HMH Platform Rostering: Load New Roster CSV (clear historical data)

This guide provides the details for rostering to Ed, ThinkCentral, and Holt McDougal Online using Clever. If you need to roster to SAM, please contact Technical Support 🔗.

This guide is intended for users who have NEVER imported data to HMH systems, used QuickRoster, or manual entry, or users who wish to clear their site with no historical data. If you have rostered to Ed, ThinkCentral, or Holt McDougal Online using SFF, OneRoster or ClassLink and want to move to Clever CSV while retaining historical data, then visit the Migrate to Clever (retain historical data) Guide 🔗 instead.

If you are using a learning management system (LMS), such as Schoology or Canvas, be sure to review our guide: Connecting Ed to Your LMS 🔗 *before* you roster.

Step 1: Setup an SFTP Site

Prior to creating an SFTP site, you must have a district administrator account on Ed, ThinkCentral, or Holt McDougal Online tied to your email.

➢ To set up an SFTP site yourself, follow these steps:

    a. Skip through the wizard steps until you get to the Request SFTP Access 🔗 step.

    b. Click the **Create SFTP Site** button. A progress bar displays as the site is created, which takes an average of 5 to 10 seconds. When completed, your connection information appears, and an auto-generated password displays.
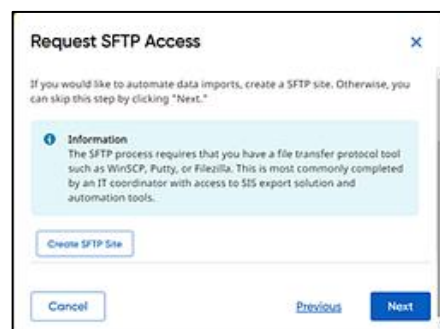
Step 2: Setup OR CSV Exports in Clever

    a. Install the HMH Core Application; for instructions see details on Clever's site: Add or Remove Apps 🔗

    b. Log in to the **Clever Admin Dashboard** and select the **HMH Core app connection**.

    c. Click the **Begin set up** link.

    d. Select the sharing details (such as, **All schools** or **customized**). Once selected, a message appears stating that it will process over the next hour. Depending on the size of your district, this may take a couple minutes to an hour. If processing takes longer than a minute, move to the next step.

    e. Return to the dashboard app list and re-select the **HMH Core application**.

    f. **Filter your data** *(Best Practice)* – To learn more, visit Clever's site: Sharing Permissions: Share by Rules 🔗.

> ⚠ **Best Practice:** HMH recommends that you filter data being sent from Clever to HMH to eliminate data such as Phy Ed, Lunchroom, Home Economics, and/or any data not relevant to the Core subjects of Homeroom, Reading, ELA, Math, Geometry, Algebra, Science, and Social Studies depending on the content you purchased. Filtering the data leads to quicker imports, less errors, improved security, and best in class end usability of the digital platforms.

    g. Select the **Settings** tab.

    h. Scroll down to the bottom, select **UPDATE** under the **SFTP Credentials** section, and enter the **URL** (**sftp://sftp.idma.app.hmhco.com**), **Username**, and **Password** for the HMH sFTP site (*provided in Step 1 above*).

IMPORTANT: When entering the URL, be sure to include the "sftp" twice; this double entry of "sftp" is part of the URL. Additionally, **Port 22** is the default port and does not change. *(See screen shot for reference.)*

i. Click **Save**. Once the credentials are entered, the OneRoster CSV file set will be sent to HMH with the data sharing rules that were configured. The HMH import will show "**failed**," which is expected, unless the schools/orgs are already mapped (that is, if you are switching from OneRoster CSV using another vendor or source).

Step 3: Setup Advanced Rostering Wizard in Ed, ThinkCentral, or Holt McDougal Online

If you need any assistance or further details about any of the steps below, visit the [Import Management Online Help](#) 🔗.

a. Log in to Ed, ThinkCentral, or Holt McDougal Online and launch the rostering wizard, as follows:

- In Ed, go to the **My Schools** page, click **Roster**, scroll to **Advanced Roster**, and click **Start Here**.

- In ThinkCentral, click **User Accounts** in the top menu, and then below **Manage**, click **Import**.

- In Holt McDougal Online, click **Import** on the side menu, and then click **Import Student/Teacher Accounts** or **Import Classes**.

Once the Clever OneRoster CSV file set is received, the file will be displayed as **DISTRICT_DATA.ZIP** in the **Most Recent Uploads** window at the bottom of the roster screen (as shown in this example).

b. Click **Download** and save the zip file to a temporary location.

Note: You must be logged in to Ed for the remaining steps. If you are a TC or HMO user and do not have an Ed account yet, contact mailto:rostering@hmhco.com for assistance.

c. Open the Rostering Wizard in Ed by doing the following: go to the **My Schools** page, click **Roster**, scroll to **Advanced Roster**, and click **Start Here**.

d. Follow the Rostering Wizard set up process:

i. Select **Clever (CSV file)** and then click **NEXT**.

ii. Rostering Wizard – **Step 1:** Select **Clever CSV**, upload the saved **District_Data.zip** file, and click **NEXT**.

iii. Rostering Wizard – **Step 2: Map Schools**. Select only the schools and platforms that will be required.

iv. Rostering Wizard – **Step 3: Define Login Options**. If using Clever SSO, make sure that the usernames defined here match your SSO usernames. To complete SSO setup, see the end of this document once all rostering steps are completed.

v. Rostering Wizard – **Step 4: Manage Courses & Classes.** Determine the class naming convention that works best for your organization and type the class naming convention in the field.
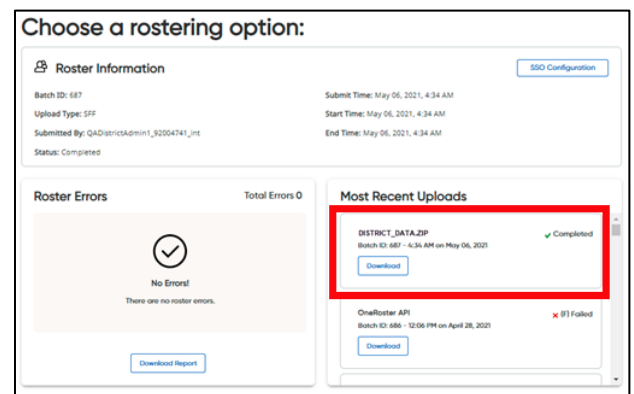
> **Note:** For TC and HMO, each class name must be unique within each teacher account. (In other words, a teacher cannot have more than one class with the same name.) HMH recommends a class name using the formula SY+sourcedId+title. For best results, see Tips for Creating Class Names ⬈.

vi. Rostering Wizard – **Step 5: sFTP Request**. This is skipped because this was already completed.

vii. Rostering Wizard – **Step 6: Define Preferences**. Since the data is coming from Clever and is automated, HMH recommends that you turn off the ability for manual entry and if rostering at a district level, remove the ability for school admins to do rostering. If you plan to use SSO, then turn off the **Forgot Password** and **Welcome email** options and be sure to communicate the correct SSO login path to your user community.

viii. Rostering Wizard – **Step 7: Prepare for your roster setup (Clear data)**

> If starting fresh with no data retention on any platforms, HMH recommends that you clear your site *before* starting a new roster. This will impact all teachers and students imported previously or manually created, deleting the users from Ed and deactivating them in ThinkCentral and Holt McDougal Online.

> Review your current rostering set up carefully and review which HMH platforms your district is using. There is no undo, so be sure to follow instructions to export data on the screen *before* completing this task.

ix. Rostering Wizard – **Step 8: Setup completed**. Select the box to "**Send Data to HMH Platforms now**" and click **SUBMIT** to process import files.

The OneRoster CSV files will be sent from Clever to HMH sFTP site as determined by the district's data sharing rules and data feed settings. When enabled in Clever, Clever will send HMH a new OneRoster CSV data set after they process the district's data feed.

Frequently Asked Questions

- **How does Clever Integration manage multiple roles?** HMH does not support multiple roles at this time.

- **Does HMH support the import of administrator accounts?** HMH only supports students and teacher record imports at this time. Admins must be manually entered.

- **Does HMH support Team Teachers?** HMH Ed supports lead and team teachers. TC and HMO support only the lead teacher assignment.

- **Does HMH support teacher-led rostering with Clever?** HMH supports admin-based rostering with Clever only.

- **I setup sFTP but no data is being sent?** If you input the HMH sFTP credentials into the HMH Core app within the Clever dashboard and the data does not send, do the following:
  - First, check that you have the correct username and password including the correct case sensitivity and no leading or trailing spaces.
  - If the usernames and passwords look correct, then confirm that you have Term Dates listed for your courses/classes. Although this data is not required by Clever, the OneRoster standard does utilize this information as to what courses/classes should be included in the data feed to HMH

CLEVER SINGLE SIGN ON (SSO) SET UP – SAML

Clever offers a SAML SSO solution to support access to HMH's Ed, ThinkCentral, and Holt McDougal Online. The self-service guide to setting up SAML SSO can be found here on Clever's site: Clever + HMH SAML Setup Guide ⬈

If SAM only, contact Tech Support.