delete this text by clicking on the **Delete key**.
4. Type in “**temp**” and hit **Enter**.
5. Close Windows Explorer.

You can now export form query data using the step-by-step **Export to Excel Instructions** below.



Export to Excel Instructions

STEP 1:

Click on **Help** in the menu at the top of your screen.

STEP 2:

You will see **Extract Data No Key** (in black) appear as a menu item, second from the bottom of the pull-down menu - click on it.

Note

Certain forms will also have the Extract Data With Key option available. If this is the case, you can select either option – the same function will be performed.

STEP 3:

The following popup will now appear:

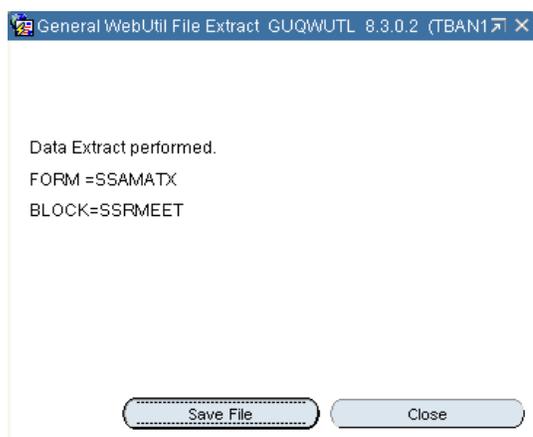


Figure 1. Extraction feedback popup window

Note that the popup shows the text “**Data Extract performed**” – meaning that Banner has performed the requested action.



A “**Save file**” button also appears on the screen.

Click the “**Save File**” button - the Banner generated file is now saved on your computer’s hard drive and the following feedback popup appears:

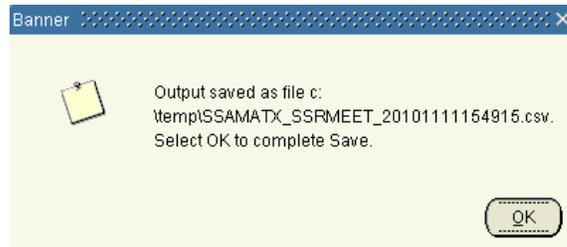


Figure 2. Export feedback popup window

Hence the file has now been stored in the “**c:\temp**” directory and Banner has given it the name “**SSAMATX_SSRMEET_201011154915.csv**” (in this particular example).

Notice the file naming convention used here: the date will vary depending on when the export is performed, but the first part **SSAMATX** – in our case - (Form name) and **SSRMEET** – in our case - (Block name) will always be the same for multiple exports performed on the same form.

STEP 4:

The file can now be viewed in **Excel 2007** (or another spreadsheet program which can read CSV files) simply by double-clicking on it in Windows Explorer.

Here’s what a sample output file should look like in Excel:

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Building	Room	Campus	Days	Meeting F Term	Begin and Subject	Course	CRN	Cross List	Function			
1	SH688	1221	1	T	1805-2055	200709 09-OCT-20 CCTR	435	2896					
2	SH688	1221	1	T	1805-2055	EVENT			B6134		LECTURE		
3	SH688	1221	1	T	1805-2055	EVENT			B8752		LECTURE		
4	SH688	1221	1	T	1305-1455	EVENT			C1726		LAB MEETS		
5	SH688	1221	1	T	1305-1455	EVENT			C1726		LAB MEETS		
6	SH688	1221	1	T	1805-2055	EVENT			B7541		LAB MEETS		
7	SH688	1221	1	T	1805-2055	EVENT			B4832		LAB MEETS		
8	SH688	1221	1	T	1805-2055	EVENT							
9													
10													

Figure 3. Sample form query data displayed in Excel 2007

You can now manipulate the extracted data directly in Excel using **filters** and other well documented Excel functions.

Release Notes

Date	Author	Change
Circa 2003	N/A	Initial version
2010-11-19	Matthew Bacz	Document updated to reflect Banner 8 changes. Document is generic in nature – not form specific. The procedures described can be applied to numerous forms.

