

# UTeach Alumni Management System: User Guide

## Logging In

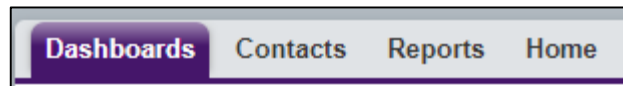
To access the UTeach Institute UTeach Alumni Tracking System, navigate to <https://uteach.force.com/partner>. If you are logging in for the first time, click the “Forgot Your Password?” link.

You will be prompted to enter your username. Your username is the email address supplied as the contact owner for your alumni records. You will receive an email containing your login instructions.

If you have trouble logging in, please contact Peggy Pitts at [pitts@uteach.utexas.edu](mailto:pitts@uteach.utexas.edu).

## Navigating the UTeach Alumni Management System

There are four tabs on the navigation bar across the top. The **Dashboard** tab leads to you the list of both national and program-specific graphs available to you. The **Contacts** tab leads to a list of your individual alumni records. The **Reports** tab leads you to a list of canned reports. More details for each of these tabs follow later in this document. The **Home** tab will be blank.

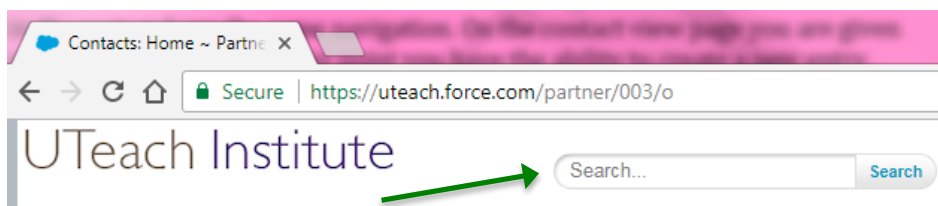


## General Navigation

All sections in the system are set up with the same navigation. On the contact view page, you are given a summary of the information within each section. From this point you have the ability to create a new entry, edit the existing entry, or delete the record if it's erroneous. Below is an example of the Education section summary.

Education <span>New Education</span>						
Action	Education ID	Subject Area	Degree	Graduation Term	Institution	Last Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">ED-003442</a>	Physics	Bachelor's	Fall 2009	Springfield University	<a href="#">Peggy Pitts</a> , 6/21/2017 4:00 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">ED-003443</a>	Education	Master's	Fall 2012	Springfield University	<a href="#">Margaret Pitts</a> , 6/22/2017 12:38 PM

- **Viewing:** To view the record in its entirety, click on the hyperlinked ID (in this example, it is titled Education ID). This will always be in the second column.
- **Editing:** There are two ways to edit a record. One is to click the blue “Edit” link from this screen. The second way is to view the record, and from that window click the EDIT button on the top middle of the page.
- **Adding New:** Click the New Education button on the top of the section.
- **Saving:** After you complete your edits, **remember to click the Save button, as nothing automatically saves.**

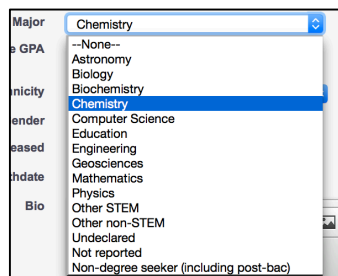


### TIP

You may also enter a last or first name in the search field to narrow your search.

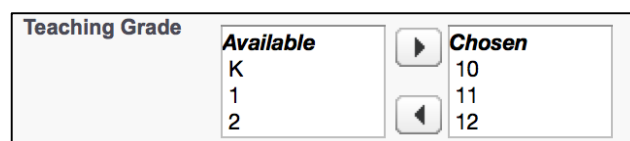
## Types of Fields and How to Enter Data into Each

**Picklist:** Has drop-down arrows on the end of the field. Click in the box and make your selection.



**TIP** Click the Save button every time you make changes in Salesforce. Nothing automatically saves.

**Multi-value picklist:** Highlight items you want from the left-hand box and move them to the right-hand box by either using the black arrows located between the boxes or by double-clicking. Can be moved in both directions.



**Checkboxes:** Click to turn check on or off.

Can Program Contact?





Text boxes: Double-click inside the field where the pencil icon is displayed.

Subject Area Physics



Lookups: Lookups do not allow for manual entry. You must search for the desired information and then attach it to the record. To activate the magnifying glass, hover over the field and double-click on the pencil icon. Do this to change an entry or to add an entry.

**High School Details**

High School Attended   

1. Click on the magnifying glass and a pop-up window will appear.
2. Use the search field in the upper left to put in the name of the school. It is best to keep with the general name and avoid using initials or designations like Middle or High. Change the search from Name to All Fields, then hit Go!

**Lookup**

Yates

Search ☐ Name ☒ All Fields

[Clear Search Results](#)

**Search Results**

**Organizations [25+]** [Hide Filters](#)

Organization Name  Parent Organization

Mailing City  Mailing State/Province

3. This can potentially return a long list of schools, but you can use the filter box to narrow down your choices. Select State (abbreviation) and add City. Then click Apply Filters.

**Organizations [6]** [Hide Filters](#)

Organization Name  Parent Organization

Physical City  Physical State/Province


[Search Filters Help](#) 

4. To attach the school to the record you're updating, click on the school name from the list yielded by your lookup.

**Organizations [1]** [Hide Filters](#)

Organization Name  Parent Organization

Mailing City  Mailing State/Province

[Search Filters Help](#) 

Filtered By: Mailing City(Houston) | [Clear Filters](#)

Organization Name	Parent Organization	Mailing City	Mailing State/Province	Type	Organization Owner Alias
<u>YATES H S</u>	HOUSTON ISD-District	HOUSTON	Texas	Public	mlumm

## IMPORTANT!

If you cannot locate the school you need, please contact Peggy Pitts at [pitts@uteach.utexas.edu](mailto:pitts@uteach.utexas.edu).

5. Remember to click Save.

## UTeach Nation Virtual Network Fields

Under Contact, Education, Employment and Awards there is an additional section for UTeach Virtual Network Information. The data in these fields is provided by alumni via the Virtual Network, and therefore the fields are read only.

UTeach Virtual Network Information	
User Subject Area	User Graduation Term
User Subject Area if Other	User Institution
User Degree	
User Degree (If Other)	

## Contacts

The **Contacts** tab is where all of your alumni are listed. You can access individual contact records by clicking on the alumnus's name.


The alumni contact record contains the following major components:

- Contact Detail
- University Information
- Employment Summary
- High School Details (this is the high school the alumnus attended)
- System Information
- Credentials
- Education
- Employment
- Awards
- Notes and Attachments
- Tracking
- NOYCE Scholarships

## Contact Detail

This section holds all the contact information for the alumnus.

**Contact Detail** Edit Upload Picture



Name	Mr. Joshua Fake	Program	UTeach Program
Middle Name	Paul	Email	josh@fake.com
Maiden Last Name		Alternate Email	joshfake@houstonisd.org
Other Name	Josh	Mailing Address	458 Alphabet Lane Spring, Texas 77040 United States
Birthdate	11/1/1985	Preferred Phone	(999) 999-1001
Bio	Was in the first group of graduates from UTeach University.		
Can Program Contact?	<input checked="" type="checkbox"/>	Facebook	<a href="http://www.facebook.com/joshfake">http://www.facebook.com/joshfake</a>
Deceased	<input type="checkbox"/>	LinkedIn	<a href="http://www.linkedin.com/joshfake">http://www.linkedin.com/joshfake</a>
		Twitter	<a href="http://www.twitter.com/joshfake">http://www.twitter.com/joshfake</a>
		Other URL	<a href="http://www.houstonisd.org/directory/y">http://www.houstonisd.org/directory/y</a>

## NOTE

The UTeach Institute will pre-populate this system using information gathered while students were still in the program. Alumni are added to the system during their Apprentice Teaching semester/term.

1. Select the Edit button to make changes.
2. Click into whichever field you wish to update and either select or type your choice.
3. After you complete your edits, **remember to click the Save button.**

**Mr. Joshua Fake** →

Contacts not associated with organizations are private and cannot be viewed by other users or included in reports.

**Contact Edit** Save Cancel

**Contact Information**

First Name	Mr. Joshua	Email	josh@fake.com
Last Name	Fake	Alternate Email	joshfake@houstonisd.org
Middle Name	Paul	Mailing Country	United States
Maiden Last Name		Mailing Street	458 Alphabet Lane
Other Name	Josh	Mailing City	Springfield
Birthdate	11/1/1985	Mailing State/Province	Texas
Bio	Was in the first group of graduates from UTeach University.		
Can Program Contact?	<input checked="" type="checkbox"/>	Preferred Phone	(999) 999-1001
Deceased	<input type="checkbox"/>	Alternate Phone	(999) 555-1234
		Facebook	<a href="http://www.facebook.com/joshfake">www.facebook.com/joshfake</a>
		LinkedIn	<a href="http://www.linkedin.com/joshfake">www.linkedin.com/joshfake</a>
		Twitter	<a href="http://www.twitter.com/joshfake">www.twitter.com/joshfake</a>
		Other URL	<a href="http://www.houstonisd.org/directory/y">www.houstonisd.org/directory/y</a>

## IMPORTANT!

Alumni log into the UTeach Nation Virtual Network using their email address therefore this field is not editable. Please contact Peggy Pitts if you have any issues.

After you click Save, you will be returned to the full contact record for the alumnus.

## University Information

This section holds all the university information for the graduate. All fields can be edited except for the Undergraduate GPA. Place a check in the NOYCE Scholar box if the graduate is a NOYCE Scholar recipient. See NOYCE Scholar at the bottom on the record to enter additional NOYCE Scholar information.

University Information			
University ID/EID	JF1234	Race/Ethnicity	Asian
Program Completion Term	Fall 2009	Gender	Male
Major	Physics	NOYCE Scholar	<input checked="" type="checkbox"/>
Undergraduate GPA	4.000		

## Employment Summary

The Employment Summary section is populated with information entered in the Employment section. To change the information here, update the Employment section located farther down the page.

Employment Summary	
Last Known Employment Status	Employed by K-12 School/District
Most Current Employment Date	7/31/2018
Overall Years in K-12	5.6

## High School Detail

This section contains the high school the alumnus attended and may be edited.

High School Details			
High School Attended	<u>SMITH STATION ELEM.</u>	ACT Math	680
		SAT Math	720

### NOTE

The High School Attended field is a Look Up. Please refer to pages 3-4 on how to use a lookup.

## System Information

This section may not be edited. It displays the university the alumnus attended and when the record was created and last modified.

System Information	
Created By	<u>Mary Lummus-Robinson</u> , 3/14/2016 3:22 PM
Last Modified By	<u>UTAus Owner</u> , 6/23/2017 2:02 PM
Organization Name	<u>UTeach University</u>

## Credentials

This section holds all of an alumnus's credential/certification information.

Credentials								
<div> <div>New Credential</div> <div>Credentials Help ?</div> </div>								
Action	Credential ID	Credential Subject	Credential Name	Credential Grade Level	Record Type	Received Date	Expiration Date	Last Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	CR-04158	Mathematics	Math 6-12	6; 7; 8; 9; 10; 11; 12	Subject Based Credential	1/13/2010	6/21/2017	<a href="#">Peggy Pitts</a> , 6/21/2017 3:56 PM
<a href="#">Edit</a>   <a href="#">Del</a>	CR-04159		ESL Generalist (Grades 4-8)		Non-Subject Based Credential	8/15/2016	8/16/2026	<a href="#">Peggy Pitts</a> , 6/21/2017 3:59 PM
<a href="#">Edit</a>   <a href="#">Del</a>	CR-04160	Physical Science	Mathematics/Physics (Grades 8-12)	6; 7; 8; 9; 10; 11; 12	Subject Based Credential	1/13/2010	1/13/2020	<a href="#">Peggy Pitts</a> , 6/21/2017 3:58 PM

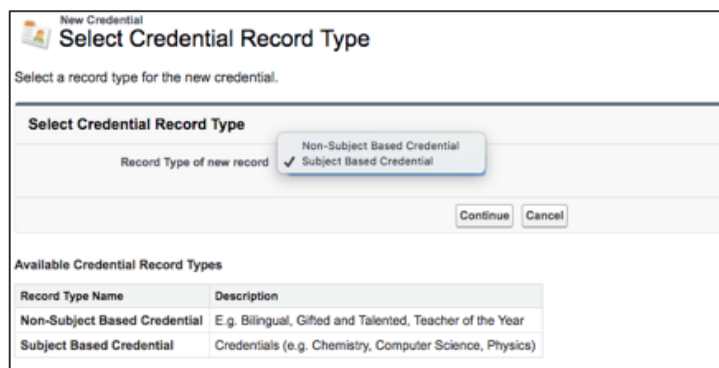
The alumni credential record contains the following major components:

- Credential Type
- If it was the credential recommended by the program
- Credential Name, Subject and Grade Levels
- State credential was awarded in
- Received & Expiration Dates

- Notes

To add a new credential, choose from either subject based or non-subject based. Enter the information and save.

**Subject Based Credential:** Select the subject based credential received.



**New Credential**  
**Select Credential Record Type**  
 Select a record type for the new credential.

**Select Credential Record Type**

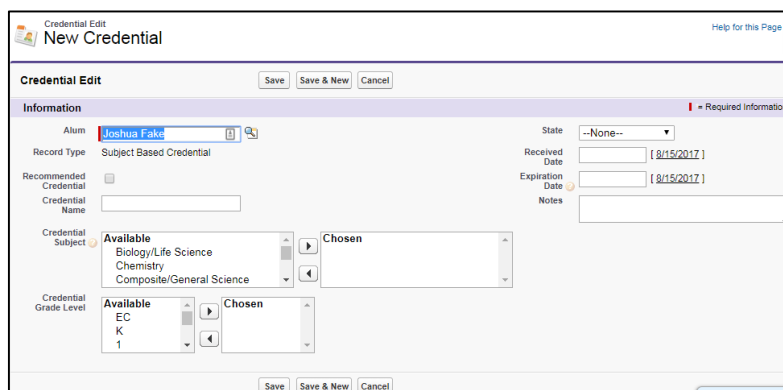
Record Type of new record

☐ Non-Subject Based Credential  
☒ Subject Based Credential

Continue Cancel

**Available Credential Record Types**

Record Type Name	Description
Non-Subject Based Credential	E.g. Bilingual, Gifted and Talented, Teacher of the Year
Subject Based Credential	Credentials (e.g. Chemistry, Computer Science, Physics)



**Credential Edit** Save Save & New Cancel

**Information** Help for this Page

Alum Joshua Fake

Record Type Subject Based Credential

Recommended Credential ☐

Credential Name

Credential Subject

Available: Biology/Life Science, Chemistry, Composite/General Science

Chosen

Credential Grade Level

Available: EC, K, 1

Chosen

State: --None--

Received Date: [ 8/15/2017 ]

Expiration Date: [ 8/15/2017 ]

Notes

Save Save & New Cancel

**Non-Subject Credential:** Credentials not related to a course subject.

- Entries for this include:
- Assistant Principal
- Bilingual
- Counselor
- ESL/ELL
- Gifted and Talented
- National Board Certified
- Principal
- Special Education
- Superintendent
- Other (please specify)

## Education

This section displays an alumnus's higher education record.

Education							
Action	Education ID	Subject Area	Degree	Graduation Term	Institution	UTeach Affiliated Record	Created Date
<a href="#">Edit</a>   <a href="#">Del</a>	ED-002493	Biology/Life Sciences	Bachelor's	Fall 2005	UTeach University	✓	3/14/2016

Education Edit

New Education

Save

Save & New

Cancel

Information

Alum

Joshua Fake

Subject Area

Biology/Life Sciences

Subject Area (If Other)

Degree

Ph.D

Degree (If Other)

Graduation Term

Spring 2016

Institution

UTeach Affiliated Record

☐

Enter the information and save.

## New Employment

This section holds all of an individual's employment information.

### INFORMATION

Alumni employment is tracked on a yearly basis. If employment information is known for a specific year, we set the start date as 8/1 and the end date as 7/31 of the following year. For example, if an alumnus is employed as a banker in 2015–2016, we set the start date as 8/1/2015 and the end date as 7/31/2016. If the alumnus has the same job for multiple years, do not create a new employment record; rather, edit the existing record and change the end date to the current year. In our example above, if the same graduate were still listed as a banker in 2016–2017, we would edit the record and change the end date from 7/31/2016 to 7/31/2017. This applies to all types of employment records.

To create a new record, click the New Employment button and select which type of employment record you wish to create.

Select Employment Record Type

Record Type of new record

K-12 Employment

K-12 Employment

Non K-12 Employment

Unemployed

Continue

Cancel

There are three types of employment records:



- **K–12 Employment:** Employed in a K–12 school or district.
- **Non K–12 Employment:** Employed, but not in a K–12 school or district.
- **Unemployed:** Not currently employed (this includes stay at home parent, graduate school, and retired).

You can enter the details for Non-K–12 Employment and Unemployed and select Save. K–12 Employment requires more details.

## Creating a K–12 Employment record

The school or district at which the alumnus is employed is a lookup. Please refer to pages 3-4 for detailed instructions.

The end date will already be set for the end of the current academic year.

## Entering K–12 Employment Detail

For K–12 Employment, please enter the following:

- **Primary Role:** Primary role at the school/district (e.g., teacher, principal, etc.)
- **Additional Role:** Any additional roles the alumnus may have at the school/district (e.g., coach, team lead, etc.)
- **Course:** Subjects the alumnus teaches (e.g., Algebra I, grade 9)

To add one of these details, click on the appropriate New button listed in the Employment Detail section of the K–12 Employment record.

Because an alumnus can be employed at multiple schools, make sure you are adding the appropriate employment details into the appropriate school. In the example below, teaching details are being added for this graduate's employment at Yates High.

**Employment**  
EM-04533

K-12 Employment [5+]

**Employment Detail** [Edit] [Delete] [Clone]

Alum	Joshua Fake	School	YATES H S
Record Type	K-12 Employment [Change]	School District	HOUSTON ISD-District
Start Date	8/1/2014	Years Employed	2.0
End Date	7/31/2016		

**UTeach Virtual Network**

User Start Date		User School	
User End Date		User School (if not found)	
		User School District	

**System Information**

Created By: Mary Lummus Robinson, 3/15/2016 10:29 AM  
Last Modified By: UTAus Owner, 6/23/2017 1:46 PM

[Edit] [Delete] [Clone]

**K-12 Employment** [New - Course] [New - Primary Role] [New - Additional Role]

Action	Teaching ID	Academic Year	Record Type	Teaching Subject	Grade	Subject Level	Primary Role	Additional Role
[Edit] [Del]	TD-25843	2015-2016	Additional Role					Club/Organization Sponsor
[Edit] [Del]	TD-7378	2015-2016	Primary Role				Teacher	
[Edit] [Del]	TD-7379	2015-2016	Course	Biology	11	Regular		
[Edit] [Del]	TD-25164	2014-2015	Primary Role				Teacher	
[Edit] [Del]	TD-25842	2014-2015	Additional Role					Club/Organization Sponsor

Show 2 more » | Go to list (7) »

## Primary Role and Additional Role

Enter a new primary role record for each year an alumnus is employed at the school listed in the employment record. To add Primary and Additional Roles, click on the applicable button. Choose the role and teaching year from the drop-down menus.

K-12 Employment Edit  
New K-12 Employment

**K-12 Employment Edit** [Save] [Save & New] [Cancel]

**Primary Role Detail**

Primary Role: Teacher

If other, provide details:

Academic Year: 2017-2018

Notes:

K-12 Employment Edit  
New K-12 Employment

**K-12 Employment Edit** [Save] [Save & New] [Cancel]

**Additional Role Detail**

Record Type: Additional Role

Additional Role: Available

If other, provide details:

Academic Year: --None--

Notes:

## New Course Teaching

This is where you can enter specific details about an alumnus's teaching assignment.

The course record contains the following major components:

- Teaching Subject, Grade(s) and Subject Level(s)
- Academic Year

### TIP

The Notes fields are for you to use to fill in any additional details. Information stored in Notes fields cannot be used in any report calculations.

**K-12 Employment Edit**
Save Save & New Cancel

**Information**

Record Type
Course
Grade

Available

K

1

2

Chosen

Teaching Subject
--None--
Subject Level

Available

Regular

AP

IB

Chosen

If other, provide details
Notes

Academic Year
--None--

After you save, you will be taken to a recap screen.

K-12 Employment
TD-7379
Back to Employment: EM-04533

**K-12 Employment Detail**
Edit Delete Clone

Alum	Joshua Fake	Grade	11
Record Type	Course <a href="#">Change</a>	Subject Level	Regular
Teaching Subject	Biology	Notes	
If other, provide details			
Academic Year	2015-2016		

**UTeach Virtual Network Information**

User Subject	User Grade
User Academic Year	User Level
	User Notes

**System Information**

Created By	Mary Lummus-Robinson, 3/15/2016 10:31 AM	Last Modified By	UTeaus Owner, 6/23/2017 1:44 PM
		Employment	EM-04533

Edit Delete Clone

If everything looks correct, return to the alumnus's employment record by clicking on the Employment ID in the lower right corner.

## Awards

Awards may be added to an alumnus's record using the same navigation as other sections.

Awards			
<span>New Award</span>			
Action	Award ID	Award Name	Award Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AW-000128</a>	First Year Teacher of Promise	First Year Teacher of Promise at Yates High School, awarded December 2010.

## Notes and Attachments

Notes and file attachments may be added to an alumnus's record.

**Notes & Attachments**
New Note Attach File

To add a note: click New Note, enter information, and Save.

To add an attachment: click Attach File and follow the instructions on the screen.

## Tracking

This section summarizes the way each alumnus's employment was tracked.

Tracking <span>New Tracking</span>				
Action	Tracking Name	Tracking Current Through	Resource Used	School Directory
<a href="#">Edit</a>	T-0003	7/31/2018	Manually Tracked	

For every new tracking record, the Tracking Current Through date is pre-populated. Select from:

- Alumni Provided
- Manually Tracked
- Program Provided

A link to the alumnus's School Directory can be entered, as well as any Tracking Notes. Click Save when entry is complete.

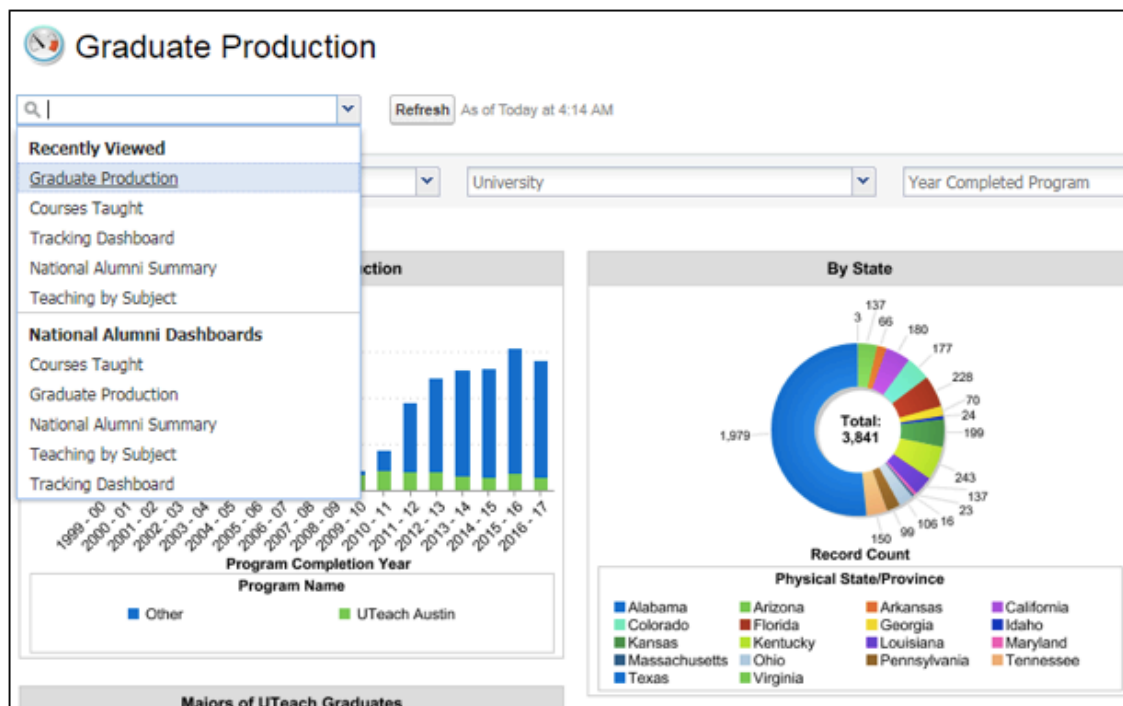
## Noyce Scholarship

NOYCE Scholarships <span>New NOYCE Scholarship</span>				
Action	NOYCE Scholarship Name	Semester Awarded	Teaching Obligation	Obligation Status
<a href="#">Edit</a>	N-0001	Fall 2006	3 year	No obligation incurred
<a href="#">Edit</a>	N-0002			

Click on the drop-down arrows to select the Semester Awarded, Teaching Obligation, and Obligation. Click Save when entry is complete.

## Dashboards

Click on the Dashboard tab in the navigation bar to access your dashboards. Use the drop-down menu at the top left to navigate to the full list of dashboards.



The drop-down list displays two categories: Recently Viewed and Nationwide.

- **Recently Viewed:** Those dashboards you viewed last.
- **Nationwide:** Dashboards that display national UTeach alumni statistics.

*Courses Taught:* Displays overall counts of alumni teaching at the high, middle, and elementary school level. Includes counts of alumni teaching specific math or science subjects. Counts are unique within a category, but not across. For example, alumni teaching middle and high school are included once in the middle school graph and once in the high school graph.

*Graduate Production:* Displays cumulative information about graduates, including production by program.

*National Alumni Summary:* Summary counts of alumni for the current tracking year.

*Teaching by Subject:* Summary counts of graduates teaching math, science, or other—not by specific subject.

*Tracking Dashboard:* provides you with tracking status for the current academic year.

## Reports

Click on the My Alumni Data folder to view the following reports specific to your program:

- All Contact Info
- Current Employment
- Current Teaching Assignment Data
- Demographic and Academic Data
- My Contacts Needing Updates
- My Contacts with No Employment
- Teaching Credentials
- Title 1 Status of Schools
- Whole History: All Employment
- Whole History: K-12 Teaching Details

### Reports & Dashboards

Folders

**All Folders**

- My Alumni Data
- National Alumni Dashboards

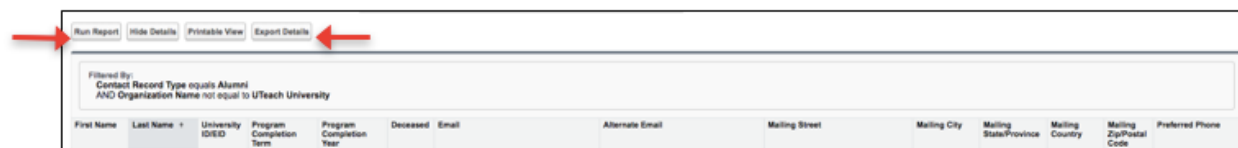
My Alumni Data

Action	Name ↑	Folder	Created By
	<b>All Contact Info</b> Alumni emails, mailing addresses, phone numbers, etc.	My Alumni Data	<a href="#">Lowry, Michelle</a>
	<b>Current Employment</b> Alumni current employment data. If "Final Employment Status" is blank, alumnus was not tracked in most recent year. Includes total years teaching.	My Alumni Data	<a href="#">Lummus-Robin...</a>
	<b>Current Teaching Assignment Data</b> Assignment location, subject, grade level, etc. If grade level was missing for a specific subject taught, the school's grade range was substituted. NOTE: MULTIPLE RECORDS PER ALUMNUS.	My Alumni Data	<a href="#">Lummus-Robin...</a>
	<b>Demographic and Academic Data</b> Alumni academic information: major, ethnicity, gender, Noyce reporting fields, GPA, high school.	My Alumni Data	<a href="#">Lummus-Robin...</a>
	<b>My Contacts Needing Updates</b> Alumni who are missing current year employment information.	My Alumni Data	<a href="#">Lummus-Robin...</a>
	<b>My Contacts with No Employment</b> A list of alumni that have never had any employment information.	My Alumni Data	<a href="#">Lowry, Michelle</a>
	<b>Teaching Credentials</b> Teaching credentials held by alumni.	My Alumni Data	<a href="#">Lummus-Robin...</a>
	<b>Title I Status of Schools</b> A list of alumni working in K-12 schools, including school Title I status, employment dates, etc. Years Teaching indicates the total years of teaching at that campus.	My Alumni Data	<a href="#">Lummus-Robin...</a>
<b>Whole History: All Employment</b>			

1-10 of 10

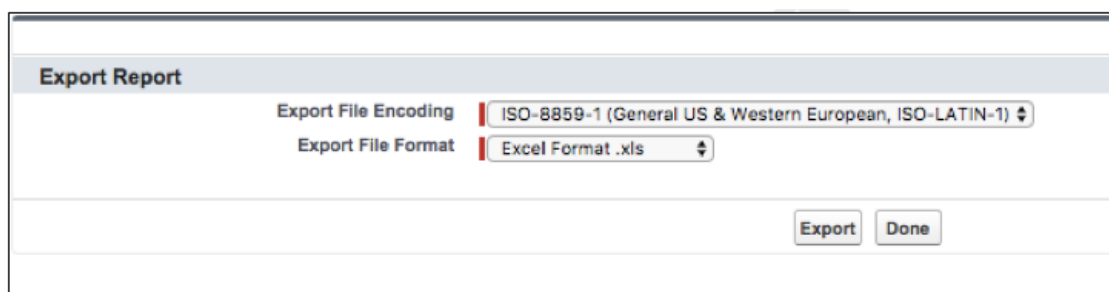
« Previous

Click on the report to view. Always click **Run Report** when the report first opens.



To export a report:

1. Click Run Report
2. Click Export Details
3. From the Export Report screen, select the desired file format (Excel or CSV). Ignore the Export File Encoding drop-down.
4. Click Export and the file will be downloaded to your computer.



5. Click Done to bring you back to your report.

Refer to Appendix 1 for a list of available reports and description of each report.

## Questions?

Questions about entering data should be directed to Peggy Pitts at [pitts@uteach.utexas.edu](mailto:pitts@uteach.utexas.edu).

## Appendix 1: List of available reports

Report Name	Report Description
All Contact Info	Alumni emails, mailing addresses, phone numbers, etc.
My Contacts with No Employment	A list of alumni that have never had any employment information.
Whole History: All Employment	Includes all alumni employment records. NOTE: MULTIPLE RECORDS PER ALUMNUS.
Title I Status of Schools	A list of alumni working in K-12 schools, including school Title I status, employment dates, etc. Years Teaching indicates the total years of teaching at that campus.
Demographic and Academic Data	Alumni academic information: major, ethnicity, gender, Noyce reporting fields, GPA, high school.
Current Teaching Assignment Data	Assignment location, subject, grade level, etc. If grade level was missing for a specific subject taught, the school's grade range was substituted. NOTE: MULTIPLE RECORDS PER ALUMNUS.
Current Employment	Alumni current employment data. If "Final Employment Status" is blank, alumnus was not tracked in most recent year. Includes total years teaching.
My Contacts Needing Updates	Alumni who are missing current year employment information.
Whole History: K-12 Teaching Details	Includes all teaching details including primary and additional role, subject, subject level, teaching year, school and district. School grade range was substituted if grade level was missing for specific subject taught. NOTE: MULTIPLE RECORDS PER ALUMNUS.
Teaching Credentials	Teaching credentials held by alumni.