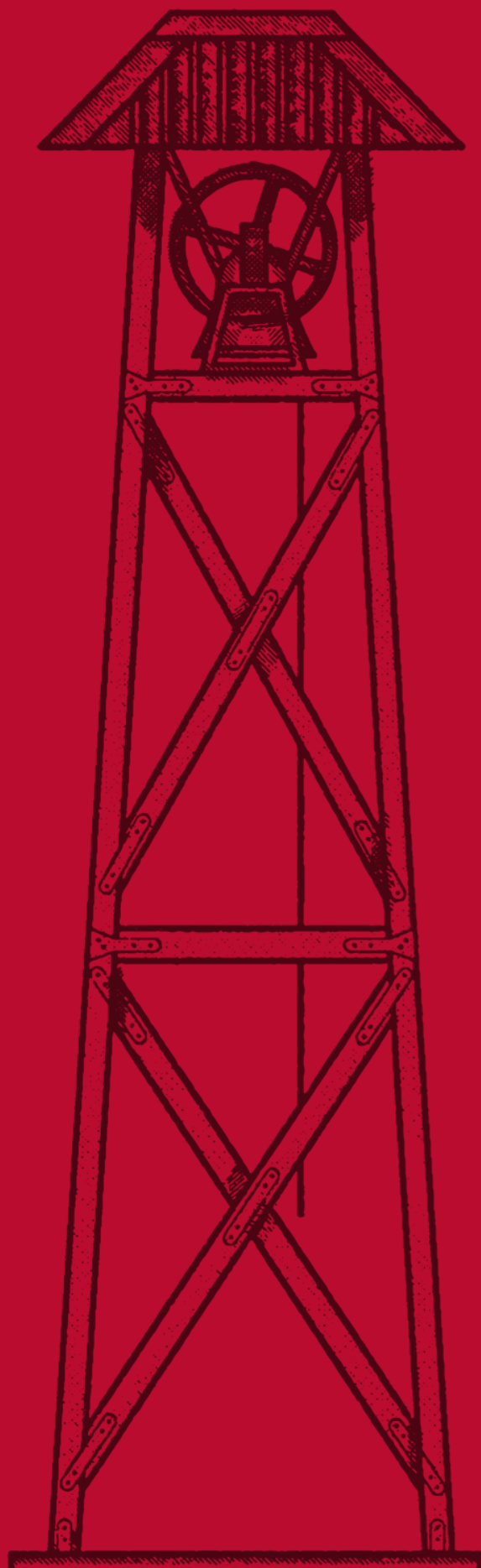


GAIL»»
GIVING AND ALUMNI INFORMATION LINK

MENTOR PROGRAM



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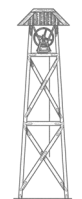


MENTOR PROGRAM FEATURES

Mentor and mentee information is tagged in GAIL several ways. All of this information is available on an individual's profile on the corresponding tabs.

- Constituencies – **NEW!** The Mentor or Mentee constituency is now available in constituent search.
- Interactions – these contain the information captured during registration when they fill out the portions about how they are interested in participating/helping. Additionally, there is an interaction entered on a Mentor's record when a Mentor is paired with a Mentee and the Mentee is a participant on the interaction.
- Attributes – these identify if someone has completed or initiated registration to become a mentor or mentee.
- Relationships – this is for the matched Mentor/Mentee pairs in GAIL.

If you need a list of Mentor/Mentee Attributes or Relationships, please contact Olivia Engesser (engesser@uga.edu) or submit a ticket to AskIT by emailing askit@uga.edu.



CONSTITUENCIES

Mentors and Mentees are listed in GAIL with corresponding Constituencies (A1). When opening up the constituent search task, you can select Mentor or Mentee from the Constituency dropdown along with other information about a person to find them in the GAIL database.

Constituent Search by Name or Lookup ID

Name/Lookup ID: Country:

Last/Org/Group name: Address:

First name: City:

Middle name: State:

Suffix: ZIP:

Lookup ID: Primary class year:

Sites: Phone number:

Email address: Prospect manager:

Constituency:

Show advanced search

Having trouble finding someone? You can submit a ticket to AskIT from the GAIL Resources page for our Records Team to help you look!

<https://dar.uga.edu/ugaticket/open.php>

AskIT

Support Center Home | Open New Ticket | Check Ticket Status

Open a New Ticket

Please fill in the form below to open a new ticket.

Help Topic:

Contact Information

Email Address:

Full Name:

Phone Number: Ext:

Ticket Details

Please Describe Your Issue

Issue Summary:

Issue Details

Attachments:

Create Ticket | Reset | Cancel

1 – Select a help topic

GAIL Support:

Use this category to request assistance with business processes (constituent record updates, direct marketing efforts, invitations, etc.) or technical assistance with GAIL.

GAIL (CRM) / IMS21 Imaging:

Use this category to request vanguard imaging of documents with sensitive data into GAIL.

GAIL (CRM) / Alumni Records – Updating Data

Use this category to request data updates on constituent records

GAIL (CRM) / Reporting and Query Request:

Use this category when requesting a selection/query. Use the bullet points in the blue window to provide selection criteria for your request

GAIL (Web/CCIS) / Donation Pages:

Use this category to submit a request for a donation page

GAIL (Web/BBIS) / GAIL Event Registration Setup:

Use this category to request a web registration page for an event (make sure to review prerequisites in the blue box).

2 – Enter your Contact Information

3 – Enter Issue Summary and Details:

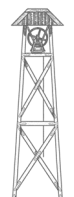
Use one click options in the Issue Details box to add HTML code, visual media, or web links in your ticket entry.

4 – Attachments:

Use this feature to upload supportive documents for your ticket.



5 – Create Ticket / Reset / Cancel:

Click the *Create Ticket* button to submit your ticket. Someone will contact you once your ticket has been assigned or completed.





INTERACTIONS

As the UGA Mentor Program continues to grow, you should expect to see more references to it in GAIL. Currently two types of interactions are being added to the records of Mentors. The first type will be titled UGA Mentor Program and indicates involvement in the program.

Details	Responses	Documentation	Attributes		
Details  					
Owner:	Morrow , Ms. Ashley Lauren Davis 2006	Expected date:	2/19/2019	Actual date:	2/19/2019
Status:	Completed	Expected start time:		Actual start time:	
Category:		Expected end time:		Actual end time:	
Subcategory:		Time zone:		Location:	
Contact method:	Other				
Event:					
Summary:	UGA Mentor Program				
Participants:	[REDACTED]				
Comment:	Participating in the UGA mentor program.				

The second type will be named CCTR – UGA Mentor – Indicated Areas Willing to Help. In this interaction you’ll find a list of additional engagement opportunities that the Mentor marked themselves as interested in.

Details	Responses	Documentation	Attributes		
Details  					
Owner:	Daniel , Mr. Jeremy Clark (Jeremy) 2016	Expected date:	10/5/2019	Actual date:	10/5/2019
Status:	Completed	Expected start time:		Actual start time:	
Category:	Engagement Interest	Expected end time:		Actual end time:	
Subcategory:	Mentor Program	Time zone:		Location:	
Contact method:	Website				
Event:					
Sites:	Career Center				
Summary:	CCTR - UGA Mentor - Indicated Areas Willing to Help				
Participants:	[REDACTED]				
Comment:	Engagement option(s) selected: * Get more involved in your local UGA Alumni Association chapter * Give a testimonial or speak with students in your respective college/school * Share your wisdom virtually (webinar, virtual panel, etc.) * Host a brunch for student donors (Big Dawg Brunch) * Host a dinner for student donors (Dinner with a Dozen Dawgs) * Learn more about hiring UGA talent * Participate in career programming via the UGA Career Center				



ATTRIBUTES & RELATIONSHIPS

Mentors and Mentees are listed in GAIL with Attributes (A2) and connected Relationships (A3). If you need a list of Mentor/Mentee Attributes or Relationships, please contact Olivia Engesser (engesser@uga.edu) or submit a ticket to AskIT by emailing askit@uga.edu.

Or, you can submit a ticket to AskIT from the GAIL Resources page.
<https://dar.uga.edu/ugaticket/open.php>

The screenshot shows the 'Open a New Ticket' form in the AskIT system. The form is divided into several sections: 'Help Topic' (with a dropdown menu), 'Contact Information' (with fields for Email Address, Full Name, and Phone Number), 'Ticket Details' (with an 'Issue Summary' field and a rich text editor for 'Issue Details'), and 'Attachments' (with a 'Choose File' button). At the bottom, there are 'Create Ticket', 'Reset', and 'Cancel' buttons. Red boxes with numbers 1 through 5 highlight specific elements: 1 points to the 'Help Topic' dropdown, 2 points to the 'Full Name' field, 3 points to the 'Issue Summary' field, 4 points to the 'Choose File' button, and 5 points to the 'Create Ticket' button.

1 – Select a help topic

GAIL Support:

Use this category to request assistance with business processes (constituent record updates, direct marketing efforts, invitations, etc.) or technical assistance with GAIL.

GAIL (CRM) / IMS21 Imaging:

Use this category to request vanguard imaging of documents with sensitive data into GAIL.

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GAIL (Web/BBIS) / GAIL Event Registration Setup:

Use this category to request a web registration page for an event (make sure to review prerequisites in the blue box).

2 – Enter your Contact Information

3 – Enter Issue Summary and Details:

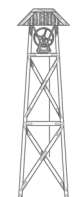
Use one click options in the Issue Details box to add HTML code, visual media, or web links in your ticket entry.

4 – Attachments:

Use this feature to upload supportive documents for your ticket.

5 – Create Ticket /Reset / Cancel:

Click the *Create Ticket* button to submit your ticket. Someone will contact you once your ticket has been assigned or completed.



APPENDIX

A1. Mentor Constituency on the Personal Info tab and at the top of a GAIL profile.

Personal Info | Contact | Relationships

Constituencies | Stewardship Recipient

Constituencies (3) + Add | Filter

Description
Alumnus
Event registrant
Mentor

Individual | Lookup ID: [REDACTED]

Constituencies: Mentor | Alumnus | Donor | Event registrant

Personal Information | Contact Information

A2. Mentor Attribute on the Attributes tab of a GAIL profile.

Attributes | Personal Info | Contact | Relationships

Attributes (5) + Add | More

Category	Attribute group
Connection 360	Communications
Connection 360	Communications
Preferred Class Year	Alumni Related
Student Code	Alumni Related
UGA Mentor Program	Mentor Program

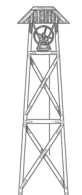
A3. Mentor Relationship on the Relationships tab of a GAIL profile.

Relationships | Revenue | Members

Relationship Maps

+ Add organization | + Add group/household

	C...	T...	Relationship
(Sandra) 1976	I...		Mentor



CONTACT INFORMATION

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