Navigating Goldmine

An Introduction
Purpose:

- Show users how to navigate Goldmine
- Give background information and tips
Overview

The first class all users of Goldmine should be taking

General knowledge on how to navigate within the system
Outline:

- How to Log On
- Main Menu
  - Password
- User Preferences
  - Programming Buttons
- Sub-Menus
- Iconic Buttons
- Person Lookup
- My Banner
How to Log On

Double Click on the Goldmine Icon on your Desktop
How to Log On

1. Enter your Banner ID
2. Enter your Banner Password
3. Enter prod_db
4. Click on Connect or press enter
Log On to Goldmine
Main Menu – Security Statement

Security Statement

This system is for the use of authorized users only. Individuals using this computer system without authority, or in excess of their authority, are subject to having all of their activities on this system monitored and recorded by system personnel.

In the course of monitoring individuals improperly using this system, or in the course of system maintenance, the activities of authorized users may also be monitored. Users (authorized or unauthorized) have no expectation of privacy except as otherwise provided by applicable privacy laws.

Anyone using this system expressly consents to such monitoring and is advised that if such monitoring reveals possible evidence of criminal activity, system personnel may provide the evidence of such monitoring to campus officials or law enforcement agencies. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use.

Click Accept
Main Menu

Type a Form name to go directly to the form

The Sub-Menus
Main Menu – Password

GUAPSWD
Main Menu – Password

Enter old password

Enter new password

Click OK
Try It On Goldmine
User Preferences

Click File

Click Preferences
User Preferences
User Preferences
User Preferences

[Image of a software interface showing User Preferences with options to add buttons to either toolbar.]

- Here is where you can delete or program the buttons.
- Add these buttons to either toolbar.
Programming Buttons

Right click button

Enter bubble help

Enter Icon Name

Enter path

Click OK
Programming Buttons

Click Apply

Hint: you will need to restart Goldmine
Try It On Goldmine
Main Menu – Sub-Menus

Products UTEP has purchased
Click on the + next to Student
Main Menu – 1st Expand

Listed are the sub-menus.

Click on the + next to General Person
Main Menu – 2nd Expand

Listed are the forms within a sub-menu.

Double click on the General Person Identification Form
Sub-Menus

- Horizontal Tool Bar
- Vertical Tool Bar
- Navigation Frame
- Sizable Frames
- Status Bar
- Key Block Area
Individual users can now use the General User Preferences Maintenance Form (GUAUPRF) to remove the “Form Name,” “Release Number,” and/or “Database Instance” from the Title Bars.
You can use the General User Preferences Maintenance Form (GUAUPRF) to:

- Display or hide the toolbar.
- Display or hide the bubble help.
- Add, delete, and rearrange buttons on the toolbar.
- Write text for each button’s bubble help.
- Specify the program that runs when a button is clicked.
You can use the General User Preferences Maintenance Form (GUAUPRF) to:

- Display or hide the bubble help.
- Add, delete, and rearrange buttons on the toolbar.
- Write text for each button’s bubble help.
- Specify the program that runs when a button is clicked.
These options take you outside the form to a related form.

This option takes you outside the form to a related form.

The yellow navigation frame on the left side of your forms shows all your navigational options for the current block. Other options take you outside the current form to other related forms.
Try It On Goldmine
Iconic Buttons

- **SEARCH** – Indicates a full screen List of Value – searchable field.

- **DATA** – data is available for this field.

- **NO DATA** – no data is available for this field.

- **SUMMARY** – Displays summary information for the associated record.
Iconic Buttons

- DETAIL – displays detail for this record
- IN PROGRESS – indicates the process has started but is not complete
- COMPLETE – the process is complete
- MAINTENANCE – indicates a maintenance function is available
Iconic Buttons

COPY – copies the current record or document

COMMENTS – displays a window where you can enter freeform text for associated record

CALCULATE – performs a calculation on data in field

APPROVE – approves the document

DISAPPROVE – disapproves the document
Forms

Iconic Buttons

Related form
Forms

When the form name changes you use exit, when you are within a form you use next block or rollback.
Click Next Block
If you get this error, click ‘OK’ and click next block again.
Log On to Goldmine
Person Lookup

- Directly entering the student ID
- Entering by name
- Lookup/search
Person Lookup – Directly

Click Next Block
Person Lookup – Directly

Person has been located
Try It On Goldmine
Person Lookup – By Name

Tab once to get to the name field and enter the “last name, first name”

Press Enter
Person Lookup – By Name

Person has been located
Try It On Goldmine
Person Lookup – Lookup/Search

Click on the spotlight/flashlight
Click on Person Search
**Person Lookup – Lookup/Search**

<table>
<thead>
<tr>
<th>ID</th>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Student</td>
<td>Jane</td>
</tr>
</tbody>
</table>

**Enter Last Name**

**Enter First Name**

Click on Execute Query
Person Lookup – Lookup/Search

In the “Chg” field “N” means a name change has occurred and a “I” means an ID change has occurred.

Click on the ID or on the select icon to select the person.
Person Lookup – Lookup/Search

Person has been located

Click Next Block

Person has been located
Try It On Goldmine
Personal Menu

**GUAPMNU**

Press enter
Personal Menu

Click Save

Press Enter - Then Down arrow or Press the Down arrow
Summary

- How to Log On
- Main Menu
  - Password
- User Preferences
- Sub-Menues
- Iconic Buttons
- Person Lookup
- Personal Menu
Where to Get More Information

Other Training Sessions
- http://admin.utep.edu/it/
  ① Click on Training

Help Desk @ 4357

Family Educational Rights and Privacy Act (FERPA)