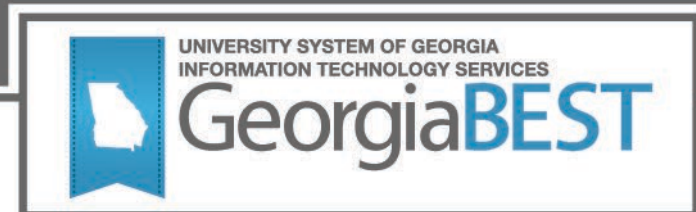


Information Technology Services



Course Attribute Dashboard Workbook

Georgia Enhancements 8.68 and 9.18

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Course Attribute Dashboard Workbook

Purpose

The new Course Attribute Dashboard (CAD) will better facilitate the management of courses directly in Banner. This initiative focuses on improving efficiency for faculty members and administrative staff and creating higher quality, consistent data for USG institutions. By improving the processes by which faculty/users can enter course data into Banner, the USG will improve institutional capacity to measure ROI on specific interventions. The design, development and integration of a course attribute dashboard that provides, faculty, academic advisors, and others streamlined and direct access to input and maintain Banner course attributes.

Setup for the Course Attribute Dashboard will be performed in administrative Banner, including the creation of groups of attribute codes with related dashboard user roles, dashboard user records with assigned roles for accessing specific courses and attribute groups, and connecting the dashboard to an email server. Dashboard access via Banner Self-Service will include functionality for users with Reviewer, Maintainer, and Approver roles. While the Reviewer role has view only access, the Maintainers can request that attribute codes be added to or deleted from course sections for the term. Approvers have the ability to approve, deny, or send back requests for further action. Emails are generated for the Maintainers and Approvers as activity occurs via the dashboard. To assist with administrative setup and review of dashboard activity, reports and processes will allow provide a report of all established administrative rules, create dashboard user records in batch, and generate a report of dashboard transactions.

This Georgia Enhancements workbook will guide functional users through the setup and usage of the Course Attribute Dashboard.

- Course Attribute Group Validation Code page (ZTVCAGC)
- Course Attribute Roles Validation Code page (ZTVCADR)
- Course Attribute Dashboard Administration page (ZSACADA)
- Course Attribute Dashboard Admin Report (ZSRC DAR)
- Course Attribute Dashboard User Load process (ZSRC DUL)
- Course Attribute Dashboard Transaction Report (ZSRC DTR)
- Course Attribute Dashboard Self-Service pages

NOTE: It is the institution's responsibility to ensure fee assessment is run, if appropriate, and in a timely manner after attribute codes are updated on course sections.

Target Audience

The target audience of this workbook includes the following:

- Banner administrative and functional staff responsible for establishing campus business practices for updating course attributes

- Faculty and staff responsible for using the Course Attribute Dashboard to request and/or approve attribute changes

General Testing Instructions

Testing should be performed to validate the functionality being delivered with this release. In order to test this release thoroughly, we ask that you follow your normal business practices and processes to see if the functionality runs correctly and also try multiple scenarios that you might not encounter often in an effort to identify any anomalies.

NOTE: All screenshots included in this workbook are from an internal ITS GeorgiaBEST test database. The data and setup at your institution may differ from screenshot examples provided in this workbook.

More Information and Support

For emergency, business interruption or other production down situations, immediately call the ITS Helpdesk (706-583-2001 or 888-875-3697 toll-free within Georgia). For noncritical issues, login with your username and password at <https://usg.service-now.com/usgsp> to submit a ticket.

Resources

Information about ITS Service Level Guidelines and the maintenance schedules can be found at https://www.usg.edu/customer_services/service_level_guidelines. For operational information of USG IT systems and services, please visit <https://status.usg.edu>.

Course Attribute Dashboard Process Flow

Complete the following steps to set up and use the Course Attribute Dashboard.

Set Up Self-Service Banner	
Specify email server and sender email address for messages originating from dashboard activities	GTVSDAX
Update information text in Web Tailor	Web Tailor



Create Validation Codes	
Establish attribute group codes	ZTVCAGC
Establish attribute role codes	ZTVCADR



Establish Dashboard Rules	
View available attribute groups	ZSACADA
Attach user roles to attribute groups	ZSACADA
Add attribute codes to attribute groups	ZSACADA
Create dashboard user records and assign roles individually	ZSACADA
Create dashboard user records and assign roles in batch	ZSRC DUL

Specify the user's course access	ZSACADA
Review attribute codes and group assignments per user	ZSACADA
Review dashboard processing per attribute group and role	ZSACADA
Review established dashboard rules	ZSRCAR



Using the Dashboard as a Reviewer	
Select term to process	Dashboard
View course list and select course(s) to review	Dashboard
View selected course(s)	Dashboard



Using the Dashboard as a Maintainer	
Select term to process	Dashboard
View course list and select course(s) to maintain	Dashboard
Select attributes to Add or Delete	Dashboard
View submission verification	Dashboard
Check for email	Email



Using the Dashboard as an Approver	
Check for “Ready to Review” email	Email
Select term to process	Dashboard
View course list and select course(s) to Approve, Deny, or Send Back	Dashboard
Enter comments	Dashboard
View verification	Dashboard
Check for “Verification” emails	Email



Monitor Dashboard Activity	
Verify course attribute updates	SSAETL
Review in-progress or completed transactions	ZSRCDTR
Review and update dashboard user records as needed	ZSRCDTR ZSRCDAR ZSACADA
Review email activity	ZSBCADE

Set Up Self-Service Banner

The Self-Service pages of the Course Attribute Dashboard were delivered as Banner 8.x functionality. The entry point to the dashboard will be a “Course Attribute Dashboard” link added to the bottom of the Faculty and Advisors menu (bmenu.P_FacMainMnu). Institutions may relocate this link to a more appropriate position or add the link to a 9.x Self-Service page.

To utilize the communication components of the dashboard, an institutional email server is needed. Settings related to the email server and sender email address will be established on Crosswalk Validation page (GTVSDAX).

Information text on the dashboard pages provides basic instructions for the dashboard users. This text can be updated via Web Tailor to customize the instructions or add institutional guidance.

NOTE: The subject and content of the emails are not customizable.

1. Specify email server and sender email address for messages originating from dashboard activities

When dashboard users with the maintainer and approver roles perform activities such as requesting attribute changes or processing requested changes (approve, deny, send back), email messages will be generated and sent to those users.

An ITS delivered script inserted three records in Crosswalk Validation (GTVSDAX) for Group COURSEATTRDASHBOARD. **These records must be updated to replace the words “UPDATE_ME” in the Comments field with a campus specific value prior to using the dashboard.**

Technical Notes:

- Dashboard activities by users with maintainer and approver roles will generate email messages. The destination address is the dashboard user’s preferred email address on E-mail Address page (GOAEMAL) and displayed on Course Attribute Dashboard Administration page (ZSACADA). The sender address and name is established by the CADADDRESS and CADNAME rules on GTVSDAX.
- Work with institutional technical staff to identify the email server hostname to be entered in the CADSERVER rule on GTVSDAX. Communications are outbound only from Banner. Ensure the email server will accept communications from the Banner server. This may require firewall or server configuration updates. Institutional technical staff should submit a ticket to ITS for any SMTP email service configuration questions.
- Refer to the “Review email activity” section of this workbook for a list of emails to be generated. Example email messages are included in the “Using the Dashboard as a Maintainer” and “Using the Dashboard as an Approver” sections of this workbook.

CADSERVER

The CADSERVER rule identifies the hostname of the institutional email server to be used. Replace the Comments value “UPDATE_ME” with the email server hostname.

Field Name	Description
Code	CADSERVER
Sequence	1
Group	COURSEATTRDASHBOARD
External Code	CAD_SERVER
Description	Hostname of CAD email server
Comments	UPDATE_ME

If an incorrect or invalid email server hostname is entered for the CADSERVER rule, the following message will be displayed on the Maintainer - Requested Attribute Submission Verification page and Approver - Verification List page of the dashboard:

*** EMAIL ERROR ... cannot send emails.

*** CONNECTION ERROR: Reply = ###, Service not available

*** Please report this to your system administrator.

CADADDRESS

The CADADDRESS rule allows the institutions to provide the sender email address for all messages originating from the dashboard. The email address must be entered in the Comments field. This email is only intended for communications from the dashboard to the users performing dashboard actions. The use of an email address that allows replies is at the institution’s discretion based on internal business practices, however, a “noreply” address may be preferred.

Field Name	Description
Code	CADADDRESS
Sequence	1
Group	COURSEATTRDASHBOARD
External Code	CAD_ADDRESS
Description	CAD sender email address
Comments	UPDATE_ME

CADNAME

The CADNAME rule identifies the sender name that should be displayed for all messages originating from the dashboard. Enter the sender name in the Comments field.

Field Name	Description
Code	CADNAME
Sequence	1
Group	COURSEATTRDASHBOARD
External Code	CAD_EMAIL_NAME
Description	CAD sender email name
Comments	UPDATE_ME

If these GTVSDAX rules are not updated, the following message will be displayed on the Maintainer - Requested Attribute Submission Verification page and Approver - Verification List page of the dashboard:

ERROR: GTVSDAX values not defined ... cannot send emails. Please report this to your system administrator.

2. Update information text in Web Tailor

Default information text was delivered with the Self-Service pages of the dashboard. Institutions may update this text via Web Tailor if needed.

Access Web Tailor Administration in Self-Service Banner 8.x and go to the Information Text link.

[Personal Information](#)
[Student](#)
[Financial Aid](#)
[Faculty Services](#)
[WebTailor Administration](#)

Search

[RETURN TO MENU](#)
[SITE MAP](#)
[HELP](#)
[EXIT](#)

WebTailor Menu

- [Web Menus and Procedures](#)
- [Menu Items](#)
- [Information Text](#)
- [User Roles](#)
- [Web Rules](#)
- [Web Modules](#)
- [Global User Interface Settings](#)
- [WebTailor Parameters](#)
- [Graphic Elements](#)
- [Login Return Location](#)
- [WebTailor Overrides](#)
- [Advancement Self-Service Rules](#)
- [LDAP Administration](#)
- [Display Audit for SSB Logins](#)
- [Display Audit for SSB Page Access](#)

RELEASE: 8.9.1.3

Search for "ZWSKCADB" to locate the dashboard procedures.

[Personal Information](#)
[Student](#)
[Financial Aid](#)
[Faculty Services](#)
[WebTailor Administration](#)

Search

[RETURN TO THE WEB TAILOR MENU](#)
[SITE MAP](#)
[HELP](#)
[EXIT](#)

Select Information Text to Customize

Search for a web menu or procedure for which you wish to customize an information text entry.

- 1) Search text is not case sensitive.
- 2) If text is entered in "Name" then the text in "Description" is ignored.
- 3) You may use wildcards for searching. i.e. %=match any number of characters _=match 1 character.
- 4) If no % is entered then a match will be found if the text is located anywhere in the field. i.e. if you enter car, matches will be found on **Carolina**, **macaroni**, and **boxcar**

Search by Name: OR Search by Description:

Select one of the available procedures -Indicates different local value

Procedure Name	Procedure Description	Enabled	Source	# Menu Items		# Info Text	
				Baseline / Local	Baseline / Local	Baseline / Local	Baseline / Local
zwskcadb.P_ApprVer	CAD Approver View - Verification List	Y	L	- / -	- / -	- / -	1
zwskcadb.P_MntCrs	CAD Maintainer View - Selected Courses	Y	L	- / -	- / -	- / -	2
zwskcadb.P_MntVer	CAD Maintainer View - Requested Attribute Submission Verification	Y	L	- / -	- / -	- / -	3
zwskcadb.P_RvwCrs	CAD Reviewer View - Selected Courses	Y	L	- / -	- / -	- / -	1
zwskcadb.P_SelCrs	CAD Reviewer/Maintainer/Approver View - Course List	Y	L	- / -	- / -	- / -	3
zwskcadb.P_SelTerm	Course Attribute Dashboard - Select a Term	Y	L	- / -	- / -	- / -	1

End of List - 6 entries

Click on the procedure name to access the available information text.

Reorder or Customize Information Text





Select the associated label to update individual information text entry.

Menus, Menu Items, Roles, and Information Text are separated into two categories:

Baseline	Baseline items cannot be modified (except by the release upgrade process). You must copy them to Local and change the Local version.
Local	You can create local records and modify them, and they will never be overwritten by later versions of Banner.

Click [here](#) for additional details on Baseline and Local records.

Information text for: zwskcldb.P_SelCrs (CAD Reviewer/Maintainer/Approver View - Course List)

Seq #	Label	Source	Information Text  -Indicates at least one different local value
1	APPROVETEXT	Local 	Refer to {website hyperlink} and institutional practices for assigning attributes. Select requests to approve, deny or send back. Current attributes for the course are available via the information icon. When using the Deny or Send Back options, the Comment field must be populated. NOTE: Email notifications will generate only if all requests for a CRN/Maintainer/date requested are processed.
1	MAINTAINTEXT	Local 	Select course(s) to proceed. If selecting multiple course sections, only select sections that require the same batch action (i.e. add specific attribute, delete specific attribute).
1	REVIEWTEXT	Local 	Select course(s) to review.

Copy All Baseline entries to Local

Add a New Information Text Entry

Customize the Associated Web Menu or Procedure

[Select another set of Information Text to customize](#)

Click on the label to view the text. Update the text as necessary and click Submit Changes.

Customize the selected Information Text Entry

Please update the information and Submit Changes.

* - indicates a required field.

Local	
Associated Web Page: zwskcldb.P_SelCrs (CAD Reviewer/Maintainer/Approver View - Course List)	
Sequence Number:	1
Label: *	REVIEWTEXT
Information Text:	<input type="text" value="Select course(s) to review."/>
Image:	<input type="text" value="Select"/> Preview Image
Comment:	<input type="text"/>
<input type="button" value="Submit Changes"/> <input type="button" value="Reset All Fields"/>	
<input type="button" value="Delete this Entry"/>	

Create Validation Codes

The Banner administrative setup required for successful usage of Course Attribute Dashboard (CAD) is based on establishing groups of attribute codes and assigning roles to dashboard users for specific levels of dashboard access. For a cohesive user experience and to ensure optimal functionality, all institutional areas with an interest in accurate course attribute data should coordinate activities and establish an overall institutional approach to setup and usage of the dashboard. Special attention should be paid to the following areas or course attribute types:

- Data Collections
- No Cost and Low Cost Course Materials
- Study Abroad
- High Impact Practices
- International Virtual Exchange

The Course Attribute Group Validation page (ZTVCAGC) is used to identify course attribute groups associated with the Course Attribute Dashboard. For instance, a campus department may create a study abroad course attribute group. This page allows for the entry of a code and description.

The Course Attribute Roles Validation page (ZTVCADR) allows for the creation of role codes associated with the Course Attribute Dashboard. In addition to a role code and description, users will identify whether the role falls into the following categories:

- Global Administrator (overall CAD administrator)
- Group Administrator (maintain attribute groups and user roles)
- Approver (approve attribute changes)
- Maintainer (request attribute changes)
- Reviewer (view only access)

Refer to the Course Section Attributes Business Practice at https://www.usg.edu/georgia_best/application_development_and_support/business_processes for additional information about maintaining course attributes.

1. Establish attribute group codes

On Course Attribute Group Validation page (ZTVCAGC), populate the Code (up to 8 characters) and Description (up to 60 characters) fields and save the record.

Best Practice Recommendation: When creating attribute group codes on ZTVCAGC, keep in mind that attribute codes will be attached to the group code on Course Attribute Dashboard Administration page (ZSACADA). It is recommended that group codes be created for related attribute codes, such as study abroad or high impact practices, rather than creating groups that will contain a range of attribute codes that cross areas or initiatives.

ellucian Course Attribute Group Validation ZTVCAGC 9.18

ADD RETRIEVE RELATED TOOLS

COURSE ATTRIBUTE GROUP VALIDATION Insert Delete Copy Filter

Code *	Description *
HIP	High Impact Practices
HISTORY	History Attribute Group
NO_LOW	No-Cost & Low-Cost Course Materials
STUDYABR	Study Abroad

1 of 1 10 Per Page Record 1 of 4

Activity Date 07/02/2021 10:37:44 AM Activity User CTAYLOR SAVE

2. Establish attribute role codes

On Course Attribute Roles Validation page (ZTVCADR), populate the Role Code (up to 12 characters) and Description (up to 60 characters) fields and check at least one of the role indicators. Multiple indicators may be checked for each record.

- Global Administrator:** This role is the overall CAD administrator. While the role does not include any inherent permissions or dashboard access, this role should be a contact for dashboard administration, such as creating attribute groups, roles, creating dashboard user records, assigning group administrators, monitoring dashboard transaction activity, etc. Multiple dashboard users may be assigned this role.
- Group Administrator:** While the role does not include any inherent permissions or dashboard access, this role should be established for each attribute group. The name and email address of the group administrator will be displayed on the Maintainer View – Requested Attribute Submission Verification page of the dashboard as a point of contact. Based on institutional business practice, this role may also be responsible for maintaining the administrative setup of the group, such as assigning the group roles to dashboard users and ensuring that the overall processing of requests for this group are correctly handled.
- Approver:** This role has the ability to approve requested attribute changes for the attribute group to which the role is assigned. The approver role allows the user to access courses in the Courses to Approve section of the dashboard Course List page.
- Maintainer:** This role is for faculty and staff who will request that attribute codes are added or removed for course sections. The maintainer role allows the user to access courses in the Courses to Maintain section of the dashboard Course List page.
- Reviewer:** This role is intended for any faculty or staff who should be able to view course attributes for course sections but cannot request changes to the existing attributes. The reviewer role allows the user to access courses in the Courses to Review section of the dashboard Course List page.

COURSE ATTRIBUTE ROLES VALIDATION						
Role Code *	Description *	Global Administrator *	Group Administrator *	Approver *	Maintainer *	Reviewer *
GLOBAL	Global Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HIP_ADMIN	HIP Group Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HIP_APPROVE	HIP Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HIP_MAINTAIN	HIP Maintainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
HIP_REVIEW	HIP Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
HISTADMIN	History Dept Group Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HISTAPPROVER	History Dept Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HISTMAINTAIN	History Dept Maintainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
HISTREVIEWER	History Department Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
NOLOWADMIN	No-Cost & Low-Cost Group Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOLOWAPPRV	No-Cost & Low-Cost Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NOLOWREVIEW	No-Cost & Low-Cost Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SB_ADMIN	Study Abroad Group Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SB_APPROVER	Study Abroad Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SB_MAINTAIN	Study Abroad Maintainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SB_REVIEWER	Study Abroad Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Record 1 of 17

Activity Date 06/22/2021 04:13:52 PM Activity User CTAYLOR

SAVE

Best Practice Recommendations:

- Attribute role codes should be established specific to each attribute group to ensure proper permissions and dashboard request processing. For instance, if a group code is established for No Cost & Low Cost Course Material attributes, create group administrator, approver, maintainer, and reviewer role codes that will only be associated with this group.
- At minimum, roles should be established for a maintainer (to request changes via the dashboard) and a group administrator with approver access (to approve requests and perform transaction and administration functions for the attribute group).

Establish Dashboard Rules

The Course Attribute Dashboard Administration page (ZSACADA) is the primary page for the following actions associated with the Course Attribute Dashboard:

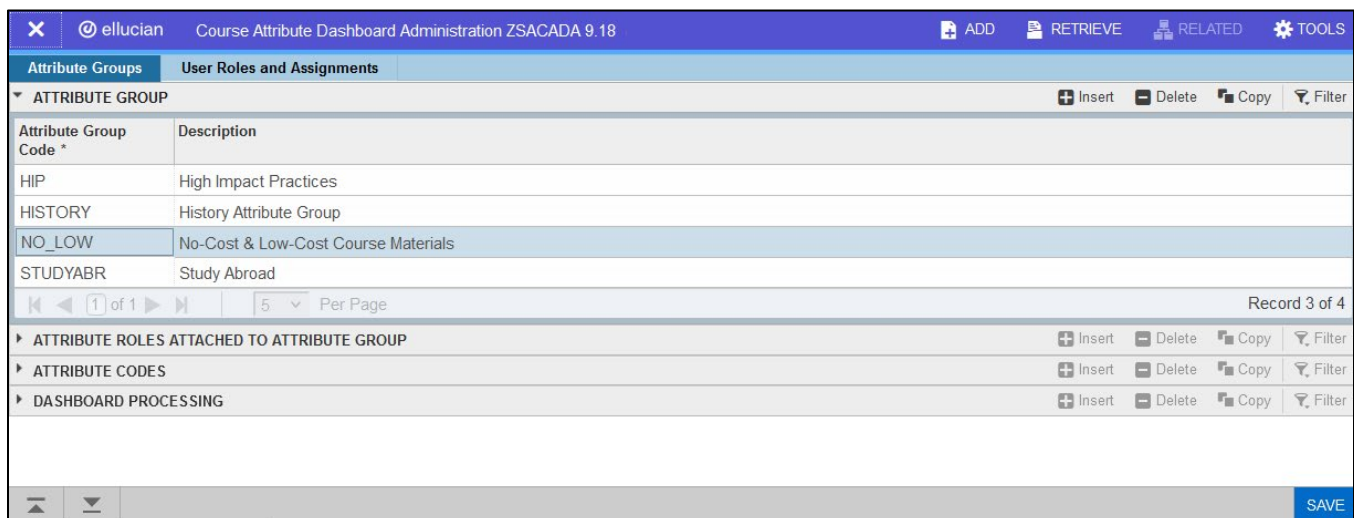
- Create attribute groups for a set of attribute codes
- Attach user roles to the attribute group
- Create dashboard users and assign user roles
- Establish user access to courses (assigned only or specify department and/or courses)
- View dashboard processing by role for the attribute group
- View attribute codes and attribute group assignments for users

The creation of dashboard user records and the assignment of roles can be performed individually on ZSACADA or in batch by running the CAD User Load Process (ZSRCUDL).

1. View available attribute groups

In ZSACADA > Attribute Groups tab > Attribute Group section, all of the attribute group codes and descriptions created on ZTV CAGC will be displayed. This Attribute Group section acts as a key block for the Attribute Groups tab. The data in the other sections of this tab are associated with the record that is selected in the Attribute Group section.

Filtering is allowed in the Attribute Group section but no records can be inserted, deleted, or copied.



Attribute Group Code *	Description
HIP	High Impact Practices
HISTORY	History Attribute Group
NO_LOW	No-Cost & Low-Cost Course Materials
STUDYABR	Study Abroad

Record 3 of 4

ATTRIBUTE ROLES ATTACHED TO ATTRIBUTE GROUP	ATTRIBUTE CODES	DASHBOARD PROCESSING
[Insert] [Delete] [Copy] [Filter]	[Insert] [Delete] [Copy] [Filter]	[Insert] [Delete] [Copy] [Filter]

SAVE

2. Attach user roles to attribute groups

In ZSACADA > Attribute Groups tab > Attribute Roles Attached to Attribute Group section, enter the role codes (validated against ZTVCADR) to be associated with the attribute group. For optimal functionality, attribute role codes should be created on ZTVCADR specific to each attribute group. Each attribute group must have at least one group administrator and one approver at any time.

Upon entry of a role code, the other fields in this section will display the role description and role checkbox indicators from ZTVCADR. These fields are display only.

Attribute Groups						
User Roles and Assignments						
ATTRIBUTE GROUP						
Attribute Group Code *	Description					
HIP	High Impact Practices					
HISTORY	History Attribute Group					
NO_LOW	No-Cost & Low-Cost Course Materials					
STUDYABR	Study Abroad					
Record 3 of 4						
ATTRIBUTE ROLES ATTACHED TO ATTRIBUTE GROUP						
Role Code	Description *	Global Administr...	Group Administr...	Approver *	Maintainer *	Reviewer *
NOLOWADMIN	No-Cost & Low-Cost Group Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOLOWAPPRV	No-Cost & Low-Cost Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NOLOWREVIEW	No-Cost & Low-Cost Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Record 1 of 4						
ATTRIBUTE CODES						
DASHBOARD PROCESSING						
						SAVE

3. Add attribute codes to attribute groups

In ZSACADA > Attribute Groups tab > Attribute Codes section, enter attribute codes for the attribute group. The Attribute Code field will validate against Attribute Validation page (STVATTR) and display the description from STVATTR.

Attribute codes entered in this section will be available to dashboard users who are assigned a role that is attached to the attribute group.

Attribute Groups		User Roles and Assignments				
ATTRIBUTE GROUP + Insert - Delete Copy Filter						
Attribute Group Code *	Description					
HIP	High Impact Practices					
HISTORY	History Attribute Group					
NO_LOW	No-Cost & Low-Cost Course Materials					
STUDYABR	Study Abroad					
1 of 1 5 Per Page Record 3 of 4						
ATTRIBUTE ROLES ATTACHED TO ATTRIBUTE GROUP + Insert - Delete Copy Filter						
Role Code	Description *	Global Administr...	Group Administr...	Approver *	Maintainer *	Reviewer *
NOLOWADMIN	No-Cost & Low-Cost Group Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOLOWAPPRV	No-Cost & Low-Cost Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NOLOWREVIEW	No-Cost & Low-Cost Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1 of 1 5 Per Page Record 1 of 4						
ATTRIBUTE CODES + Insert - Delete Copy Filter						
Attribute Code	Description					
ZLCM	Low-cost: \$40 or under req cost					
ZNCM	No-cost: \$0 required costs					
1 of 1 5 Per Page Record 1 of 2						
DASHBOARD PROCESSING + Insert - Delete Copy Filter						
						SAVE

4. Create dashboard user records and assign roles individually

The creation of dashboard user records and the assignment of roles can be performed individually on ZSACADA or in batch by running the CAD User Load Process (ZSRCDUL).

In ZSACADA > User Roles and Assignments tab > Dashboard Users section, enter the ID number of a dashboard user and save the record. The user's name and preferred email address from E-mail Address page (GOAEMAL) will be displayed. The records in this section are sorted alphabetically by last name.

An email address is required for the user to receive communications based on dashboard activity. If the message "No Preferred Email Address" is displayed in the Email Address field, follow institutional business practices to add an email address on GOAEMAL with the Preferred indicator checked.

Best Practice Recommendations: Due to the design of the Dashboard Users section, the data columns are not sortable. Use the Filter option to search for users by ID number or Name.

Attribute Groups			User Roles and Assignments		
DASHBOARD USERS					
ID *	NAME *	Email Address			
900161254	Barry White	bwhite@u.edu			
900123780	Walter Bishop	wbishop@u.edu			
900150958	Peter Bishop	pbishop@u.edu			
900039570	Jamie Jensen	No Preferred Email Address			
900076676	Jane Austen	jausten@u.edu			
Record 5 of 18					
ASSIGNED ROLE					
DEPARTMENTS AND COURSES					
ATTRIBUTE CODES AND GROUP ASSIGNMENTS					
SAVE					

With the user record selected in the Dashboard Users section, go to the Assigned Role section. Populate the Role Code field (validated against ZTVCADR). Upon entry of a role code, the other fields in this section will display the role description and role checkbox indicators from ZTVCADR. These fields are display only. Save the record.

Attribute Groups			User Roles and Assignments			
DASHBOARD USERS						
ID *	NAME *	Email Address				
900161254	Barry White	bwhite@u.edu				
900123780	Walter Bishop	wbishop@u.edu				
900150958	Peter Bishop	pbishop@u.edu				
900039570	Jamie Jensen	No Preferred Email Address				
900076676	Jane Austen	jausten@u.edu				
Record 5 of 18						
ASSIGNED ROLE						
Role Code *	Description *	Global Administ...	Group Administ...	Approver *	Maintainer *	Reviewer *
NOLOWMNTAI	No-Cost & Low-Cost Maintainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Record 1 of 1						
DEPARTMENTS AND COURSES						
ATTRIBUTE CODES AND GROUP ASSIGNMENTS						
SAVE						

When deleting a record from the Assigned Role section, the following message will be displayed in the Notification Center:

Deleting Role Code will also delete all associated Dept/Courses. Would you like to proceed?

Clicking Yes will result in data being removed from the Departments and Courses section associated with the role code.

Best Practice Recommendation: At least one group administrator and approver should be assigned for each attribute group code at all times to ensure correct routing of requests within the dashboard. When the need to replace users with these roles arises, add the replacement group administrator and/or approver before removing the users with those existing roles.

5. Create dashboard user records and assign roles in batch

The CAD User Load Process (ZSRCDUL) can create dashboard user records and/or add roles in batch. The process can be run for a term or for a population selection.

When running the process for a term, dashboard user records can be created for all active faculty for that term (based on active status, faculty indicator, and effective term on SIAINST). Use a population selection to create dashboard user records for campus staff who are not designated as faculty on SIAINST. Do not populate the Term Code parameter when using a population selection. The process can also add role codes to existing dashboard users.

To create dashboard user records without assigning a role code, enter A for Parameter 6 (Dashboard User Record Action) and N for Parameter 7 (User Role Action).

To assign role codes to existing dashboard users, enter N for Parameter 6 (Dashboard User Record Action) and Y for Parameter 7 (User Role Action). In Parameter 8 (Role Code to Process), enter the role code to be assigned to the users.

If no preferred email address exists for ID number, ZSRCDUL will not process the record create a user record or assign a role for that ID.

Always run the process in audit mode and review the .lis file prior to running the process in update mode.

The process generates .lis and .log files. The .lis file contains a listing of records processed and the .log file contains processing logic details for technical troubleshooting purposes.

Parameters for ZSRCDUL

No	Name	Required?	Description/Instructions	Default Values
01	Term Code	N	Enter term code.	
02	Application Code	N	Enter if using population selection.	
03	Selection Identifier	N	Enter if using population selection.	
04	Creator ID	N	The Creator ID of the sub-population, if applicable.	
05	User ID	N	The User ID of the sub-population, if applicable	
06	Dashboard User Record Action	Y	(A)dd user to dashboard; (N)o change to user record.	

07	User Role Action	Y	(A)dd role to user; (N)o change to role	
08	Role Code to Process	N	Enter course attribute role code to be assigned to the user.	
09	Run Mode	Y	(A)udit mode or (U)pdate mode	A

The following messages may be displayed in the Message column of .lis file:

- Dashboard User record will be inserted
- Dashboard User record inserted
- Dashboard User record already exists
- User Role record will be inserted
- User Role record inserted
- User Role record already exists
- Cannot create Role for User - No Dashboard User record exist
- No preferred email address – not processed
- Error inserting Dashboard User record
- Error inserting User Role record

In addition, the following errors may be generated in the .lis file if ZSRC DUL is unable to identify eligible ID's to process.

- Population Selection was Empty
- Parameter Error: When POPSEL selected, all 4 POPSEL values required
- No active faculty identified for processing

Sample .lis file

ID	NAME	MESSAGE
07-JUL-2021 15:13:59	ITS UNIVERSITY	PAGE: 1
	Course Attribute Dashboard User Load Process	ZSRCDUL 9.18
900055178	Bishop, Astrid	Dashboard User record inserted User Role record inserted
900039681	Bishop, Charlie	Dashboard User record inserted User Role record inserted
900131517	Bishop, Ella	No preferred email address - not processed
900145902	Bishop, Lincoln	Dashboard User record already exists User Role record already exists
900158970	Bishop, Olivia	Dashboard User record inserted User Role record inserted
900130657	Bishop, Sebastian	Dashboard User record inserted User Role record inserted
* * * REPORT CONTROL INFORMATION * * *		
TERM CODE:		
APPLICATION CODE:	STUDENT	
SELECTION IDENTIFIER:	CADPOPSL	
CREATOR ID:	CTAYLOR	
USER ID:	CTAYLOR	
DASHBOARD USER RECORD ACTION:	A	
USER ROLE ACTION:	A	
ROLE CODE TO PROCESS:	NOLOWMNTAIN	
RUN MODE	U	
LINE LIMIT:	55	
RECORDS PROCESSED:	6	
DASHBOARD USER RECORD COUNT:	4	
USER ROLE COUNT:	4	
USER RECORDS NOT LOADED:	0	
ROLE RECORDS NOT LOADED:	2	
RECORDS NOT PROCESSED:	1	

6. Specify the user's course access

For each dashboard user, whether the dashboard user record and/or role were assigned individually via ZSACADA or in batch via ZSRCDUL, the department and course records must be updated manually on ZSACADA > Departments and Courses section.

Department and course access is specific to each role code assigned to the dashboard user. If the dashboard user has more than one role code in the Assigned Role section, confirm that the correct assigned role is selected before going to the Departments and Courses section.

The Faculty View Assigned Courses Only radio button defaults to No. To allow the dashboard user to access all courses for which they are an assigned instructor, set the radio button to Yes and save the record.

To allow a dashboard user access to all courses for a department or specific courses, leave the Faculty View Assigned Courses Only radio button set to No and enter the specific department and/or course information.

The following scenarios can be established in the Departments and Courses section:

- To indicate the user can only access courses to which they are assigned as an instructor, set the Faculty View Assigned Courses Only radio button to Yes. No department or course specific entries are required.
- To indicate the user can access any course associated with a specific department, set the Faculty View Assigned Courses Only radio button to No and populate the Department Code field.
- To indicate the user can only access courses for a specific department to which the user is an assigned instructor, set the Faculty View Assigned Courses Only radio button to No, populate the Department Code field, and check the Assigned Courses Only indicator.
- To indicate the user can access a specific course, set the Faculty View Assigned Courses Only radio button to No and populate the Subject and Course Range Low fields.
- To indicate the user can access a specific course for which the user is an assigned instructor, set the Faculty View Assigned Courses Only radio button to No and populate the Subject and Course Range Low fields. Check the Assigned Courses Only indicator.
- To indicate the user can access a range of courses, set the Faculty View Assigned Courses Only radio button to No and populate the Subject, Course Range Low, and Course Range High fields.
- To indicate the user can access a range of courses to which the user is an assigned instructor, set the Faculty View Assigned Courses Only radio button to No, populate the Subject, Course Range Low, Course Range High fields, and check the Assigned Courses Only indicator.

ellucian Course Attribute Dashboard Administration ZSACADA 9.18

ADD RETRIEVE RELATED TOOLS

Attribute Groups **User Roles and Assignments**

DASHBOARD USERS Insert Delete Copy Filter

ID *	NAME *	Email Address
900161254	Barry White	bwhite@u.edu
900123780	Walter Bishop	wbishop@u.edu
900150958	Peter Bishop	pbishop@u.edu
900039570	Jamie Jensen	No Preferred Email Address
900076676	Jane Austen	jausten@u.edu

Record 5 of 18

ASSIGNED ROLE Insert Delete Copy Filter

Role Code *	Description *	Global Administr...	Group Administr...	Approver *	Maintainer *	Reviewer *
NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Record 1 of 1

DEPARTMENTS AND COURSES Insert Delete Copy Filter

Faculty View Yes No

Assigned Courses Only

Department Code	Description *	Subject	Description *	Course Range Low	Course Range High	Assigned Courses Only
BIOL	Biology					<input type="checkbox"/>
CHEM	Chemistry					<input checked="" type="checkbox"/>
		BCHM	Biochemistry	1001	1022	<input type="checkbox"/>
		BOTN	Botany	1005		<input checked="" type="checkbox"/>

Record 4 of 4

ATTRIBUTE CODES AND GROUP ASSIGNMENTS Insert Delete Copy Filter

SAVE

Be aware that deleting an assigned role for the dashboard user or changing the Faculty View Assigned Courses Only radio button will delete any associated records in the Departments and Courses section.

When changing the Faculty View Assigned Courses Only radio button from No to Yes and clicking Save, the following message will be displayed in the Notification Center:

Changing value to Yes will delete all Department and Courses records. Would you like to proceed?

Clicking Yes will result in data being removed from the Departments and Courses section associated with the role code.

7. Review attribute codes and group assignments per user

The ZSACADA > User Roles and Assignments tab > Attribute Codes and Group Assignments section displays the attribute codes available to be used by the dashboard user. This section also identifies the attribute group the attribute codes are associated with. The information in this section is based on the user's assigned roles. This section is display only.

Course Attribute Dashboard Administration ZSACADA 9.18						
Attribute Groups		User Roles and Assignments				
DASHBOARD USERS						
ID *	NAME *	Email Address				
900161254	Barry White	bwhite@u.edu				
900123780	Walter Bishop	wbishop@u.edu				
900150958	Peter Bishop	pbishop@u.edu				
900039570	Jamie Jensen	No Preferred Email Address				
900076676	Jane Austen	jausten@u.edu				
1 of 4						Record 5 of 18
ASSIGNED ROLE						
Role Code *	Description *	Global Administr...	Group Administr...	Approver *	Maintainer *	Reviewer *
NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1 of 1						Record 1 of 1
DEPARTMENTS AND COURSES						
ATTRIBUTE CODES AND GROUP ASSIGNMENTS						
Attrib... Code *	Description *	Attribute Group Code *	Description *			
ZLCM	Low-cost:\$40 or under req cost	NO_LOW	No-Cost & Low-Cost Course Materials			
ZNCM	No-cost: \$0 required costs	NO_LOW	No-Cost & Low-Cost Course Materials			
1 of 1						Record 1 of 2
						SAVE

8. Review dashboard processing per attribute group and role

The ZSACADA > Attribute Groups tab > Dashboard Processing section displays the dashboard users who are assigned a role attached to the attribute group. This section is display only.

On ZSACADA > Attribute Groups tab > Attribute Group Code section, select an attribute group code, then select a role code in the Attribute Roles Attached to Attribute Group section. The Dashboard Processing section will display the dashboard users with this role code, including ID, name, role code, role description, and email address.

An email address is required for the user to receive communications based on dashboard activity. If the message “No Preferred Email Address” is displayed in the Email Address field, follow institutional business practices to add an email address on GOAEMAL with the Preferred indicator checked.

Attribute Groups							User Roles and Assignments				
ATTRIBUTE GROUP Insert Delete Copy Filter											
Attribute Group Code *	Description										
HIP	High Impact Practices										
HISTORY	History Attribute Group										
NO_LOW	No-Cost & Low-Cost Course Materials										
ROLEA	RoleA Group										
STUDYABR	Study Abroad										
											Record 3 of 6
ATTRIBUTE ROLES ATTACHED TO ATTRIBUTE GROUP Insert Delete Copy Filter											
Role Code	Description *	Global Administrat...	Group Administrat...	Approver *	Maintainer *	Reviewer *					
NOLOWADMIN	No-Cost & Low-Cost Group Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
NOLOWAPPRV	No-Cost & Low-Cost Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
NOLOWMNTAIN ...	No-Cost & Low-Cost Maintainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
NOLOWREVIEW	No-Cost & Low-Cost Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
											Record 3 of 4
ATTRIBUTE CODES Insert Delete Copy Filter											
DASHBOARD PROCESSING Insert Delete Copy Filter											
Functional Role	ID *	NAME *	Role Code *	Role Description *	Email Address *						
Maintainer	900055178	Astrid Bishop	NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	abishop@u.edu						
Maintainer	900161254	Barry White	NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	bwhite@u.edu						
Maintainer	900039681	Charlie Bishop	NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	cbishop@u.edu						
Maintainer	900106710	Cindy Sanderson	NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	No Preferred Email Address						
Maintainer	900161277	Gil Grissom	NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	ggrissom@u.edu						
											Record 1 of 11
											SAVE

9. Review established dashboard rules

The CAD Admin Report (ZSRCAR) generates a report of existing attribute group codes, attribute codes associated with the attribute group, user roles attached to the attribute group, and users with the assigned roles. This report provides an easy way to review the rules established on ZSACADA.

The process generates .lis and .log files. The .lis file contains a listing of records processed and the .log file contains processing logic details for technical troubleshooting purposes.

The .lis file is divided into two sections:

- ATTRIBUTE GROUP AND ATTRIBUTE CODES
- ATTRIBUTE GROUP AND USER ROLES

The ATTRIBUTE GROUP AND ATTRIBUTE CODES section displays the attribute group code, attribute group description, all attribute codes in the group, and attribute description. If an attribute group code exists without attribute codes attached, the message No Attribute Codes will display.

The ATTRIBUTE GROUP AND USER ROLES section displays the attribute group code, user role code, user role description, assigned user ID, and user name. If no role codes or users are associated with the attribute group, the messages No Role Codes or No Users will be displayed.

Parameters for ZSRC DAR

No	Name	Required?	Description/Instructions	Default Values
01	Attribute Group Code	N	Enter attribute group code to report; blank for all.	
02	User Role Code	N	Enter user role code to report; blank for all.	
03	Attribute Code	N	Enter attribute code to report; blank for all.	
04	Include Assigned Users?	Y	(N)o; (Y)es to print assigned users	

To generate a list of all existing ZSACADA records, use the following parameter combination:

- Parameter 01 = Blank
- Parameter 02 = Blank
- Parameter 03 = Blank
- Parameter 04 = Y

To generate a list of all roles and attribute codes associated with an attribute group code, use the following parameter combination:

- Parameter 01 = Enter attribute group code
- Parameter 02 = Blank
- Parameter 03 = Blank
- Parameter 04 = N

To generate a list of all attribute group codes and attribute codes associated with a role code, use the following parameter combination:

- Parameter 01 = Blank
- Parameter 02 = Enter role code
- Parameter 03 = Blank
- Parameter 04 = N

To generate a list of all attribute group codes and role codes associated with an attribute code, use the following parameter combination:

Parameter 01 = Blank

Parameter 02 = Blank

Parameter 03 = Enter attribute code

Parameter 04 = N

If no data on ZSACADA matches the parameter values, the following message displays in the .lis file: No data found that matches your selection criteria

Sample .lis file

07-JUL-2021 15:18:50	ITS UNIVERSITY	PAGE:	1
	Course Attribute Dashboard Admin Report	ZSRCAR 9.18	
* ATTRIBUTE GROUP AND ATTRIBUTE CODES *			
ATTRIBUTE GROUP CODE	DESCRIPTION	ATTRIBUTE CODE	DESCRIPTION
NO_LOW	No-Cost & Low-Cost Course Materials	ZLCM	Low-cost:\$40 or under req cost
		ZNCM	No-cost: \$0 required costs
* ATTRIBUTE GROUP AND USER ROLES *			
ATTRIBUTE GROUP CODE	USER ROLE CODE	DESCRIPTION	ASSIGNED USER ID NAME
NO_LOW	NOLOWADMIN	No-Cost & Low-Cost Group Admin	900123780 Bishop, Walter
	NOLOWAPPRV	No-Cost & Low-Cost Approver	900161254 Ade, Lemon
	NOLOWMNTAIN	No-Cost & Low-Cost Maintainer	900123780 Bishop, Walter
			900161254 Ade, Lemon
			900039681 Bishop, Charlie
			900055178 Bishop, Astrid
			900059033 Bishop, Nina
			900076676 Austen, Jane
			900098984 Card, Orson Scott
			900123780 Bishop, Walter
			900130657 Bishop, Sebastian
			900145902 Bishop, Lincoln
			900150958 Bishop, Peter
			900158970 Bishop, Olivia
	NOLOWREVIEW	No-Cost & Low-Cost Reviewer	900161254 Ade, Lemon
			900098984 Card, Orson Scott
			900150958 Bishop, Peter
* * * REPORT CONTROL INFORMATION * * *			
ATTRIBUTE GROUP CODE:	NO_LOW		
USER ROLE CODE:			
ATTRIBUTE CODE:			
INCLUDE ASSIGNED USERS?:	Y		
LINE LIMIT:	55		

Using the Dashboard as a Reviewer

A dashboard user with a Reviewer role has view-only access to courses based on ZSACADA rules. This role is intended for any faculty or staff who should be able to view course attributes for course sections but cannot request changes to the existing attributes. The reviewer role allows the user to access courses in the Courses to Review section of the dashboard Course List page.

As a Reviewer, the dashboard user selects a term to process, selects courses to view, and reviews the course details and current course attributes.

NOTE: The Self-Service pages of the Course Attribute Dashboard were delivered as Banner 8.x functionality. The entry point to the dashboard will be a “Course Attribute Dashboard” link added to the bottom of the Faculty and Advisors menu (bmenu.P_FacMainMnu). Institutions may relocate this link to a more appropriate position or add the link to the 9.x Self-Service page.

1. Select term to process

Log into Banner Self-Service and access the Course Attribute Dashboard.

On the Course Attribute Dashboard - Select a Term page, select a term to process. The dropdown term list will only display current or future terms. This list identifies terms to display based on term start and end dates on Term Code Validation page (STVTERM) and today’s date.

Click Submit to see the Course Attribute Dashboard - Course List page.

Course Attribute Dashboard - Select a Term

Use the Course Attribute Dashboard to view existing course attributes, request updates, and/or approve requests based on your dashboard role. Refer to {website hyperlink} and institutional practices for assigning attributes.

Select a term to proceed.

Select a Term: ▼

2. View course list and select course(s) to review

Links at the top of the Course Attribute Dashboard - Course List page will allow you to jump to the page sections:

- Courses to Review
- Courses to Maintain
- Courses to Approve

A Return to Top of Page link is located at the bottom of each page section.

The term selected is displayed at the top of the page. The Select a Different Term button will take you back to the Course Attribute Dashboard - Select a Term page.

The message “No courses to review” may be displayed in the Courses to Review section if no courses are available to review.

Course Attribute Dashboard - Course List

[Go to Courses to Review](#)
 [Go to Courses to Maintain](#)
 [Go to Courses to Approve](#)

TERM: Summer 2021 (202105)

Courses to Review
 Select course(s) to review.

Select Course:	CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Attribute Code/Desc
- No courses to review -								

[Return to Top of Page](#)

The following information will be displayed for available courses:

- CRN
- Section Number
- Subject
- Course Number
- Title
- Department Code
- Department Description
- Attribute Code/Description

Check the Select Course box next to courses to review.

Course Attribute Dashboard - Course List

[Go to Courses to Review](#)
[Go to Courses to Maintain](#)
[Go to Courses to Approve](#)

TERM: Fall 2021 (202108)

Select a Different Term

Courses to Review

Select course(s) to review.

Select Course:	CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Attribute Code/Desc
<input type="checkbox"/>	80239	01	ENGL	1101	English Composition I	ENGL	English	ZLCM Low-cost: \$40 or under req cost
<input checked="" type="checkbox"/>	80240	02	ENGL	1101	English Composition I	ENGL	English	No attributes
<input type="checkbox"/>	80241	04	ENGL	1101	English Composition I	ENGL	English	ZNCM No-cost: \$0 required costs

Click the Review Courses button located at the bottom of the Courses to Review section.

<input type="checkbox"/>	82811	85G	ENGL	1102	English Composition II	ENGL	English	ECOR E-Core
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Review Courses

[Return to Top of Page](#)

3. View selected courses

The Course Attribute Dashboard - Reviewer - Selected Courses page will be displayed. The term selected is displayed at the top of the page.

The selected courses will be displayed with the same format and content as the previous page.

Click the Return to Course List button to return to Course Attribute Dashboard - Course List page or click Select a Different Term button to return to the Course Attribute Dashboard - Select a Term page.

Course Attribute Dashboard - Reviewer - Selected Courses

TERM: Fall 2021 (202108)

The current course section attributes are displayed.
Refer to {website hyperlink} and institutional practices for assigning attributes.

Selected Courses:

CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Attribute Code/Desc
80240	02	ENGL	1101	English Composition I	ENGL	English	No attributes

[Return to Course List](#)

[Select a Different Term](#)

Using the Dashboard as a Maintainer

A dashboard user with a Maintainer role has access to courses based on ZSACADA rules. This role is for faculty and staff who will request that attribute codes are added or removed for course sections. The maintainer role allows the user to access courses in the Courses to Maintain section of the dashboard Course List page.

As a Maintainer, the dashboard user selects a term to process and selects courses to view. The user reviews the course details and current course attributes, then selects one or more attributes to add or delete for the selected courses. The dashboard will display verification of the requested changes, email this information to the Maintainer and to the Approvers for the attribute group associated with the requested changes. Upon completion of the requests by an Approver, the Maintainer will receive emails indicating if the request was approved, denied, or sent back for further action.

NOTE: The Self-Service pages of the Course Attribute Dashboard were delivered as Banner 8.x functionality. The entry point to the dashboard will be a “Course Attribute Dashboard” link added to the bottom of the Faculty and Advisors menu (bmenu.P_FacMainMnu). Institutions may relocate this link to a more appropriate position or add the link to the 9.x Self-Service page.

1. Select term to process

Log into Banner Self-Service and access the Course Attribute Dashboard.

On the Course Attribute Dashboard - Select a Term page, select a term to process. The dropdown term list will only display current or future terms.

Click Submit to see the Course Attribute Dashboard - Course List page.

Course Attribute Dashboard - Select a Term

Use the Course Attribute Dashboard to view existing course attributes, request updates, and/or approve requests based on your dashboard role. Refer to {website hyperlink} and institutional practices for assigning attributes.

Select a term to proceed.

Select a Term: ▼

2. View course list and select course(s) to maintain

Links at the top of the Course Attribute Dashboard - Course List page will allow you to jump to the page sections:

- Courses to Review
- Courses to Maintain
- Courses to Approve

A Return to Top of Page link is located at the bottom of each page section.

The term selected is displayed at the top of the page. The Select a Different Term button will take you back to the Course Attribute Dashboard - Select a Term page.

Course Attribute Dashboard - Course List

[Go to Courses to Review](#)
 [Go to Courses to Maintain](#)
 [Go to Courses to Approve](#)

TERM: Summer 2021 (202105)

The message “No courses to maintain” may be displayed in the Courses to Maintain section if no courses are available to maintain.

Courses to Maintain

Select course(s) to proceed.
 If selecting multiple course sections, only select sections that require the same batch action (i.e. add specific attribute, delete specific attribute).

Select Course:	Role Code	CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Attribute Code/Desc
- No courses to maintain -									

[Return to Top of Page](#)

The following information will be displayed for available courses:

- Role Code
- CRN
- Section Number
- Subject
- Course Number
- Title
- Department Code
- Department Description
- Attribute Code/Description

Check the Select Course box next to courses to maintain.

The course list is grouped by role code. Only select courses with the same role code. The role code controls which attribute codes are available for use.

When selecting multiple course sections, be aware that the same batch action will be taken for all selected sections (i.e. add attribute, delete attribute).

Courses to Maintain
 Select course(s) to proceed.
 If selecting multiple course sections, only select sections that require the same batch action (i.e. add specific attribute, delete specific attribute).

Select Course:	Role Code	CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Attribute Code/Desc
<input checked="" type="checkbox"/>	NOLOWMNTAIN	80613	18	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ESSC Area E Social Science
<input checked="" type="checkbox"/>	NOLOWMNTAIN	81308	15	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ESSC Area E Social Science
<input checked="" type="checkbox"/>	NOLOWMNTAIN	81783	04	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ESSC Area E Social Science

Click the Maintain Courses button located at the bottom of the Courses to Maintain section.

<input type="checkbox"/>	SB_MAINTAIN	82894	81G	SPAN	2002	Intermediate Spanish II	SPAN	Spanish	CFAP Area C Fine Arts ECOR E-Core FPFL Area F Psychology Foreign Lang
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[Return to Top of Page](#)

NOTE: If the Maintainer has multiple role codes with the Maintainer indicator checked, multiple rows may be displayed for each CRN with a different Role Code for each. Only select courses with the same role code. This ensures that the appropriate list of attribute codes is available. If courses with different role codes are selected the following message will appear on the Course Attribute Dashboard - Maintainer - Selected Courses page: "You cannot assign attributes to courses with multiple ROLE CODE values. Please return to the course list and select only courses with the same ROLE CODE."

3. Select attributes to Add or Delete

The Course Attribute Dashboard - Maintainer - Selected Courses page will be displayed. The term selected is displayed at the top of the page.

The selected courses will be displayed with the same format and content as the previous page.

If you choose not to request attribute changes at this time, click the Return to Course List button to return to Course Attribute Dashboard - Course List page or click Select a Different Term button to return to the Course Attribute Dashboard - Select a Term page.

Select one or more codes (hold Shift or Ctrl button on keyboard and click the desired codes) in the Attribute Codes box and click either the Add or Delete button.

Course Attribute Dashboard - Maintainer - Selected Courses

TERM: Fall 2021 (202108)

The current course section attributes are displayed.
Refer to {website hyperlink} and institutional practices for assigning attributes.

Selected Courses:

Role Code	CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Attribute Code/Desc
NOLOWMNTAIN	80613	18	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ESSC Area E Social Science
NOLOWMNTAIN	81308	15	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ESSC Area E Social Science
NOLOWMNTAIN	81783	04	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ESSC Area E Social Science

Available Attribute Codes to Add or Delete:

Attribute Codes:

ZLCM Low-cost: \$40 or under req cost ^

ZNCM No-cost: \$0 required costs

ADD DELETE

Return to Course List

Select a Different Term

When attempting to delete an attribute code that does not currently exist for the course, the overall message "Could not delete selected attributes for any of the selected courses" may be displayed. In addition, the Message column for the impacted course will display "Attribute code does not exist for CRN. Request not submitted."

Course Attribute Dashboard - Maintainer - Requested Attribute Submission Verification

TERM: Fall 2021 (202108)

The following requested course section attribute change has been successfully submitted.

Batch Number: 59

Selected Courses:

CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Add/Delete	Attribute Code/Desc	Message
81449	45	ENGL	1101	English Composition I	ENGL	English	DELETE	ZNCM No-cost: \$0 required costs	Attribute code does not exist for CRN. Request not submitted.

***** COULD NOT DELETE SELECTED ATTRIBUTES FOR ANY OF THE SELECTED COURSES *****

[Return to Selected Courses](#)

[Return to Course List](#)

[Select a Different Term](#)

When attempting to add an attribute code that already exists for the course, the overall message “*** Could not add selected attributes for any of the selected courses***” may be displayed. In addition, the Message column for the impacted course will display “Attribute code already exists for CRN. Request not submitted.”

Course Attribute Dashboard - Maintainer - Requested Attribute Submission Verification

TERM: Fall 2021 (202108)

The following requested course section attribute change has been successfully submitted.

Batch Number: 59

Selected Courses:

CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Add/Delete	Attribute Code/Desc	Message
81449	45	ENGL	1101	English Composition I	ENGL	English	ADD	ZLCM Low-cost:\$40 or under req cost	Attribute code already exists for CRN. Request not submitted.

***** COULD NOT ADD SELECTED ATTRIBUTES FOR ANY OF THE SELECTED COURSES *****

[Return to Selected Courses](#)

[Return to Course List](#)

[Select a Different Term](#)

4. View submission verification

The Maintainer View – Requested Attribute Submission Verification page will display. This page will include a batch number, details about the selected courses and requested change.

NOTE: The requests submitted and displayed together on this page are considered to be a single batch. Awareness of the requests contained in a batch is important related to emails generated by the approval process. To reduce the number of emails received, messages related to approving, denying, and sending back requests are only generated when all requests in a batch have been completed by an Approver.

Course Attribute Dashboard - Maintainer - Requested Attribute Submission Verification

TERM: Fall 2021 (202108)

The following requested course section attribute change has been successfully submitted.

Batch Number: 59

Selected Courses:

CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Add/Delete	Attribute Code/Desc	Message
80613	18	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	
81308	15	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	
81783	04	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	

This request will be routed to the next step for processing.

Name	Role Code	Role Description	Email Address
Jane Austen	NOLOWAPPRV	No-Cost & Low-Cost Approver	jausten@u.edu
Walter Bishop	NOLOWAPPRV	No-Cost & Low-Cost Approver	wbishop@u.edu

This request is being processed as part of the following attribute group:

Attribute Group Code	Description
NO_LOW	No-Cost & Low-Cost Course Materials

Group Administrators	Email Address
Barry White	bwhite@u.edu
Walter Bishop	wbishop@u.edu

[Return to Selected Courses](#)

[Return to Course List](#)

[Select a Different Term](#)

If these GTVSDAX rules for Group COURSEATTRDASHBOARD are not updated, the following message will be displayed on the Maintainer - Requested Attribute Submission Verification page:

ERROR: GTVSDAX values not defined ... cannot send emails. Please report this to your system administrator.

If an incorrect or invalid email server hostname is entered for the CADSERVER rule on GTVSDAX, the following message will be displayed on the Maintainer - Requested Attribute Submission Verification page and Approver - Verification List page of the dashboard:

*** EMAIL ERROR ... cannot send emails.

*** CONNECTION ERROR: Reply = ###, Service not available

*** Please report this to your system administrator.

5. Check for emails

Submitting a request to add or delete attribute codes will trigger an email with the subject “Course Attribute Dashboard Submission Verification”. The message will contain the same information that is displayed on the Maintainer View – Requested Attribute Submission Verification page. This message will be sent to the dashboard user’s preferred email address.

From: noreply@u.edu <Course Attribute Dashboard>
Sent: Tuesday, August 31, 2021 3:14 PM
To: pbishop@u.edu <Peter Bishop>
Subject: Course Attribute Dashboard Submission Verification

Peter Bishop,

You submitted a request for the following attribute updates:

TERM: Fall 2021 (202108)

Batch Number: 59

CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Add/Delete	Attribute Code/Desc	Message
80613	18	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	
81308	15	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	
81783	04	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	

This request will be routed to the next step for processing.

Name	Role Code	Role Description	Email Address
Jane Austen	NOLOWAPPRV	No-Cost & Low-Cost Approver	jausten@u.edu
Walter Bishop	NOLOWAPPRV	No-Cost & Low-Cost Approver	wbishop@u.edu

This request is being processed as part of the following attribute group:

Attribute Group Code	Description
NO_LOW	No-Cost & Low-Cost Course Materials

Group Administrators	Email Address
Barry White	bwhite@u.edu
Walter Bishop	wbishop@u.edu

When an Approver reviews and completes all requests for a single batch, one or more of the following emails may be received:

- Course Attribute Dashboard Request Approved
- Course Attribute Dashboard Request Denied
- Course Attribute Dashboard Request Sent Back

Below is an example of the denial email:

From: noreply@u.edu <Course Attribute Dashboard>													
Sent: Monday, August 30, 2021 2:29 PM													
To: pbishop@u.edu <Peter Bishop>													
Subject: Course Attribute Dashboard Request Denied													
Peter Bishop,													
The following attribute update request(s) have been Denied													
TERM: Fall 2021 (202108)													
Action	Comment	Date Processed	CRN	Sect	Subj	Course Number	Title	Dept Code	Department Description	Add/Delete	Attribute Code/Desc	Maintainer Name	Batch Number
Denied	Not approved for this section	30-AUG-2021	80371	19	POLS	1101	American Government	POLS	Political Science	ADD	ZSAW Study Away	Peter Bishop	56

Using the Dashboard as an Approver

A dashboard user with an Approver role has access to courses based on ZSACADA rules. This role has the ability to approve requested attribute changes for the attribute group to which the role is assigned. The approver role allows the user to access courses in the Courses to Approve section of the dashboard Course List page.

As an Approver, the dashboard user selects a term to process and selects requests to approve, deny, or send back for further action. The Approver is required to enter a comment if denying or sending a request back. The dashboard will display verification of the actions and email this information to the Approver and to the Maintainer who requested the changes upon completion of the requests.

NOTE: The Self-Service pages of the Course Attribute Dashboard were delivered as Banner 8.x functionality. The entry point to the dashboard will be a “Course Attribute Dashboard” link added to the bottom of the Faculty and Advisors menu (bmenu.P_FacMainMnu). Institutions may relocate this link to a more appropriate position or add the link to the 9.x Self-Service page.

1. Check for “Ready to Review” email

When requests are submitted, the Approver(s) for the attribute group will receive an email with the subject “Course Attribute Dashboard Ready to Review”. This message will contain basic details about the request.

From: noreply@u.edu <Course Attribute Dashboard>
Sent: Tuesday, August 31, 2021 3:14 PM
To: wbishop@u.edu <Walter Bishop>
Subject: Course Attribute Dashboard Ready to Review

Walter Bishop,

A course attribute update request is ready for you to review:

TERM: Fall 2021 (202108)

Batch Number: 59

CRN	Section	Subject	Course Number	Title	Department Code	Department Description	Add/Delete	Attribute Code/Desc	Message
80613	18	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	
81308	15	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	
81783	04	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	

This request will be routed to the next step for processing.

Name	Role Code	Role Description	Email Address
Jane Austen	NOLOWAPPRV	No-Cost & Low-Cost Approver	jausten@u.edu
Walter Bishop	NOLOWAPPRV	No-Cost & Low-Cost Approver	wbishop@u.edu

This request is being processed as part of the following attribute group:

Attribute Group Code	Description
NO_LOW	No-Cost & Low-Cost Course Materials

Group Administrators	Email Address
Barry White	bwhite@u.edu
Walter Bishop	wbishop@u.edu

2. Select term to process

Log into Banner Self-Service and access the Course Attribute Dashboard.

On the Course Attribute Dashboard - Select a Term page, select a term to process. The dropdown term list will only display current or future terms.

Click Submit to see the Course Attribute Dashboard - Course List page.

Course Attribute Dashboard - Select a Term

Use the Course Attribute Dashboard to view existing course attributes, request updates, and/or approve requests based on your dashboard role.

Refer to {website hyperlink} and institutional practices for assigning attributes.

Select a term to proceed.

Select a Term: ▼

3. View course list and select course(s) to Approve, Deny, or Send Back

Links at the top of the Course Attribute Dashboard - Course List page will allow you to jump to the page sections:

- Courses to Review
- Courses to Maintain
- Courses to Approve

A Return to Top of Page link is located at the bottom of each page section.

The term selected is displayed at the top of the page. The Select a Different Term button will take you back to the Course Attribute Dashboard - Select a Term page.

Course Attribute Dashboard - Course List

[Go to Courses to Review](#)
 [Go to Courses to Maintain](#)
 [Go to Courses to Approve](#)

TERM: Summer 2021 (202105)

The message “No courses to approve” may be displayed in the Courses to Approve section if no courses are available to approve.

NOTE: For attribute groups that include multiple users with an Approver role, all available requests will be displayed to each approver. A request is considered completed (approved, denied, or sent back) if at least one approver updates the request. The request will be removed from the Courses to Approve list for all approvers.

Courses to Approve

Refer to {website hyperlink} and institutional practices for assigning attributes.
 Select requests to approve, deny or send back. Current attributes for the course are available via the information icon. When using the Deny or Send Back options, the Comment field must be populated.
 NOTE: Email notifications will generate only if all requests for a CRN/Maintainer/date requested are processed.

Select Course:	CRN	Sect	Subj	Course #	Title	Dept Code	Department Description	Add/Delete	Attribute Code/Desc	Maintainer Name	Date Requested	Batch Number
- No courses to approve -												

[Return to Top of Page](#)

The following information will be displayed for available courses:


- CRN
- Section Number
- Subject

- Course Number
- Title
- Information Icon (hover text displays current attributes)
- Department Code
- Department Description
- Add/Delete
- Attribute Code/Description
- Maintainer Name
- Date Requested
- Batch Number

Check the Select Course box next to courses to process.

When selecting multiple course sections, be aware that the same batch action will be taken for all selected sections (i.e. approve request, deny request).




Hover the cursor over the information icon displays the current attributes associated with the course.

<input type="checkbox"/>	81783 04	ANTH 1102	Intro to Anthropology - INTL		ANTH Anthropology	ADD	ZNCM No-cost: \$0 required costs	Peter Bishop	31-AUG-2021	59
Current Attributes: ZLCM Low-cost:\$40 or under req cost										

Click the Approve, Deny, or Send Back button located at the bottom of the Courses to Approve section.

Courses to Approve

Refer to [website hyperlink](#) and institutional practices for assigning attributes. Select requests to approve, deny or send back. Current attributes for the course are available via the information icon. When using the Deny or Send Back options, the Comment field must be populated.
NOTE: Email notifications will generate only if all requests for a CRN/Maintainer/date requested are processed.

Select Course:	CRN	Sect	Subj	Course #	Title	Dept Code	Department Description	Add/Delete	Attribute Code/Desc	Maintainer Name	Date Requested	Batch Number
<input checked="" type="checkbox"/>	80613 18	ANTH	1102		Intro to Anthropology - INTL	 ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	Peter Bishop	31-AUG-2021	59
<input type="checkbox"/>	81308 15	ANTH	1102		Intro to Anthropology - INTL	 ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	Peter Bishop	31-AUG-2021	59
<input type="checkbox"/>	81783 04	ANTH	1102		Intro to Anthropology - INTL	 ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	Peter Bishop	31-AUG-2021	59

[Return to Top of Page](#)

4. Enter comments

The selected courses will display on the Course Attribute Dashboard - Approver - Selected Courses page. No comments are required when approving requests, but comments are required to deny or send back a request. Depending on the action to be taken, one of the following messages will be displayed:

- OPTIONAL: Provide comments for course attribute requests when selecting Approve
- REQUIRED: Please provide comments for ALL course attribute requests when selecting Deny
- REQUIRED: Please provide comments for ALL course attribute requests when selecting Send Back

Populate the Comment field as appropriate (up to 2000 characters) and click the Submit button.

Course Attribute Dashboard - Approver - Selected Courses

TERM: Fall 2021 (202108)

REQUIRED: Please provide comments for ALL course attribute requests when selecting Deny

CRN	Sect	Subj	Course #	Title	Dept Code	Department Description	Add/Delete	Attribute Code/Desc	Maintainer Name	Date Requested	Batch Number	Comment
80613	18	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	Peter Bishop	01-SEP-2021	61	Incorrect attribute

Submit

Return to Course List

Select a Different Term

If comments are not entered when denying or sending back a request, clicking the Submit button will result in a red Stop icon appearing to the left of the Comment field. The request cannot be submitted until the Comment field is populated.

Personal Information Student **Faculty Services**

Search Go

Course Attribute Dashboard - Approver - Selected Courses

TERM: Fall 2021 (202108)

REQUIRED: Please provide comments for ALL course attribute requests when selecting Send Back

CRN	Sect	Subj	Course #	Title	Dept Code	Department Description	Add/Delete	Attribute Code/Desc	Maintainer Name	Date Requested	Batch Number	Comment
80405	05	SPAN	1001	Elementary Spanish I - INTL	SPAN	Spanish	ADD	ZSA1 Less than 2 weeks	Peter Bishop	09-JUL-2021	26	<input type="text"/>

Submit

Return to Course List

Select a Different Term

RELEASE: 8.68

5. View verification

The Course Attribute Dashboard - Approver - Verification List page will display.

The data shown on this page includes the request specific data, action taken, comment (if entered), and a message field. The Message field will display any errors that may have occurred when saving the record.

Course Attribute Dashboard - Approver - Verification List													
TERM: Fall 2021 (202108)													
The following requested course section attribute changes have been successfully processed.													
Action	Comment	Date Processed	CRN	Sect	Subj	Course Number	Title	Dept Code	Department Description	Add/Delete	Attribute Code/Desc	Maintainer Name	Message
Denied	Incorrect attribute	07-JUL-2021	80613	18	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	Peter Bishop	
<input type="button" value="Return to Course List"/>													
<input type="button" value="Select a Different Term"/>													

If these GTVSDAX rules for Group COURSEATTRDASHBOARD are not updated, the following message will be displayed on the Approver - Verification List page:

ERROR: GTVSDAX values not defined ... cannot send emails. Please report this to your system administrator.

If an incorrect or invalid email server hostname is entered for the CADSERVER rule on GTVSDAX, the following message will be displayed on the Maintainer - Requested Attribute Submission Verification page and Approver - Verification List page of the dashboard:

*** EMAIL ERROR ... cannot send emails.

*** CONNECTION ERROR: Reply = ###, Service not available

*** Please report this to your system administrator.

6. Check for “Verification” emails

The individual request is now considered complete, however, if other requests were submitted by the Maintainer at the same time, the batch of requests may not be complete. Emails are only generated after all requests in the batch are completed. Only the Approver who took action on the requests in the batch for the attribute group will receive an email.

Based on the action, the email will have one of the following subjects:

- Course Attribute Dashboard Approval Verification
- Course Attribute Dashboard Denial Verification
- Course Attribute Dashboard Sent Back Verification

Below is an example of the approval verification email:

From: noreply@u.edu <Course Attribute Dashboard>
Sent: Wednesday, September 1, 2021 9:19 AM
To: wbishop@u.edu <Walter Bishop>
Subject: Course Attribute Dashboard Approval Verification

Walter Bishop,

The following attribute update request(s) have been Approved

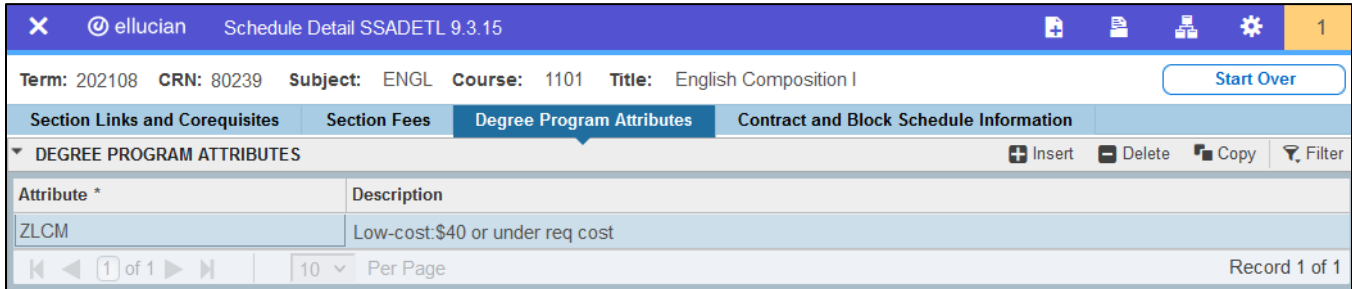
TERM: Fall 2021 (202108)

Action	Comment	Date Processed	CRN	Sect	Subj	Course Number	Title	Dept Code	Department Description	Add/Delete	Attribute Code/Desc	Maintainer Name	Batch Number
Approved		01-SEP-2021	81308	15	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	Peter Bishop	61
Approved		01-SEP-2021	81783	04	ANTH	1102	Intro to Anthropology - INTL	ANTH	Anthropology	ADD	ZNCM No-cost: \$0 required costs	Peter Bishop	61

Monitor Dashboard Activity

1. Verify course attribute updates

Any approved course attribute requests processed by the dashboard will result in attributes being added to or deleted from the Schedule Detail page (SSAETL) > Degree Program Attributes section > Attribute field. Verify that SSAETL was accurately updated.



The screenshot shows the 'Schedule Detail SSAETL 9.3.15' page. The 'Degree Program Attributes' tab is active, displaying a table with one attribute: ZLCM, described as 'Low-cost:\$40 or under req cost'. The page includes navigation controls like 'Start Over', 'Insert', 'Delete', 'Copy', and 'Filter', and pagination information showing 'Record 1 of 1'.

Attribute *	Description
ZLCM	Low-cost:\$40 or under req cost

2. Review in-progress or completed transactions

The CAD Transaction Report (ZSRCDTR) generates a report of in-progress or completed actions performed via the dashboard. The report uses transactional data (ZSTCADT table) to report in-progress records and the audit history data (ZSBCADH table) to report completed actions.

Based on the combination of parameters entered, the report can generate a variety of output including, but not limited to, the following:

- All in-progress actions for term
- All completed actions for term
- All in-progress and completed actions for term
- All in-progress actions for user
- All in-progress actions for user and attribute codes
- Approved actions for a user
- Denied actions for a date range

The process generates .lis and .log files. The .lis file contains a listing of records processed and the .log file contains processing logic details for technical troubleshooting purposes.

Parameters for ZSRCDTR

No	Name	Required?	Description/Instructions	Default Values
01	Term Code	Y	Enter term code.	
02	CRN	N	Enter CRN or leave blank to report all CRNs for term.	
03	Subject Code	N	Enter subject code.	
04	Course Number	N	Enter course number to report or leave blank to report all courses for subject.	
05	Department Code	N	Enter department code.	
06	Attribute Code	N	Enter attribute code(s) to report.	
07	Dashboard User ID	N	Enter ID to report.	
08	In-Progress Actions?	Y	Y to list in-progress actions; N to list completed actions	
09	Request Status	N	(A)pproved, (D)enied, (S)end Back or leave blank for all.	
10	Start Date	N	Enter earliest date to report. Format MM/DD/YYYY	
11	End Date	N	Enter latest date to report. Format MM/DD/YYYY	

Best Practice Recommendation: Run ZSRCDTR before changing a user's role or removing a dashboard user to identify any in-progress activity that may require completion prior to the role change or removal. If in-progress activity exists, the requests must be completed via the dashboard (approve, deny, or send back) prior to updating the user's record on ZSACADA.

Sample .lis file

07-JUL-2021 17:08:11		ITS UNIVERSITY				PAGE: 1				
FALL 2021		Course Attribute Dashboard Transaction Report				ZSRCDTR 9.18				
CRN	SUBJ	CRSE	SECT	DEPT	NAME	ADD/ DELETE	ATTR CODE	IN PROG	REQUEST STATUS	DATE
80295	FREN	1001	01	FREN	Bishop, Peter	ADD	ZSA1	N	SEND BACK	06-JUL-2021
80403	SPAN	1001	01	SPAN	Bishop, Peter	ADD	ZSAW	N	SEND BACK	06-JUL-2021
80406	SPAN	1002	02	SPAN	Bishop, Peter	ADD	ZSAW	N	DENY	06-JUL-2021
80613	ANTH	1102	18	ANTH	Bishop, Peter	ADD	ZLCM	N	APPROVE	07-JUL-2021
80613	ANTH	1102	18	ANTH	Bishop, Peter	ADD	ZNCM	N	APPROVE	07-JUL-2021
80613	ANTH	1102	18	ANTH	Bishop, Peter	ADD	ZLCM	N	APPROVE	07-JUL-2021
80613	ANTH	1102	18	ANTH	Bishop, Peter	ADD	ZNCM	N	DENY	07-JUL-2021
80613	ANTH	1102	18	ANTH	Bishop, Peter	ADD	ZLCM	N	APPROVE	07-JUL-2021
80613	ANTH	1102	18	ANTH	Bishop, Peter	ADD	ZLCM	N	APPROVE	07-JUL-2021
80646	FREN	1002	02	FREN	Bishop, Peter	ADD	ZSAW	N	SEND BACK	06-JUL-2021
80880	SPAN	2001	02	SPAN	Bishop, Peter	ADD	ZSAW	N	DENY	06-JUL-2021
81308	ANTH	1102	15	ANTH	Bishop, Peter	ADD	ZNCM	N	APPROVE	07-JUL-2021
81518	SPAN	2002	01	SPAN	Bishop, Peter	ADD	ZSAW	N	APPROVE	06-JUL-2021
81783	ANTH	1102	04	ANTH	Bishop, Peter	ADD	ZNCM	N	APPROVE	07-JUL-2021
* * * REPORT CONTROL INFORMATION * * *										
TERM CODE:		202108								
CRN:										
SUBJECT CODE:										
COURSE NUMBER:										
DEPARTMENT CODE:										
ATTRIBUTE CODE:										
DASHBOARD USER ID:		900150958								
IN-PROGRESS ACTIONS?:		N								
REQUEST STATUS										
START DATE:										
END DATE:										
LINE LIMIT:		55								
RECORD COUNT:		14								
CRN COUNT:		9								
IN-PROGRESS COUNT:		0								
APPROVED COUNT:		8								
DENIED COUNT:		3								
SEND BACK COUNT:		3								

3. Review and update dashboard user records as needed

Regularly review dashboard user records and update role assignments and course access on ZSACADA. As assigned courses and job duties change, the user records should be updated.

Before making any changes to ZSACADA data, run ZSRCDTR to identify any in-progress activity and complete the requests via the dashboard.

Run ZSRCDAR to review ZSACADA data.

- Verify attribute codes in attribute groups
- Verify roles assigned to users

At least one group administrator and approver should be assigned for each attribute group code at all times to ensure correct routing of requests within the dashboard. When the need to replace users with these roles arises, add the replacement group administrator and/or approver before removing the users with those existing roles.

Complete all in-progress activities and remove assigned roles prior to removing a dashboard user record from ZSACADA.

4. Review email activity

While there is no administrative Banner method of viewing email activity originating from the dashboard, campus technical staff can access CAD email data from the dashboard email table (ZSBCADE) for troubleshooting purposes. This table stores the following information:

- Batch ID
- Term Code
- User PIDM
- Action - (A)pprove, (D)eny, or (S)end Back
- Message Type Code
- Email Address
- Email Date

Below are the types of emails that can originate from the dashboard:

Recipient	Type	Type Code	Email Subject Line
Maintainer	Submission Verification	VERIFY	Course Attribute Dashboard Submission Verification
Maintainer	Approve	M_APRV	Course Attribute Dashboard Request Approved
Maintainer	Deny	M_DENY	Course Attribute Dashboard Request Denied
Maintainer	Send Back	M_BACK	Course Attribute Dashboard Request Sent Back
Approver	Ready to Review	REVIEW	Course Attribute Dashboard Ready to Review
Approver	Approve	A_APRV	Course Attribute Dashboard Approval Verification
Approver	Deny	A_DENY	Course Attribute Dashboard Denial Verification
Approver	Send Back	A_BACK	Course Attribute Dashboard Sent Back Verification

Appendix A: Document History

This section details the history of the document and updates made for each modification.

Release and Date	Page/Process	Page	Update Description
Georgia Enhancements 8.68 & 9.18 September 10, 2021	N/A	N/A	Original