

Umoja CRM Training

Module one: Accessing student lists and cleaning up data

Umoja CRM: What is it good for?

The CRM is the database and personalized website for each umoja program. It allows Coordinators to track student data, organize events and track student participation and touches. It is administered by umoja and all affiliated program have their own website and access.

Umoja CRM and MIS Data

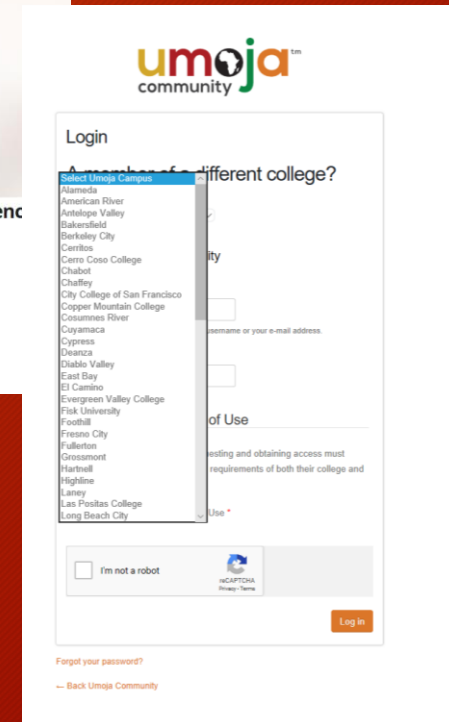
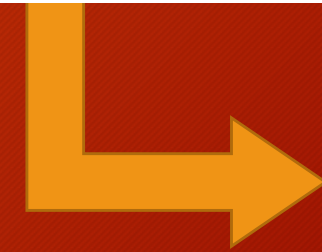
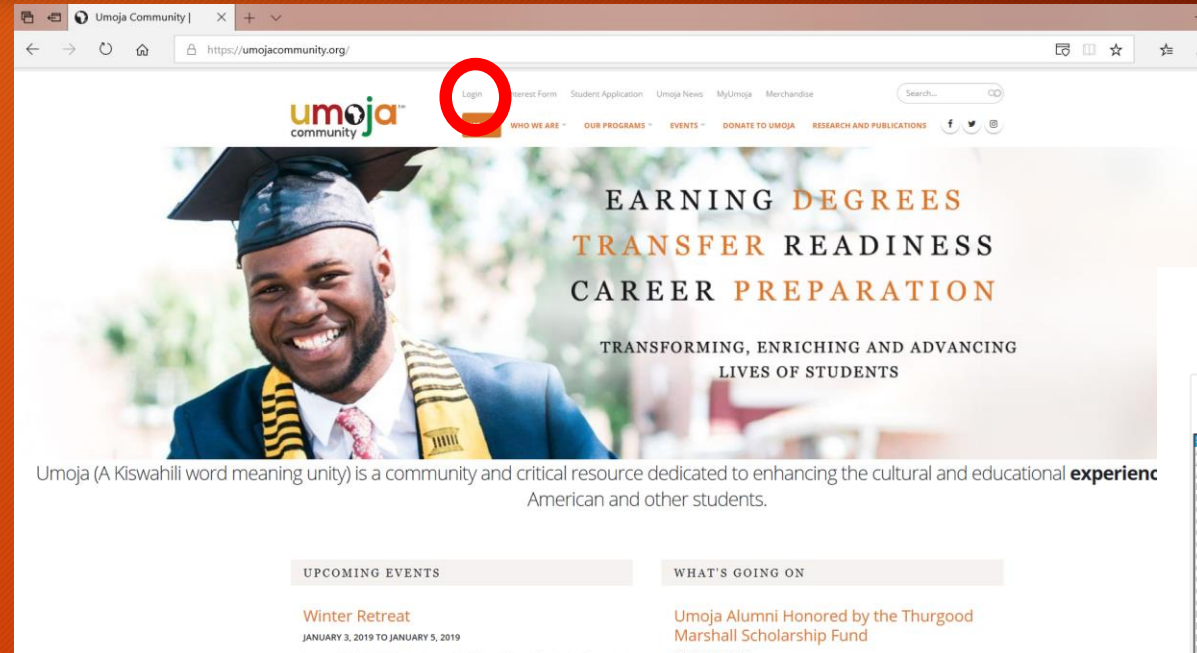
	MIS	CRM
Link	https://datamart.cccco.edu/datamart.aspx	https://umojacommunity.org/user/login (each Coordinator will use their log-in info)
Owner/ Operator	CA Community Colleges Chancellor's Office (CCCCO)	Umoja Community Education Foundation
Data Enterer	Institutional Research (IR) Department or designated personnel	Campus Umoja Coordinator
Data Entry Method	Typically a list of students (names and id #s) are provided to the Enterer for them to be coded as Umoja students. Each campus uses their own systems such as, Banner, PeopleSoft, etc.	Most students are entered when they complete the Student Interest Form and/or Student Application on the Umoja website. Students can also be entered manually into the Umoja online database or can be uploaded using the import function in the CRM.
Student Count	Typically only students enrolled in an Umoja course and/ or are assigned to an Umoja Counselor are counted as an active Umoja student each semester.	Students can be counted based upon the Umoja Student Definition in the MOU. Current and continuing students in addition to those who are actively part of the community, but not taking Umoja classes can be included in the headcount.
Data Updates	Data should be submitted w/n 30 days of the end of the previous semester. It can be updated as needed by system administrator.	Data can be accessed and input at anytime. Data should be submitted w/n 30 days of the end of the previous semester.
Touches	Cannot capture Umoja touches.	Can capture Umoja touches (individual participants in Umoja events/ activities).
Output	Headcount of Umoja students (unduplicated).	<ul style="list-style-type: none"> ★ Headcount of Umoja students. ★ Event sign-in sheets ★ Touches ★ Student contact info ★ Student applications

Logging in

As an Umoja Coordinator you have your own log-in information. If you are a new Coordinator or have not accessed the CRM yet, contact the Umoja office for log-in information.

You can access your CRM page from the Umoja home page at:
<https://umojacommunity.org>

Select your college from the drop-down menu and enter your information.



CRM Home Page

What to look for:

Your college name in domain bar

Search bar that can be used for initial search for students and applications

The screenshot shows a web browser window with the URL <https://alameda.umojacommunity.org/civicrm?reset=1>. The browser's address bar is circled in blue. The page features a navigation menu with items like 'Logout', 'Umoja CRM', 'Interest Form', 'Student Application', 'Umoja News', and 'MyUmoja'. A search bar is located in the top right corner. The main header includes the 'umojacommunity' logo and navigation links: 'HOME', 'WHO WE ARE', 'OUR PROGRAMS', 'DONATE TO UMOJA', and 'RESEARCH AND PUBLICATIONS'. Social media icons for Facebook, Twitter, and Instagram are also present. Below the header, the text 'Umoja CRM Home' is circled in red. A 'Configure Your Dashboard' link is visible, followed by a yellow welcome message box that reads: 'Welcome to your Home Dashboard. Your dashboard provides a one-screen view of the data that's most important to you. Graphical or tabular data is pulled from the reports you select, and is displayed in 'dashlets' (sections of the dashboard).'. A 'Leave a Message' button is located in the bottom right corner.

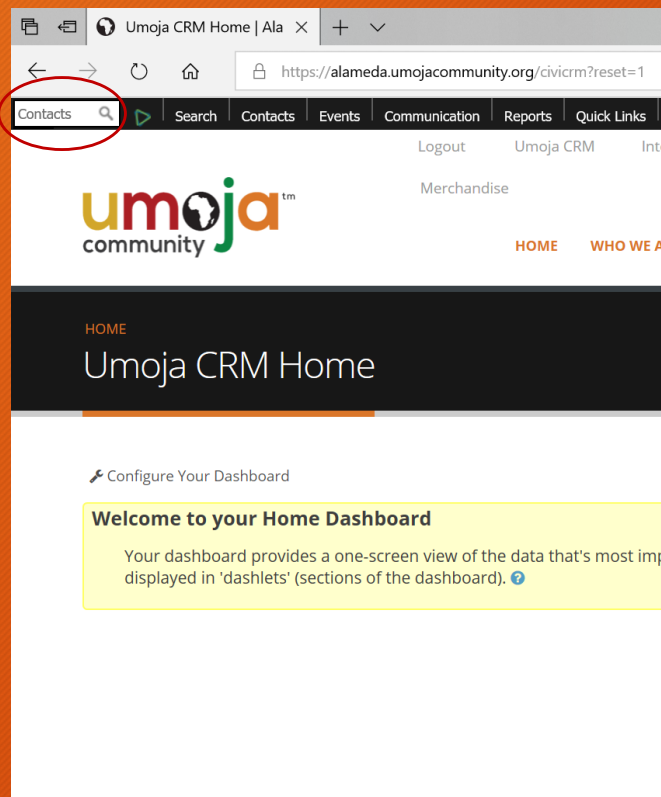
Finding Contacts

Once you have logged in, you can locate students one of two ways. This search will yield all entries, including all student applications and entries.

You can edit your search criteria to narrow your search once you get to this screen, depending on what you are trying to capture.

Finding Contacts list

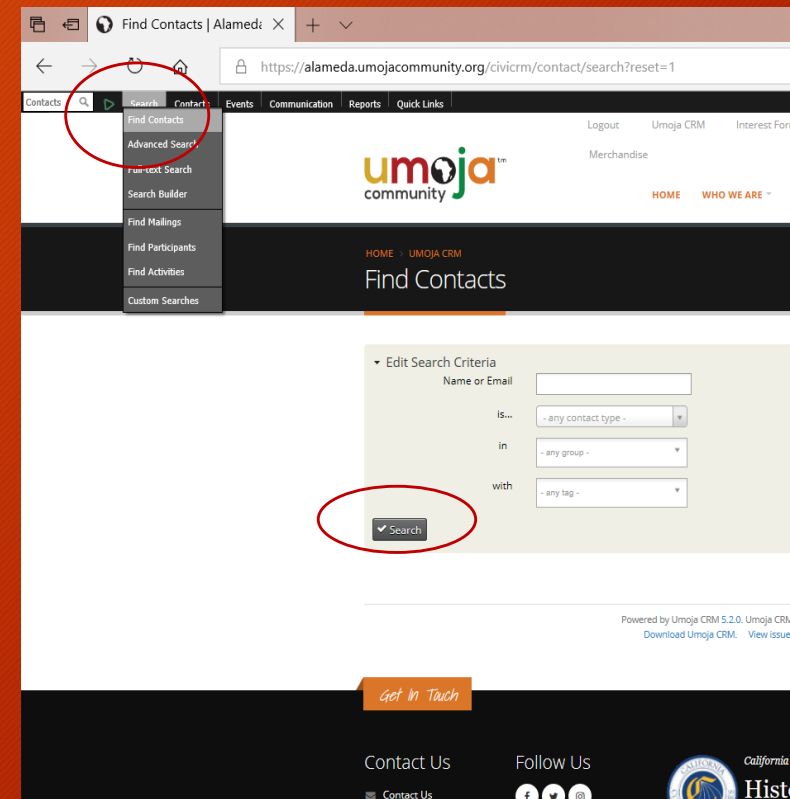
Click your cursor into the search box and press enter



OR

Move cursor over the Search tab and click on Find Contacts from the drop-down menu.

Once the search box appears, click Search.



Contact List

68 Contacts

Select Records: All 68 records 0 Selected records only

Actions

Next > Last >> Contact 1 - 50 of 68 Page 1 of 2

	Name	Address	City	State	Postal	Country	Email	Phone	Action
<input type="checkbox"/>	Abigail, Hannah	1800 Broadway Ave...	oakland			United States			View Edit more
<input type="checkbox"/>	Abraham, John	1715 Webster St Al...	Alameda	CA	94501	United States			View Edit more
<input type="checkbox"/>	Adams, Amanda								View Edit more
<input type="checkbox"/>	Adams, Doretha	1900 Douglas Ave. #...	Oakland	CA	94603	United States			View Edit more
<input type="checkbox"/>	Adams, Steve	170 East 32nd	Oakland	CA	94604	United States			View Edit more
<input type="checkbox"/>	Adams, William	1638 85th Ave Apt...	Oakland	CA	94621	United States			View Edit more
<input type="checkbox"/>	Adams, Travis	1437 Montgomery Street	Oakland	CA	94603	United States			View Edit more
<input type="checkbox"/>	Adams, Yvonne	245 MacArthur Blvd	oakland	CA	95610	United States			View Edit more
<input type="checkbox"/>	Adams, David	7103 12th Ave	oakland	CA	94603	United States			View Edit more
<input type="checkbox"/>	Adams, Margaret	1000 Lakeside Ave	antioch	CA	94531	United States			View Edit more
<input type="checkbox"/>	Adams, Angelica	1522 20 11th St	Alameda	CA	94501	United States			View Edit more
<input type="checkbox"/>	Adams, Lisa	142 Edgar Avenue Al...	Alameda	CA	94501	United States			View Edit more
<input type="checkbox"/>	Adams, John	1800 Franklin Street	oakland	CA	94605	United States			View Edit more
<input type="checkbox"/>	Adams, David	1000 Webster Dr	Richmond	CA	94806	United States			View Edit more
<input type="checkbox"/>	Adams, Michael	253 32nd Street	emeryville	CA	94608	United States			View Edit more
<input type="checkbox"/>	Adams, Lisa Ann	1400 10th Ave	alameda	CA	94501	United States			View Edit more
<input type="checkbox"/>	Adams, Robert	2145 14th Ave	Alameda	CA	94501	United States			View Edit more
<input type="checkbox"/>	Adams, Thea	1500 Barbours Point...	Alameda	CA	94501	United States			View Edit more
<input type="checkbox"/>	Adams, Angela	1410 20th Ave # 101	Oakland	CA	94605	United States			View Edit more

This is how your list of contacts will appear.

This is a list of all of the contacts in your database.

You can filter your search, view and edit entries and print lists from this page.

Advanced Search

You can Edit your Search Criteria and filter searches.

You can search individuals or by criteria such as “Contact Source” (e.g. Interest Form)

Later trainings will show how to create groups and tags that can also be used to search and organize data.

The screenshot displays the 'Advanced Search' interface for the Umoja Community. The page is organized into several sections:

- Search Criteria:** Includes 'Display Settings For Results' with 'Display Results As' set to 'Contacts' and 'Views For Display Contacts' set to 'default view'.
- Search Settings:** Shows 'Search Operator' set to 'AND' and a 'Search' button.
- Basic Criteria:** A grid of search filters including:
 - Complete OR Partial Name
 - Complete OR Partial Email
 - Contact Type(s)
 - Group(s) (search by group type) - circled in red
 - Select Tag(s)
 - All Tags
 - Phone
 - Phone Location
 - Phone Type
 - Exclude/Include by Privacy Option(s)
 - Preferred Communication Method
 - Contact Source - circled in red
 - Job Title
 - Email On Hold
 - Contact ID - circled in red
 - Student ID
 - Preferred Language
 - CMS User? Yes/No

Cleaning up your data

Once you have accessed your contact list, you can update the data to ensure that it is accurate. These are the recommended actions:

- Delete duplicate student accounts or “dummy” accounts (e.g. “Test Student”)
- Check to ensure that all students have first and last name, also check for accuracy of other contact information
- Review student forms and update student status

Cleaning up your data

HOME > UMOJA CRM
Find Contacts

Edit Search Criteria

3 Contacts Showing only Contacts starting with "I"

Select Records: All 3 records Selected records only

Actions

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Reset all selections

<input type="checkbox"/>	Name	Address	City	State	Postal	Country	Email	Phone	Action
<input type="checkbox"/>	info@umojacommunity.biz						info@umojacomm...	4150570946	View Edit more
<input type="checkbox"/>	Paris	1422711th Ave	oakland	CA	94606	United States	10926220@cc.pe...	5102103547	View Edit more

Access Keys: [?](#)

Powered by Umoja CRM 5.2.0. Umoja CRM is openly available under the GNU AGPL License.
[Download Umoja CRM](#) [View issues and report bugs](#) [Online documentation](#)

Get in Touch

Identify duplicate or “dummy” profiles and click “View” to progress to the next screen in order to delete. You can click “Edit” to add or change information.

HOME > UMOJA CRM > VIEW CONTACT

info@umojacommunity.biz

Actions Edit Delete Contact

Summary Activities 0 Events 0 Relationships 0 Groups 0 Notes 0 Tags 0 Change Log 1

Employer

Job Title

Nickname

Source

Home Email info@umojacommunity.org

Website

Privacy

Preferred Method(s)

Preferred Language English (United States)

Email Format Both

Communication Style

Email Greeting Dear

Postal Greeting Dear

Addressee

Tags

Contact Type Individual

Contact ID / User ID 4298 / 6908

Student ID

Phone

IM

Gender

Date of Birth

Age

Other Information

This page allows you to view, edit and delete the contact among other actions.