Course Attribute Dashboard Workbook

Georgia Enhancements 8.68 and 9.18
Table of Contents

Course Attribute Dashboard Workbook.................................................................................................................. 1
   Purpose......................................................................................................................................................... 1
   Target Audience........................................................................................................................................ 1
   General Testing Instructions.................................................................................................................... 2
   More Information and Support .................................................................................................................. 2
   Resources.................................................................................................................................................. 2

Course Attribute Dashboard Process Flow ........................................................................................................... 3

Set Up Self-Service Banner .................................................................................................................................. 6
   1. Specify email server and sender email address for messages originating from dashboard activities ................................................................................................................. 6
      CADSERVER........................................................................................................................................ 7
      CADADDRESS.................................................................................................................................... 7
      CADNAME.......................................................................................................................................... 8
   2. Update information text in Web Tailor ......................................................................................................... 8

Create Validation Codes ..................................................................................................................................... 11
   1. Establish attribute group codes .................................................................................................................. 11
   2. Establish attribute role codes ...................................................................................................................................... 12

Establish Dashboard Rules .................................................................................................................................. 14
   1. View available attribute groups .................................................................................................................. 14
   2. Attach user roles to attribute groups ........................................................................................................... 15
   3. Add attribute codes to attribute groups ....................................................................................................... 15
   4. Create dashboard user records and assign roles individually ........................................................................... 16
   5. Create dashboard user records and assign roles in batch ................................................................................ 18
      Parameters for ZSRCYDUL .................................................................................................................... 18
      Sample .lis file...................................................................................................................................... 20
   6. Specify the user’s course access .................................................................................................................... 20
   7. Review attribute codes and group assignments per user ............................................................................... 22
8. Review dashboard processing per attribute group and role ........................................... 23
9. Review established dashboard rules ............................................................................. 24

Parameters for ZSRC DAR ................................................................................................. 25
Sample .lis file .................................................................................................................... 26

Using the Dashboard as a Reviewer .................................................................................. 27
1. Select term to process .................................................................................................. 27
2. View course list and select course(s) to review .......................................................... 27
3. View selected courses ................................................................................................. 29

Using the Dashboard as a Maintainer ............................................................................... 31
1. Select term to process .................................................................................................. 31
2. View course list and select course(s) to maintain ....................................................... 31
3. Select attributes to Add or Delete ............................................................................. 33
4. View submission verification ....................................................................................... 35
5. Check for emails .......................................................................................................... 37

Using the Dashboard as an Approver ............................................................................... 39
1. Check for “Ready to Review” email ........................................................................... 39
2. Select term to process .................................................................................................. 40
3. View course list and select course(s) to Approve, Deny, or Send Back ...................... 41
4. Enter comments .......................................................................................................... 43
5. View verification .......................................................................................................... 45
6. Check for “Verification” emails .................................................................................... 45

Monitor Dashboard Activity .............................................................................................. 47
1. Verify course attribute updates .................................................................................... 47
2. Review in-progress or completed transactions ........................................................... 47

Parameters for ZSRC DTR ................................................................................................. 48
Sample .lis file .................................................................................................................... 49
3. Review and update dashboard user records as needed .............................................. 49
4. Review email activity .............................................................................................................. 50

Appendix A: Document History ............................................................................................ A-1
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 (ZSRCDAR)
- Course Attribute Dashboard User Load process (ZSRCDUL)
- Course Attribute Dashboard Transaction Report (ZSRCDTR)
- 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.

<table>
<thead>
<tr>
<th>Set Up Self-Service Banner</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify email server and sender email address for messages originating from dashboard activities</td>
<td>GTVSDAX</td>
</tr>
<tr>
<td>Update information text in Web Tailor</td>
<td>Web Tailor</td>
</tr>
</tbody>
</table>

Create Validation Codes

<table>
<thead>
<tr>
<th>Create Validation Codes</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish attribute group codes</td>
<td>ZTVCAGC</td>
</tr>
<tr>
<td>Establish attribute role codes</td>
<td>ZTVCADR</td>
</tr>
</tbody>
</table>

Establish Dashboard Rules

<table>
<thead>
<tr>
<th>Establish Dashboard Rules</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>View available attribute groups</td>
<td>ZSACADA</td>
</tr>
<tr>
<td>Attach user roles to attribute groups</td>
<td>ZSACADA</td>
</tr>
<tr>
<td>Add attribute codes to attribute groups</td>
<td>ZSACADA</td>
</tr>
<tr>
<td>Create dashboard user records and assign roles individually</td>
<td>ZSACADA</td>
</tr>
<tr>
<td>Create dashboard user records and assign roles in batch</td>
<td>ZSRCDUL</td>
</tr>
<tr>
<td>Specify the user's course access</td>
<td>ZSACADA</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Review attribute codes and group assignments per user</td>
<td>ZSACADA</td>
</tr>
<tr>
<td>Review dashboard processing per attribute group and role</td>
<td>ZSACADA</td>
</tr>
<tr>
<td>Review established dashboard rules</td>
<td>ZSRCDDR</td>
</tr>
</tbody>
</table>

### Using the Dashboard as a Reviewer

<table>
<thead>
<tr>
<th>Select term to process</th>
<th>Dashboard</th>
</tr>
</thead>
<tbody>
<tr>
<td>View course list and select course(s) to review</td>
<td>Dashboard</td>
</tr>
<tr>
<td>View selected course(s)</td>
<td>Dashboard</td>
</tr>
</tbody>
</table>

### Using the Dashboard as a Maintainer

<table>
<thead>
<tr>
<th>Select term to process</th>
<th>Dashboard</th>
</tr>
</thead>
<tbody>
<tr>
<td>View course list and select course(s) to maintain</td>
<td>Dashboard</td>
</tr>
<tr>
<td>Select attributes to Add or Delete</td>
<td>Dashboard</td>
</tr>
<tr>
<td>View submission verification</td>
<td>Dashboard</td>
</tr>
<tr>
<td>Check for email</td>
<td>Email</td>
</tr>
</tbody>
</table>
### Using the Dashboard as an Approver

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check for “Ready to Review” email</td>
<td>Email</td>
</tr>
<tr>
<td>Select term to process</td>
<td>Dashboard</td>
</tr>
<tr>
<td>View course list and select course(s) to Approve, Deny, or Send Back</td>
<td>Dashboard</td>
</tr>
<tr>
<td>Enter comments</td>
<td>Dashboard</td>
</tr>
<tr>
<td>View verification</td>
<td>Dashboard</td>
</tr>
<tr>
<td>Check for “Verification” emails</td>
<td>Email</td>
</tr>
</tbody>
</table>

### Monitor Dashboard Activity

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verify course attribute updates</td>
<td>SSADTL</td>
</tr>
<tr>
<td>Review in-progress or completed transactions</td>
<td>ZSRCDTR</td>
</tr>
<tr>
<td>Review and update dashboard user records as needed</td>
<td>ZSRCDTR</td>
</tr>
<tr>
<td></td>
<td>ZSRCDAR</td>
</tr>
<tr>
<td></td>
<td>ZSACADA</td>
</tr>
<tr>
<td>Review email activity</td>
<td>ZSBCADE</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>CADSERVER</td>
</tr>
<tr>
<td>Sequence</td>
<td>1</td>
</tr>
<tr>
<td>Group</td>
<td>COURSEATTRDASHBOARD</td>
</tr>
<tr>
<td>External Code</td>
<td>CAD_SERVER</td>
</tr>
<tr>
<td>Description</td>
<td>Hostname of CAD email server</td>
</tr>
<tr>
<td>Comments</td>
<td>UPDATE_ME</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>CADADDRESS</td>
</tr>
<tr>
<td>Sequence</td>
<td>1</td>
</tr>
<tr>
<td>Group</td>
<td>COURSEATTRDASHBOARD</td>
</tr>
<tr>
<td>External Code</td>
<td>CAD_ADDRESS</td>
</tr>
<tr>
<td>Description</td>
<td>CAD sender email address</td>
</tr>
<tr>
<td>Comments</td>
<td>UPDATE_ME</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>CADNAME</td>
</tr>
<tr>
<td>Sequence</td>
<td>1</td>
</tr>
<tr>
<td>Group</td>
<td>COURSEATTRDASHBOARD</td>
</tr>
<tr>
<td>External Code</td>
<td>CAD.EMAIL_NAME</td>
</tr>
<tr>
<td>Description</td>
<td>CAD sender email name</td>
</tr>
<tr>
<td>Comments</td>
<td>UPDATE_ME</td>
</tr>
</tbody>
</table>

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.
Search for “ZWSKCADB” to locate the dashboard procedures.

<table>
<thead>
<tr>
<th>Procedure Name</th>
<th>Procedure Description</th>
<th>Enabled Source</th>
<th>Baseline / Local</th>
<th>Baseline / Local</th>
</tr>
</thead>
<tbody>
<tr>
<td>zwskcadb.P_AprrVer</td>
<td>CAD Approver View - Verification List</td>
<td>Y</td>
<td>- / -</td>
<td>- / 1</td>
</tr>
<tr>
<td>zwskcadb.P_MntCrs</td>
<td>CAD Maintainer View - Selected Courses</td>
<td>Y</td>
<td>- / -</td>
<td>- / 2</td>
</tr>
<tr>
<td>zwskcadb.P_MntVer</td>
<td>CAD Maintainer View - Requested Attribute Submission Verification</td>
<td>Y</td>
<td>- / -</td>
<td>- / 3</td>
</tr>
<tr>
<td>zwskcadb.P_RvwCrs</td>
<td>CAD Reviewer View - Selected Courses</td>
<td>Y</td>
<td>- / -</td>
<td>- / 1</td>
</tr>
<tr>
<td>zwskcadb.P_SelCrs</td>
<td>CAD Reviewer/Maintainer/Approver View - Course List</td>
<td>Y</td>
<td>- / -</td>
<td>- / 3</td>
</tr>
<tr>
<td>zwskcadb.P_SelTerm</td>
<td>Course Attribute Dashboard - Select a Term</td>
<td>Y</td>
<td>- / -</td>
<td>- / 1</td>
</tr>
</tbody>
</table>

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: zwskcdbc_P_SelCrs (CAD Reviewer/Maintainer/Approver View - Course List)

<table>
<thead>
<tr>
<th>Seq #</th>
<th>Label</th>
<th>Source Information Text</th>
<th>Indicates at least one different local value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>APPROVETEXT</td>
<td>Local</td>
<td>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.</td>
</tr>
<tr>
<td>1</td>
<td>MAINTAINTEXT</td>
<td>Local</td>
<td>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).</td>
</tr>
<tr>
<td>1</td>
<td>REVIEWTEXT</td>
<td>Local</td>
<td>Select course(s) to review.</td>
</tr>
</tbody>
</table>

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

- indicates a required field.

Associated Web Page: zwskcdbc_P_SelCrs (CAD Reviewer/Maintainer/Approver View - Course List)

Sequence Number: 1
Label: ● REVIEWTEXT
Information Text:
Select course(s) to review.

Image:
Select Preview Image

Comment:

Submit Changes  Reset All Fields  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.
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.
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 (ZSRCDUL).

1. View available attribute groups

In ZSACADA > Attribute Groups tab > Attribute Group section, all of the attribute group codes and descriptions created on ZTVCAGC 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.
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.

![Screenshot of Attribute Roles Attached to Attribute Group section]

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.

![Screenshot of Attribute Codes section]
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.
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.

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**

<table>
<thead>
<tr>
<th>No</th>
<th>Name</th>
<th>Required?</th>
<th>Description/Instructions</th>
<th>Default Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Term Code</td>
<td>N</td>
<td>Enter term code</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>Application Code</td>
<td>N</td>
<td>Enter if using population selection</td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>Selection Identifier</td>
<td>N</td>
<td>Enter if using population selection</td>
<td></td>
</tr>
<tr>
<td>04</td>
<td>Creator ID</td>
<td>N</td>
<td>The Creator ID of the sub-population, if applicable</td>
<td></td>
</tr>
<tr>
<td>05</td>
<td>User ID</td>
<td>N</td>
<td>The User ID of the sub-population, if applicable</td>
<td></td>
</tr>
<tr>
<td>06</td>
<td>Dashboard User Record Action</td>
<td>Y</td>
<td>(A)dd user to dashboard; (N)o change to user record.</td>
<td></td>
</tr>
<tr>
<td>07</td>
<td>User Role Action</td>
<td>Y</td>
<td>(A)dd role to user; (N)o change to role</td>
<td></td>
</tr>
<tr>
<td>----</td>
<td>------------------</td>
<td>-----</td>
<td>----------------------------------------</td>
<td></td>
</tr>
<tr>
<td>08</td>
<td>Role Code to Process</td>
<td>N</td>
<td>Enter course attribute role code to be assigned to the user.</td>
<td></td>
</tr>
<tr>
<td>09</td>
<td>Run Mode</td>
<td>Y</td>
<td>(A)udit mode or (U)pdate mode</td>
<td></td>
</tr>
</tbody>
</table>

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 ZSRCDUL 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
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.
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.
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.
9. Review established dashboard rules

The CAD Admin Report (ZSRCDA) 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 ZSRCDAF

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

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 15:18:30        ITS UNIVERSITY
Course Attribute Dashboard Admin Report

* ATTRIBUTE GROUP AND ATTRIBUTE CODES *

<table>
<thead>
<tr>
<th>ATTRIBUTE GROUP CODE</th>
<th>DESCRIPTION</th>
<th>ATTRIBUTE CODE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>NO_LOW</td>
<td>No-Cost &amp; Low-Cost Course Materials</td>
<td>ZLCM</td>
<td>Low-cost: $40 or under req cost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ZNCM</td>
<td>No-cost: $0 required costs</td>
</tr>
</tbody>
</table>

* ATTRIBUTE GROUP AND USER ROLES *

<table>
<thead>
<tr>
<th>ATTRIBUTE GROUP CODE</th>
<th>USER ROLE CODE</th>
<th>DESCRIPTION</th>
<th>ASSIGNED</th>
<th>NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>NO_LOW</td>
<td>NOLONADMIN</td>
<td>No-Cost &amp; Low-Cost Group Admin</td>
<td>900123780</td>
<td>Bishop, Walter</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>900161254</td>
<td>Ade, Isabella</td>
</tr>
<tr>
<td></td>
<td>NOLONAPPRV</td>
<td>No-Cost &amp; Low-Cost Approver</td>
<td>900123780</td>
<td>Bishop, Walter</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>900161254</td>
<td>Ade, Isabella</td>
</tr>
<tr>
<td></td>
<td>NOLONMNTAIN</td>
<td>No-Cost &amp; Low-Cost Maintainer</td>
<td>9000955178</td>
<td>Bishop, Astrid</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>900059003</td>
<td>Bishop, Nna</td>
</tr>
<tr>
<td></td>
<td>NOLONREVIEW</td>
<td>No-Cost &amp; Low-Cost Reviewer</td>
<td>900076676</td>
<td>Austen, Jane</td>
</tr>
</tbody>
</table>

* * * 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.

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.

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

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:

<table>
<thead>
<tr>
<th>CRN</th>
<th>Section</th>
<th>Subject</th>
<th>Course Number</th>
<th>Title</th>
<th>Department Code</th>
<th>Department Description</th>
<th>Attribute Code/Desc</th>
</tr>
</thead>
<tbody>
<tr>
<td>80240</td>
<td>02</td>
<td>ENGL</td>
<td>1101</td>
<td>English Composition I</td>
<td>ENGL</td>
<td>English</td>
<td>No attributes</td>
</tr>
</tbody>
</table>

[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.

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.

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

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).

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

<table>
<thead>
<tr>
<th>Select Course</th>
<th>Role Code</th>
<th>CRN</th>
<th>Section</th>
<th>Subject</th>
<th>Course Number</th>
<th>Title</th>
<th>Department Code</th>
<th>Department Description</th>
<th>Attribute Code/Desc</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NOLOWMNTAIN 80613 18</td>
<td>ANTH 1102</td>
<td>Intro to Anthropology - INTL</td>
<td>ANTH</td>
<td>Anthology</td>
<td>ESSC Area E Social Science</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>NOLOWMNTAIN 81308 15</td>
<td>ANTH 1102</td>
<td>Intro to Anthropology - INTL</td>
<td>ANTH</td>
<td>Anthology</td>
<td>ESSC Area E Social Science</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>NOLOWMNTAIN 81783 04</td>
<td>ANTH 1102</td>
<td>Intro to Anthropology - INTL</td>
<td>ANTH</td>
<td>Anthology</td>
<td>ESSC Area E Social Science</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.
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.”
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.”

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.
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.

<table>
<thead>
<tr>
<th>Email Address</th>
<th>Role Code</th>
<th>Role Description</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:jsausten@u.edu">jsausten@u.edu</a></td>
<td>NOLOWAPPRV</td>
<td>No-Cost &amp; Low-Cost Approver</td>
<td><a href="mailto:jsausten@u.edu">jsausten@u.edu</a></td>
</tr>
<tr>
<td><a href="mailto:wlbishop@u.edu">wlbishop@u.edu</a></td>
<td>NOLOWAPPRV</td>
<td>No-Cost &amp; Low-Cost Approver</td>
<td><a href="mailto:wlbishop@u.edu">wlbishop@u.edu</a></td>
</tr>
</tbody>
</table>

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]**

<table>
<thead>
<tr>
<th>Action</th>
<th>Comment</th>
<th>Date Processed</th>
<th>CRN</th>
<th>Sect</th>
<th>Subj</th>
<th>Course Number</th>
<th>Title</th>
<th>Dept Code</th>
<th>Department Description</th>
<th>Add/ Delete</th>
<th>Attribute Code/ Desc</th>
<th>Maintainer Name</th>
<th>Batch Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denied</td>
<td>Not approved for this section</td>
<td>30-AUG-2021</td>
<td>80371</td>
<td>19</td>
<td>POLS 1101</td>
<td>POLS</td>
<td>American Government</td>
<td>Political Science</td>
<td>ADD</td>
<td>ZSAX Study Away</td>
<td>Peter Bishop</td>
<td>56</td>
<td></td>
</tr>
</tbody>
</table>
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.
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.
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.

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.

The following information will be displayed for available courses:

- CRN
- Section Number
- Subject
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.

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

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.
**Course Attribute Dashboard - Approver - Selected Courses**

**TERM: Fall 2021 (202108)**

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

<table>
<thead>
<tr>
<th>CRN</th>
<th>Sect</th>
<th>Subj</th>
<th>Course #</th>
<th>Title</th>
<th>Dept Code</th>
<th>Department Description</th>
<th>Add/Delete</th>
<th>Attribute Code/Desc</th>
<th>Maintainer Name</th>
<th>Date Requested</th>
<th>Batch Number</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>00405</td>
<td>05</td>
<td>SPAN</td>
<td>1001</td>
<td>Elementary Spanish I - INTL</td>
<td>SPAN</td>
<td>Spanish</td>
<td>ADD</td>
<td>ZSA1 Less than 2 weeks</td>
<td>Peter Bishop</td>
<td>09- JUL-2021</td>
<td>26</td>
<td>1</td>
</tr>
</tbody>
</table>

**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.

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)

<table>
<thead>
<tr>
<th>Action</th>
<th>Comment</th>
<th>Date Processed</th>
<th>CRN</th>
<th>Sect Subj</th>
<th>Course Number</th>
<th>Title</th>
<th>Dept Code</th>
<th>Department Description</th>
<th>Add/Delete</th>
<th>Attribute Code/Desc</th>
<th>Maintainer</th>
<th>Batch Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td></td>
<td>01-SEP-2021</td>
<td>81308</td>
<td>15</td>
<td>ANTH 1102</td>
<td>Intro to Anthropology ANTH Anthropology ADD - INTL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ZNCM No-cost: $0 required costs</td>
<td>Peter Bishop</td>
</tr>
<tr>
<td>Approved</td>
<td></td>
<td>01-SEP-2021</td>
<td>81783</td>
<td>04</td>
<td>ANTH 1102</td>
<td>Intro to Anthropology ANTH Anthropology ADD - INTL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ZNCM No-cost: $0 required costs</td>
<td>Peter Bishop</td>
</tr>
</tbody>
</table>
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 (SSADETL) > Degree Program Attributes section > Attribute field. Verify that SSADETL was accurately updated.

![Dashboard screenshot]

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 ZSRCDTTR

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

**Best Practice Recommendation:** Run ZSRCDTTR 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.
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)prove, (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:

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Type</th>
<th>Type Code</th>
<th>Email Subject Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintainer</td>
<td>Submission Verification</td>
<td>VERIFY</td>
<td>Course Attribute Dashboard Submission Verification</td>
</tr>
<tr>
<td>Maintainer</td>
<td>Approve</td>
<td>M_APRV</td>
<td>Course Attribute Dashboard Request Approved</td>
</tr>
<tr>
<td>Maintainer</td>
<td>Deny</td>
<td>M_DENY</td>
<td>Course Attribute Dashboard Request Denied</td>
</tr>
<tr>
<td>Maintainer</td>
<td>Send Back</td>
<td>M_BACK</td>
<td>Course Attribute Dashboard Request Sent Back</td>
</tr>
<tr>
<td>Approver</td>
<td>Ready to Review</td>
<td>REVIEW</td>
<td>Course Attribute Dashboard Ready to Review</td>
</tr>
<tr>
<td>Approver</td>
<td>Approve</td>
<td>A_APRV</td>
<td>Course Attribute Dashboard Approval Verification</td>
</tr>
<tr>
<td>Approver</td>
<td>Deny</td>
<td>A_DENY</td>
<td>Course Attribute Dashboard Denial Verification</td>
</tr>
<tr>
<td>Approver</td>
<td>Send Back</td>
<td>A_BACK</td>
<td>Course Attribute Dashboard Sent Back Verification</td>
</tr>
</tbody>
</table>
# Appendix A: Document History

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

<table>
<thead>
<tr>
<th>Release and Date</th>
<th>Page/Process</th>
<th>Page</th>
<th>Update Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Georgia Enhancements 8.68 &amp; 9.18</strong></td>
<td>N/A</td>
<td>N/A</td>
<td>Original</td>
</tr>
<tr>
<td><strong>September 10, 2021</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>