

## How to Quickly Export any Banner Form

**FIRST, edit your Banner Preferences settings to enable exporting from the Help menu. This edit is saved, you should not have to re-enter it.**

MENU: File >> Preferences >> Directory Options >>

“Local directory for saving output”

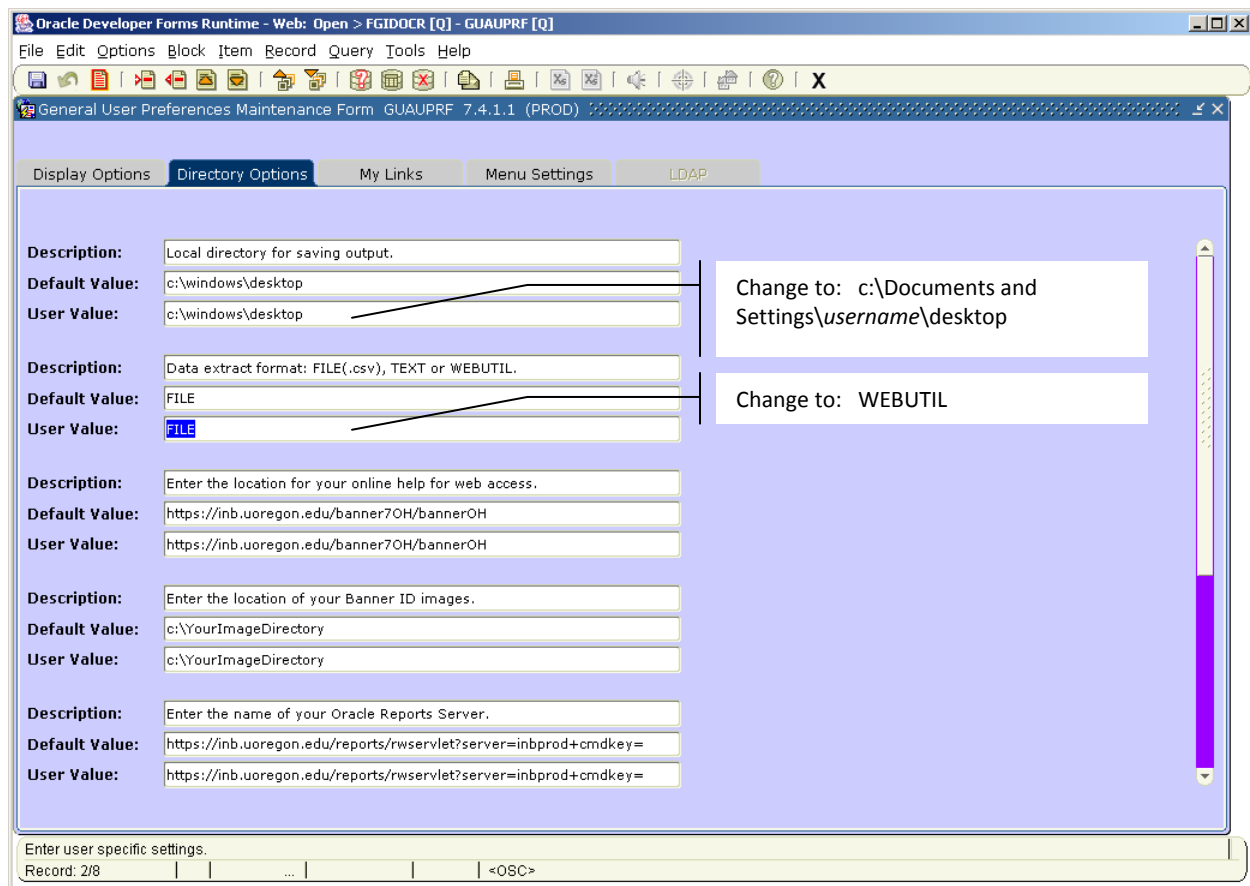
To send all your exports to your desktop, change the default User Value to:  
c:\Documents and Settings\*your username*\desktop

and

“Data extract format: FILE(.csv), TEST or WEBUTIL”

Change the User Value from the default FILE to WEBUTIL

SAVE preferences

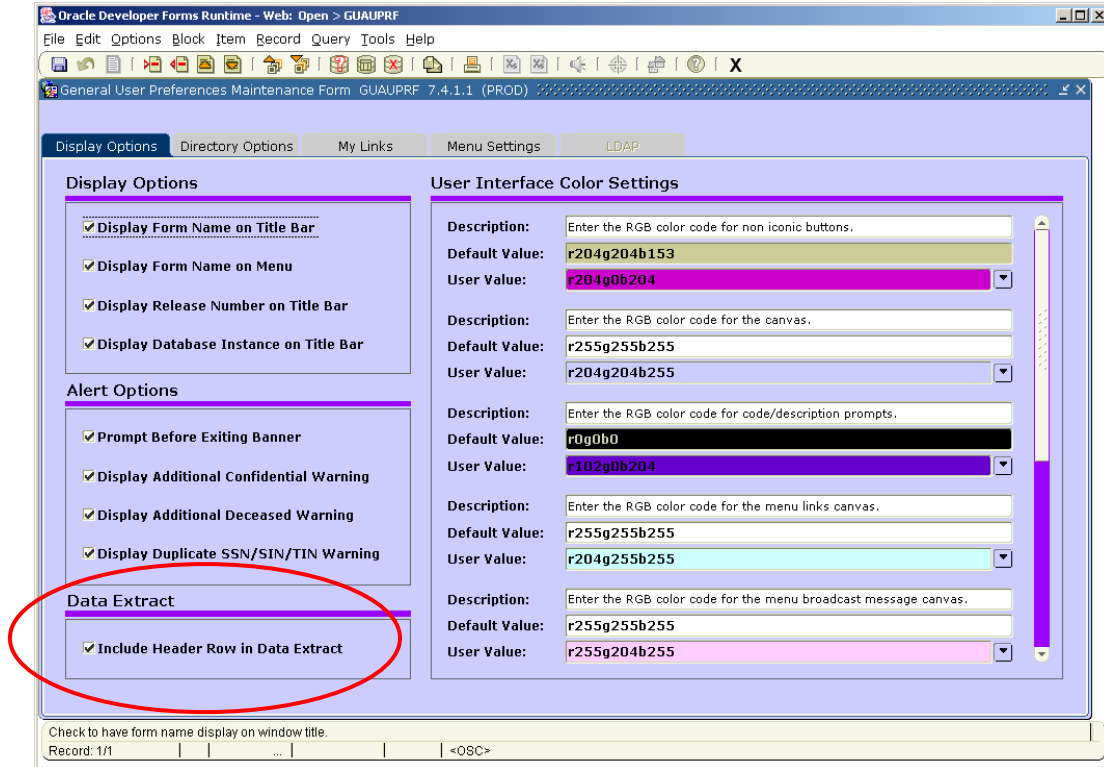


**SECOND**, edit your **Banner Preferences** settings to include the row headers in your exports. This edit is saved, you should not have to re-enter it.

MENU: File >> Preferences >> Display Options >>

Under the Data Extract block, CHECK the “Include Header Row in Data Extract” box.

SAVE preferences.



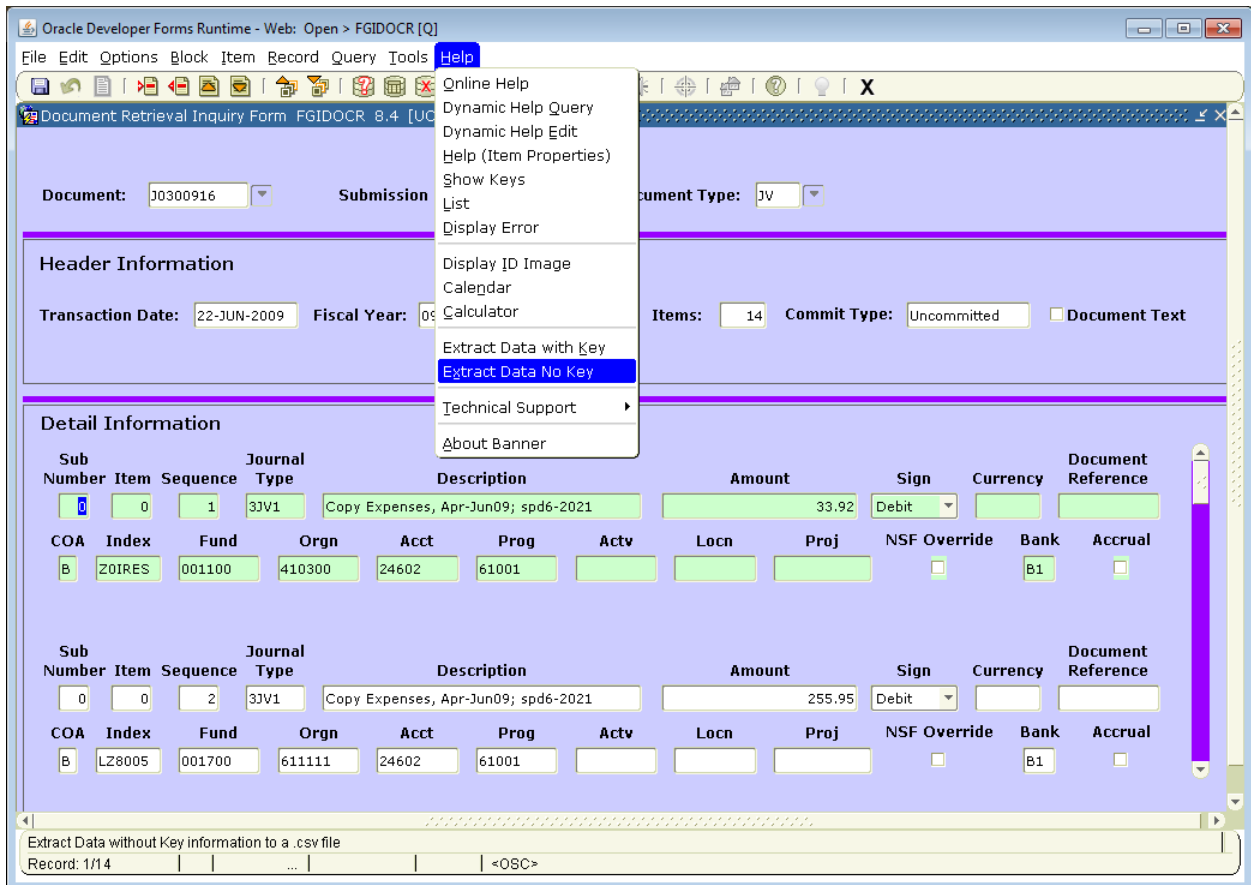
NOTE: The two advantages to using the HELP menu to export data are (1) it is quicker than using the create spreadsheet option, and (2) the data doesn't export with all the trailing spaces.

After the above Preference settings have been saved, you can quickly export Banner documents and forms. Form “FGIDOCR” is used in the following example, but any form/report should work following the same steps.

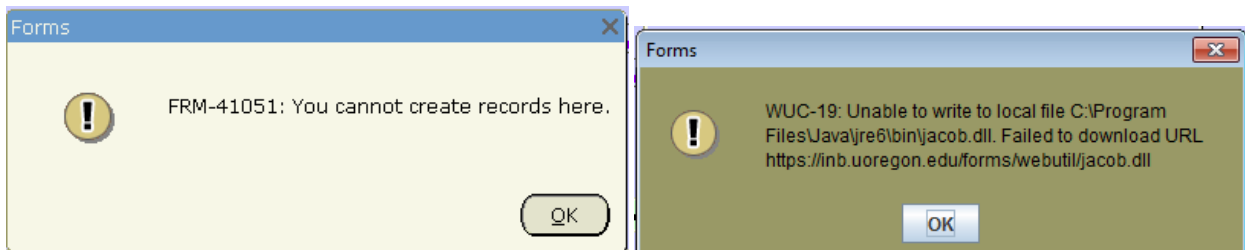
Retrieve a document number in FGIDOCR.

Then export the data:

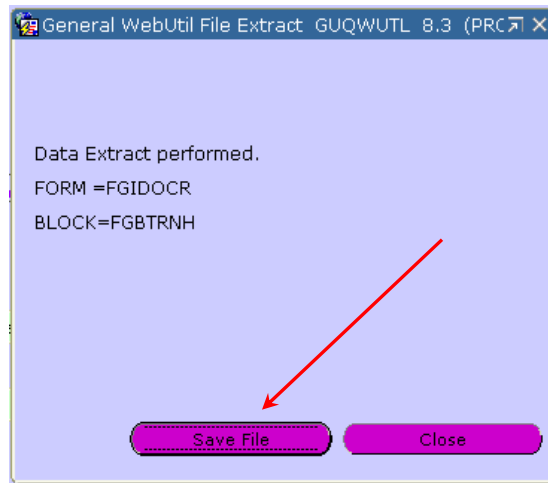
MENU: Help >> Extract Data No Key (or Extract Data with Key. Both return essentially the same results, but ‘with Key’ can be more problematic.)



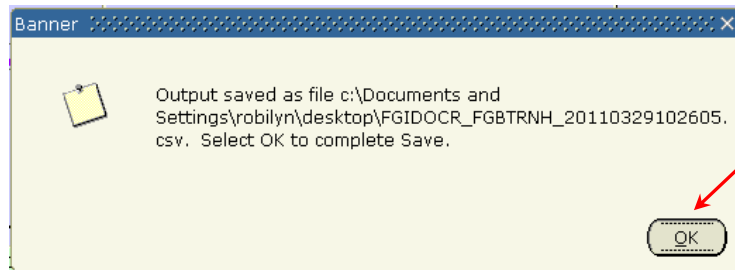
Ignore any error messages you may receive by clicking “OK”:



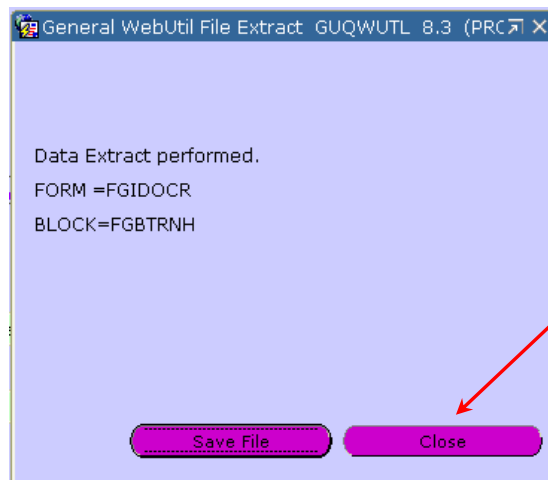
Click "Save File"



Banner will respond with the filename and filepath of the exported data file.  
Click "OK"



Click "CLOSE"



**You should now be able to find the exported data file on your desktop.**