

# The Basics of Ellucian CRM Recruit

(Formerly Ellucian Recruiter)



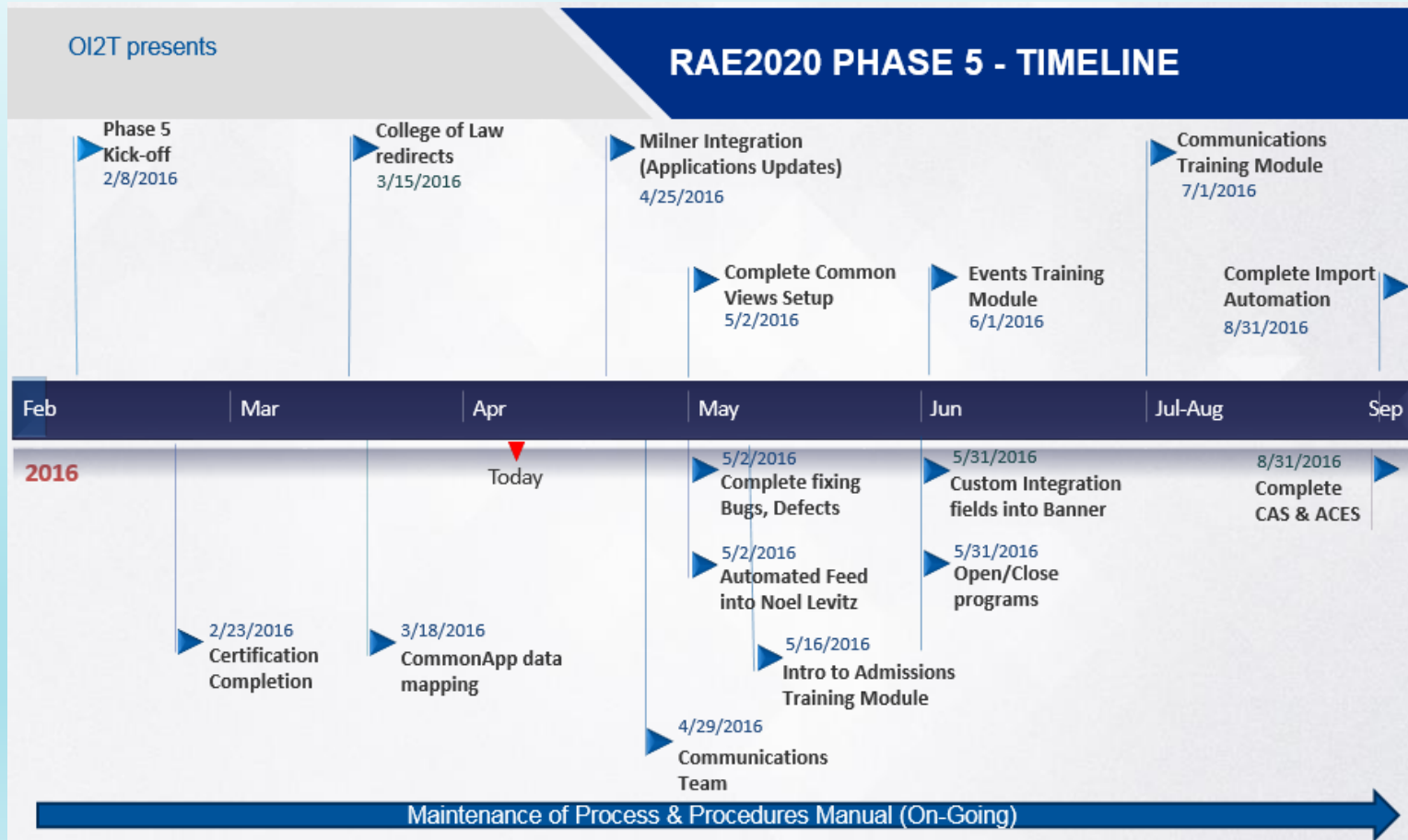
# Agenda

- Implementation of Ellucian CRM
  - RAE 2020
  - Phases (Timeline)
- Terminology
- Integration Overview
- Front End (Student Perspective)
- Back End (Staff Perspective)
- Requesting Access
- Training Opportunities
- Questions

# Implementation of Ellucian CRM

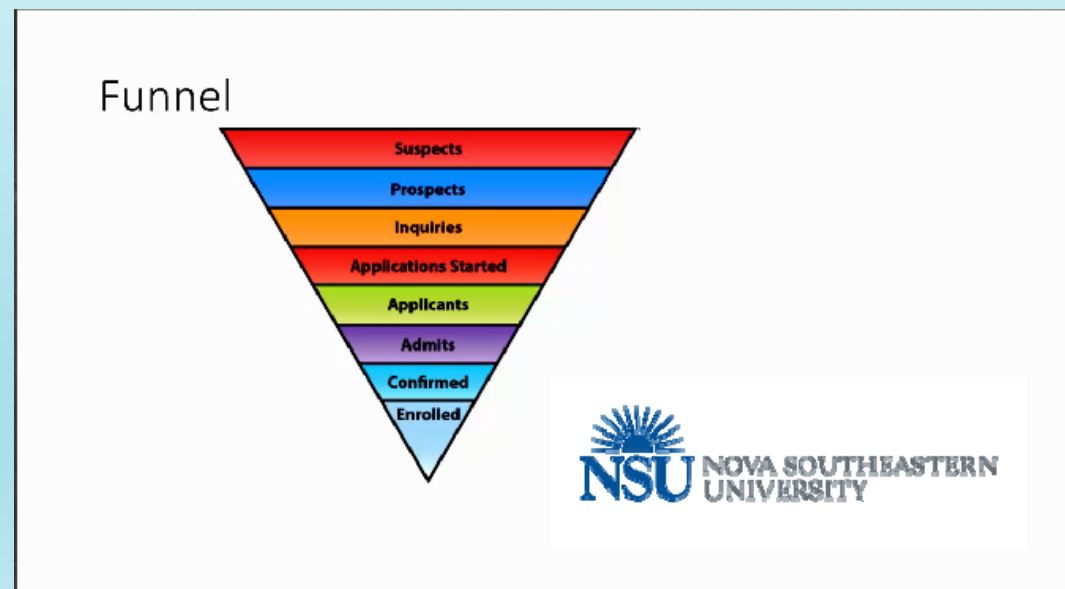
- **Phase 1:** went live 6/8/2015
  - Education
  - Engineering & Computing
  - Health Care Sciences
  - Nursing
  - Business
- **Phase 2:** went live 8/10/2015
  - Undergraduate
- **Phase 3:** went live 12/4/2015
  - Osteopathic
  - Dental
  - Pharmacy
  - Medical Sciences
  - Optometry
- **Phase 4:** Went live 1/29/16
  - Law
  - Natural Sciences & Oceanography
  - Psychology
  - Arts, Humanities, Social Sciences (went live 4/18/2016)
- **Phase 5:** Began 2/15/2016
  - Stabilization

# Implementation of Ellucian CRM



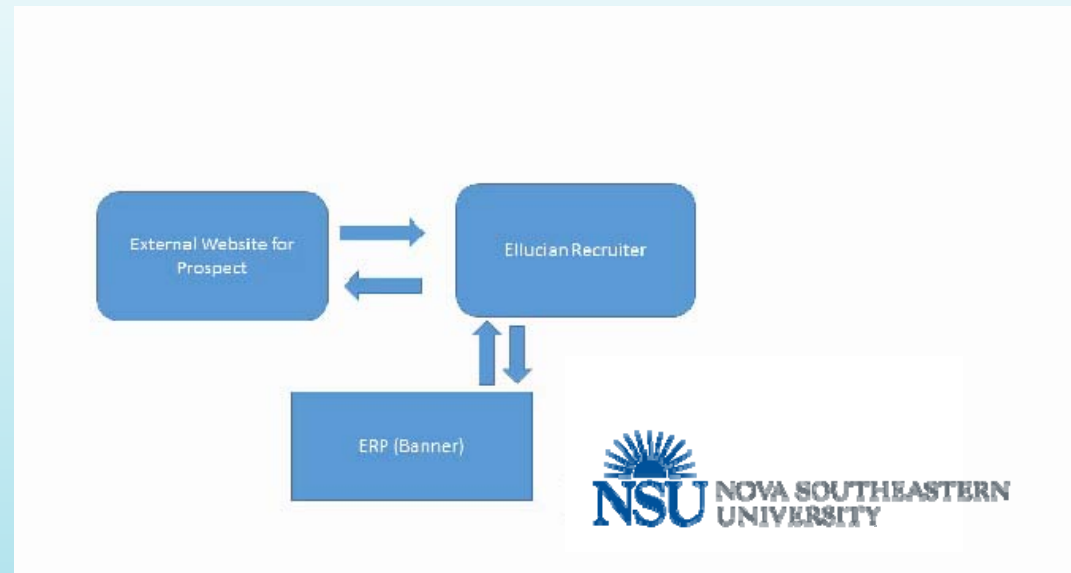
# Terminology

- Ellucian Recruit CRM is a web-based recruiting tool
  - Built on a Customer Relationship Management (CRM) Platform
  - Uses Microsoft Dynamics CRM
    - Passes the data to the Enterprise Resource Planning System (Banner)
- Suspect
- Prospect
- Inquiry
- Applicant
  - Admits
  - Confirmed
  - Enrolled



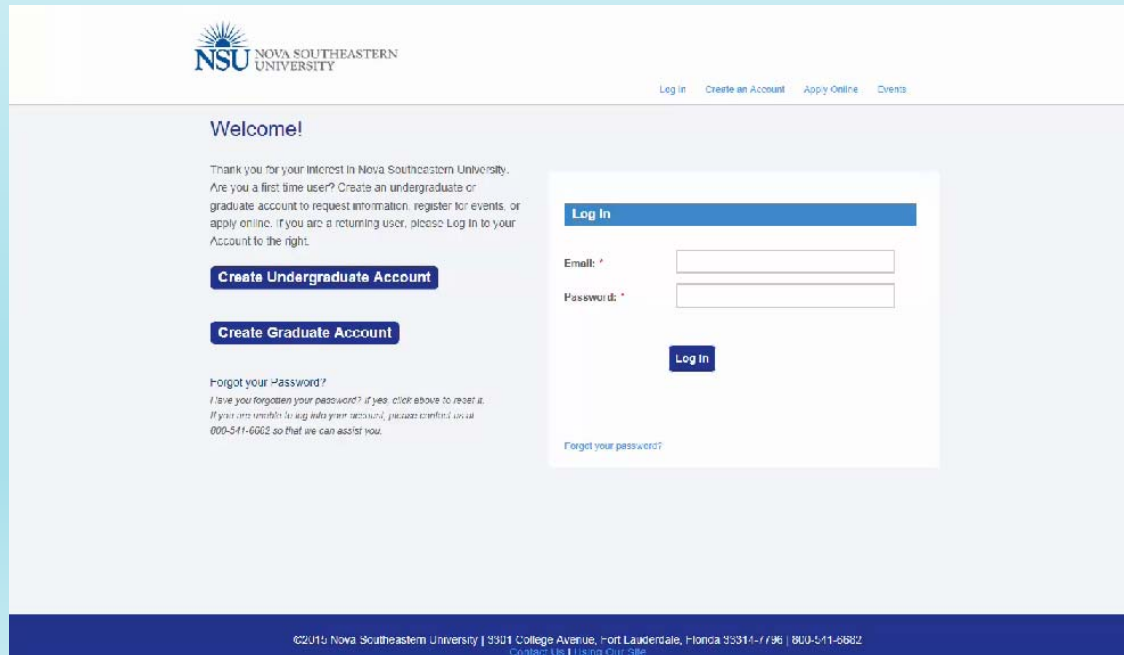
# Integration Overview

- Prospect Data does not move into Banner
  - External Website (create account)
  - Test Score Imports
    - GRE
    - GMAT
    - TOEFL
    - ACT/SAT
  - Prospect Lists
  - Recruit Cards
  - Event Attendance
- Applicant Data moves into Banner from CRM Recruit
  - Dataloads team matches suspended records
  - Decision Codes entered in Banner move to CRM Recruit
  - Enrolled information moves to CRM Recruit
    - Based on Primary Recruitment Path



# Front End (Student Perspective)

- *<https://apply.nova.edu>*
- Training URL: *<http://fldvt-webrut1.ad.nova.edu:9080/Datatel.ERecruiting.Web.External/Pages/Welcome.aspx>*



The screenshot shows the 'Welcome!' page of the NSU application portal. At the top, the NSU logo is on the left, and navigation links 'Log In', 'Create an Account', 'Apply Online', and 'Events' are on the right. The main content area has a 'Welcome!' heading followed by a paragraph: 'Thank you for your interest in Nova Southeastern University. Are you a first time user? Create an undergraduate or graduate account to request information, register for events, or apply online. If you are a returning user, please Log In to your Account to the right.' Below this are two buttons: 'Create Undergraduate Account' and 'Create Graduate Account'. A 'Forgot your Password?' link is also present. On the right side, there is a 'Log In' section with a blue header, input fields for 'Email: \*' and 'Password: \*', a 'Log In' button, and a 'Forgot your password?' link at the bottom. The footer contains the text: '©2015 Nova Southeastern University | 3301 College Avenue, Fort Lauderdale, Florida 33314-7796 | 800-541-6882' and 'Contact Us | Using Our Site'.

NSU NOVA SOUTHEASTERN UNIVERSITY

Log In Create an Account Apply Online Events

### Welcome!

Thank you for your interest in Nova Southeastern University. Are you a first time user? Create an undergraduate or graduate account to request information, register for events, or apply online. If you are a returning user, please Log In to your Account to the right.

[Create Undergraduate Account](#)

[Create Graduate Account](#)

[Forgot your Password?](#)

If you've forgotten your password? if yes, click above to reset it. If you are unable to log into your account, please contact us at 800-541-6882 so that we can assist you.

#### Log In

Email: \*

Password: \*

[Log In](#)

[Forgot your password?](#)

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Contact Us | Using Our Site

# Back End (Staff Perspective)

- <https://recruiter.nova.edu>

- **Training URL:**

<https://recruiteradmintest.nova.edu/Training/main.aspx#>

The screenshot displays the 'Recruiter' application interface. The top menu bar includes 'File', 'Contacts', 'View', 'Charts', 'Add', 'Customize', and 'Help'. Below this is a toolbar with various icons for actions like 'New', 'Edit', 'Activate', 'Merge', 'Detect Duplicates', 'Send Direct E-mail', 'Add to Marketing List', 'Connect', 'Assign', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', 'Run Report', 'Import Data', 'Prospect/Suspect Search', 'Send Prospect To ERP', 'Send Scores To ERP', 'Send Transcript Courses To ERP', 'Advanced Find', and 'ExactTarget'. The left sidebar contains a navigation tree with categories: 'Recruiting' (People & Organizations, Recruiting Reports, Territories & Goals), 'Workplace', 'Recruiting' (Campaigns, Travel & Events, Applications, Recruiting Imports, ExactTarget, Settings), and 'Settings'. The main content area is titled 'Contacts' and 'All Active Prospects'. It features a search bar and a table of prospects. The table has columns: NSU ID, Full Name, College Code, Academic Level, Degree Level, Academic Progr..., Anticipated Entr..., Created On, Email Address, Application Sub..., Address 1: City, and a status icon. The table lists 25 prospects, including '5-27 Test-ESS', 'A Ford', 'A Maria Edwards', 'A Ryl J Poleon', 'A Smith', 'A W', 'A. Deepak Naik', 'A.B.M. Asim', 'A.J. Perez', 'A.J. Statham', 'A.J. Whitney', 'Aabhas Kharel', 'Aachal Kumbhaikar', 'Aadesh Pokharel', 'Aadil Glasswala', 'Aadil Khan', 'Aadish LDhoka', 'Aaditya Acharya', 'Aaditya Raghavan', 'Aaditya Sahu', 'Aaditya Singh Rathore', and 'Aad/marr Hadad'. The bottom status bar shows '1 - 250 of 5000+ (0 selected)' and a page indicator 'Page 1'.

NSU ID	Full Name	College Code	Academic Level	Degree Level	Academic Progr...	Anticipated Entr...	Created On	Email Address	Application Sub...	Address 1: City	Status
	5-27 Test-ESS	Shepard Broad...	Masters - Law		Education Law (...)	Summer II 2016	5/27/2016 4:41...	5-27@timothys...			L
	A Ford	College of Healt...	Doctorate - HC...	Doctoral	Health Science (...)	Summer II 2016	4/1/2016 7:05 PM	asford@bridgep...		naugautck	L
	A Maria Edwards	Undergraduate	Main Campus (D...		Biology	Fall 2018	9/26/2015 5:00...	amariagorgeous...		Fairfield	L
	A Ryl J Poleon	Undergraduate	Main Campus (D...		Biology	Fall 2017	9/26/2015 8:42...	seio712@aol.com		Lakeland	L
	A Smith	College of Oste...	Masters - DO	Masters	Medical Educati...	Fall 2016	6/9/2016 8:07 AM	zia45701@yaho...		Akron	L
	A W	Undergraduate	Main Campus (D...		Undecided (Deci...	Fall 2016	9/27/2015 9:41...	violinlink@gma...		Raleigh	L
	A. Deepak Naik	Undergraduate	Main Campus (D...		General Enginee...	Fall 2018	11/17/2015 3:35...	dnaik3148@gm...		Bangalore	Jr
	A.B.M. Asim	Undergraduate	Main Campus (D...		Biology	Fall 2018	9/26/2015 10:03...	abruasim7@gm...		West Palm Beach	L
	A.J. Perez	Undergraduate	Main Campus (D...		Undecided (Deci...	Fall 2017	1/22/2016 10:39...	DJAfterhours1@...			L
	A.J. Statham	Undergraduate	Main Campus (D...		Undecided (Deci...	Fall 2016	10/28/2015 10:5...	ajstatham0@gm...		Fairburn	L
	A.J. Whitney	Undergraduate	Main Campus (D...		Undecided (Deci...	Fall 2017	9/26/2015 3:43...	awhitney2017@...		Atlanta	L
N01793288	Aabhas Kharel	Undergraduate	Main Campus (D...		Computer Engin...	Fall 2016	1/4/2016 11:28...	aabhashkarel@g...	6/10/2016	kavre	N
	Aachal Kumbhaikar	Undergraduate	Main Campus (D...		Finance	Fall 2019	3/15/2016 12:25...	achaikumbhaika...		Banaglore	Jr
	Aadesh Pokharel	Undergraduate	Main Campus (D...		Undecided (Deci...	Fall 2016	12/17/2015 9:13...	aadeshp@gmail...		London	L
	Aadil Glasswala	Undergraduate	Main Campus (D...		Undecided (Deci...	Fall 2016	9/27/2015 9:54...	AGLASSWALA@...		Bogota	L
	Aadil Khan	Undergraduate	Main Campus (D...		Mathematics	Fall 2016	12/10/2015 4:18...	k_aadil@outloo...		London	L
	Aadish LDhoka	Undergraduate	Main Campus (D...		General Enginee...	Fall 2018	11/19/2015 12:1...	aadishdhoka282...		Bangalore	Jr
	Aaditya Acharya	Undergraduate	Main Campus (D...		General Enginee...	Fall 2017	5/24/2016 11:02...	SHARMA.PRAJO...		Rupandehi	N
	Aaditya Raghavan	Undergraduate	Main Campus (D...		Undecided (Deci...	Fall 2018	5/19/2016 11:22...	MAALOLAN.RA...		Morganville	L
	Aaditya Sahu	Undergraduate	Main Campus (D...		General Enginee...	Fall 2018	3/12/2016 12:54...	aadityasahu200...		Banaglore	Jr
	Aaditya Singh Rathore	Undergraduate	Main Campus (D...		Music	Fall 2016	3/8/2016 12:08...	9vcooman12roc...			L
	Aad/marr Hadad	Undergraduate	Main Campus (D...		Undecided (Deci...	Fall 2017	11/4/2015 7:06...	aad/marr@gmail...		Orlando	L



# Requesting Access

- OIIT Blackboard Course Certification

- <https://sharklearn.nova.edu>
- Log into Blackboard with NSU username and password
- Click on **Courses** Tab at the top
- On the left, under **Course Search** type **Recruiter** Search for **Recruiter**
- Click the drop-down that says **Enroll** when you highlight the **Train\_Ellucian-Recruiter-Resources** title
- Click **Submit**
- Click **OK** to be taken directly to the course
  - Complete the **Basic Recruiter Access** Training Module
  - Complete the **Application Processing** in Recruiter Training Module (if applicable)

- Notify Super User when Course Certification is Complete

- Super User Requests New User Access via **NSU Service Manager**

# Training Opportunities

- OIIT Blackboard Resources
  - <https://sharklearn.nova.edu>
  - Search for **Recruiter**
  - Register for course
- OIIT Izone
  - <https://app.nova.edu/izonetraining/register.aspx>
  - Select **Recruiter** from drop down
- Ellucian Portal (Education Services)
  - <https://ellucian.okta.com/>
  - Click on **Education Services** icon
  - Must have a user account – notify super user

# Questions?

- Additional questions – contact me:
  - Leah Glasby, Associate Director Recruitment & Admissions Systems
    - [gleah@nova.edu](mailto:gleah@nova.edu)
    - (954) 262-2876

