

Ellucian CRM: platform overview



Enterprise-class, higher education-specific

Built for higher education

Ellucian CRM is designed for colleges and universities and provides higher education-specific business processes and data models as well as dashboards and reporting. Ellucian also delivers a set of baseline higher education data for your test or training environment, including International Organization for Standardization (ISO) and P20W Education Standards Council (PESC) standard data sets. Institutions can choose whether to use PESC standard data or institution-specific data sets to mirror core administrative systems. Ellucian provides a set of preconfigured options for community colleges, public institutions, and private institutions that include workflows, reports, views, dashboards, and communication plans.

Meets your needs today—and tomorrow

Until now, institutions seeking constituent relationship management solutions often had to choose between an enterprise-class constituent relationship management solution and one that meets the specific needs of higher education. With Ellucian CRM, there is no need to compromise. The Ellucian CRM Platform is built on the Microsoft® Dynamics CRM platform, an enterprise-class, analyst-recommended constituent relationship management solution with a well-established global footprint of more than three million users. This ensures your institution has world-class constituent relationship management capabilities that meet your needs today. And, with Ellucian CRM, those capabilities will continue to expand, so you can keep up with the rapid pace of innovation as your institution's needs evolve.

Supports the full student lifecycle

Ellucian CRM is a powerful, integrated set of relationship management solutions that help your institution more successfully recruit and enroll prospective students, support and retain current students, and cultivate meaningful lifelong relationships with alumni and supporters. The recruiting, student success, and advancement constituent relationship management solutions are all built on the same platform, enabling a unified view of constituent engagement.

Software-as-a-Service (SaaS) can help you reduce total cost of ownership and speed time to value because you:

- Use the latest version of software and take advantage of innovative new features
- Don't need to install, update, or manage software updates
- Pay a single subscription fee for software, support, maintenance, and administration
- Have consistent system availability and performance, even during peak times throughout the academic year

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Unparalleled integration and interoperability

People across your institution have the information they need in context, which helps everyone provide better service.

Integrate web services with core administrative systems

Ellucian CRM facilitates unparalleled web services integration with other core administrative systems—including student systems, finance systems, financial aid, learning management systems, and advancement systems. This powerful web services integration ensures data flows freely as a natural part of day-to-day operations without the immense effort of creating custom scripts or repeatedly moving snapshots of data from one system to another. People across the institution have the information they need in context, enabling everyone to provide better constituent service.

Unifying features embedded in your core administrative systems

People across your institution rely on your core administrative systems to perform their day-to-day functions. Ellucian CRM is unique because it provides features and capabilities that are embedded in the core administrative system, especially if you use a student information system such as Banner® by Ellucian or Colleague® by Ellucian. This eases adoption and provides convenience and insight to all those actively using your core administrative systems.

Multiple authentication options support single sign-on

People across your institution use an ever-expanding list of applications and everyone wants the convenience of single sign-on. It's important that your constituent relationship management solutions are compatible with your identity and access management strategy—not just for the convenience of users but to ensure appropriate user access and security controls are enforced. Today's technology-savvy students have high standards for convenience. When they do not have a single sign-on experience, they get frustrated and that ultimately creates an unnecessary barrier to engaging. Ellucian CRM supports a variety of authentication standards for staff including Security Assertion Markup Language (SAML) and Lightweight Directory Access Protocol (LDAP) and authentication mechanisms such as Active Directory, Central Authentication Service (CAS), and Shibboleth. This flexibility allows you to manage identity and access controls efficiently and appropriately for your institution. As an added benefit, students also have the option to authenticate using Facebook.

Infrastructure for automating data imports and exports

Ellucian CRM provides a variety of tools to ease the process of importing and exporting data. Whether it is a unique, one-time data migration, or a process where certain data files will be imported regularly, its powerful collection of easy-to-use tools let you map the data appropriately, import the data quickly, invoke the appropriate business logic, and duplicate checking rules to consistently maintain your data quality standards. In addition, Ellucian provides preconfigured import formats for commonly used higher education data sets such as test scores.

Integration with heavily used knowledge worker applications

Ellucian CRM becomes a seamless extension of the knowledge worker's daily life because applications that many already spend much of their time with, such as Microsoft Outlook or Microsoft Excel, are integrated. Individual email correspondence with a constituent from a staff member's Outlook client can be tracked automatically and any view of data within Ellucian CRM can be exported to Excel with just one click. The familiar user experience makes it easy for people to begin integrating powerful constituent relationship management capabilities into their day-to-day activities and increases the likelihood that the system is kept up to date with the latest information—all without requiring end users to significantly change their current habits.





Extensible technology supports speed-to-value and sustainability

Extend and customize your own constituent relationship management (CRM) experience in a way that minimizes the costs and complexity of upgrades.

Access to consistent, current, and standardized information

Ellucian CRM includes dashboards, forms, and views that can be personalized for the individual and standardized across the institution. The user experience can be extensively customized on an individual or department level, without custom coding. This creates an opportunity for each end user to add views and dashboards that help maximize efficiency. And those views and dashboards can be shared across teams, so managers can ensure that entire departments have consistent information. In addition, foundational capabilities let authorized users add a field to a data table and form or add new tables and forms without custom code and without interfering with your ability to upgrade. This flexibility improves user adoption and reduces burden on IT for customizations or report-building because no coding or technical skills are required.

Published APIs and software development kit facilitate extensions

Web services endpoints provide flexibility for extensions, customizations, and additional integrations so Ellucian CRM fits neatly within your portfolio of technology assets. The Ellucian CRM Platform includes published RESTful and SOAP-based APIs with a software development kit. So whether your institution chooses to build extensions now or in the future, your investment will not have to be rewritten with every upgrade.

Architecture manages customizations through upgrades

The Ellucian CRM contains a powerful infrastructure for managing client-specific configurations and custom code separately from Ellucian configurations and code. Similarly, Ellucian code is managed separately from Microsoft Dynamics CRM code. This enables institutions to extend and customize their own constituent relationship management experience in a way that minimizes the costs and complexity of upgrades. In addition, it allows institutions to upgrade one solution without affecting another, supporting the complexity of an enterprise-wide deployment with multiple solutions.

ELLUCIAN CRM

Ellucian CRM Recruit

CRM Advise

Ellucian CRM Advance

ELLUCIAN CRM PLATFORM

Enterprise-class and higher education-specific

Unparalleled integration and interoperability

Extensible technology supports speed to value and minimizes cost

Flexible deployment options

Microsoft Dynamics CRM



ELLUCIAN XE

APIs | Web services

ERP

HR

Finance

Student

Financial Aid

Banner® by Ellucian

Colleague® by Ellucian

PowerCampus™ by Ellucian

Command center for managing configuration settings provides flexibility

Each institution has unique requirements about when and how it needs business logic invoked. Many products in the market have hardcoded certain approaches into the business logic layer. And even if it's possible to customize, it can be extremely time consuming to manually code this logic and maintain it through upgrades. Ellucian customers retain their flexibility through a command center which controls this logic as configuration settings. Institutions can use the preconfigured settings that Ellucian suggests for community colleges, public and private institutions, or change the behavior of business logic directly through the user interface at any time without custom coding. Making these settings available to authorized non-technical users removes a significant burden on IT and makes it faster and easier to ensure the system is optimally configured for your business processes.

Diagnostic utility validates setup and configuration

Often small changes in server settings can create issues that are not readily identified, despite the sometimes detrimental effect on the proper functioning of the system. The Ellucian CRM includes a diagnostic utility which validates the infrastructure's health. This spotlight utility checks the proper functioning of the application, student-facing websites, web services integration with the student information system, and the ecommerce payment gateways, as well as proper system-level authentication across all web service endpoints. As a result, it can help you immediately identify an issue in system setup and save many frustrating hours troubleshooting to diagnose problems. The integration and interoperability of the Ellucian CRM Platform is powerful but complex, so this utility speeds the setup and eases ongoing maintenance.



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Process automation tools enable customized automation

Ellucian CRM includes a robust workflow and process automation engine (Windows Workflow Foundation) that enables users to automate complex series of actions and activities directly through the user interface without code. Simple task assignment can be automated, reminders can be set and monitored, and complex, interrelated sets of actions can be automated when certain conditions are met. This takes the burden off of end users and IT staff and helps enforce consistent processes, despite large numbers of users. Automated follow-up items support better constituent service because you don't have to wait for individuals to manually conduct next steps.

Architecture speeds innovation and new feature enhancements

Ellucian CRM includes a powerful infrastructure for registering plug-ins and workflow activities and adding them to the solution—making it easier to build enhanced functionality more quickly.

Tools speed installation and upgrades

Ellucian CRM is neatly packaged into a collection of installers that automate complex deployment logic which would otherwise be time-consuming, tricky, and error-prone to execute manually. This set of tools speeds installations and reduces risks of mistakes in setup, so every upgrade is significantly faster and easier.



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Ellucian is the world's leading provider of software and services higher education institutions need to help students succeed. More than 2,400 institutions in 40 countries rely on Ellucian to help enable the mission of higher education for over 18 million students. Ellucian provides student information systems (SIS), finance and HR, recruiting, retention, analytics and advancement software solutions. With more than 1,400 institutions subscribing to Ellucian's cloud services and SaaS offerings, the company is one of the largest providers of cloud-based solutions. Ellucian also supports the higher education community with a range of professional services, such as application software implementation, training, education, and management consulting.

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