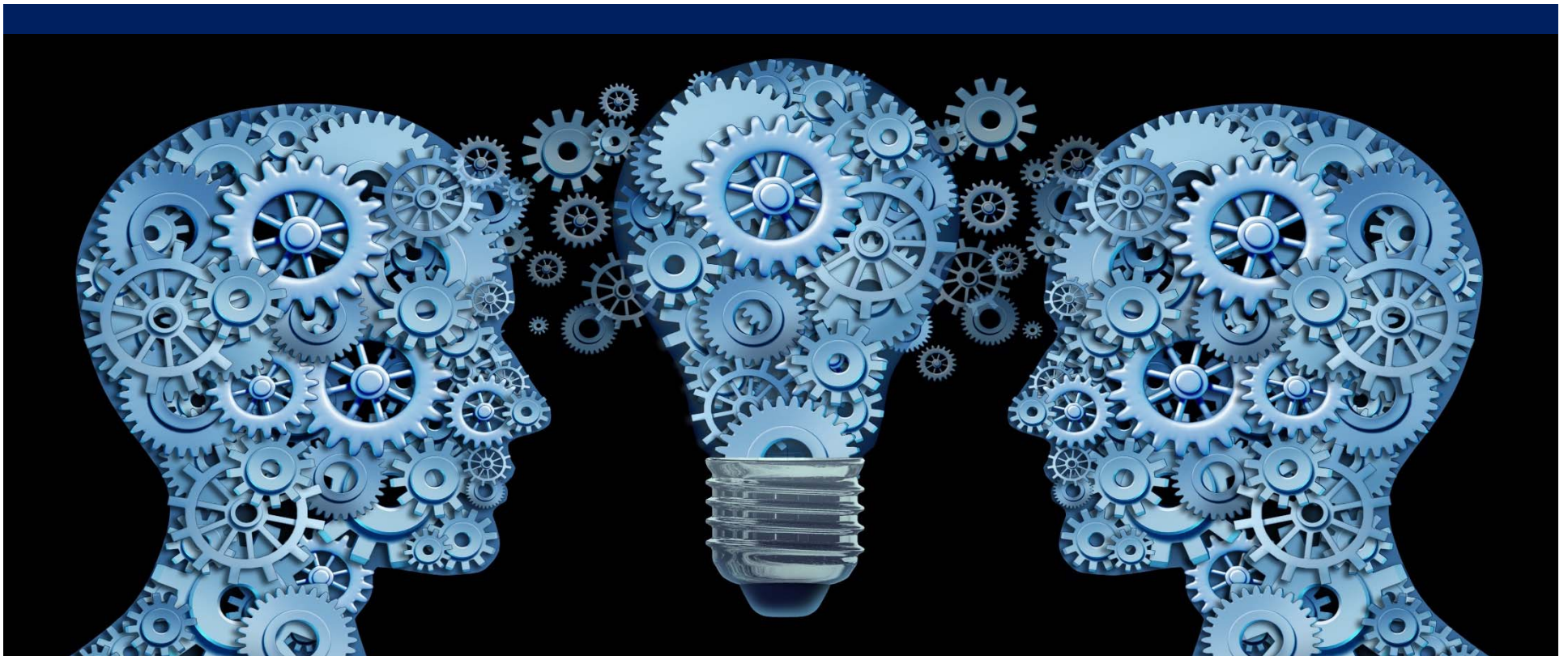


The Basics of Ellucian CRM Recruit

Leah Glasby

Associate Director



Objective

Upon completion of this presentation, you will know:

- An introductory overview of the university's CRM recruitment and admissions system, Ellucian CRM Recruit.
- The basics of CRM Recruit from the prospective student's view.
- Select functions performed by ESS Systems team will also be addressed.



Agenda

Today's topics will include:

- Recruit CRM Terminology
- Web Front End
- Web Back End
 - Navigating the Recruit Console
 - Working with Prospect Records
 - Search for a Record
 - Review a Record
- Reporting Issues
- Training
- Question and Answer



Ellucian Recruit CRM

- Ellucian Recruit CRM is a web-based recruitment and admissions tool.
- Replaces Web for Recruitment/Web for Admissions
 - Built on a Customer Relationship Management (CRM) Platform
 - Uses Microsoft Dynamics CRM
- Transfers the data to Banner Student Information System (SIS)



Terminology

- People
- Opportunity
- Ownership
- Activities
- Recruitment Funnel
- Supplemental Item
- Super User
- Web Front End
- Web Back End



People and Opportunities

- Contacts are managed in Recruit through the creation of prospective student 'Person' records.
- Recruitment Opportunities track each enrollment opportunity that a prospective student may represent across different entry terms, academic levels, and academic programs.
 - Each prospective student can have multiple Recruitment Opportunities



Ownership

- Work assigned to a specific user, who is then responsible for a specific record(s).
 - Opportunity Owner “Recruiter”
 - Application Owner
 - Application Folder Owner
 - Ownership assignments
 - System Workflow
 - Manually by CRM user



Activities

Activities document all communication that transpire between every prospective student and the University.

Information includes the type of communication, as well as the subject, time and details.

Types:

- Phone Call
- Appointment
- Email
- Task (Walk-ins)

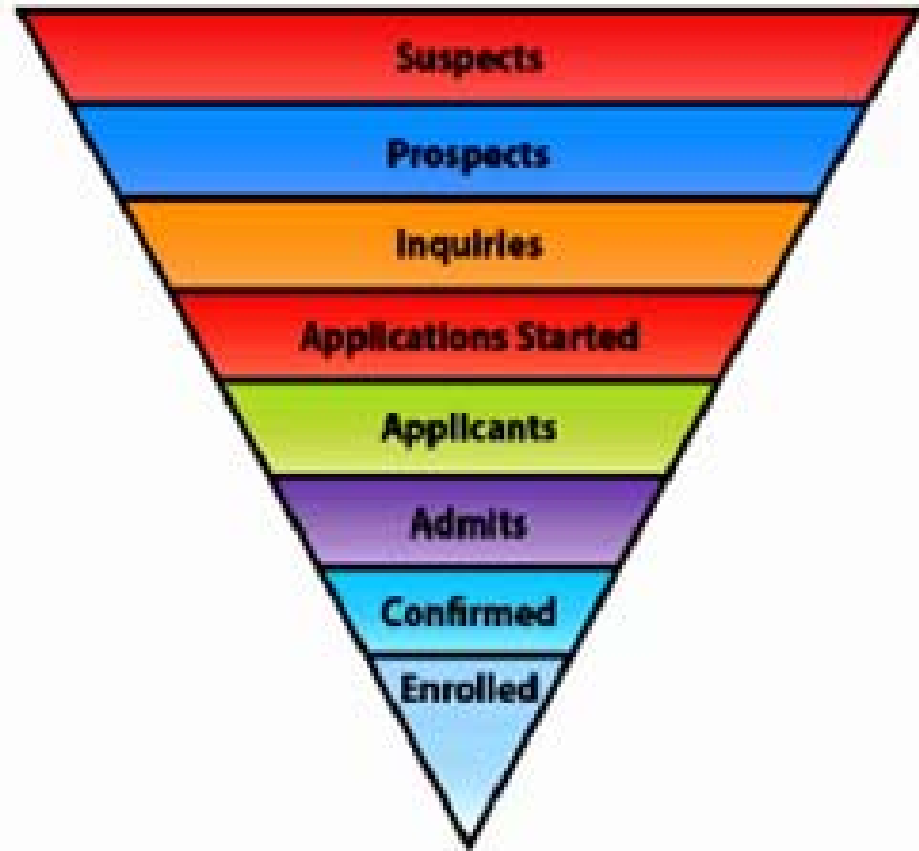
Categories:

- Open
- Closed



Recruitment Funnel

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



Supplemental Item

- Item outstanding/received from a prospective student during the application process, in support of their application:
 - Transcript
 - Test Score
 - Letter of Recommendation
 - Portfolio



Super User

- Designated NSU staff members who serve as Recruit subject matter experts for their respective departments
 - Receive updates of changes in the system
 - Attend meetings and give input on processes and procedures
 - Submit tickets to OIIT to assist in trouble-shooting issues and Request new User access



Web Front End

- The online portal that prospective students and applicants access via Nova Southeastern University's website:
<https://apply.nova.edu>



Recruit Webpage for Prospective Students



[Log In](#) | [Create a New Undergraduate Account](#) | [Create a New Graduate Account](#) | [Application Deadlines](#) | [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.

Email Note:

Please add @nova.edu to your email Safe Senders list in order to be able to receive email communications from NSU. Otherwise, you may miss important messages from NSU!

[Create a New Undergraduate Account](#)

[Create a New Graduate Account](#)

Forgotten Password

Have you forgotten your password? If yes, click above to reset it.
If you are unable to log into your account, please contact us at 800-541-6682 so that we can assist you.

[Log In](#)

Email: *

Password: *

[Log In](#)

[Forgot your password?](#)

Recruit Webpage for Prospective Students



[Log In](#) | [Create a New Undergraduate Account](#) | [Create a New Graduate Account](#) | [Application Deadlines](#) | [Apply Online](#) | [Events](#)

Create An Account

☐ Are you logged in from a public computer?

Thank you for your interest in Nova Southeastern University. To better serve you, we ask that you take a few moments to create an account with the university. Creating an account allows you to communicate your interests to us, to register for events, and to complete your application for admission. **By creating this account, you are certifying that you will not share your unique Login ID and PIN for NSU's application system.** Note: Form fields with a red asterisk (*) are required and must be completed before you can finalize the creation of your account.

Demographic Information

First Name *

Last Name *

Email Address *

Confirm Email Address *

Home Phone

Cellphone

Birth Date

Will you accept text messages?

☒ Do Not Allow ☐ Allow

Recruit Portal for Prospective Students



[Log Out](#) | [My Account](#) | [Application Deadlines](#) | [Apply Online](#) | [Events](#)

My Account

Welcome, ESSTraining! Nova Southeastern University has a long-standing tradition of excellence. We hope you will consider scheduling a visit to our campus soon.

My Profile

Contact

ESSTraining Test-ESS

999-555-6666

esstraining@nova.edu

333-888-8888

Address

555 Main Street

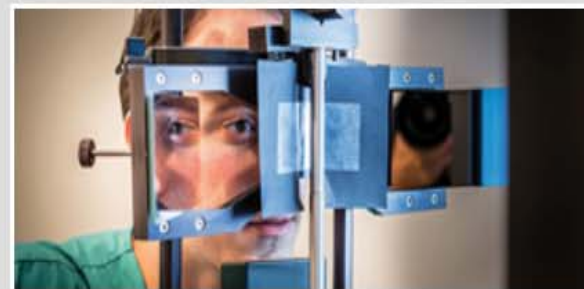
Davie

Florida

33314

United States

Program Spotlight



The M.S. in Clinical Vision Research program bridges clinical care in optometry with vision science by educating and training health-care professionals to conduct clinical research in a patient care or academic setting.

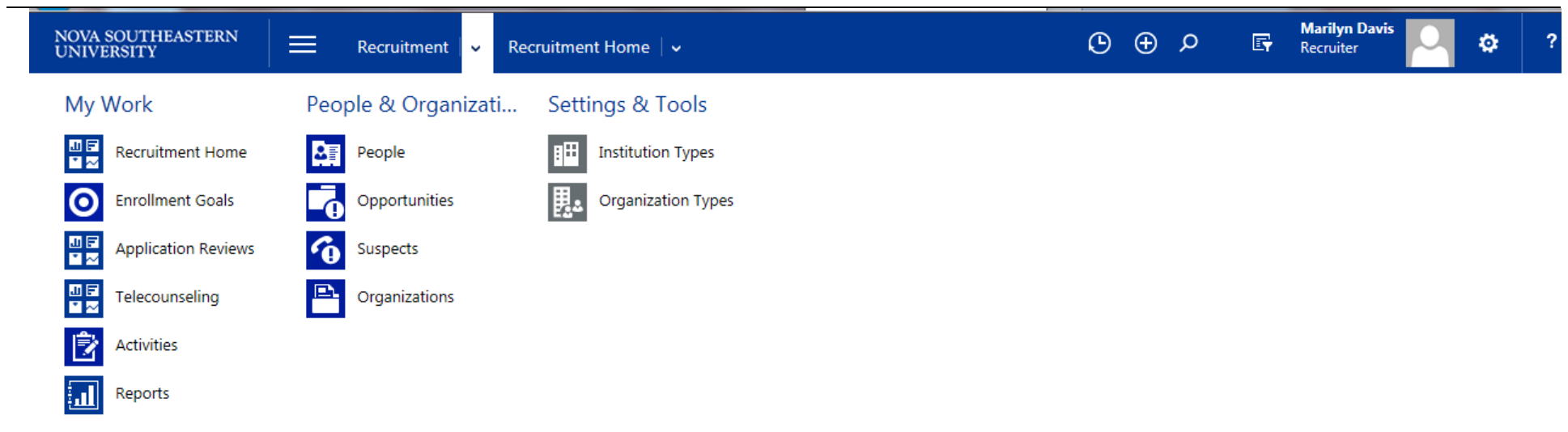
Contact Us

[Undergraduate](#)

[Graduate](#)

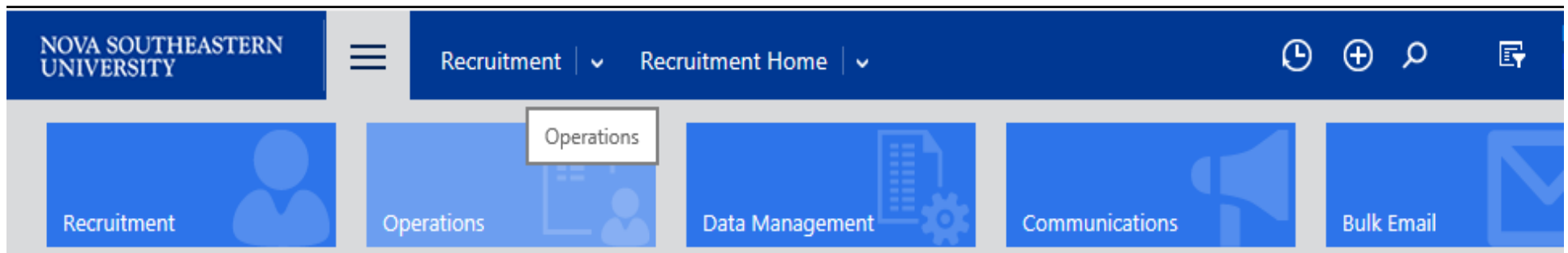
Web Back End

- The Recruit Console
 - The platform that staff utilize to perform internal operational functions: ***<https://recruit.nova.edu>***
 - Default browser should be Google Chrome



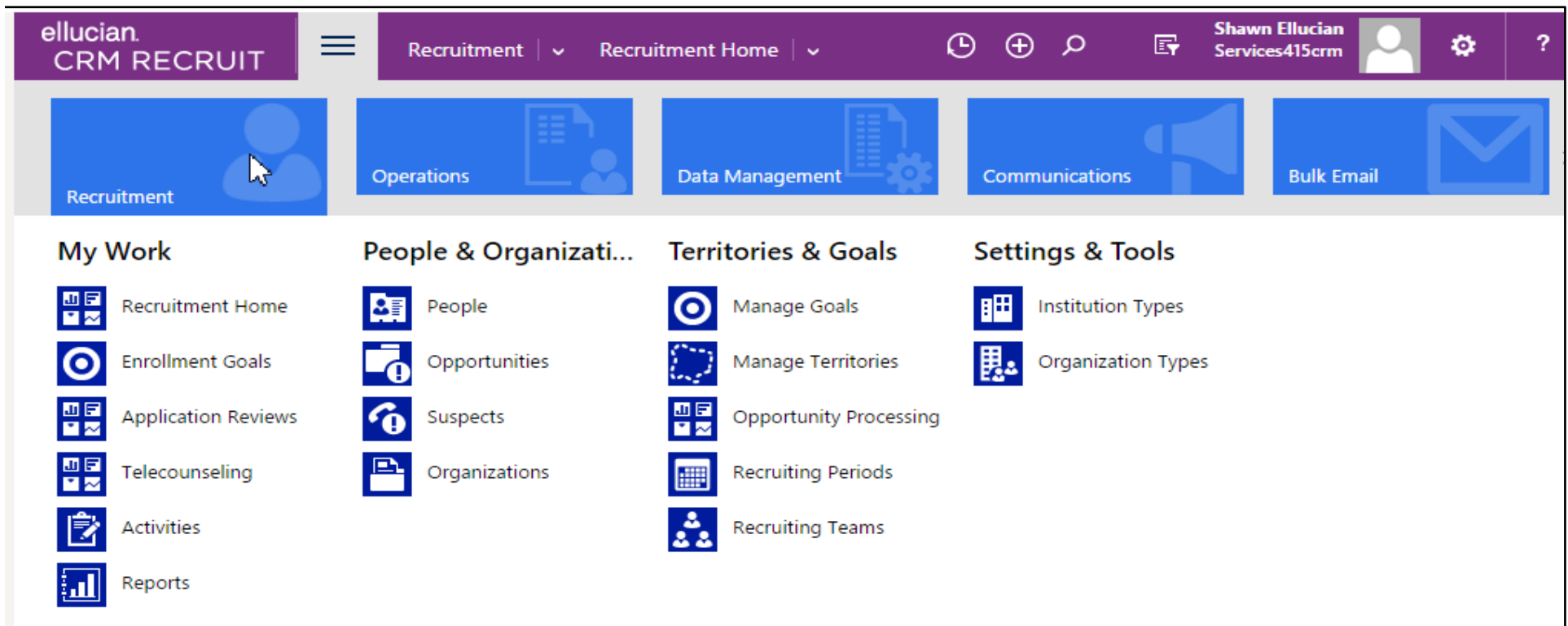
Navigation

- Modules
 - Recruitment
 - Operations
 - Data Management
 - Communications
 - Bulk Email
 - Travel & Events
 - Settings



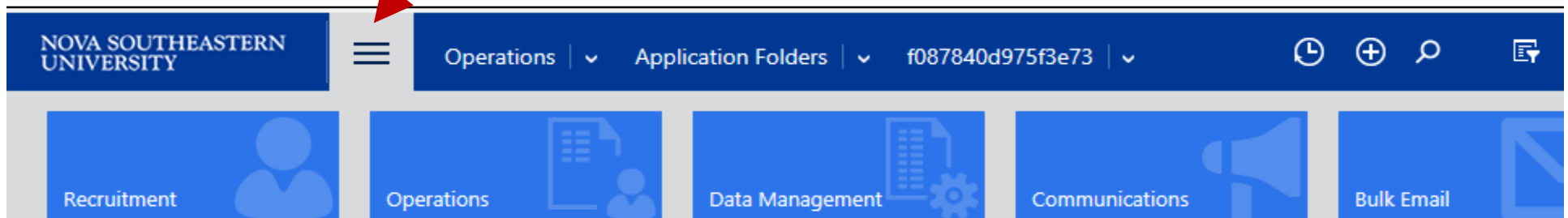
Navigation

- Operational Functions
 - When a module is selected, categorized icons will appear.



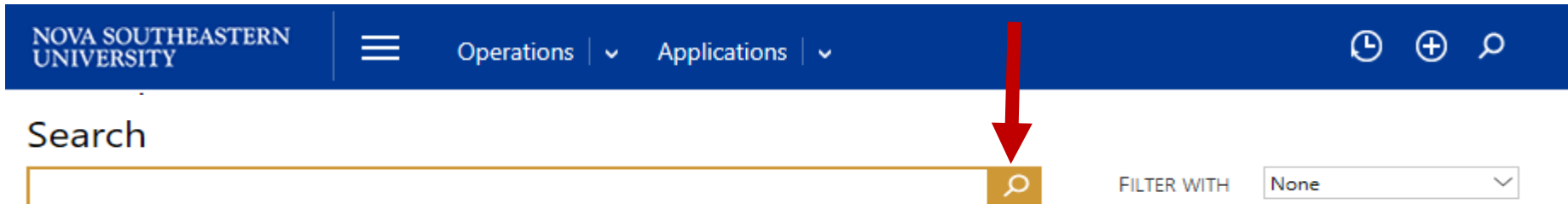
Navigation

- At any point in the navigation process, users can access the blue header and click the **menu icon**, to return to the main console.



Record Search

- Click **magnifying glass** on the blue toolbar
 - A 'Search' field will appear.



The screenshot shows the top navigation bar of the NOVA Southeastern University system. On the left is the university logo. In the center are menu items 'Operations' and 'Applications' with dropdown arrows. On the right are three icons: a clock, a plus sign, and a magnifying glass. Below the toolbar, a 'Search' label is positioned above a text input field. A red arrow points from the magnifying glass icon in the toolbar to the search input field. To the right of the input field is a 'FILTER WITH' dropdown menu currently set to 'None'.

- Type prospective student's NSU ID, full name, or partial name and * (wildcard) in Search field.











Record Search

- Under '**People**' click **student's name** to open the record

Search

test-ess

FILTER WITH None

Suspects	People	Opportunities	Applications
 Test-ESS Heather heatherj@nova.edu	 bradman456jkl test-ess 1/1/1996 ----	 Test-ESS 1-26-18 Application Started	 11-22 Test Test-ESS c3d3ecd645655b4 Graduate Application
 Test-ESS Melissa ruidiaz@nova.edu	 2-7c Test-ESS ---- ----	 Test-ESS 1-26-18 Inquiry	 11-22 Test Test-ESS 28eba5dee414e620 Graduate Application




Reviewing a Profile

- NSU ID
- Name Information
- Contact Information
- Recruitment Opportunities
 - Applications
 - Application Folders
- Related Information
 - Activities
 - Notes
 - Test Scores
 - Financial Aid
 - Academic History
- Centralized Application (CAS)



Reviewing a Profile




PERSON ▾


Zachary Test-ESS

Zachary Test-ESS

ERP ID

 NXXXXXXX


Origin Source*

 Royall & Com

Summary

NAME INFORMATION

Person Type

 Prospective

Prefix

--

First Name*

Zachary

Middle Name

--

Last Name*

Test-ESS

Suffix

--

Nickname

--

Alternate First Name

--

Alternate Last Name

--

CONTACT INFORMATION

Contact Preference*

Any

Email Address

198605@em i

Home Phone

407-792-950 :

Mobile Phone


--

Preferred Mailing Address


--

Contact Methods


Allow Contact




Mail




Phone



Bulk Email



Email



RECRUITMENT OPPORTUNITIES

+

Topic ↑

Recruiter

Funnel Stage

Fall 2018 - Art

Craig Futterman

Application Submit

<


>

PERSONAL INFORMATION

Birth Date

12/27/199

Age

 --

Gender

Male

Gender Identity

--

Marital Status

--

Citizenship Status

U.S. Citizen

SSN

XXX-XX-XXXX

PERMANENT ADDRESS INFORMATION

Outside the U.S. or Canada

No

Address Line 1

119 Wornall

Address Line 2

--

City

Sanford

County

--

State/Province

Florida

ZIP/Postal Code

32771-7759

RELATED INFORMATION

Activities

Interactions

Attributes

Financial Aid

Academic History

Test Scores

BDM

POSTS

ACTIVITIES

NOTES

U.S. Premier Programs Desk

Reporting Issues

- System issues should be reported to the department super-user, who will submit a ticket to OIIT via Service Manager.
- The super-user will monitor the ticket status and report the outcome to the employee.
- Duplicate records should be reported to:
dataloads@nova.edu
 - When reporting a duplicate records, include:
 - First and last name
 - Date of birth (if available)



Training

- Ellucian Portal (Education Services)
<https://ellucian.okta.com>
 - Click on **Education Services** icon
 - Must have a user account – notify super user
 - ***Recruit Overview and Navigation***
 - Managing Opportunities and Recruitment Goals
 - Managing and Processing Applications
 - Completing Application Reviews
 - Managing Events, Dashboards, and Reporting



Innovation Quote

*“Innovation distinguishes
between a leader
and follower.”*

-Steve Jobs



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