



Smart Alerts

Discovery Documentation



Questions?

Contact us at engage@unifyed.com

Table of Contents

| | |
|--|---|
| Introduction | 3 |
| 1. Team Member Information..... | 3 |
| 2. Smart Alerts..... | 4 |
| Banner details required to establish connection to Banner server instance: | 5 |

Introduction

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

Team Member Information

| Name | Email Address | Phone # | Role | Sub - Contractor |
|------|---------------|---------|------|------------------|
| | | | | |
| | | | | |
| | | | | |

Roles:

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

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

Smart Alerts

Use Case Information

***** Sample Use Case*****

Use case Name: Mid-Semester Progress (Grades)

Business Scenario - Mid Semester grades are assigned by faculty via the University/School ERP around day 38 of the semester. They are only assigned for Fall and Spring courses, and only for full term courses. They are also only assigned if the student has a D, F, or I grade at that point in the semester. Once the grade is assigned by the instructor, the grades are available for immediate viewing by the student in ERP/MyCollege.

When does it occur (Optional) - Around day 38 of the Fall and Spring semesters.

Table affected – GRADES

Relevant Columns - GRADES_USERID, GRADES_CRN, GRADES_TERM_CODE, GRADES_ACTIVITY_DATE, GRADES_GRDE_CODE_IND

Date field - GRADES_ACTIVITY_DATE

User ID Field - GRADES_USERID

Mapping Information – How to map the User ID Field in Banner with the Unifyed Portal User.

Use Case Trigger - When the GRADES_ACTIVITY_DATE becomes today for the term we are processing, check to see if the GRADES_GRDE_CODE_IND is no longer null. If so, deliver a message to the student letting them know they have a mid-semester grade available in ERP/MyCollege for the GRADES_CRN.

***** End of Sample *****

Reference Use case:

Use case Name:

1. Business Scenario –
2. When does it occur (Optional) -
3. Table affected -

Identity | Discovery Documentation

4. Relevant Columns –
5. Date field –
6. Queries – *(the above 3 field will be derived from the query).*
7. User ID Field –
8. Mapping Information –
9. Use Case Trigger –

Banner details required to establish connection to Banner server instance:

| | |
|---|-----------------------------|
| Banner DB IP address & port number | Development: Production: |
| Banner Hostname | Development: Production: |
| Banner Database SID | Development: Production: |
| Banner database username & password | |
| Test username and password of portal user | |

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

Disclaimer

Any changes made in the information provided in this document by the member school post the sign-off (during the course of the project implementation) needs to be approved by Campus Consortium as it may have impact on the scope, timeline and cost of this project.

Client Project Lead

| | |
|-----------------|------|
| Authorized Name | Date |
|-----------------|------|

| | |
|-----------------|------|
| Authorized Name | Date |
|-----------------|------|

Unifyed Identity Delivery Lead

| | |
|-----------------|------|
| Authorized Name | Date |
|-----------------|------|

| | |
|-----------------|------|
| Authorized Name | Date |
|-----------------|------|