



Welcome to Intelliworks

What is Intelliworks?

Intelliworks is a CRM (Customer Relationship Management) online database which is designed to handle all aspects of our Graduate School Admissions Process, including:

- ✚ Marketing & Events
- ✚ Application
- ✚ Interactions
- ✚ Communications

This secure cloud solution is the front end of the admissions process until the applicant is officially rejected, is accepted as non-matriculated or is accepted as a matriculated student into a program. Once an applicant is accepted, their information is transferred into Banner—the system of record for our students. At this point, you'd use Banner as you currently do to register students for classes, etc. Application data is stored on the Intelliworks server, not VU's server.

Contacts:

At the core of the database, each individual person is known as a “Contact”. Related information about that person is linked to the Contact record, such as personal information, organizations, GRE score, application, resume, phone calls, appointments, experience, education, event registrations, etc.

Customized by You:

Create a custom “view” to show you only the information you need, when you need it; perform mass updates, send email blasts, and most importantly, search for information in the system that meets certain criteria.

Daily Usage:

Every day you will log into Intelliworks first thing each morning to see what is happening—there is no notification. Each Intelliworks user has been given a specific role and permissions to see/edit data. Everything you do in the system is date/time-stamped. It is important to logout when you are finished using Intelliworks so another person cannot use your account.

Intelliworks Terms & Vocabulary

Term	Definition/Usage
Contact	Any person entered into the database based on either an inquiry from them or their official application into up to 2 programs. Each contact represents one “record” in the database. Each contact contains data “fields” which relate to that contact. The email address field is the key for the record.
Home Page	The welcome screen you see when you log in which displays customizable widgets (Sections) for various views of data which is relevant to you. Use this for information you need to see right away. E.g., My Inquiries, My Applicants, etc.
Life Cycle	The stage the contact is in during the admissions process, e.g., Prospect, Application in Progress, Application Completed, Approved, etc.
Organization	There are three types of links between a contact and an organization: (1) Student, (2) Employee, and/or (3) Member of a school, company, church, or organization.
Target	Audience you intend to invite to an event, market or email. It is typically based on criteria to search for matching records in the database. E.g., All prospects from PA & NJ who are interested in Biology and/or Finance; All applicants who have not submitted recommendations, etc.
Inquiries	A general question posed by a prospect which a person has completed online. These demand IMMEDIATE ATTENTION. Customized Email templates have been created to assist with a consistent message from your department. E.g., “Please tell me where the Nursing Open House is located and the start time.”
Cases	A record of any and all interactions you have with a person/contact. It is a place to record all emails, phone calls, meetings, etc. you have with a contact. Anyone who is working with that contact can quickly see what has transpired with that contact.
Registrations	The area where you can review the contents of a Contact’s application. GRE scores are also kept here and not on the Contact.
Events	Intelliworks manages any UNPAID events such as open houses, career fairs and contains online registration and tracking capabilities. Customized Email templates have been created.
Campaign	A campaign is a marketing effort whereby VU targets a certain population to apply to a program or attend an event. You can see how many emails were sent, how many were read, how many actually clicked a link, how many looked at our website. Customized Email templates have been created.
Applicant Self-Service	A portal designed for the applicant which shows them everything regarding the process, including what is missing/completed with their application.
Social Media	Facebook, Twitter, etc. sites. Intelliworks can grab Facebook request for information link and bring it into Intelliworks. Replies go back out via Facebook. It’s another way to get prospects into the Intelliworks system.
Inline Editing	The ability to click “Edit” at the end of a field (if you have permission) and edit one field in the record.
Direct line Editing	The ability to edit more than one field at a time for a Contact.
Dynamic	The data is current up to the minute it is queried or sent. When we schedule emails to be sent “later” the data it pulls is dynamic and is current up until it is sent.
Static	The data does not update after a particular time or event.
Hard Bounce Email	Email that has been rejected at the server level. The account does not exist on the server you are sending the email to. Perhaps the person no longer works at a particular email address. Hard bounces will appear on the Contact’s email field so you know it is invalid and needs to be updated with the contact via a phone call.
Soft Bounce Email	Email that has made it through to the server (an account exists) but is not able to be delivered to the person. Perhaps their inbox is full or they are out of the office and you get an out of office reply.

Term	Definition/Usage
.csv File	CSV is an acronym meaning “Comma Separated Value”. It is the format you can specify when exporting tabular data (numbers and text) into plain-text form. .csv files contain generic data without formatting and can be read by text editors, MACs and PC applications. The data is dumped as a group of field data values, separated by a comma. If no value resides in the field, a comma is used to represent that field. This is different than exporting the data directly to an Excel file where the data formatting would transfer. Exporting to a .csv file is usually the “norm” for exporting/importing data between different platforms and applications. For example: a CSV file might be used to transfer information from a database program to a spreadsheet.
