

Umoja CRM Training

Module two: Adding Student Data

Adding Student Data

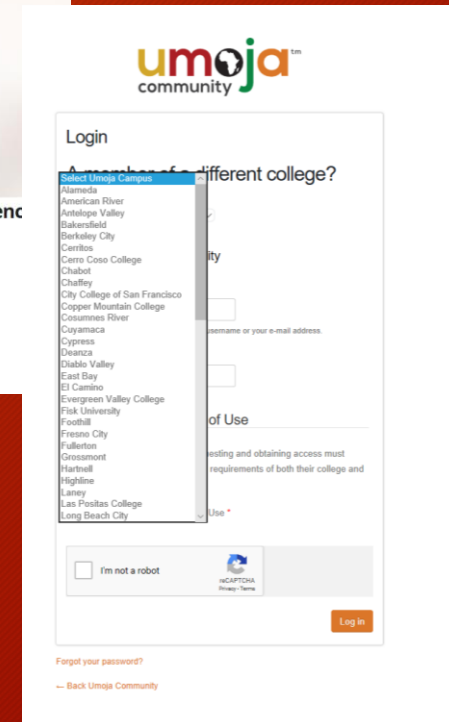
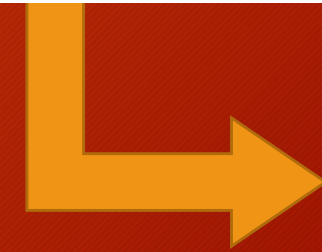
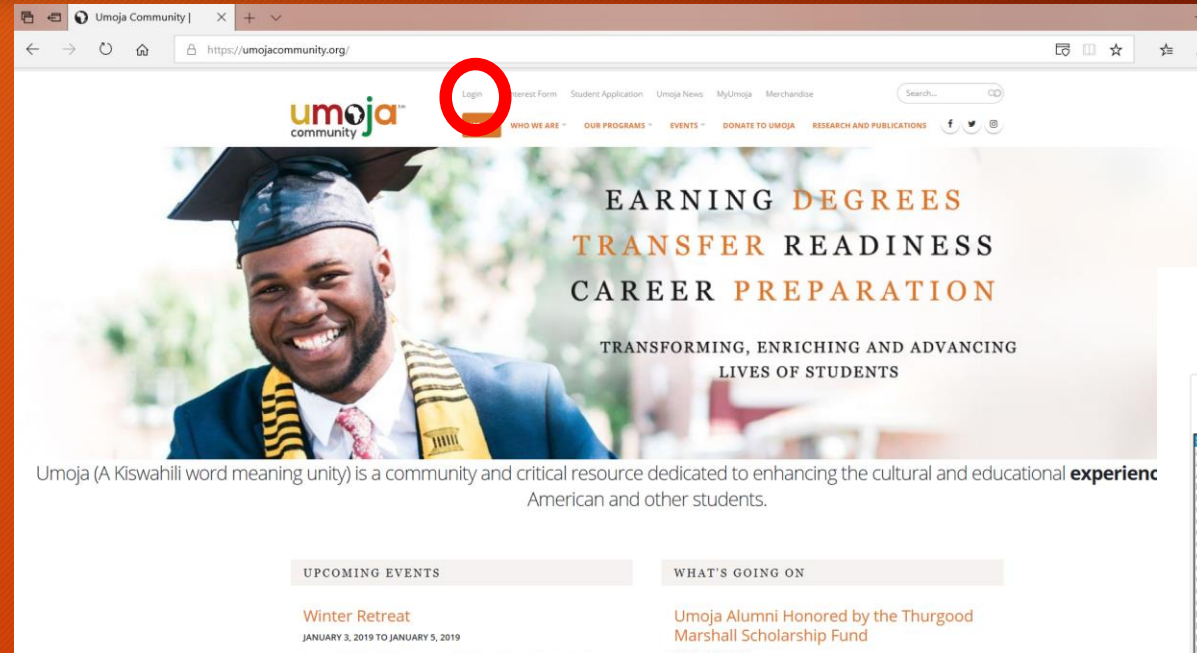
Most student profiles are created by students when they complete the Interest Form or Student Application from your program Umoja page. This populates their name, email, student ID and any other information they add. You can edit students profiles with their updated information and status updates. When you have students to add manually, you can do so individually or as a group using this module as a guide.

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

The screenshot shows a web browser window with the URL <https://alameda.umojacommunity.org/civicrm?reset=1>. The browser's address bar is annotated with a blue circle and a callout box pointing to it. The page features a navigation menu with items like 'Logout', 'Umoja CRM', 'Interest Form', 'Student Application', 'Umoja News', and 'MyUmoja'. The Umoja Community logo is prominently displayed. Below the logo, there are navigation links: 'HOME', 'WHO WE ARE', 'OUR PROGRAMS', 'DONATE TO UMOJA', and 'RESEARCH AND PUBLICATIONS'. A dark banner below the navigation contains the text 'HOME' and 'Umoja CRM Home', with the latter circled in red. The main content area includes a 'Configure Your Dashboard' link and a yellow welcome message: '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 visible in the bottom right corner.

Adding Students Individually

Before adding a student or student list, use the search functions to ensure that students are not already in the system. This will prevent duplicate and inflated data.

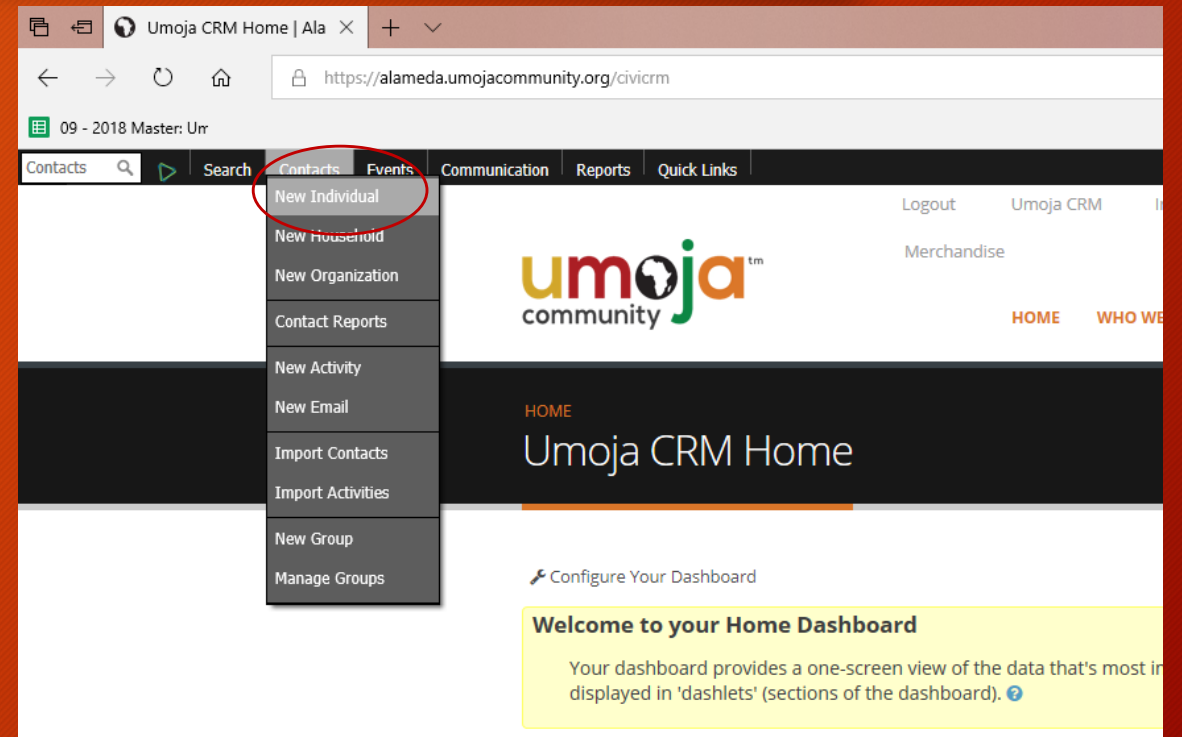
To add a student individually, have their name, email and student ID ready. You can include any additional contact or demographic information that you have in their profile as well.

Adding Students Individually

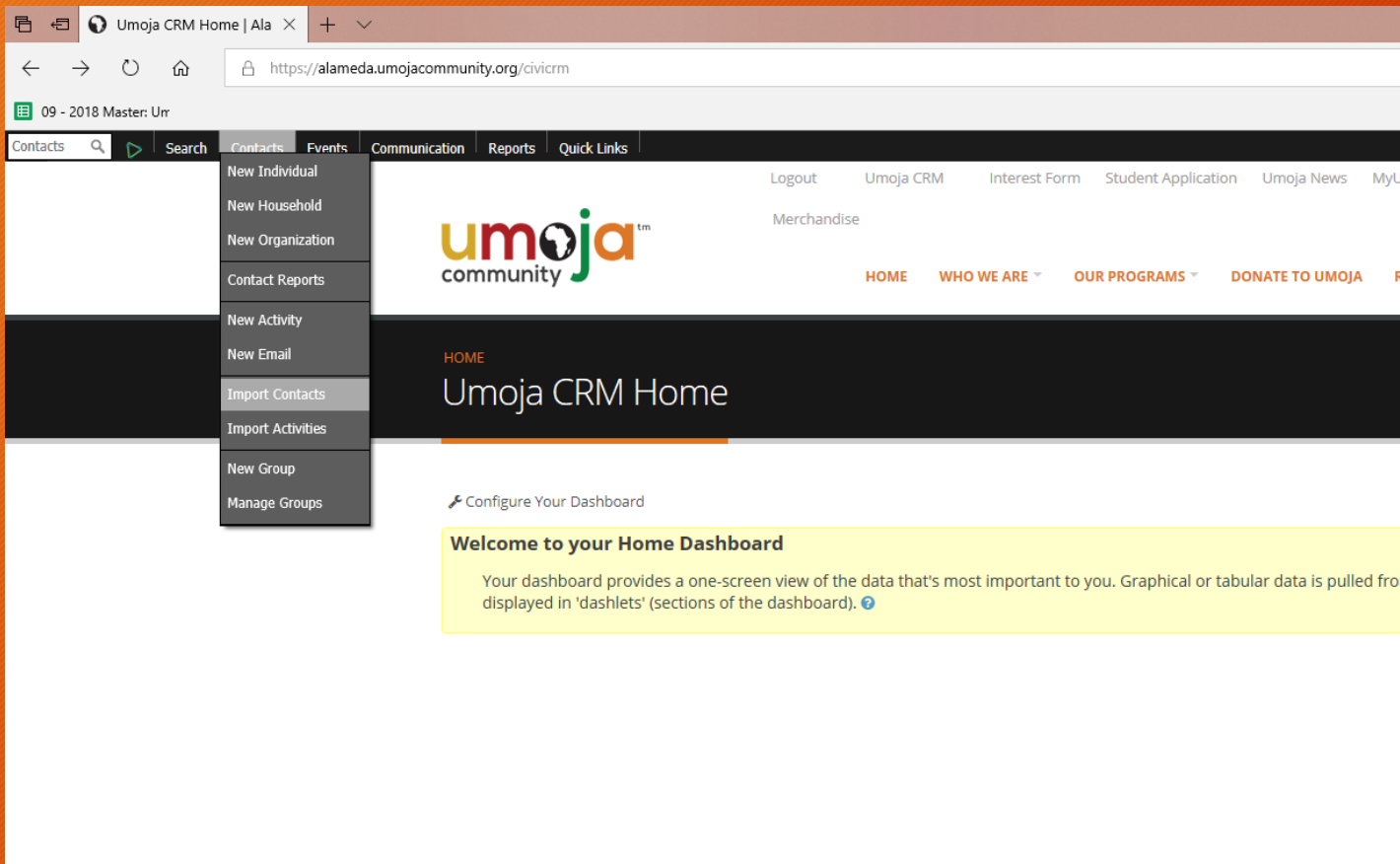
Select “Contacts” and click on “Add Individual” then “New Student”

The new student profile screen will appear. This allows you to enter student information individually. When entering student data, please enter full name, Student ID and email address at a minimum. Once you have added or updated the student profile, click save.

...and that's it!



Adding Multiple Students



To add multiple students at once, you must have a Comma-Separated Values (CSV) spreadsheet to upload. If you have student data saved on an Excel spreadsheet, save the document as a (CSV).

To access this option, first click “Contacts” then “Import Contacts”.

Adding Multiple Students

The first screen of the Import process is where you upload your document.

- Select “Browse” and locate your document to upload.
- Make sure you select the box that says “First row contains column headers” if your document has headers for each column (eg “First Name”, “Last Name”, “ID”)
- Once you have selected your document and checked that box, click “Continue”.

Note: You do not have to change or select any “Import Options”. If you have preferences in this area, you may use it, if not, it will default to standard settings.

The screenshot shows the 'Import Contacts' interface in the Umoja CRM. The page title is 'Import Contacts' and the breadcrumb is 'HOME > UMOJA CRM > IMPORT'. The main heading is 'Choose Data Source (step 1 of 4)'. Below the heading, there is a progress bar with four steps: '1. Choose Data Source', '2. Match Fields', '3. Preview', and '4. Summary'. A text box explains the import wizard's purpose. Below this, there are 'Continue' and 'Cancel' buttons. The 'CHOOSE DATA SOURCE' section has a 'Data Source' dropdown set to 'Comma-Separated Values (CSV)'. The 'UPLOAD CSV FILE' section has an 'Import Data File' field with a 'Browse...' button circled in red. Below the field, there are instructions about file format and size, and a checkbox for 'First row contains column headers'. The 'IMPORT OPTIONS' section includes settings for 'Contact Type', 'For Duplicate Contacts', 'Dedupe Rule', 'Import Field Separator', and 'Date Format'.

Adding Multiple Students

HOME > UMOJA CRM > IMPORT

Import Contacts

✓ 1. Choose Data Source » 2. Match Fields 3. Preview 4. Summary

Match Fields (step 2 of 4)

Review the values shown below from the first 2 rows of your import file and select the matching Umoja CRM database fields from the drop-down lists in the right-hand column. Select '- do not import -' for any columns in the import file that you want ignored.

If you think you may be importing additional data from the same data source, check 'Save this field mapping' at the bottom of the page before continuing. The saved mapping can then be easily reused the next time data is imported.

< Previous ✓ Continue ✕ Cancel

Column Names	Import Data (row 1)	Import Data (row 2)	Matching Umoja CRM Field
First Name	August	Zora	First Name *
Last Name	Wilson	Hurston	Last Name *
Student ID	1234	4321	External Identifier *
Email	augustw@college.edu	zorah@college.edu	Email (match to contact) * Home
Phone Number	2232323	9989988	Phone Home Phone

Save this field mapping

< Previous ✓ Continue ✕ Cancel

This next screen is a preview of how the data has imported.

- Use this screen to make sure your data fields (e.g. First Name, Last Name, Student ID) match
 - Use “External Identifier” for your Student ID numbers.
- If your fields match, click “Continue”.

Adding Multiple Students

This screen allows you to preview your data before uploading. Use this screen to ensure you have the correct number of imports, screen for duplicates and identify any errors.

If there are errors that the system caught, it will notify you on this screen.

Once you confirm those details, click “Import Now”.

After you have done this, your student data will appear in your contact search. Each entry will create a student profile that you can update, place in groups and add information to later.

1. Choose Data Source 2. Match Fields **3. Preview** 4. Summary

Preview (step 3 of 4)

The information below previews the results of importing your data in Umoja CRM. Review the totals to ensure that they represent your expected results. Click 'Import Now' if you are ready to proceed.

< Previous **Import Now** × Cancel

Total Rows	3	Total number of rows in the imported data.
Valid Rows	3	Total rows to be imported.

Column Names	Import Data (row 1)	Import Data (row 2)	Matching Umoja CRM Field
First Name	August	Zora	First Name
Last Name	Wilson	Hurston	Last Name
Student ID	1234	4321	External Identifier
Email	augustw@college.edu	zorah@college.edu	Home -Email (match to contact)
Phone Number	2232323	9989988	Home -Phone -Phone

▶ Add imported records to a new group

▼ Add imported records to existing group(s)

▶ Create a new tag and assign it to imported records

▶ Tag imported records

< Previous **Import Now** × Cancel

Review Your Contacts

The screenshot shows the Umoja CRM interface. At the top, there is a navigation bar with links for Logout, Umoja CRM, Interest Form, Student Application, Umoja News, and MyUmoja. Below this is the Umoja Community logo and a search bar. The main content area is titled 'Find Contacts' and displays a list of 68 contacts. The list is organized into columns: Name, Address, City, State, Postal, Country, Email, and Phone. Each row represents a contact, and there are 'View', 'Edit', and 'more' options for each entry. The page also includes a search criteria editor, a record selection dropdown, and a pagination control showing 'Page 1 of 2'.

<input type="checkbox"/>	Name	Address	City	State	Postal	Country	Email	Phone	Action
<input type="checkbox"/>	oakland	CA	94501	United States	...	...	View Edit more
<input type="checkbox"/>	Alameda	CA	94501	United States	...	...	View Edit more
<input type="checkbox"/>	Oakland	CA	94603	United States	...	...	View Edit more
<input type="checkbox"/>	Oakland	CA	94604	United States	...	...	View Edit more
<input type="checkbox"/>	Oakland	CA	94621	United States	...	...	View Edit more
<input type="checkbox"/>	Oakland	CA	94603	United States	...	...	View Edit more
<input type="checkbox"/>	oakland	CA	95610	United States	...	...	View Edit more
<input type="checkbox"/>	oakland	CA	94603	United States	...	...	View Edit more
<input type="checkbox"/>	antioch	CA	94531	United States	...	...	View Edit more
<input type="checkbox"/>	Alameda	CA	94501	United States	...	...	View Edit more
<input type="checkbox"/>	Alameda	CA	94501	United States	...	...	View Edit more
<input type="checkbox"/>	oakland	CA	94605	United States	...	...	View Edit more
<input type="checkbox"/>	Richmond	CA	94806	United States	...	...	View Edit more
<input type="checkbox"/>	emeryville	CA	94608	United States	...	...	View Edit more
<input type="checkbox"/>	alameda	CA	94501	United States	...	...	View Edit more
<input type="checkbox"/>	Alameda	CA	94501	United States	...	...	View Edit more
<input type="checkbox"/>	Alameda	CA	94501	United States	...	...	View Edit more
<input type="checkbox"/>	Oakland	CA	94605	United States	...	...	View Edit more

Once you have added your students and/or uploaded your data, go back to the search function to ensure that your data is there.

The number of entries should reflect the additions you made.

You can now search entries, group students and run reports!