

The Basics of Ellucian CRM Recruit

Leah Glasby

Associate Director, Recruitment & Admission Systems

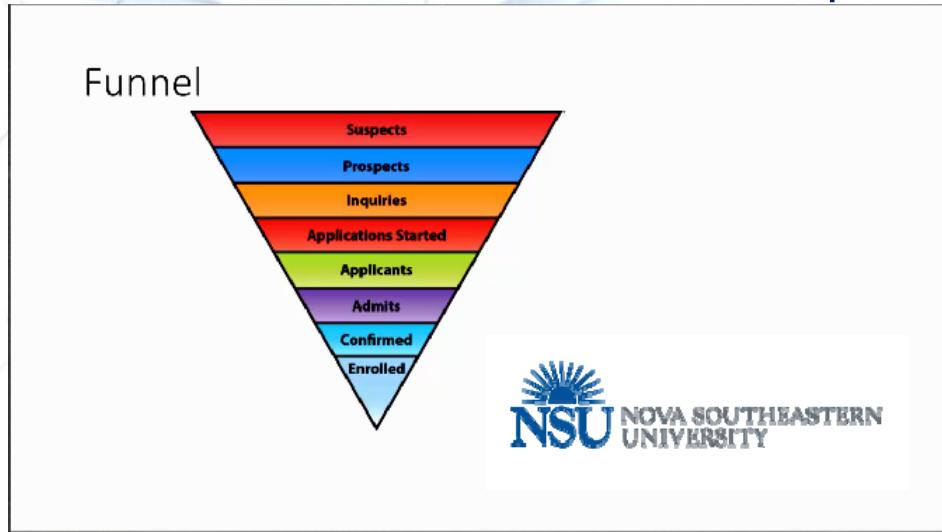
Agenda

- Terminology
- Integration Overview
- Front End
- Back End
- Requesting Access
- Training
- CRM Recruit 4x
- Questions



Terminology

- Ellucian Recruit CRM is a web-based recruiting tool.
- Replaces Web for Recruitment/Web for Admissions
 - Built on a Customer Relationship Management (CRM) Platform
 - Uses Microsoft Dynamics CRM
 - Passes the data to the Enterprise Resource Planning System (Banner)

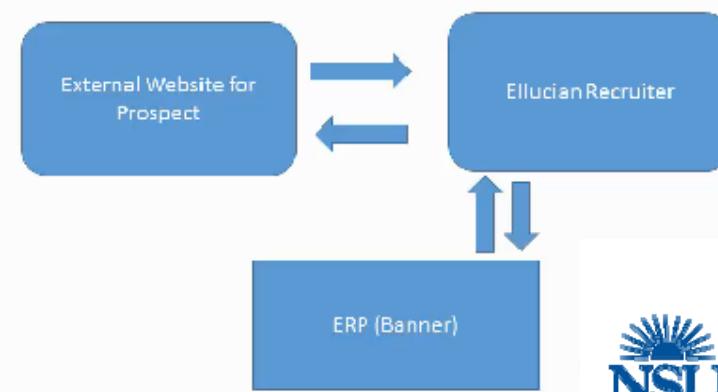


- Suspect
- Prospect
- Inquiry
- Applicant
 - Admits
 - Confirmed
 - Enrolled



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



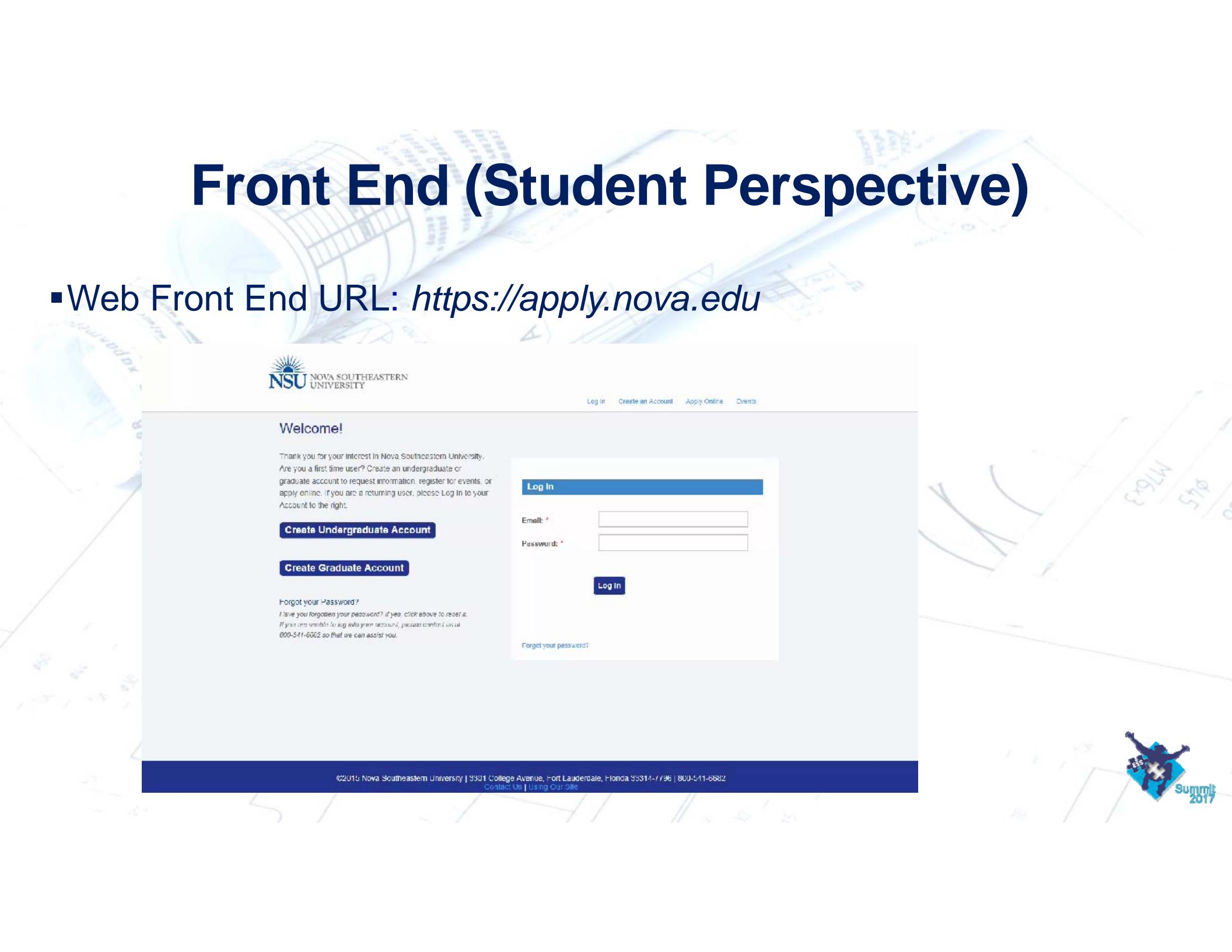
Integration Overview

- Applicant Data moves into Banner from CRM Recruit
 - Data loads 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)

- Web Front End URL: <https://apply.nova.edu>



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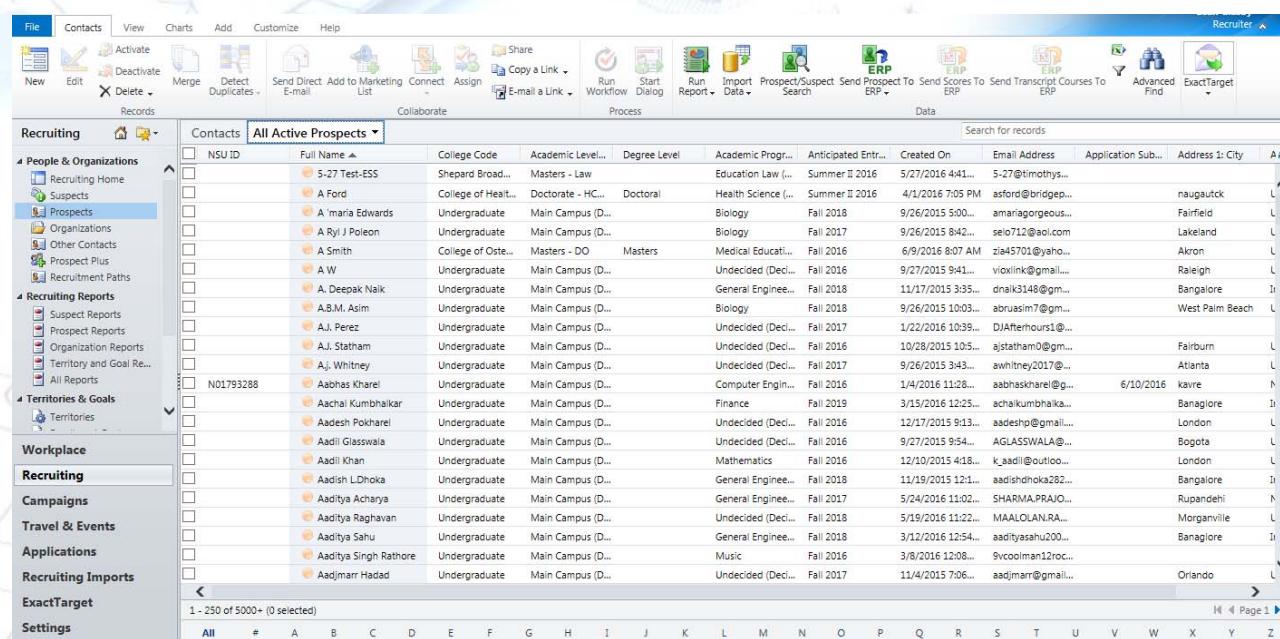
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Back End (Staff Perspective)

- Back End (Production) URL: <https://recruiter.nova.edu>
- Back End (Training) URL: <https://recruiteradmintest.nova.edu/Training/main.aspx>



The screenshot shows the ExactTarget Recruiter software interface. The top navigation bar includes File, Contacts, View, Charts, Add, Customize, and Help. The main menu bar includes New, Edit, Activate, Merge, Detect Duplicates, Send Direct, Add to Marketing List, Connect, Assign, Share, Copy a Link, Run Workflow, Start Dialog, Run Report, Import Data, Prospect/Suspect, Send Prospect To ERP, Send Scores To ERP, Send Transcript Courses To ERP, Advanced Find, and ExactTarget. The left sidebar navigation includes Recruiting, People & Organizations, Prospects, Recruiting Reports, Territories & Goals, Workplace, Recruiting, Campaigns, Travel & Events, Applications, Recruiting Imports, ExactTarget, and Settings. The main content area displays a grid of prospects with columns for NSU ID, Full Name, College Code, Academic Level, Degree Level, Academic Program, Anticipated Entr., Created On, Email Address, Application Sub., Address 1: City, and a search bar. The data grid shows 1-250 of 5000+ prospects, with a navigation bar at the bottom for All, #, A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z.



Requesting Access

- OIIT Blackboard Course Certification
 - URL: <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**



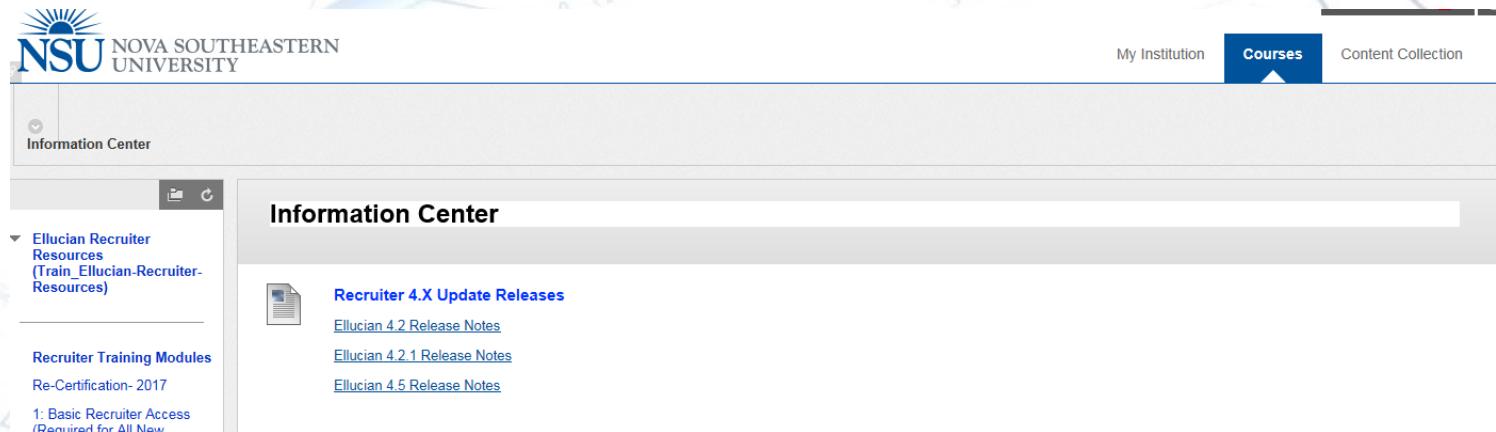
Training Opportunities

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



CRM Recruit 4x

- Projected Go Live: March 2018
- Blackboard Resources
 - <https://sharklearn.nova.edu>
 - Go to **Ellucian Recruiter Resources** course
 - Click on **Information Center**



The screenshot shows the NSU Blackboard Information Center page. At the top, there is a navigation bar with 'My Institution', 'Courses' (which is highlighted in blue), and 'Content Collection'. The main content area is titled 'Information Center'. On the left, there is a sidebar with a tree view showing 'Ellucian Recruiter Resources (Train_Ellucian-Recruiter-Resources)' expanded, and 'Recruiter Training Modules' and 'Re-Certification- 2017' collapsed. The main content area displays a list titled 'Recruiter 4.X Update Releases' with three items: 'Ellucian 4.2 Release Notes', 'Ellucian 4.2.1 Release Notes', and 'Ellucian 4.5 Release Notes'.



Questions?

- Additional questions – contact our team:
 - Leah Glasby, Associate Director
 - *gleah@nova.edu*
 - (954) 262-2876
 - Gerry Lopez, Associate Director
 - *gerardo@nova.edu*
 - (954) 262-7416
 - Kelly Sanchez, Assistant Director
 - *ticlavil@nova.edu*
 - (954) 262-7238





Don't settle for what life gives you; make life better and build something.

Ashton Kutcher

