

## **Golden (by Benthic Software)**

Golden is a query tool for Oracle databases. It includes advanced query abilities, data editing, and powerful import and export abilities including support for Excel and Calc spreadsheets. Golden allows approved users access to submit SQL queries to the Administrative Information System (AIS) and return useable data in a customizable format.

### **Access, Installation and Configuration**

Before you begin using Golden there are three requirements:

#### **1. Access to the RPT Database:**

To request your RPT ID and password, CTRL+click on the following link:

<https://eforms.siu.edu/siuforms/info/ais0101.php> , or use your browser and navigate to eforms.siu.edu. In the search box enter the form name "Request for Reporting Access RPT". Download and complete the form. In section 3 select 'All Financials' to gain access to financial transactions. If you need special access to Human Resource or Accounts Payable data, select the appropriate box. Because of the sensitive nature of the information in these two modules, special access will be granted on a case-by-case basis. Once you have completed the form and obtained the necessary signatures, mail it to (Accounting Services MC: 6812). The form will be routed to the appropriate approvers and you will be notified when your access is ready.

#### **2. Installation and Configuration of the Oracle Client:**

The Oracle Client is software that allows Golden to communicate with AIS. A copy of the Oracle 11 Client can be downloaded here

(<https://sql.siu.edu/downloads/Golden%20Setup.zip>). Your LAN administrator should use [Appendix A](#) below to install and configure the Oracle Client.

#### **3. Purchase, Installation, and Configuration of the Golden Software:**

The Golden software can be purchased and downloaded from Benthicsoftware.com. Each department is responsible for the software purchase and license storage. Be sure to download the latest 32-bit version. Your LAN administrator should accept all default settings when installing Golden. Use [Appendix B](#) below to complete the configuration.

## Using Golden

Now that you have Golden installed and configured to work with AIS, you can begin using the software to pull data. Golden uses Oracle SQL queries, sometimes referred to as scripts, to request data from AIS. This guide will help you access scripts, navigate Golden, run scripts and export data to Microsoft Excel.

## Script Access

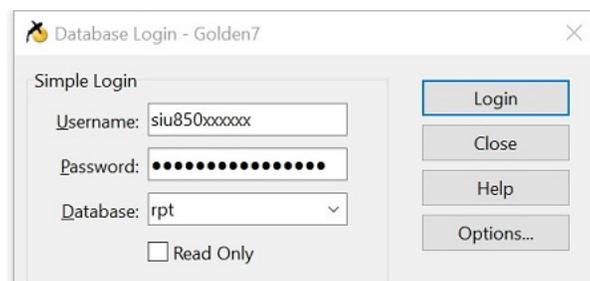
To begin using scripts visit the SQL User's Group website (<https://sql.siu.edu/scripts.html>). In the blue box on the right side labeled '**Base SQL Scripts**', are links to several basic scripts. Click on each script's link, download and save it to a location accessible from your computer. All SQL scripts will end with the file extension '.sql' but most computers are not configured by default to open this type of file. Consult with your LAN administrator to set Golden as the default application for files ending with '.sql'.

## Navigation

Open Golden by selecting the Golden icon from the Benthic Software folder on your start menu.

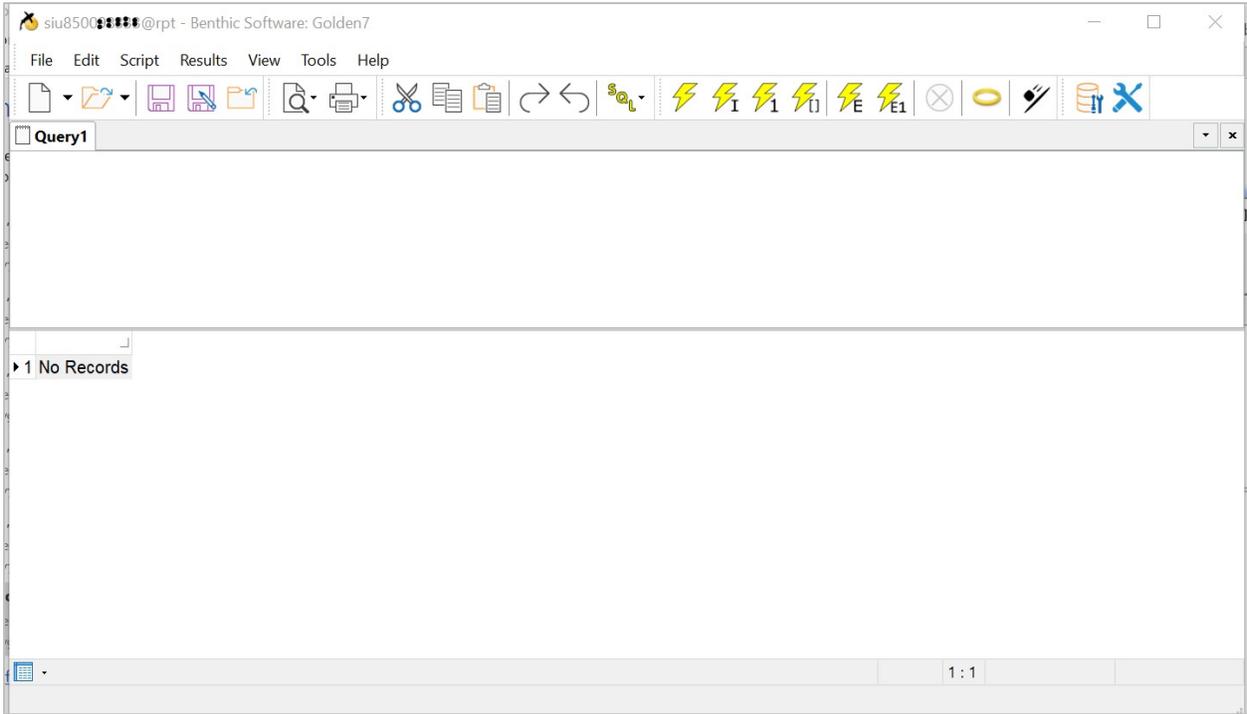


Enter your **Username** and **Password** in the appropriate boxes. Select '**rpt**' from the dropdown menu next to **Database**. Click the **Login** button.

A screenshot of the 'Database Login - Golden7' window. The window has a title bar with a small icon and a close button. The main area is titled 'Simple Login' and contains four input fields: 'Username' with the text 'siu850xxxxxx', 'Password' with a masked field of dots, 'Database' with a dropdown menu showing 'rpt', and a 'Read Only' checkbox which is unchecked. To the right of the input fields are four buttons: 'Login' (highlighted in blue), 'Close', 'Help', and 'Options...'. The window has a standard Windows-style border.

*NOTE: The 'RPT' or "Report" database is a daily copy of the AIS database. The information stored in RPT was posted to AIS the previous day. Each night the AIS database along with all Usernames and Passwords is copied to RPT, and therefore require special attention when it is time to change your password. Refer to the [password change instructions](#) below on Page 8.*

You are now logged into Golden and connected to the RPT database.

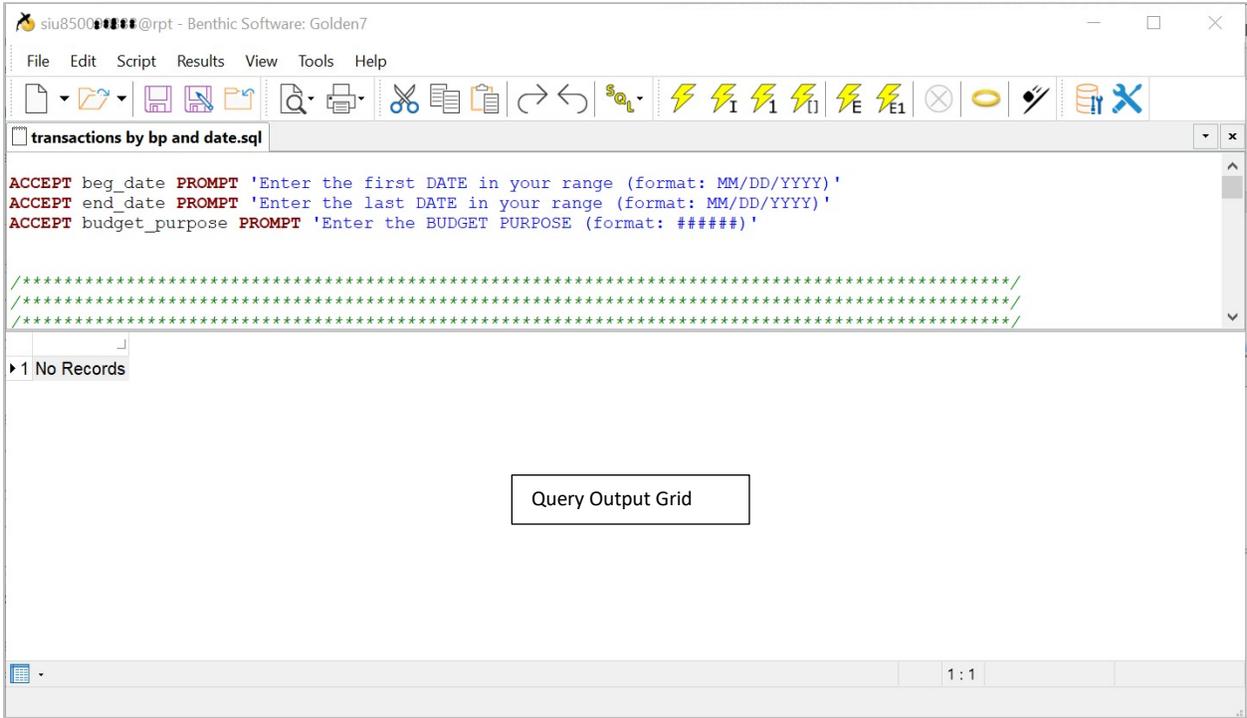


At the top of the window you will see your username and the database you are connected to. Below this is the Main Toolbar. This toolbar contains many of the standard toolbar options (i.e. open, save & print) but also contains tools to [run your script](#) and [export your data](#) output. We will look at these options later in this document.



Below the toolbar is the query editing area. This area will display the script you intend to run and allow you to edit the script to fit your needs. Most users will only display and run scripts from this area. Editing scripts takes a basic knowledge of SQL.

Beneath the query editing area is the query output grid. This area is used to display the output of your script.

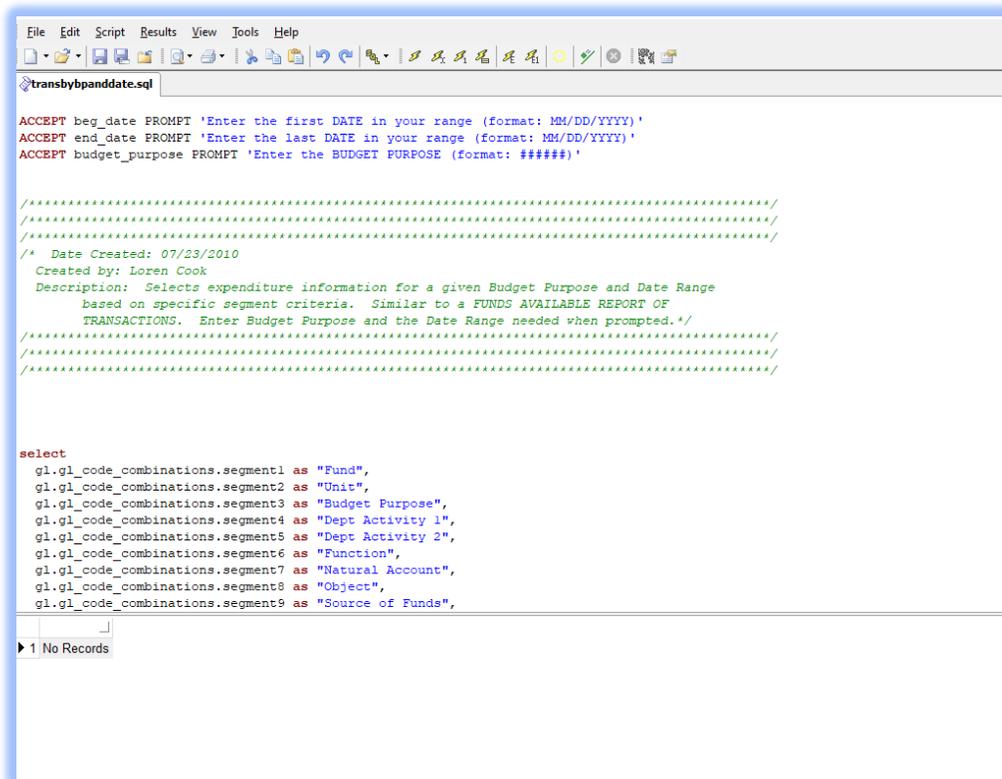


## Running SQL Scripts

From the File menu select 'Open' then 'Open file into new tab'. Alternatively, you can select the 'Open file into new tab' icon from your toolbar.



Navigate to one of the scripts you downloaded from the SQL User's Group page and click the **Open** button. For this demonstration we will use the script named 'transbybpanndate.sql'.



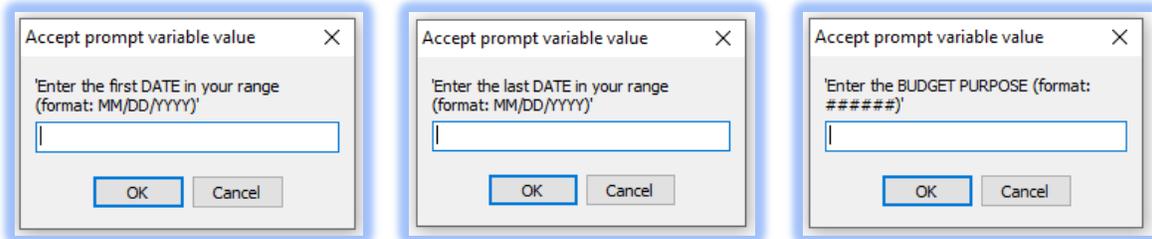
The script will be displayed in the query editing area and can be modified. *NOTE: If you are not familiar with Oracle SQL you should not make modifications to the script. Even small changes may prevent the script from running or provide incorrect output.*

Notice there is nothing shown in the query output grid at this time. This area will remain blank until you run the script. To run the script, select 'Script' then 'Run script' from your toolbar or select the 'Run script' icon.



*NOTE: This script will prompt you for three variables (Start Date, End Date, and Budget Purpose) however, many scripts are written with the variables defined and will not prompt you for input.*

Enter each variable and click the 'OK' button. Once the last variable has been submitted, the script will run. When the script is finished running, the query output grid will be populated with the results.



The message 'Done' will be displayed in the lower left corner and the number of records retrieved will be displayed in the lower right corner.

Fund	Unit	Budget Purpose	Dept Activity 1	Dept Activity 2	Function	Natural Account	Object	Source of Funds	Funding FY	Description	
1	2000003	20003	200003	00000	00000	12	50000	4545	00	YY	Invoice Number: 2-EE340761   Supplier: Office Max
2	2000003	20003	200003	00000	00000	12	50000	4545	00	YY	Invoice Number: PCARD300000-180   Supplier: Office M
3	2000003	20003	200003	00000	00000	12	50000	4545	00	YY	Invoice Number: PCARD010001-300   Supplier: Office M
4	2000003	20003	200003	00000	00000	12	50000	4545	00	YY	Invoice Number: 012120.Id   Supplier: Office Max
5	2000003	20003	200003	00000	00000	12	50000	4545	00	YY	Invoice Number: PCARD3000001-181   Supplier: Office M
6	2000003	20003	200003	00000	00000	12	50000	4545	00	YY	Invoice Number: 010020.Id   Supplier: Office Max

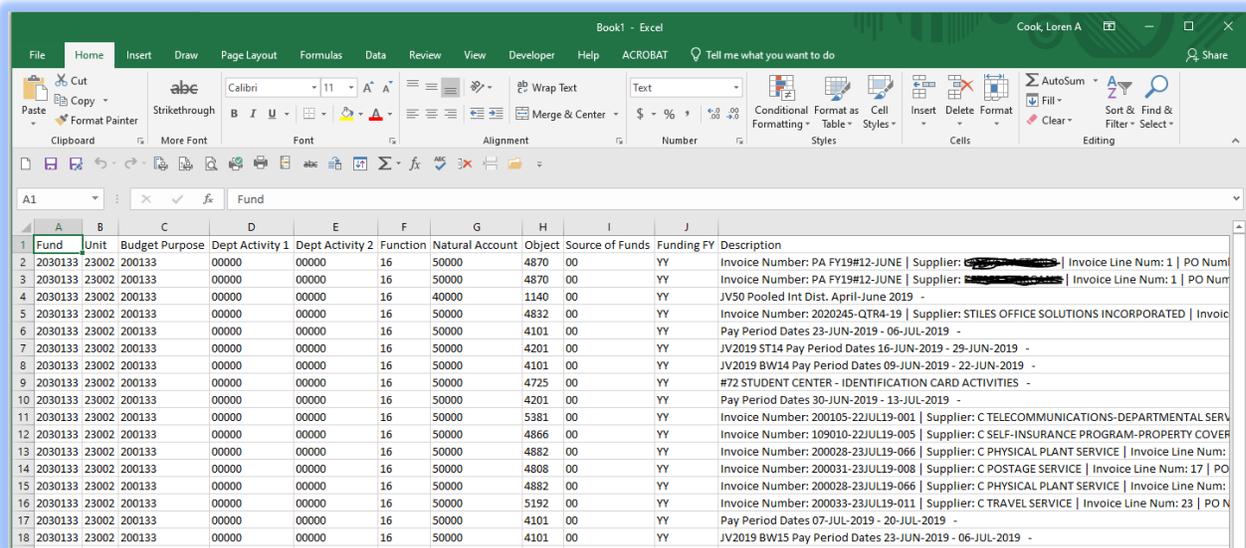
Done ran 4 of 4 statements. 98: 108 Selected 6 records

## Exporting Data

Script results displayed in Golden can be useful for a small set of data however, to be useful most output will require further calculations. To allow further manipulation of data, applications like Microsoft Excel may be required. Fortunately, Golden has a built-in utility to export data from the query output grid directly to MS Excel.

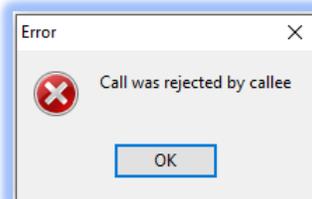
Once your script has finished running and you have results displayed in the query output grid, select **'Results'** then **'Export results to Excel'**.

Microsoft Excel will open and your output will be displayed in a new spreadsheet.



Fund	Unit	Budget Purpose	Dept Activity 1	Dept Activity 2	Function	Natural Account	Object	Source of Funds	Funding FY	Description
2030133	23002	200133	00000	00000	16	50000	4870	00	YY	Invoice Number: PA FY19#12-JUNE   Supplier: [REDACTED]   Invoice Line Num: 1   PO Num
2030133	23002	200133	00000	00000	16	50000	4870	00	YY	Invoice Number: PA FY19#12-JUNE   Supplier: [REDACTED]   Invoice Line Num: 1   PO Num
2030133	23002	200133	00000	00000	16	40000	1140	00	YY	JV50 Pooled Int Dist. April-June 2019 -
2030133	23002	200133	00000	00000	16	50000	4832	00	YY	Invoice Number: 2020245-QTR4-19   Supplier: STILES OFFICE SOLUTIONS INCORPORATED   Invoic
2030133	23002	200133	00000	00000	16	50000	4101	00	YY	Pay Period Dates 23-JUN-2019 - 06-JUL-2019 -
2030133	23002	200133	00000	00000	16	50000	4201	00	YY	JV2019 ST14 Pay Period Dates 16-JUN-2019 - 29-JUN-2019 -
2030133	23002	200133	00000	00000	16	50000	4101	00	YY	JV2019 BW14 Pay Period Dates 09-JUN-2019 - 22-JUN-2019 -
2030133	23002	200133	00000	00000	16	50000	4725	00	YY	#72 STUDENT CENTER - IDENTIFICATION CARD ACTIVITIES -
2030133	23002	200133	00000	00000	16	50000	4201	00	YY	Pay Period Dates 30-JUN-2019 - 13-JUL-2019 -
2030133	23002	200133	00000	00000	16	50000	5381	00	YY	Invoice Number: 200105-22JUL19-001   Supplier: C TELECOMMUNICATIONS-DEPARTMENTAL SERV
2030133	23002	200133	00000	00000	16	50000	4866	00	YY	Invoice Number: 109010-22JUL19-005   Supplier: C SELF-INSURANCE PROGRAM-PROPERTY COVER
2030133	23002	200133	00000	00000	16	50000	4882	00	YY	Invoice Number: 200028-23JUL19-066   Supplier: C PHYSICAL PLANT SERVICE   Invoice Line Num:
2030133	23002	200133	00000	00000	16	50000	4808	00	YY	Invoice Number: 200031-23JUL19-008   Supplier: C POSTAGE SERVICE   Invoice Line Num: 17   PO
2030133	23002	200133	00000	00000	16	50000	4882	00	YY	Invoice Number: 200028-23JUL19-066   Supplier: C PHYSICAL PLANT SERVICE   Invoice Line Num:
2030133	23002	200133	00000	00000	16	50000	5192	00	YY	Invoice Number: 200033-23JUL19-011   Supplier: C TRAVEL SERVICE   Invoice Line Num: 23   PO N
2030133	23002	200133	00000	00000	16	50000	4101	00	YY	Pay Period Dates 07-JUL-2019 - 20-JUL-2019 -
2030133	23002	200133	00000	00000	16	50000	4101	00	YY	JV2019 BW15 Pay Period Dates 23-JUN-2019 - 06-JUL-2019 -

**NOTE:** If you have an Excel spreadsheet open and are in the process of editing a cell while attempting to export data, Golden will display the following error message.



## Password Change

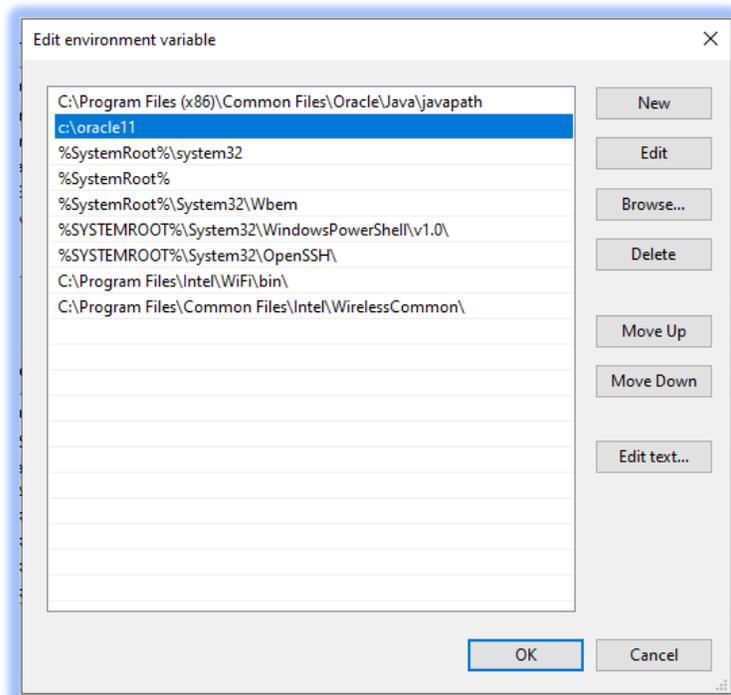
Since RPT is a daily copy of AIS all usernames and passwords are also copied from AIS to RPT. When you receive a message indicating your password has expired follow these steps to update your password. *NOTE: You will be updating your password in the AIS database, however this will not change your access to AIS via the web portal. This username and password combination is only used with Golden.*

1. Open Golden and enter your Username and Password in the appropriate boxes.
2. Select **'AIS'** from the Database dropdown menu and click the **'Login'** button.
  - You may be prompted to enter a new password at this time. If so, complete the **'Set New Password'** box as indicated and click the **'OK'** button. If not, go on to step 3.
3. From the **'File'** menu select **'Change Password'**.
4. Enter the updated password information and click the **'OK'** button.
  - You have now changed your password in the AIS database and it will be copied to the RPT database when the daily copy is made. If you would like to run scripts in RPT today, continue to step 5, otherwise you may close Golden.
  - *Note: The next time you open Golden the Database dropdown will be set to **'ais'**. Before running scripts, you must change this to **'rpt'** and enter your new password.*
5. Log out of AIS by selecting **'File'** then **'Disconnect'**.
6. Log in to RPT by selecting **'File'** then **'Login'**. Enter your Username and old Password in the appropriate boxes.
7. Select **'rpt'** from the Database dropdown menu and click the **'Login'** button.
  - You may be prompted to enter a new password at this time. If so, complete the **'Set New Password'** box as indicated and click the **'OK'** button. If not, go on to step 8.
8. From the **'File'** menu select **'Change Password'**.
9. Enter the updated password information and click the **'OK'** button.
10. You have now changed the password in both AIS and RPT and will be able to run scripts at this time.

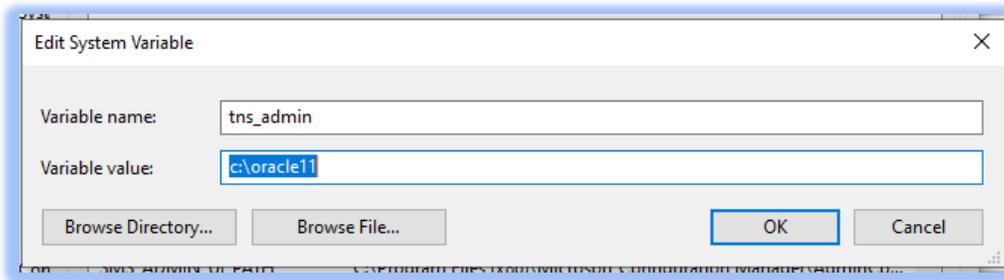
## Appendix A:

### Installation and Configuration of the Oracle Client

1. Copy '**Oracle11**' folder directly under the **C:\** directory.
2. Right-Click '**This PC**' and select '**Properties**'.
3. Choose '**Advanced system settings**' from the list on the left.
4. In the '**System Properties**' window on the '**Advanced**' tab select the '**Environment Variables**' button.
5. Under the '**System variables**' section scroll down and select '**Path**'.
6. Click the '**Edit**' button.
7. Click the '**New**' button.
8. Type the path to the Oracle files **c:\Oracle11** then click the '**OK**' button



9. Under the 'System variables' section click the '**New**' button to create a new system variable
10. Enter '**tns\_admin**' in the 'Variable name' field and '**c:\Oracle11**' in the 'Variable value' field



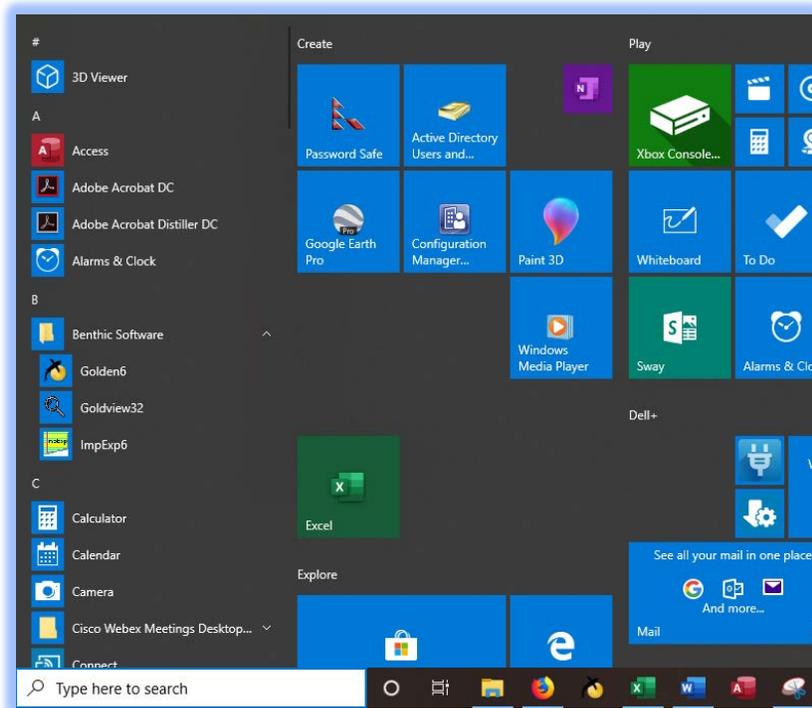
11. Click '**OK**' to save it and '**OK**' until you are back to the '**System**' window
12. Close the window and restart your computer

## Appendix B:

### Installation and First Time Configuration of Golden

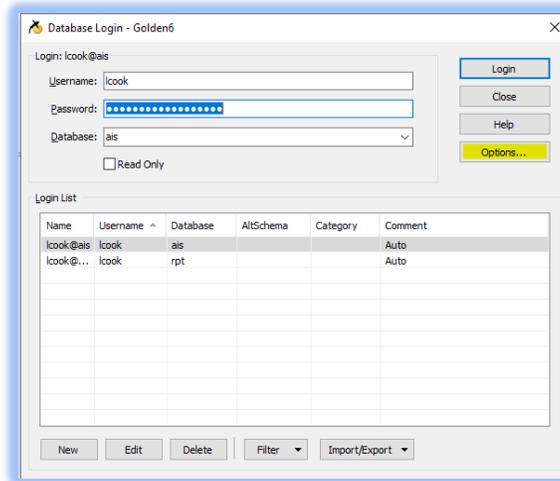
1. **Purchase** and **Download** the latest 32-bit version of Golden from [benthicsoftware.com](http://benthicsoftware.com).
2. Double Click the **Golden setup file**.
3. Follow the prompts and choose the default settings

Once Golden is installed it will create the '**Benthic Software**' folder in your program list. Inside this folder you will find Golden.

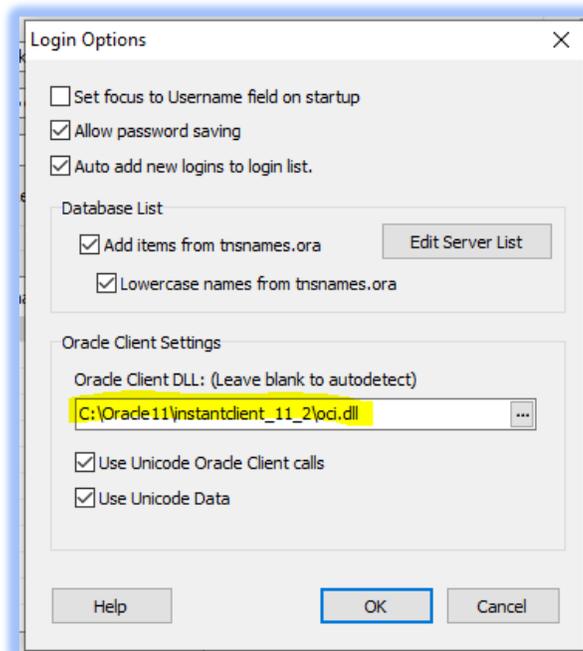


## Setting OCI.DLL Parameter in Golden

1. Open **GOLDEN**.
2. At the login window click the '**Options**' button. (Note: If you do not see the Options button click the '**More**' button to display it.)



3. In the '**OCI DLL Name:**' box enter the following string: '**C:\Oracle11\instantclient\_11\_2\oci.dll**'



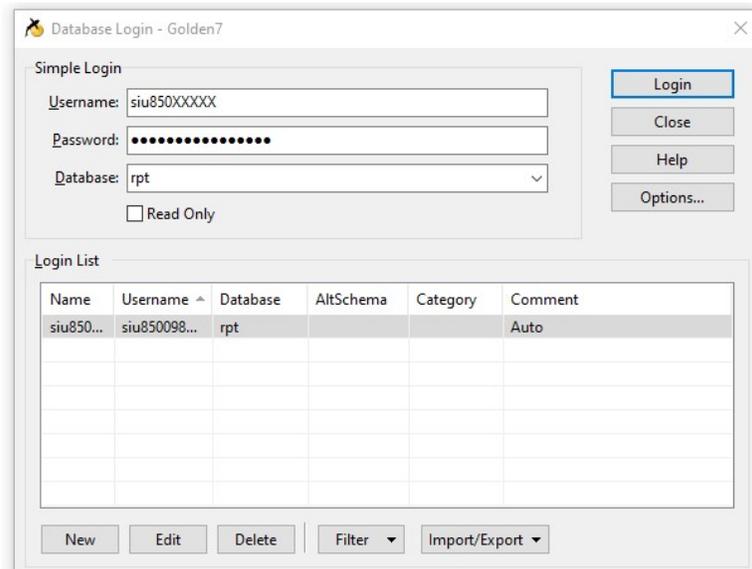
4. Click '**OK**'

## Logon to Golden

1. Enter your '**Username**', '**Password**', and '**rpt**' in the '**Database**' box.

(Note: The first time you open Golden the '**Database**' box will be empty.)

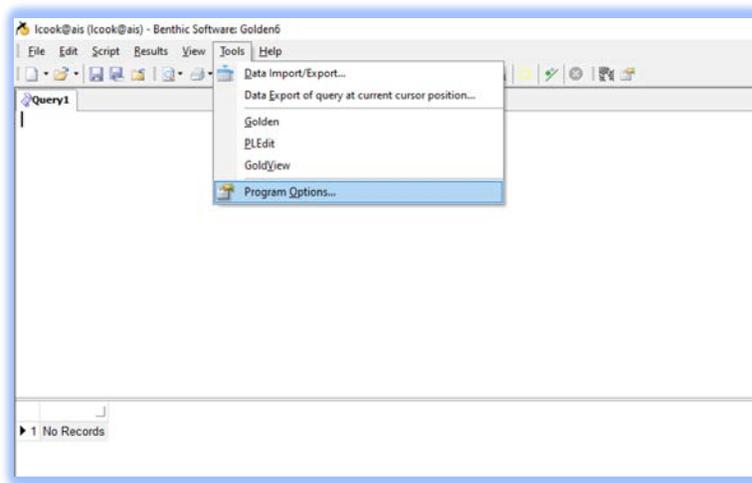
Click '**Login**'



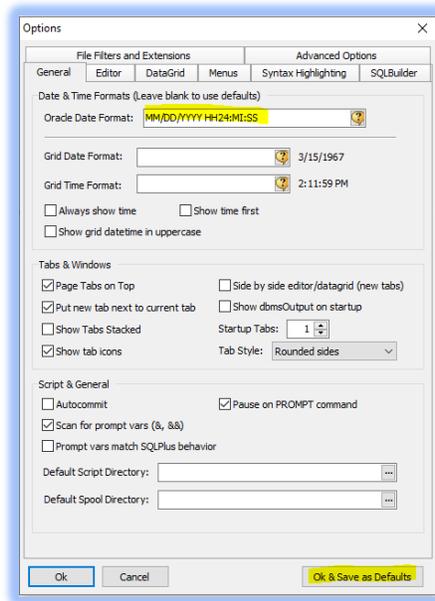
## Setting the Oracle Date Format

1. While logged into Golden, select '**Tools**'.

2. From the Tools drop-down menu, select '**Program Options**'.



3. Enter the 'Oracle Date Format': MM/DD/YYYY HH24:MI:SS



4. Click the 'Ok & Save as Defaults' button.