

Hobsons Connect User Training For Program Directors and Key Staff



Graduate School
and Research

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Introduction

The Graduate School currently uses several software systems to manage the Graduate School prospect management and admissions processes. These tools are available to Program Directors and Key Staff members, to easily support their prospects and applicants.

Access can be granted to Program Directors and Key Staff members for these systems by accessing <http://gradaccess.wcu.edu>.



Hobsons Connect

Hobsons Connect is the software platform used by Graduate School to manage prospects and applicants. Functionality includes:

- Automated Communication Plans
- Automated Reporting
- Dashboard Reporting
- Prospect and/or applicant VIP Personal Web Portal for information gathering and application status updates.



Hobsons Connect and ApplyYourself

Hobsons Connect and Hobsons ApplyYourself are integrated with each other. ApplyYourself sends application data to Connect on a regular basis.

Connect does not send information to ApplyYourself

Applicant information held within ApplyYourself is available in Connect for communication and reporting purposes.



Log into Hobsons Connect and ApplyYourself

Since Connect and ApplyYourself is integrated, when you log in access to both systems are granted. Access to log into Connect is <http://gradcrm./wcu.edu>.

- Your password will expire every 30 days
- Your password must have a special character
- Graduate School is unable to reset your password
- Please use the Reset Password link.



Log in to Your Account

Username*:

Password*:

[Reset password](#)

[Need assistance resetting your password?](#)

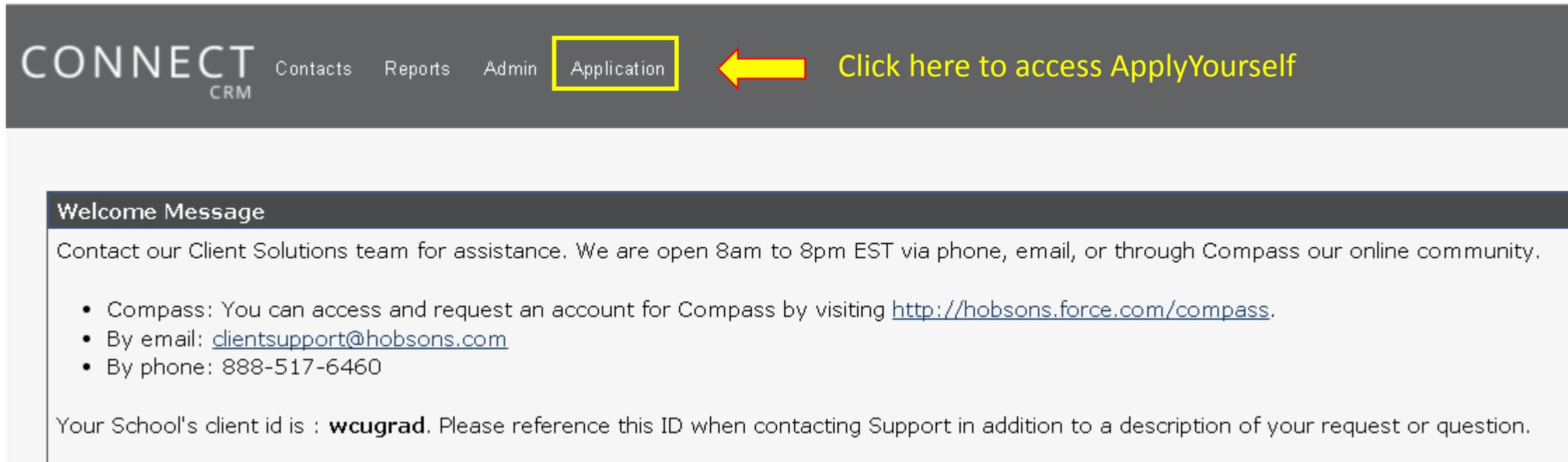


Welcome Screen

When you log into Connect, you will be placed within the Connect C.R.M. by default. If you are a current ApplyYourself user, you can still access the applications from Connect.

NOTE: ApplyYourself is only available for Power Users.

If you need access to ApplyYourself, contact Graduate School at 828-227-7398.



CONNECT CRM Contacts Reports Admin **Application** ← Click here to access ApplyYourself

Welcome Message

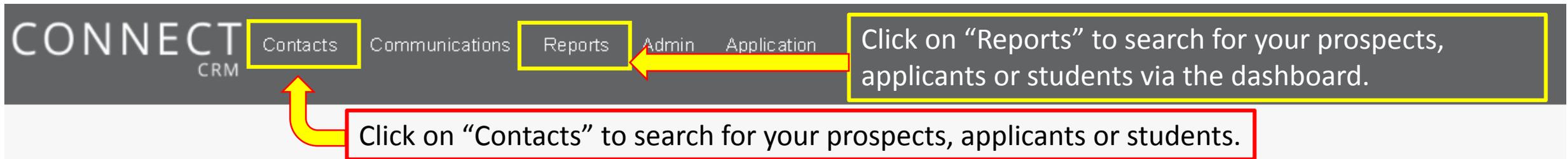
Contact our Client Solutions team for assistance. We are open 8am to 8pm EST via phone, email, or through Compass our online community.

- Compass: You can access and request an account for Compass by visiting <http://hobsons.force.com/compass>.
- By email: clientsupport@hobsons.com
- By phone: 888-517-6460

Your School's client id is : **wcugrad**. Please reference this ID when contacting Support in addition to a description of your request or question.

Types of Access

At the top of the Connect screen, there are several tabs or links to access the various modules of Connect. You will only need to learn how to search for your contacts and/or review your dashboard reports.



The screenshot shows the top navigation bar of the Connect CRM interface. The word "CONNECT" is on the left, with "CRM" below it. To its right are five tabs: "Contacts", "Communications", "Reports", "Admin", and "Application". The "Contacts" and "Reports" tabs are highlighted with yellow boxes. A yellow arrow points from the "Reports" tab to a yellow-bordered text box on the right that says "Click on 'Reports' to search for your prospects, applicants or students via the dashboard." Another yellow arrow points from the "Reports" tab to a red-bordered text box below it that says "Click on 'Contacts' to search for your prospects, applicants or students."

Welcome Message

Contact our Client Solutions team for assistance. We are open 8am to 8pm EST via phone, email, or through Compass our online community.

- Compass: You can access and request an account for Compass by visiting <http://hobsons.force.com/compass>.
- By email: clientsupport@hobsons.com
- By phone: 888-517-6460

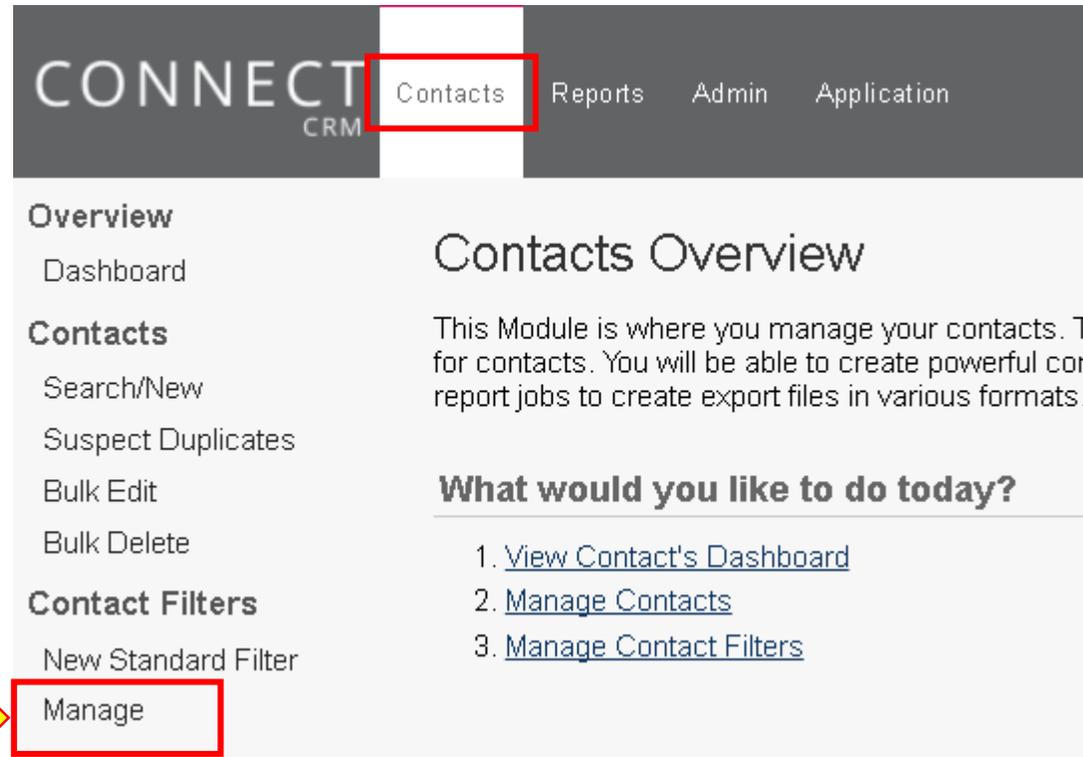
Your School's client id is : **wcugrad**. Please reference this ID when contacting Support in addition to a description of your request or question.

Contacts

You can search for prospect, in-process and submitted applicants and students in Connect.

The search results can provide you with contact information from Connect and ApplyYourself

1 - Click on “Contacts” to search for your prospects, applicants or students.



Contacts Overview

This Module is where you manage your contacts. It is for contacts. You will be able to create powerful contact report jobs to create export files in various formats.

What would you like to do today?

1. [View Contact's Dashboard](#)
2. [Manage Contacts](#)
3. [Manage Contact Filters](#)

2 - Click on “Search” to look for your prospects, applicants or students.



Searching for Contacts

When searching for prospects, in-process and submitted applicants and students in Connect, you can only search using certain fields.

You can search by the following:

- First Name
- Last Name
- Email Address

You can also search by

- Applicant Client ID = ApplyYourself ID
 - Banner ID = 920 Number
- Login = VIP and/or AY User Name

EXAMPLE – Last Name = Application

Search for Contacts

Mode:

Use exact search ⓘ

3 Click on the "Search" button at the top or bottom of the screen

1 Remember to un-check this box when searching

2 Select the field(s) to search by

ID:

Applicant Client ID:

Banner ID:

Login:

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

PO Present 1:

PO Present 2:

City Present 1:

State Present 1:

Zip Present 1:

Present NC County:

Country of Citizenship:

E-mail:



Contact Search Results

- The contact search results provides you with the data from the fields established within the contacts navigator.
- The contacts navigator can be customized to provide the specific results you are looking for.
- Click on the “ID” link to view the contacts information

Search Results Contact Navigator: [Make Default](#) | [Customize](#)

[Auto-Merge](#) [New Contact](#) [New Search](#) [Delete](#)

Page 1 of 1 [Go](#) **Displaying:** 1 to 1 of 1 **Items/page:**

Action	ID	Banner ID	Created	Created Date	Applicant Client ID	Login	Submitted Date	Last Name	First Name	E-mail	Catamount Email	Program	Concentr
<input type="checkbox"/> Edit	61	920123456	12/12/2013 4:53 PM	9/11/2012	5514279	ncp13cer	2/16/2017	Application	Practice	dpstrickland@wcu.edu	dpstrickland@catamount.wcu.edu	Gerontology Certificate - Distance	No Conce

Last generated on Mon May 01 2017 11:52:40 GMT-0400 (Eastern Daylight Time)

Hobsons Product Training - Connect - C.R.M. | Customer Relationship Management - Navigating the Contacts search results



- Applicant Client ID:
- Banner ID:
- Login:
- Prefix:
- First Name:
- Middle Name:
- Last Name:
- Suffix:
- Mailing - PO Present 1:
- PO Present 2:
- City Present 1:
- State Present 1:
- Zip Present 1:
- Present NC County:
- Country of Citizenship:
- E-mail:
- Email:
- Catamount Email:
- Area Code:
- US Telephone:
- Cell Phone:
- Birth - APP:
- Country Present 1:
- Non US:
- Recruiting Events:
- Sex: None Male Female
- Contact Type:
- E-Mail Opt Out:
- Interest Page Source Code ID:
- Contact Stage:
- How Learn:
- Questions?:

Search results are specific to your record access account. You should only see results for the program(s) you support.

If contact information needs to be updated, contact the Graduate School at 828-227-3198 or email at grad@wcu.edu

- Enrollment Deadline Date:
- Created Date:
- Submitted Date:
- Completed Date:
- Program Director Names:
- Program Director Email Address:
- Program:
- WCU Location:
- Term_APP:
- Concentration:
- Recommendations (Complete Status):
- Other Supporting Documents (Complete Status):
- Transcripts (Complete Status):
- Standardized Test Scores (Complete Status):
- GMAT Test Status:
- GRE Test Status:
- IELTS Test Status:
- MAT Test Status:
- Other Test Status:
- TOEFL Test Status:
- Recommendation:
- Decision Date:
- Decision Publish Date:
- Conditions (CB): Other (Please submit in text box) Must submit an official final transcript showing a conferred bachelor's degree prior to the end of the first term Must submit official acceptable test scores prior to the end of first term Must earn a minimum 3.0 GPA in first term
- In Process Status:
- In Process Status Publish Date:
- Enrollment Decision:
- Application Fee (Complete Status):
- Military Fee Approved:
- AY Decision:
- Open House Attendance Biltmore Park 2016:
- Open House Attendance Cullowhee 2016:
- Registration Cullowhee Graduate Program Open House:
- Registration Asheville Graduate Program Open House:
- Open House Date:

Although search results cannot be export from the contacts module, you can export results from the Reports module.



Graduate School and Research



Hobsons Product Training - Connect - C.R.M. | Customer Relationship Management - Navigating the Contacts Email communications



[Communications Log](#) |
 [Contact Edits Log](#) |
 [Contact Stages](#)

[View all contact communication details.](#)

View Communications by...

Log: Type: Sub-Type:

View the emails sent and if they were viewed by the contacts



Page 1 of 5
 Displaying: 1 to 25 of 125
 Items/page:

Action	Name	Log	Type	Sub-Type	Description	Comm Plan	Date and Time	Who
	Program Director - Welcome to WCU Graduate School	E-mail Viewed	Communication	EMT E-Mail Results	Program Director - Welcome to WCU Graduate School	New Students	4/29/2017 3:00:46 PM	Program Director - Welcome to WCU Graduate School
	Next Steps - New Student	E-mail Viewed	Communication	EMT E-Mail Results	Next Steps - New Student	New Students	4/29/2017 2:01:16 PM	Next Steps New Student
	Happy Holidays and Closing Notice	E-mail Sent/Not Viewed	Communication	EMT E-Mail Results	Happy Holidays and Closing Notice	Others	12/6/2016 11:02:16 AM	Happy Holidays
	Welcome to WCU Graduate School	E-mail Viewed	Communication	EMT E-Mail Results	Welcome to WCU Graduate School	New Students	12/3/2016 1:03:02 PM	Welcome to WCU Graduate School
	Next Steps - New Student	E-mail Viewed	Communication	EMT E-Mail Results	Next Steps - New Student	New Students	12/3/2016 1:02:41 PM	Next Steps New Student
	Military Application Fee Refund Denied	E-mail Viewed	Communication	EMT E-Mail Results	Military Application Fee Refund Denied	Submitted Applications	11/30/2016 1:03:40 PM	Military Fee Refund - Denied
	Military Application Fee Refund Denied	E-mail Viewed	Communication	EMT E-Mail Results	Military Application Fee Refund Denied	Submitted Applications	11/29/2016 1:03:04 PM	Military Fee Refund - Denied
	Welcome to WCU Graduate School	E-mail Bounced	Communication	EMT E-Mail Results	Welcome to WCU Graduate School	New Students	11/18/2016 1:02:49 PM	Welcome to WCU Graduate School
	Next Steps - New Student	E-mail Viewed	Communication	EMT E-Mail Results	Next Steps - New Student	New Students	11/18/2016 1:02:18 PM	Next Steps New Student
	Thank you for considering	E-mail Viewed	Communication	EMT E-Mail Results	Thank you for considering	New Students	11/3/2016 1:01:52 PM	Thank you for considering



For More Information

If you would like information about how to automate email communications for your program, please contact the [Graduate School](#).

828-227-7398

grad@wcu.edu



IMPORTANT

The Reports module is not restricted in areas of archive, edits, and deletions.

Please do not click on “Edit”, “Archive” or “Delete” links while viewing reports.

IMPORTANT



Connect Dashboards

After you click on the “Reports” link, you will be able to view various reports and two different dashboards to assist you with your prospects, in-process and submitted applicants and students

CONNECT
CRM

Contacts

Communications

Reports

Admin

Application

Click on “Reports” to search for your prospects, applicants or students via the dashboard.

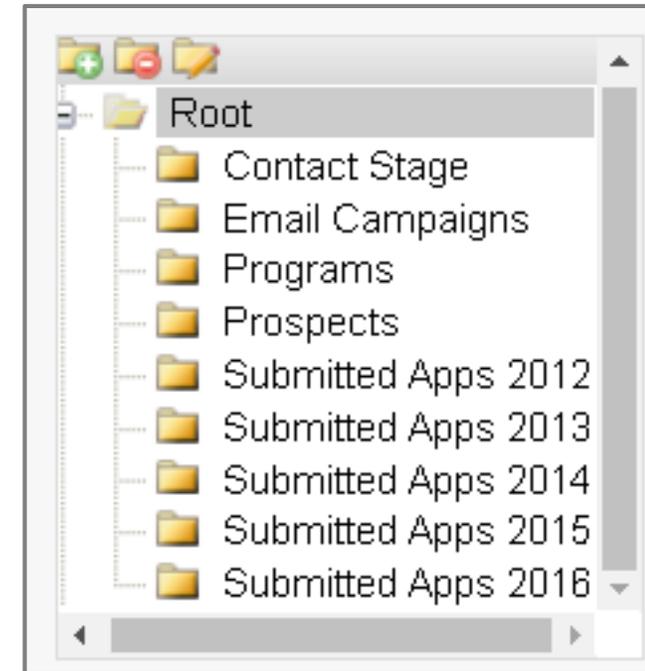
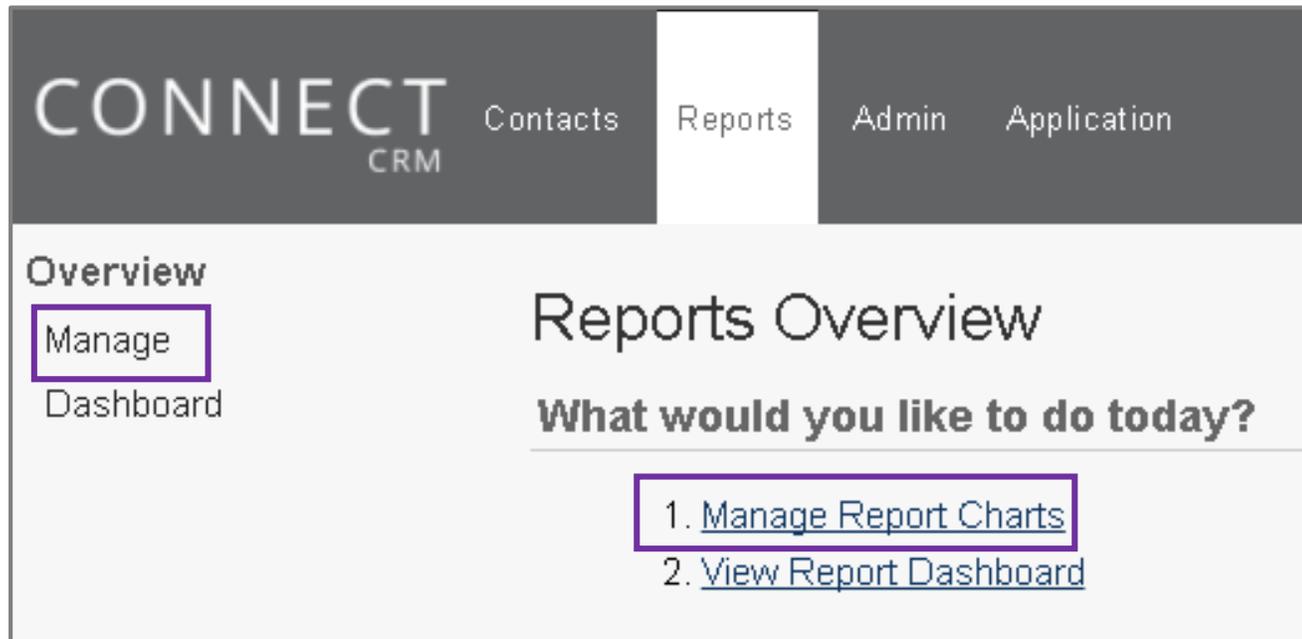
Welcome Message

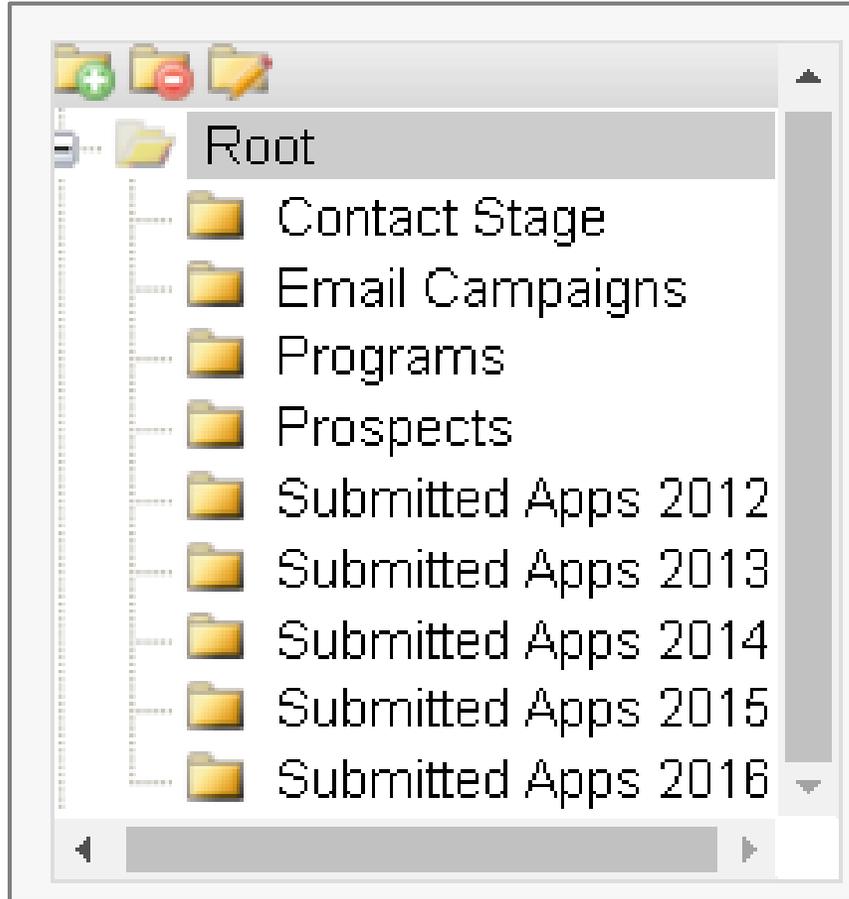
Contact our Client Solutions team for assistance. We are open 8am to 8pm EST via phone, email, or through Compass our online community.

- Compass: You can access and request an account for Compass by visiting <http://hobsons.force.com/compass>.
- By email: clientsupport@hobsons.com
- By phone: 888-517-6460

Your School's client id is : **wcugrad**. Please reference this ID when contacting Support in addition to a description of your request or question.

- Click on “Manage”, or....
- Click on “Manage Report Charts”  then.....
- Choose the folder for the reports you would like to view.





Connect Reports

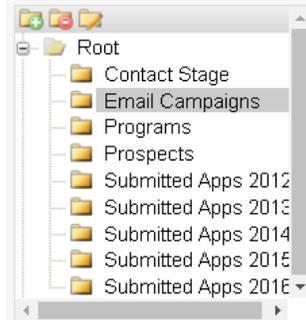
- Contact Stage = Reports based upon contact stage
 - Targeted Prospect, Prospect, In-Process App, Submitted App, Enrolled, Denied, Withdrawn, Waitlisted
- Email Campaigns = Results from various email and marketing efforts
- Programs = Reports to assist programs
- Prospects = Program Prospects
- Submitted Apps 2012 – Combined Graduate School Report
- Submitted Apps 2013 – Combined Graduate School Report
- Submitted Apps 2014 – Combined Graduate School Report
- Submitted Apps 2015 – Combined Graduate School Report
- Submitted Apps 2016 – Combined Graduate School Report

Report Chart Navigator



The Reports Chart Navigator holds all the reports in the folders. Click on the “View” link to see the results.

Remember results are specific to your record access account, or you can only see results for the program(s) you support.



[Delete Report\(s\)](#) [Move Report\(s\)](#)

View: All Reports Modified: All [Go](#)

Displaying 1 - 28 of 28 Reports Rows per page: 50 [Go](#)

Action	Title	Attribute(s)	Filter
<input type="checkbox"/> View Edit	2014 GRE Scores without Apps FREE Campaign	Contact Stage	2014 GRE Scores without Apps
<input type="checkbox"/> View Edit	2014 UG JR SR FREE Campaign	Contact Stage	Import filter WCU UG JR_SR 201480.bt-New_03-28-2016_03.51.02_PM
<input type="checkbox"/> View Edit	2015 Chancellors List	Contact Stage	Import filter 201510 Chancellor's List Spring 2015-10-5.bt-New_03-28-2016_03.48.57_PM
<input type="checkbox"/> View Edit	2015 COB GMAT Paid Campaign	Contact Stage	Import filter GMAC_COB_06082015.csv-New_03-28-2016_03.55.06_PM
<input type="checkbox"/> View Edit	2015 COB Marketing Campaign	Contact Stage	Prospects - College of Business - Marketing
<input type="checkbox"/> View Edit	2015 Fall GRE Scores without Apps FREE Campaign	Contact Stage	Import filter 2015 GRE NO APPS Imported Targeted Prospects 20151013.bt-New_03-28-2016_04.28.48_PM
<input type="checkbox"/> View Edit	2015 GMAT Paid Campaign	Contact Stage	GMAT COB Email Campaign June 2015
<input type="checkbox"/> View Edit	2015 GRE BIO CHEM HIST ENG Paid Campaign	Contact Stage	Import filter WCUGRAD_2015_HIST_ENG_CHEM_BIOL_5897-2015-251003_5-13-2015.csv-New_03-28-2016_03.58.41_PM
<input type="checkbox"/> View Edit	2015 McNair Scholar	Contact Stage	Import filter WCU_McNair Scholar 10292015.bt-New_03-28-2016_04.37.37_PM
<input type="checkbox"/> View Edit	2015 Summer GRE Scores without Apps FREE Campaign	Contact Stage	Import filter 2015 GRE NO APPS Imported Targeted Prospects 20150519.bt-New_03-28-2016_04.28.35_PM
<input type="checkbox"/> View Edit	2015 UG JR SR FREE Campaign	Contact Stage	Import filter WCU UG JR_SR 201580_10232015.bt-New_03-28-2016_04.39.28_PM
<input type="checkbox"/> View Edit	2016 - 2017 Biltmore Park Open House	Contact Stage	2016 - 2017 Biltmore Park Open House Attendees
<input type="checkbox"/> View Edit	2016 - 2017 Cullowhee Open House	Contact Stage	2016 - 2017 Cullowhee Open House Attendees
<input type="checkbox"/> View Edit	2016 Chancellor's List	Contact Stage	Import filter 201610 Chancellor's List Spring 2016 02232016.bt-New_03-28-2016_04.42.37_PM
<input type="checkbox"/> View Edit	2016 Marketing Campaign Tier 1	Contact Stage , Program	2016 Prospects - Marketing_Tier 1
<input type="checkbox"/> View Edit	2016 Marketing Campaign Tier 2	Contact Stage , Program	Marketing Campaigns - Tier 2

The Reports Chart Navigator results shows the amount of contacts in the various fields

Click on the number links to see the contact listing, giving you the ability to view the contact details.

These results can be exported by clicking on the application you wish to export to.



Report Chart Viewer



Report Name: 2016 Marketing Campaign Tier 2

Filter: Marketing Campaigns - Tier 2

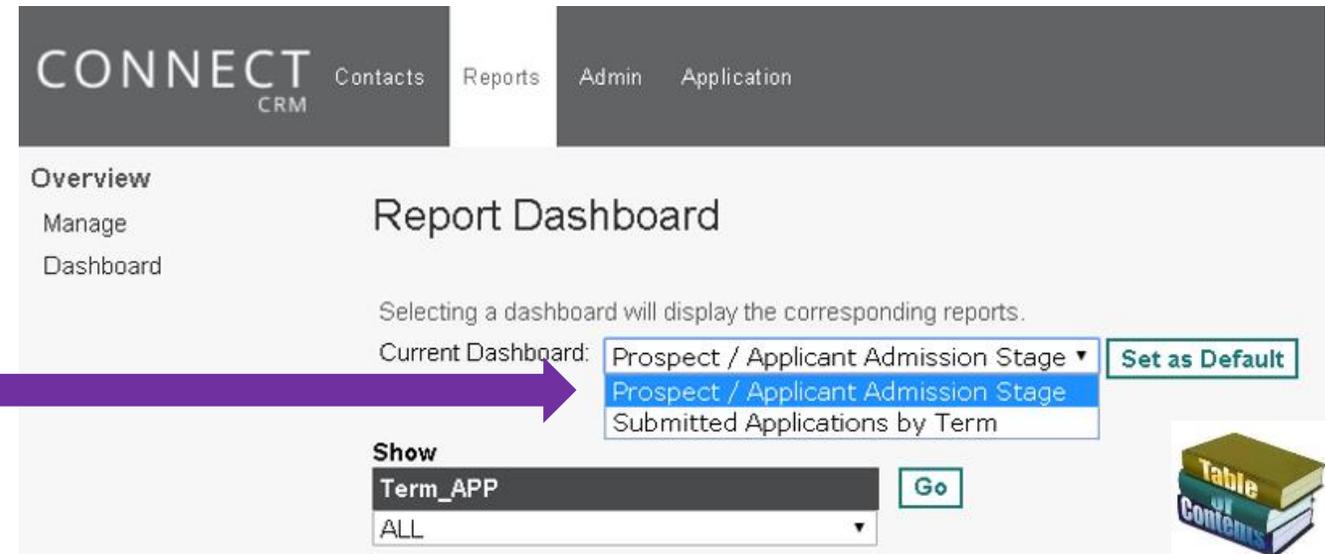
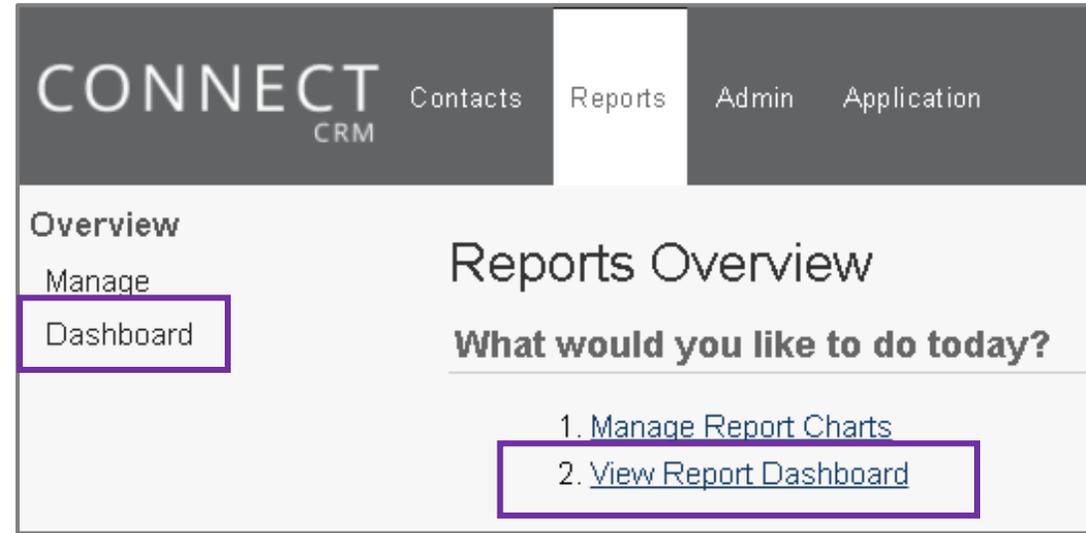
Attribute(s): Contact Stage, Program

Generated: 5/1/2017 3:52 PM

Generated By: Don Strickland

Contact Stage	Program - Higher Ed Student Affairs - M.Ed.	Program - Elementary Education - M.A.Ed. - AIG - Distance	Program - Elementary Education - M.A.Ed. - Literacy - Distance	Program - English - M.A.	Program - Entrepreneurship - M.E. - Distance	Program - History - M.A.
Targeted Prospect	16	20	17	11	22	16
Prospect	4	1	2	2	2	1
In Process App	1	0	3	3	4	2
Submitted App	0	0	0	0	1	0
Enrolled	3	1	3	2	5	0
Withdrawn	0	0	1	0	1	1
Totals	24	22	26	18	35	20

- Click on “Dashboard”
or....
- Click on “View Report Dashboard”
- Select a dashboard in the drop down listing



Hobsons Product Training - Connect - C.R.M. | Customer Relationship Management - Viewing the Connect Dashboard Reports



The Reports Chart Navigator results shows the amount of contacts in the various fields

Click on the number links to see the contact listing, giving you the ability to view the contact details.



These results can be exported by clicking on the application you wish to export to.

Contact Stage	Term_APP - Spring 2017	Term_APP - Summer 2017	Term_APP - Fall 2017	Term_APP - Spring 2018	Term_APP - Summer 2018	Term_APP - Fall 2018	Term_APP - Fall 2019	Term_APP - Summer 2019	Term_APP - Spring 2019	Term_APP - Spring 2020	Term_APP - Summer 2020	Term_APP - Fall 2020	Term_APP - Fall 2021	Contact Stage Totals
Prospect	489	273	1468	77	32	284	73	3	22	8	1	21	4	2755
In Process App	218	147	772	115	24	61	1	0	0	0	0	0	0	1338
Submitted App	2	26	148	35	4	4	0	0	0	0	0	0	0	219
A-Code	0	20	52	1	1	0	0	0	0	0	0	0	0	74
Denied	79	9	475	0	0	1	0	0	0	0	0	0	0	564
Enrolled	195	158	292	5	4	5	0	0	0	0	0	0	0	659
Waitlist	0	0	250	0	0	1	0	0	0	0	0	0	0	251
Withdrawn	64	15	183	0	0	0	0	0	0	0	0	0	0	262
Totals	1047	648	3640	233	65	356	74	3	22	8	1	21	4	6122



For More Information

If you would like a Connect report and/or dashboard created for your program, please contact the [Graduate School](#).

828-227-7398

grad@wcu.edu

