


HMH Platform Rostering: Migrate to Clever CSV (retain historical data)

This guide provides the details for rostering to Ed, ThinkCentral, and Holt McDougal Online using Clever. If you need to roster or setup SSO to SAM, please contact [Technical Support](#) .

This guide is intended for users who have imported data to HMH systems using SFF or OneRoster in previous imports and wish to retain data. If you have never imported to Ed, TC, or HMO or wish to clear your site with no historical data, then visit [HMH Platform Rostering: Load New Roster \(clear historical data\)](#)  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: Stop the Current Upload of Data

If you used Simple File Format (SFF) or OneRoster 1.1 CSV in your previous upload, you need to stop the uploading of the previous data files (turn off any SIS export scheduled task and putty/winscp job).

If you used OneRoster 1.1 API (such as integrations from ClassLink, Infinite Campus, Skyward, Aeries, PowerSchool, and others), follow these steps:

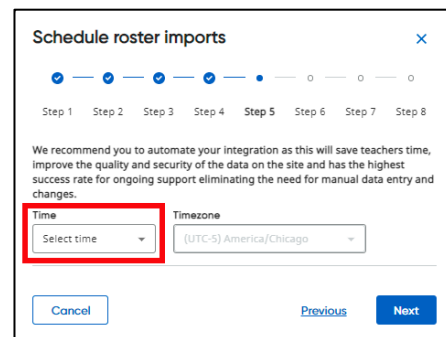
- a. Log in to Ed, ThinkCentral, or Holt McDougal Online and launch the rostering wizard, as follows:
 - In Ed, go to the **My Schools** page, click **Roster**, scroll to **Advanced Roster**, and click **Start Here**.
 - In ThinkCentral, click **User Accounts** in the top menu, and then below **Manage**, click **Import**.
 - In Holt McDougal Online, click **Import** on the side menu, and then click **Import Student/Teacher Accounts** or **Import Classes**.

- b. Skip through the wizard steps until you get to the [Schedule Roster Imports](#)  step.

- c. From the **Time** drop-down list, choose **Select Time**.

- d. Click the **Next** button. This saves your settings and turns off automated API imports.

- e. Close the wizard by clicking the **X** in the right corner of the dialog box. (If you continue through the wizard by clicking the **Next** buttons and arrive on the final step, be sure to *uncheck* the **Send data to HMH Platforms now** check box prior to clicking **Submit**.)




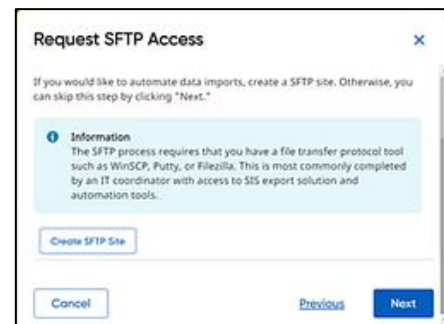
Step 2: Setup an SFTP Site


If you automated imports using Simple File Format (SFF) or OneRoster 1.1 CSV in previous uploads, you can skip this step and use the existing site. HMH encourages you to reset your password to prevent the possibility of uploading multiple files. (See instructions on the next page.)

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.



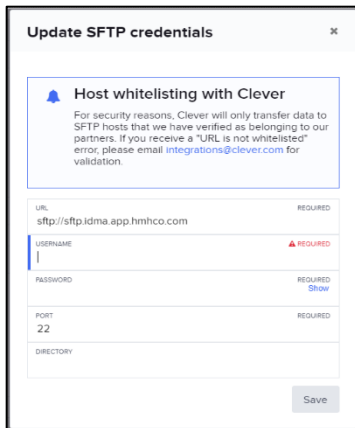
- To change your SFTP password, follow these steps:
 - a. Skip through the wizard steps until you get to the [Request SFTP Access](#)  step.
 - b. Click the **Reset Password** button. A warning appears to confirm that you want to reset the password.
 - c. In the warning box, click the **Reset Password** button. A progress bar displays. When completed, the connection information updates and the new password appears.

Step 3: 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. From the HMH Core dashboard application, 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*).



Update SFTP credentials

Host whitelisting with Clever
For security reasons, Clever will only transfer data to SFTP hosts that we have verified as belonging to our partners. If you receive a "URL is not whitelisted" error, please email integrations@clever.com for validation.

URL REQUIRED
sftp://sftp.idma.app.hmhco.com

USERNAME REQUIRED
1

PASSWORD REQUIRED [Show](#)

PORT REQUIRED
22

DIRECTORY

[Save](#)

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

IMPORTANT: RISK OF DATA LOSS! When you change rostering vendors, IDs can change, which may result in the loss of data. HMH supports a mass update of IDs, but that must be done on the **first import and must include ALL users. Those users must have the same username from last year to this year.** If you roster before all scheduling is completed, any data on users in last year's file that is not in this year's first import will be lost.

➤ If you wish to export data, see [Export Historical Data](#) .

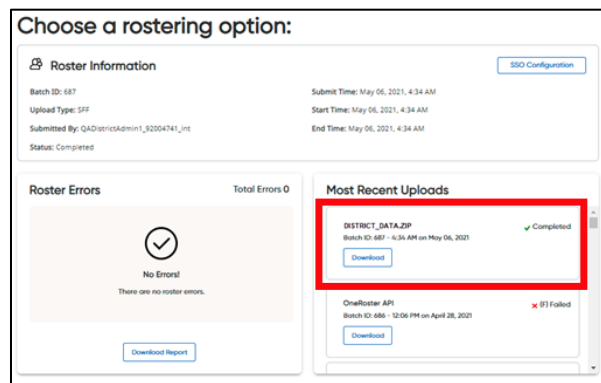
- Log in to the HMH platform (Ed, ThinkCentral, or Holt McDougal Online) using a District Administrator account and navigate to the Rostering section. (See Step 1 a for details.)

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).

- 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@hnhco.com> for assistance.

- 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**.
- Follow the Rostering Wizard set up process:



- Select **Clever (CSV file)** and then click **NEXT**.
- Rostering Wizard – **Step 1:** Select **Clever CSV**, upload the saved **District_Data.zip** file, and click **NEXT**.
- Rostering Wizard – **Step 2: Map Schools**. Select only the schools and platforms that will be required.
- 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.

Note: If you change usernames from last year to this year, the system will create new accounts in ThinkCentral and Holt McDougal Online, which results in the loss of users' historical data. Be sure to [export data](#) out of these systems if you plan to change usernames.

- 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](#) .
- Rostering Wizard – **Step 5: sFTP Request**. This is skipped because this was already completed.
- 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.

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- viii. Rostering Wizard – **Step 7: Clear your Site.** Select **NO**.
- ix. Rostering Wizard – **Step 8: Setup completed.** Select the box to “**Send Data to HMH Platforms now**” and click **SUBMIT** to process import files.
- x. **Threshold Warnings** – You will potentially receive 2 Threshold Warnings.
 - **1st Threshold Warning:** The first warning may be related to Rostering IDs changing. This allows Ed to match up the old Ed users to the new IDs supplied by Clever. Be sure ALL SCHOOLS completed rostering before approving your import. Any user who was in the system last year but is not in your first Clever import this year will lose their Ed data.
 - **2nd Threshold Warning:** The second warning is likely due to large amounts of data changing. This is common for the first import of the year because all students change grade levels and class enrollments. Approve this warning.


Note: Once all users have their IDs updated, if you wish to go back through the wizard again and this time say YES to Clear your Site, HMH will remove all teachers and students and then reload. This will remove any users that are not in the latest import file while also retaining and reactivating all users that are in the Clever feed.

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.