



Unifyed PeopleSoft Smart Alerts Discovery Document



Questions?

Contact us at engage@unifyed.com

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1. Introduction

This document captures all the details of the client’s project team and prerequisites required for Unifyed PS Smart Alerts. This information will be used for deploying and configuring PS Smart Alerts on the client’s Unifyed production environment.

2. Team Member Information

Name	Email Address	Phone #	Role	Sub - Contractor
			Sponsor	
			Project Manager	
			Portal Administrator	
			Backup Portal Administrator	
			Network Administrator	

Roles:

1. Sponsor
2. Project Manager
3. Portal Administrator
4. Back Up Portal Administrator
5. Network Administrator

*Per the CampusEAI Master Services Agreement your institution has executed with CampusEAI, the institution must identify any staff working on the project that are contracted. Contracted staff must receive authorization and execute CampusEAI Confidentiality Agreements in order to receive access to CampusEAI resources.

3. PeopleSoft Smart Alerts

PeopleSoft Information (Production Environment)

[Leave blank if not applicable]

Field to be used for mapping identities between Unifyed portal and PeopleSoft Ex: OPRID	
Read privileges on Relevant tables Ex: PSOPRDEFN	
Mapping query to be used for Mapping identities between Unifyed portal and PeopleSoft	SELECT distinct LOWER(OPRID) AS SCREEN_NAME, EMPLID userID FROM PSOPRDEFN where EMPLID IN (<values>)

PeopleSoft details required to establish connection to PeopleSoft server instance:

PeopleSoft IP address & port number	
PeopleSoft hostname	
PeopleSoft Database name/ID	
PeopleSoft database username & password	
Test username and password of portal user with working PeopleSoft account	

List of Sample Alerts:

Financial Aid Alerts: Student Enrollment/Waiver site open; Automatic Enrollment Reminder; etc.

Student Finance Alerts: Payment Due; Late Fees; Outstanding Balance, Etc.

Registrar Alerts: Registration Hold, etc

