# HDR EOI - Guide for Sub-Deans

| Questions? |
| --- |
| **Graduate Research** |
| graduateresearch@csu.edu.au |
| +61 2 6933 2578 |

## Background

- Microsoft Dynamics 365 is the university's customer relationship manager (CRM).
- Most administrative teams are using CRM for student and student-related correspondence.
- A **request** is an CRM-based administrative workflow that is used to deliver an outcome to a student.
- Expressions of interest (EOI) can now be submitted via a web form.

> ⓘ Access CRM at any time via https://csu.crm6.dynamics.com

## Reviewing the EOI

### Access CRM and open the EOI

- When an EOI (request) is assigned to you, by default you will receive an email containing a CRM link.
- Requests requiring attention can be viewed from the 'Academic Dashboard' in CRM.
- Open a request by selecting the request title

Academic Dashboard ⌄

My Active Requests ⌄

| ✓ | Request Title ⌄ | Type ⌄ | Contact ⌄ |
| --- | --- | --- | --- |
| | HDR EOI Test Person | HDR Expression of Interest | Rhea Search |

### Navigation

- Navigate the request by switching between the tabs '**Applicant**', '**Request**' and '**Assessment & Decision**'.
- The application information is contained in 'Applicant' and 'Request'.
- Uploaded documents will appear under 'Timeline' in 'Assessment & Decision'.

**HDR EOI Test Person** - Saved
Request

Applicant    Request    Assessment & Decision    Related

| Tab | Information Available |
| --- | --- |
| Applicant Tab | <ul><li>Applicant details</li><li>Academic qualifications</li><li>Research experience (publication history)</li><li>Active admission applications (if any)</li><li>English proficiency</li><li>Supervisor details (if nominated)</li></ul> |

| Request Tab | • Course student is interested in.<br>• Scholarships or funding arrangements<br>• Research Proposal |
|---|---|
| Assessment and Decision | • Correspondence (in the timeline)<br>• Documents (in the timeline)<br>• Internal Comments added by Graduate Studies Team.<br>• Decision fields. |

## Forward to academic staff

- use the 'Email a Link' button to open a new email (in Outlook) with a link to the request.
- CRM links will work for people with a Charles Sturt username /password.
- the recipient can use the link to view the request in CRM, view or download attachments, add internal comments, but not approve or decline.
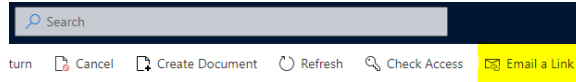


## Approving/Declining an EOI

The decision is entered in the 'Assessment & Decision' tab.
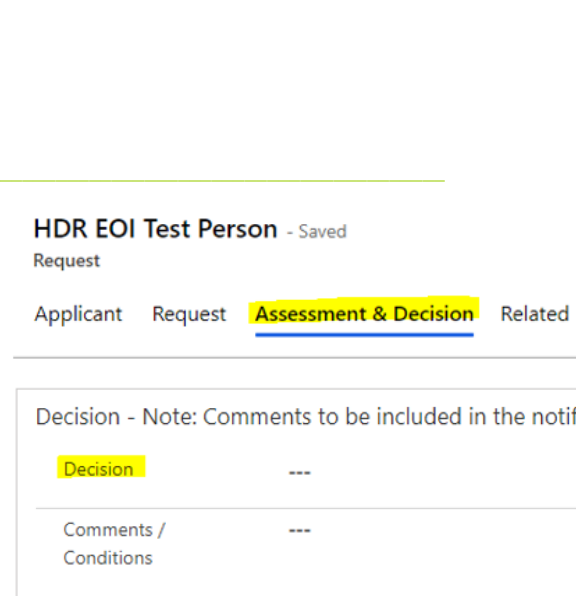


### Approval - options available

When approving an EOI, options are available to approve an alternate course, or suggest a school/supervisor:

- nominate an alternative course
- nominate a supervisor or school (if no supervisor nominated in application)
- (optional) insert decision comments to expand on, or explain your decision or suggestion for a particular school or supervisor
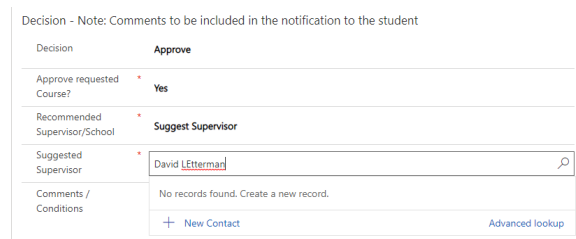
*Approving alternate course*
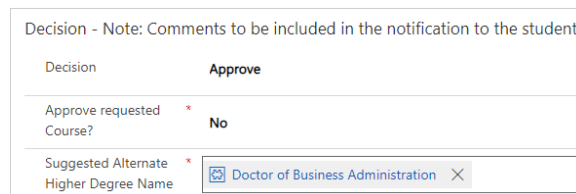


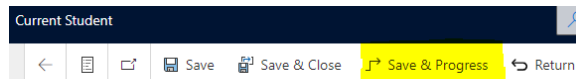### Declining

- comments are mandatory, and will be sent directly to the applicant as part of a template.

*Suggest a supervisor*



### Completing the request

After the decision has been entered, select 'Save and Progress' from the menu. The outcome will be sent directly to the applicant via a template email.



*Example approval email template: with approve requested course, suggest school.*

Request Reference: REQ-00822-X2Y1P1

Hi Clinton

Congratulations! Your expression of interest in a higher degree by research at Charles Sturt University has been successful.

Michael Osborne invites you to formally apply for admission to the Master of Philosophy

Michael Osborne, indicated that you may wish to discuss your application with staff from the Australian Graduate School of Policing and Security about being a supervisor for your research.

Please also note the following comments from the Sub-Dean,
These are my comments as I typed them in the request.

Learn more applying with us.

Looking for financial assistance? We have a range of scholarships on offer. You can apply for a scholarship as part of your application for admission.

If you're not successful in a scholarship round, you can still pursue studies as a full fee-paying candidate. Review the cost of tuition as a full-fee paying student under the fees and costs section of Master of Philosophy. Eligible candidates may be able to defer payment of fees through FEE-HELP. If you have further questions about your eligibility for a FEE-Help loan to pay part or all of your tuition costs, please contact us.

Any questions? Please reply to this email or explore our FAQ

Kind regards,

Charles Sturt University
Contact us | Student Portal

## Contacting an applicant

You can use the CRM to send a new email to the applicant (or any other contact). The correspondence will be contained within this request, and visible to anyone accessing the CRM.

- select the '+' icon in the Timeline (Assessment & Decision tab).
- select email from the pop-up menu
- default 'To:' address is the applicant; this can be changed.
- Enter a subject
- 'Regarding' is the request title, and cannot be changed.

⚠️ When emailing from CRM, 'From' will be a generic address, and will not contain your personal email address. Any reply email will go into CRM, viewable from the request timeline.

*Adding a new email*

| Timeline | + ∇ ⊞ ⋮ |
|---|---|
| 🔍 Search timeline | |
| ✎ Enter a note... | 📎 |

*Compose new email*

**Email**

| From | 🏛 **Charles Sturt University** |
|---|---|
| To | 📇 **Rhea Search** |
| Cc | --- |
| Bcc | --- |
| Subject | --- |
| Regarding | 📝 **HDR EOI Ranjani Perera** |

*Sending, saving a draft, add an attachment*

▷ Send    💾 Save    📑 Save & Close    📎 Attach File

## Returning a request to Graduate Studies team

Current Student 🔍

← 📄 ⧉   💾 Save   📑 Save & Close   ↱ Save & Progress   ↩ Return

If you need to return a request to the Graduate Studies team, select the 'Return' button from the menu. The request will return to the 'Verification' stage.

> ⓘ  Add an 'internal comment' under 'Assessment & Decision' to bring something to attention of another staff member.

## Managing email notifications

By default you will receive an email whenever a request is assigned to you. You can manage which emails you want to receive.

- Open Microsoft Dynamics (https://csu.crm6.dynamics.com)
- Open 'Settings' from the 'Service' menu (bottom left of CRM window).
- Under 'Email Subscriptions', select your name.
- On the 'User' page, you can change which emails you want to receive from CRM.
- Change the 'When a request is assigned to me' setting as desired.

*Access 'Settings' menu*
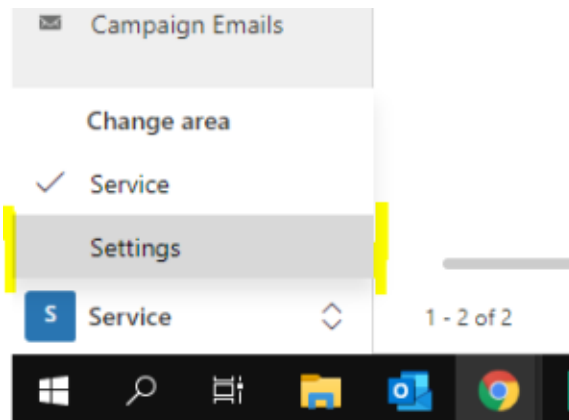


*Select name to open user record*
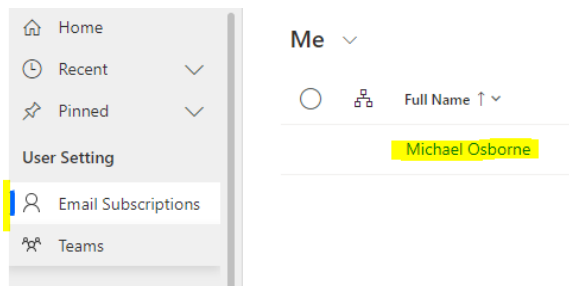


*Managing email subscriptions from CRM*



**Version History**

| Version | Published | Changed By | Comment |
|---|---|---|---|
| **CURRENT (v. 3)** | **12/Nov/2021 15:17** | Michael Osborne | |
| v. 2 | 12/Nov/2021 15:03 | Michael Osborne | Initial version |

v. 1     12/Nov/2021 14:52     Michael Osborne