






Extract Data from Banner to Excel

Refer to Setups to Extract Banner Data documentation prior to extracting data the first time.

- Retrieve data to be extracted.
- Click **Help** (Menu bar), **Extract Data with Key** or **Extract Data No Key**.
 - Extract Data with Key includes information entered into the Key Block.
 - Does not extract field names (column headings). i.e.; First column is University ID, then Last Name, First Name, etc.
- Select '**Open in Excel**' if asked.
- Save file to PC.
 - Work with file as needed outside of Banner.

HR Example:

PHIETIM list of all employees for a specific Payroll ID and Payroll Number.

- Key in **PHATIME** in the **Object Search Field (Go To...)** on the Banner Main Menu.
 - Press **Enter**.
- In the Key block enter the appropriate information:
 - **Organization** – Key in number.
 - **Transaction Status** – Select **All (Except not Started)**.
 - **Payroll ID** – Key in **BW** for Bi-weekly or **ST** for Student.
 - **Payroll Number** – Key in payroll number for time entry information to extract to Excel.
 - If the date and time for entering and approving the payroll has passed, will receive a warning on the Auto Hint/Status line that pay period selected is not open for time entry.
- Click  (Next Block) to move to **Jobs Information Block**.
- Click  (Search) from Jobs information block (between ID and Last Name) to open Web/Department Employee Time Inquiry PHIETIM.
- **To extract employee list to Excel:**
 - Refer to Setup Banner Extract documentation to verify PC and internet settings.
 - Click **Help** (Menu bar), **Extract Data with Key** or **Extract Data No Key**.
 - Extract Data with Key includes information entered into the Key Block.
 - Does not extract field names (column headings). i.e.; First column for data is University ID, then Last Name, First Name, etc.
 - Select '**Open in Excel**' if asked.
 - Save file to PC.
 - Work with file as needed outside of Banner.
- Click  to close PHIETIM and return to PHATIME.
- Click  (Rollback) to return to the Key Block (to search for another payroll list).
- Click  (Exit) to close PHATIME and return to **Banner Main Menu**.