

# The Basics of Ellucian CRM Recruit

(Formerly Ellucian Recruiter)



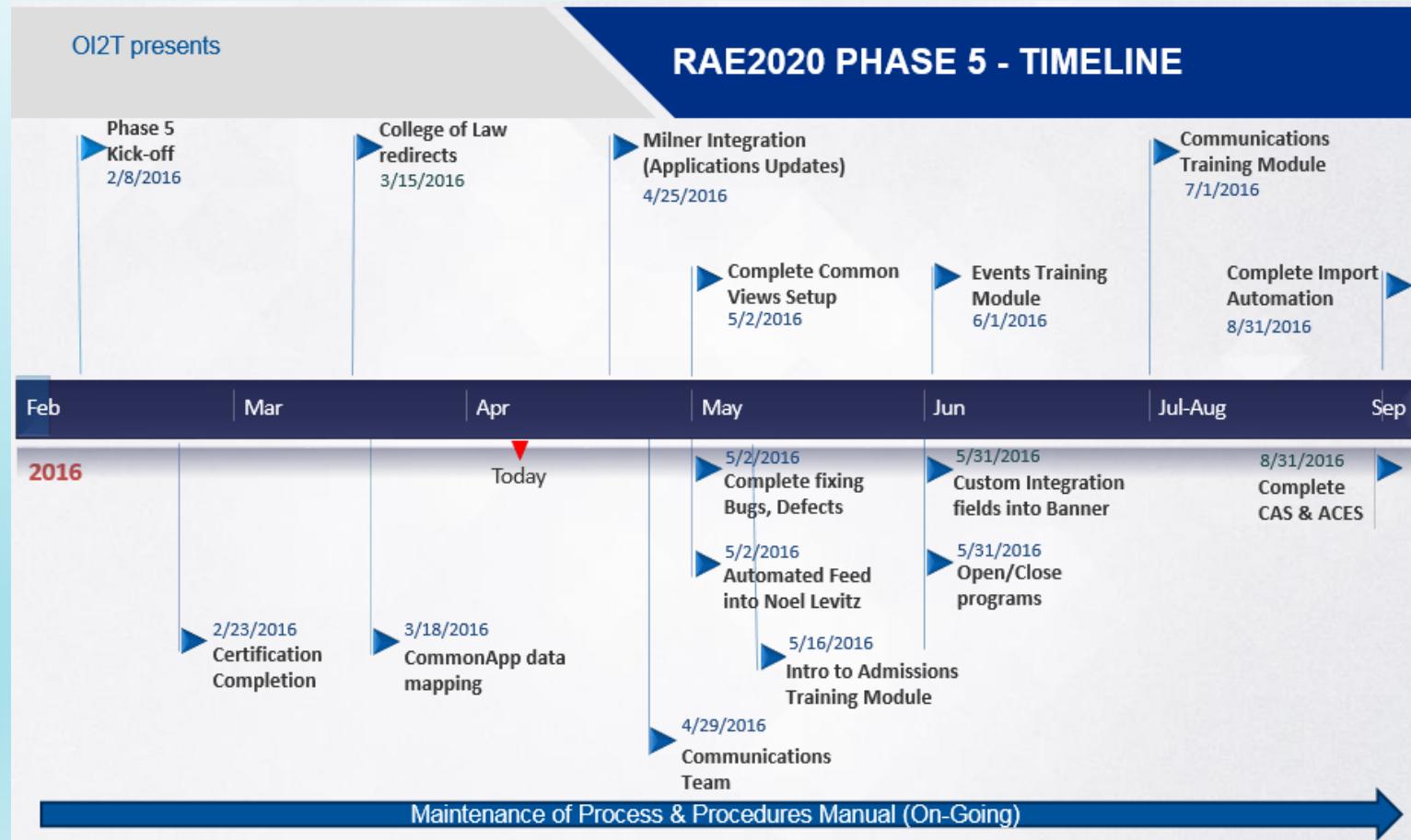
# Agenda

- 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)

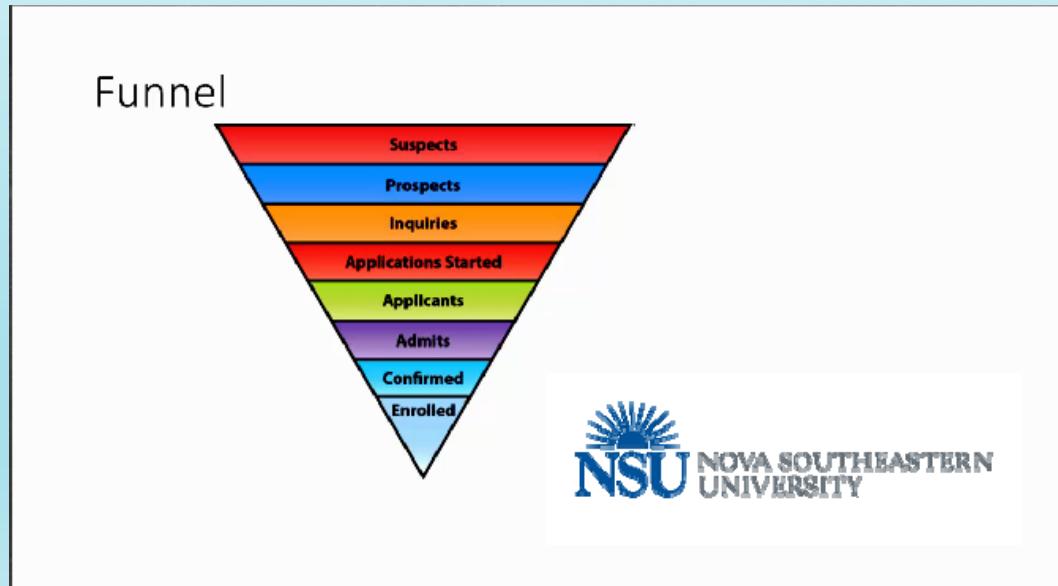
- Suspect

- Prospect

- Inquiry

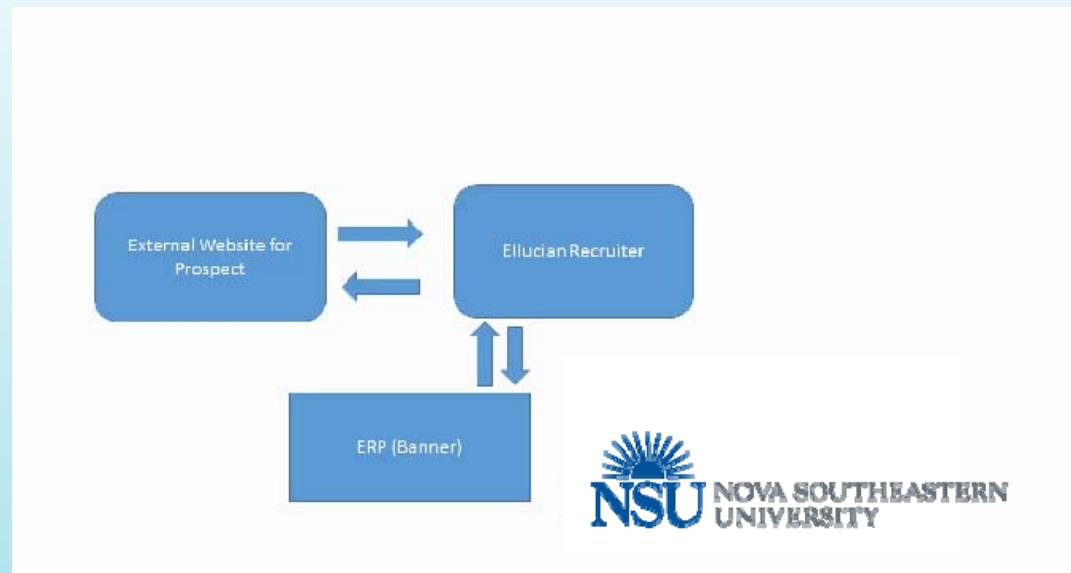
- Applicant

- Admits
  - Confirmed
  - Enrolled



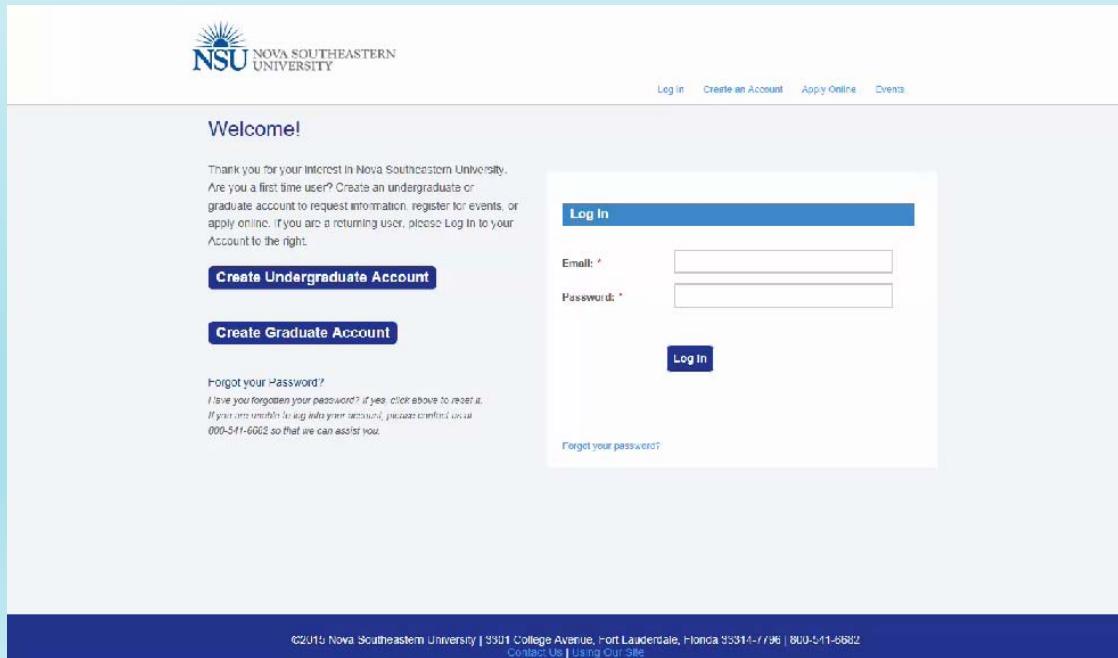
# Integration Overview

- 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>



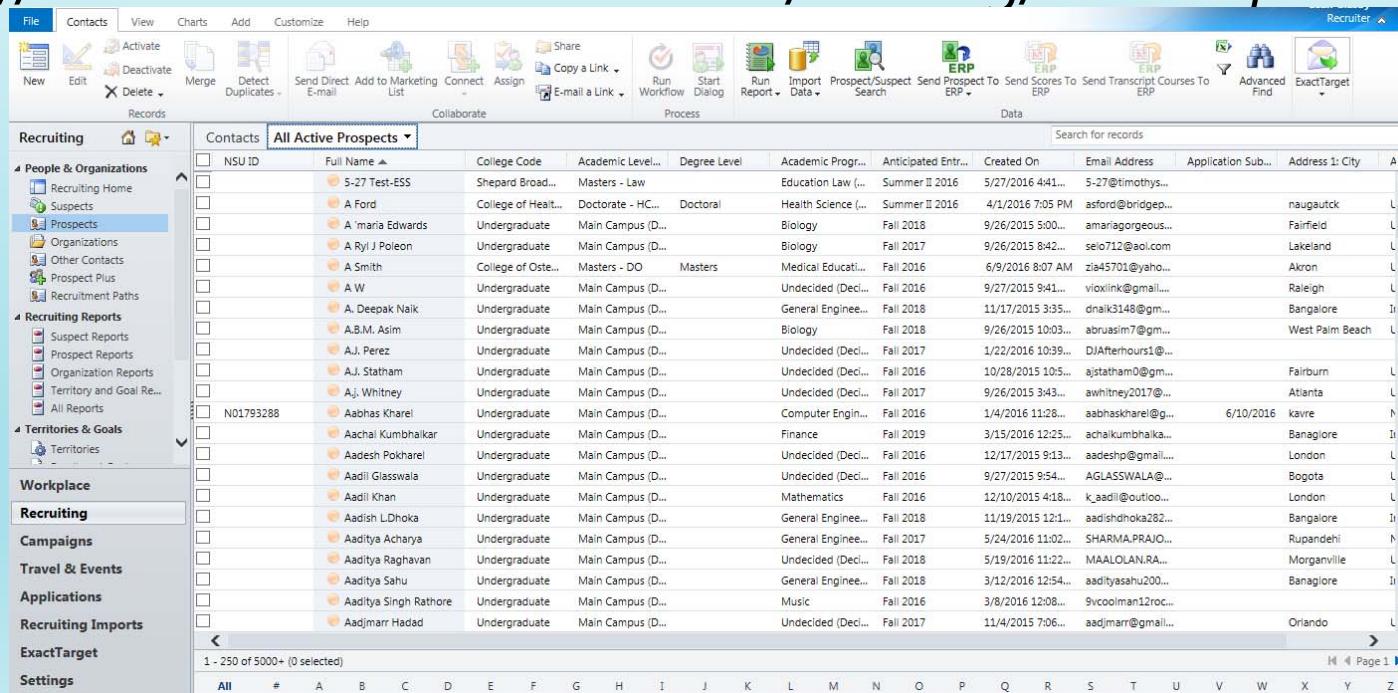
The screenshot shows the Nova Southeastern University website's login page. At the top, the NSU logo and the text "NOVA SOUTHEASTERN UNIVERSITY" are visible. To the right, there are links for "Log In", "Create an Account", "Apply Online", and "Events". The main content area has a "Welcome!" message. Below it, text for first-time users and returning users is displayed, along with "Create Undergraduate Account" and "Create Graduate Account" buttons. A "Log In" form is centered, containing fields for "Email" and "Password" with a "Log In" button below them. At the bottom of the page, there is a link for "Forgot your Password?". The footer is a dark blue bar with the text "©2015 Nova Southeastern University | 3301 College Avenue, Fort Lauderdale, Florida 33311-7736 | 800-511-6882" and links for "Contact Us" and "Using Our Site".

# Back End (Staff Perspective)

■ <https://recruiter.nova.edu>

■ Training URL:

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



The screenshot shows the 'Recruiter' application interface. The top navigation bar includes 'File', 'Contacts', 'View', 'Charts', 'Add', 'Customize', and 'Help'. Below the navigation bar is a toolbar with various icons for actions like 'New', 'Edit', 'Activate', 'Deactivate', 'Delete', 'Merge', 'Detect Duplicates', 'Send Direct E-mail', 'Add to Marketing List', 'Connect', 'Assign', 'Share', '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 main window has a left sidebar with a tree view of 'Recruiting' sections: 'People & Organizations' (Recruiting Home, Suspects, Prospects, Organizations, Other Contacts, Prospect Plus, Recruitment Paths), 'Recruiting Reports' (Suspect Reports, Prospect Reports, Organization Reports, Territory and Goal Reports, All Reports), 'Territories & Goals' (Territories), 'Workplace', 'Recruiting' (selected), 'Campaigns', 'Travel & Events', 'Applications', 'Recruiting Imports', 'ExactTarget', and 'Settings'. The main content area displays a table titled 'All Active Prospects' with columns: NSU ID, Full Name, College Code, Academic Level..., Degree Level, Academic Progra..., Anticipated Entr..., Created On, Email Address, Application Sub..., Address 1: City, and a 'Actions' column. The table lists numerous prospects with their details. At the bottom of the table, it says '1 - 250 of 5000+ (0 selected)'. The bottom navigation bar includes letters A through Z and 'Page 1'.

# 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:
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