

Got a question? Go to [www.sli.do](http://www.sli.do) and enter code **P161**. Then ask away!

# GAIL EVENTS MGMT

## summer workshop

Welcome! We're so glad you could join us today!



MJ  
[michael.james@uga.edu](mailto:michael.james@uga.edu)  
706-542-9475



Emily Clary  
[ejclary@uga.edu](mailto:ejclary@uga.edu)  
706-542-0817



Cindy Bond  
[cmbond@uga.edu](mailto:cmbond@uga.edu)  
706-542-8153

Hosted by Client Services in MLC Rm 368  
Tuesday, July 30th, 2019, at 2:00pm  
Wednesday, July 31st, 2019, at 9:00am



Countdown timer

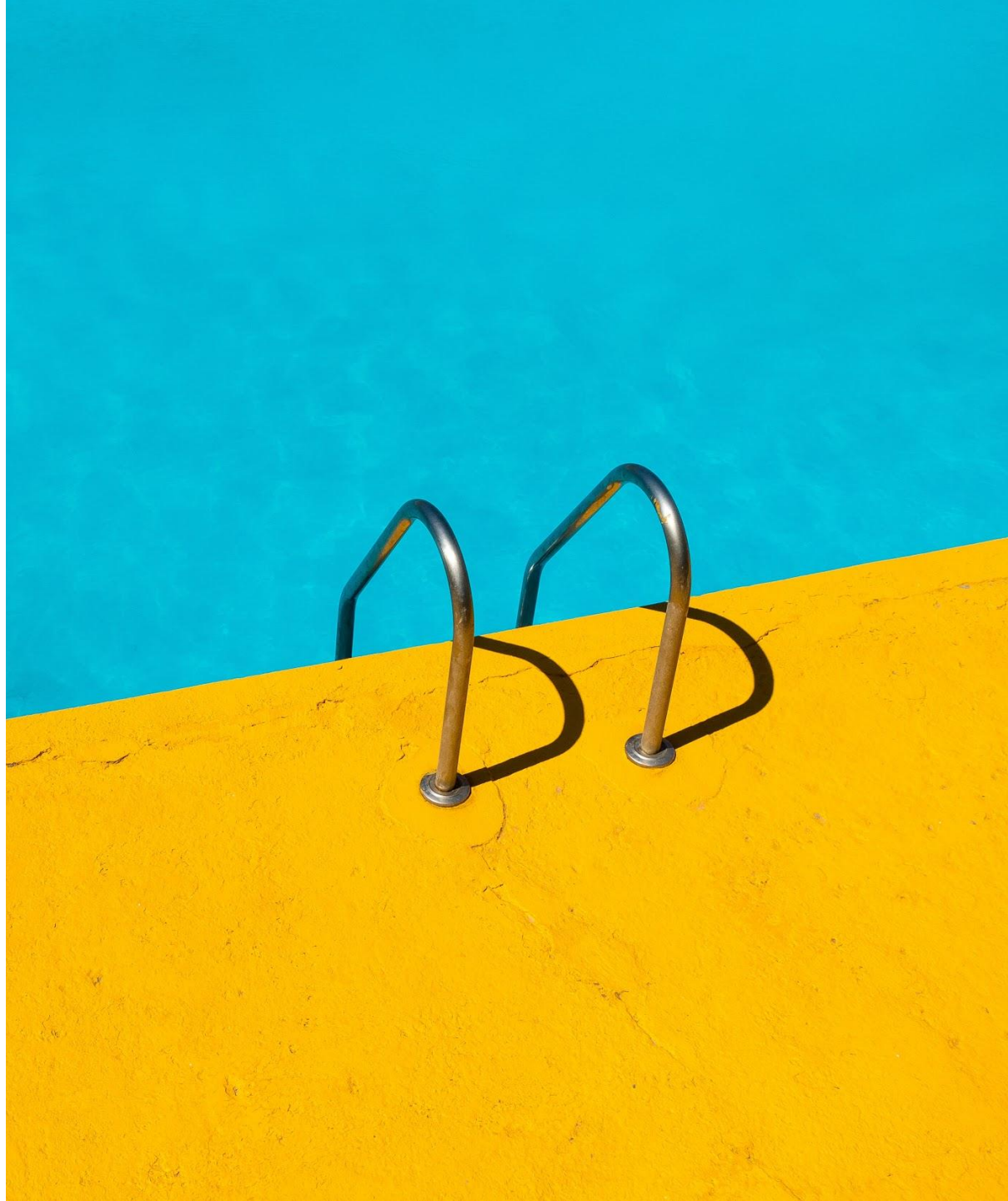
**10:00**

(with alarm)

---

## Purpose of this workshop

- Provide instruction on higher-level GAIL concepts
- Give users the opportunity to field their events questions
- Show off what's new in GAIL in the last year or so
- Discuss best-practices and the reasons behind them
- Strengthen GAIL community by meeting users with similar roles

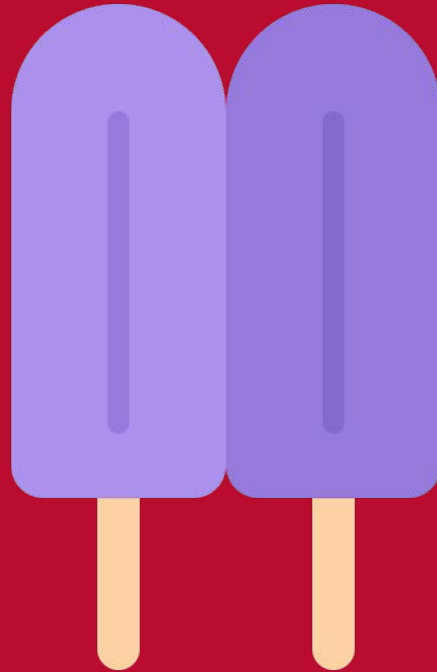


---

# On the agenda!



- ★ What's new on the resources site
  - ★ What's new in GAIL in the last year
  - ★ Best practices for events
    - Events calendar
    - Event or marketing effort?
    - When to go multi-level
    - Selection in description
    - Large paid events, when to close a registration page, pending registrations tab
    - Do I need to refresh my selection?
  - ★ Adding documentation, speakers, lodging, seating charts, budgets
  - ★ Smart queries
  - ★ Copy events
  - ★ Name formats and salutations
  - ★ Your questions
-



**NEW TO THE**  
**GAIL resources site**

---

Go to GAIL Go to Reeher Go to Advizor Go to OneSolution Go to Deposits

Search...

**GAIL**  
GIVING AND ALUMNI INFORMATION LINK

Training ▾

Resources ▾

ASKIT

Contact

Give Now

How can we help?

GAIL Dictionary

Naming Conventions

GAIL Blog

Guides & Videos

Forms & Policies

G-Wiz



## Events

How do I create an event in GAIL? How do I send an event invitation or save the date?

**SET!**




















G-WIZ for events





**GAIL IMPROVEMENTS**  
**from the last year**

---

←	Tasks/Coordinators	Registrations	Pending Registrations	Registrants-More Details	Regret Responses	Speakers	Expenses	Options	Invitations	Appeals	Docume
Regret Responses (31)  More ▾											
	First Name	Last Name	Email	Comments	Attending	RSVP F					
			@att.net		Declined	Yes					
			.com	I am so sorry to miss this fun event but I won't be in town. Many thanks for the i...	Declined	Yes					
			@mac.com	I am sorry that I will not be able to attend the Friday Peabody reception. I always l...	Declined	Yes					
			@rocketmail.com		Declined	Yes					
			@gmail.com	Unfortunately, we're unable to attend. We very much appreciate the invite!	Declined	Yes					
			@uga.edu	Thank you for the invitation. I am unable to attend the Peabody Awards this year.	Declined	Yes					
			@macfound.org	Thank you for this kind invitation. I'm very sorry I'm unable to attend.	Declined	Yes					
			@usc.edu		Declined	Yes					
			@uga.edu		Declined	Yes					
			@yahoo.com	Unfortunately will not be able to make it	Declined	Yes					
			@documentary.org		Declined	Yes					
			@gmail.com	Sorry to miss. Ironically, I will be in Athens celebrating JHPFest, the 75th birthday ...	Declined	Yes					
			@uga.edu	TEST TEST	Declined	Yes					
			@aol.com		Declined	Yes					
			@aol.com	regret they cannot attend the Peabody reception n Fri...	Declined	Yes					
			@hkstrategies.com		Declined	Yes					

# RSVP No

Add a “send regrets” link on your [registrations web page](#) to see who isn't coming and why.

---

---

## BEE enhancements

Take greater control of how your event communication will display on a desktop/laptop computers vs. mobile devices with “[hide on desktop](#)”.

Add [salutations](#) to your email to pull in constituents’ names and add a personal touch.

Easily undo your last steps with the [undo button](#).







## Email Statistics

Emails (8,557)



More ▾



Columns ▾



Clear all filters

Email name

A&S - Cortona Italy Alumni Organization

TCOB - EMBA Career Workshop Aug 201

A&S - Cortona Italy Alumni Organization

A&S - UGA in Rome (Copy of Event Invi

SSW - Ethical Frameworks that Underlie

AA - San Diego Chapter Mail 7.17.19 (Co

A&S - Dodd FY20 Weekly News (A&S - D

CDPF - 2019 PLC Recruitment Richards A

GMOA - 19.07.22 - Weekly Brief (GMOA - 19.07.22 - Weekly Brief

AA - Tattnall & Evan County Freshmen Sendoff 8.6.19 (Copy of Event Invitation: AA - T...

AA - Forsyth County Freshmen Sendoff 2019 - 2 (Copy of Event Invitation: AA - Forsyt...

AA - Freshman Send Off Evite - Dalton 2019 - 2 (Copy of Event Invitation: AA - Freshm...

- ☒ Opt outs in list
- ☒ Resulting global opt outs
- ☒ Send after date
- ☒ Sender
- ☒ Sender name
- ☒ Sent date
- ☒ Sent hour
- ☒ Site prefix

Apply

Cancel



Email subject

on 6... Correction: Atlanta Cortona 50th Anniversary Celel

er W... Executive Career Planning Workshop

50t... Atlanta Cortona 50th Anniversary Celebration & Re

UGA in Rome: Call for Storytellers for the 50th Reu

itati... SSW - Ethical Frameworks that Underlie Social Just

apte... Get Involved!

Dodd News: July 22

hard... Don't Forget! You're Invited to the Richards' UGA I

Weekly Brief from the Georgia Museum of Art

You're Invited!

Reminder - Meet fellow Dawgs!

Reminder - Meet fellow Bulldogs!

New **email statistics** columns



# **BEST PRACTICES** **for events management**

---

---

# Events Calendar



When putting your event together you should check the [events calendar](#).

This will show you all other events (if they've been put in GAIL).

Hover to get event description.

Make a smart selection of when to hold your event based on what else is going on.

---

—

When is an event  
communication a  
marketing effort?



---

# When to go multi-level?



**AdvanceUGA**  
CONFERENCE



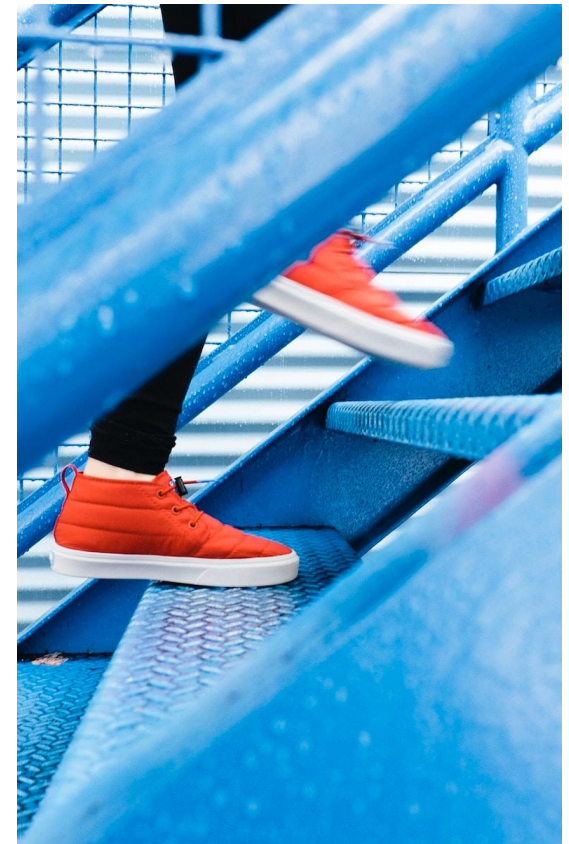
What is a multi-level event?

Any time a registrant can sign up for more than one thing.

Often, sessions/“mini events” within a bigger event.

Or more unique situations:

Capping registration options.





## Making the most of your event description

- If it is not clear from the title of your event that the purpose is **fundraising**, be sure to mention this.
- Avoid or spell out acronyms that may be unfamiliar to other departments.
- GAIL cannot remember the name of selections you include with your invitations..... ::sigh::.... Why not put them in your description so you don't forget!



---

# Large events, pending registrations, & closing registration pages

## Large events

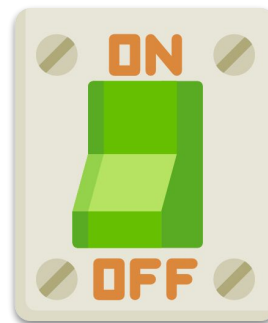
If you're having a large event where you anticipate more than 100 people will sign up, give **gift accounting** a heads up first.

[gifts@uga.edu](mailto:gifts@uga.edu)



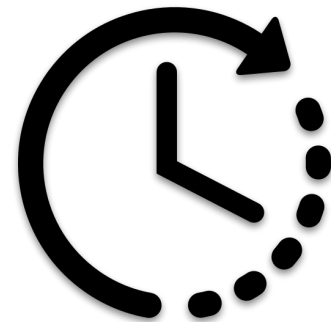
## Closing registration pages

Don't leave your registration page up until the day of the event. Have registration end a few days before to allow time for payment processing.



## Pending registrations tab

When people have registered for your event, but their payment is still processing they'll hang out in the **pending registrations** tab.



## When should I refresh my selection?

- There are two types of selections:  
**Static and Dynamic**
- **Dynamic selections** can only be used in an event invitation and refresh on their own when you process the invitation
- **Static selections** can be used in events or marketing efforts, and need to be refreshed when you use them in an event invitation

	Event Invitation	Marketing Effort
Static Selection	YES	NO
Dynamic Selection	NO	Cannot be used in a Marketing Effort





# From the query team

## Example request

Hello!

I would like a selection of all TCOB Alumni including graduates and matriculates who have a major, minor or certificate living in the Athens area. Please use the predefined Region code. I will be sending mailed invitations through the Events module. The event is in September, but I am planning to mail the invitations around July 15<sup>th</sup>.

Could you please include the following fields in the excel file:

Gail ID, Name, Address, City, State, Zip,  
Degree, Major, Class Year, TCOB Cumulative  
Giving Total, UGA Cumulative Giving Total,  
TCOB, FY19 Giving Total

Thanks!

1. If we ask follow-up questions, it **doesn't mean you made your request incorrectly**.
2. Our general turnaround time is **2-3 business days for new selections**/queries, we provide **same day turnaround for refreshing** or updating existing selections/queries and on occasion we can accommodate emergencies.
3. We are **happy to talk through a request** prior to submission. If you have questions about whether something is possible, we are happy to answer those questions as well.
4. Lastly and most importantly, **you shouldn't feel pressured to submit a request perfectly!** We are happy to help you figure things out.



# EVENTS MANAGEMENT

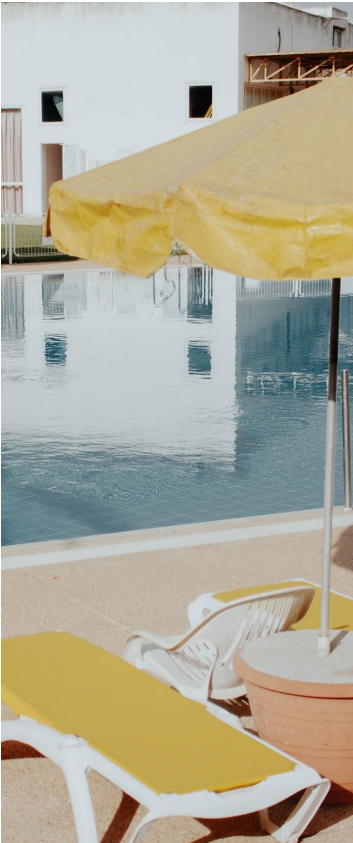
## how-tos

---



---

# Make the most of the management side of events management



## Documentation and speakers

Keep records of documents and important persons for future reference.

## Budgets

The events module in GAIL can help you stay on budget by tracking expenses.

## Lodging and seating charts

Having an overnight event or banquet with assigned seats? GAIL can help by tracking lodging and making seating charts!

---

# Smart queries

Smart queries have one variable (event name) that you can edit. They can pull your event registrants or attendees.

## When should I use it?

- Sending pre-event info to your registrants: attire, directions, parking info
- Sending post-event communications to the folks who actually showed up: a survey, an invitation to a future event

## Teach me how!

1. Run a Smart Query Search to locate the one for your college.
2. Edit the Definition to match your event.
3. Choose Registrants or Attendees and save.
4. Set up an invitation like normal and add the name of the Smart Query in like you would any other selection.

The image shows two overlapping screenshots of a software interface. The background screenshot is titled 'Smart Query Instance Search' and shows a search for 'event attendees' with 32 results found. The foreground screenshot is titled 'Edit Smart Query - A&S - Event Attendees' and shows the 'Parameters' tab. It includes a description 'Event registrant attendance' and a note 'This query returns registrants for past events.' There are two radio buttons: 'Specific event:' (selected) and 'Any event:'. The 'Specific event:' field is set to 'A&S - Music - 2019 Retirement Dinner'. A red arrow points to the search icon next to this field. Below these options is a checkbox labeled 'Only return registrants who are marked as attended' which is currently unchecked.

**Smart Query Instance Search**

Name:  Search

Record type:

Results (32 records found)

Name	Description
A&S - Event Attendees	Select the name of the event you w...
AA - Event Attendees	Select the name of the event you w...
ATHL - Event Attendees	Select the name of the event you w...
CAES - Event Attendees	Select the name of the event you w...
CDDR - Event Attendees	Select the name of the event you w...
COE - Event Attendees	Select the name of the event you w...
COMM - Event Attendees	Select the name of the event you w...
CPH - Event Attendees	Select the name of the event you w...
CVM - Event Attendees	Select the name of the event you w...
DARVP - Event Attendees	Select the name of the event you w...
ECOL - Event Attendees	Select the name of the event you w...
ENGR - Event Attendees	Select the name of the event you w...
FACS - Event Attendees	Select the name of the event you w...
GMOA - Event Attendees	Select the name of the event you w...
GRAD - Event Attendees	Select the name of the event you w...

**Edit Smart Query - A&S - Event Attendees**

Parameters Results Set save options

**Event registrant attendance**

This query returns registrants for past events.

☒ Specific event:

☐ Any event:

☐ Only return registrants who are marked as attended

---

# To Copy or Not to Copy

## Invitations

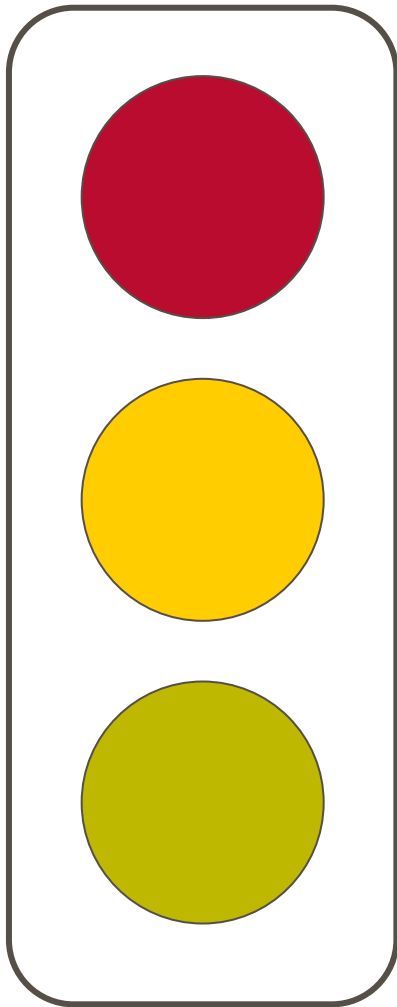
- Never use the Copy From option when adding constituents to an invitation. It will not take exclusions into account. Request a new selection or use a smart query instead.

## Events

- Copy Options can be used when creating a new event to bring over things like tasks, lodging options, and expenses. It should never be used to copy designations, invitations, or invitees.

## Registration options

- You can't edit individual options once they're added, but if most/all are the same from the last event then this will save you a lot of time. **They will still need to be approved by Jennifer Hancock.**



---

# Name formats + Salutations



## Formal Email Salutations

- For a formal salutation (Dear Mr. James), use Standard Name Format

## Informal Email Salutations

- For an informal salutation (Dear MJ), use ASRV - Informal Email Salutations

## Including Spouses on Mailings

- To force spouses into your postal mailing list, use Events - Preferred Name Format
  - For some events (like board meetings) this obviously wouldn't be appropriate
-



# YOUR EVENTS

## questions

---