




# HMH Platform Rostering with Clever API

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

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.

## If changing from Clever CSV to Clever API, read this important information about the changing of Unique IDs:

Clever customers who start out on the Clever CSV solution and are looking to move to the Clever API notice that their Student/Staff IDs are changing. To learn more about the impact of changing Rostering IDs, see [Change Your Rostering Vendor or User IDs](#) .

If you wish to retain previous saved user data, follow the steps in this guide.

The ideal setup is to do this change off last year's data and be sure the username in the CSV and API are setup the same way. That way, every account gets updated to the Clever API based user IDs. If you have already rolled over to the new school year, then you need to wait until ALL users are rostered for the new school year because you will lose the historical data of any user not in the first import via the API.

## 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 must stop the uploading of the previous data files (turn off any SIS export scheduled task and putty/winscp job).


If you are using the Clever CSV connections, follow these steps:

- Log in to your **Clever Admin Dashboard**, and search for **HMHCORE**.
- Navigate to **Settings** and then to **SFTP Credentials**.
- Toggle to **Disable OneRoster Exports**.

This stops the files from being exported for HMHCORE rostering.

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

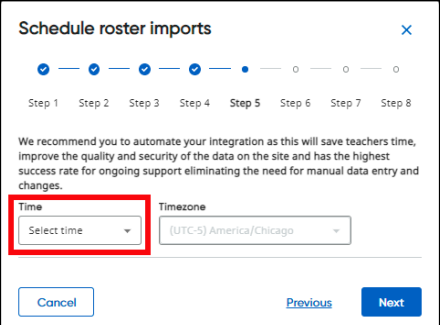
- Log in to Ed, ThinkCentral, or Holt McDougal Online and launch the rostering wizard, as follows:
  - In Ed, go to the **My Schools** page, click **Roster**, scroll to **Advanced Roster**, and click **Start Here**.
  - In ThinkCentral, click **User Accounts** in the top menu, and then below **Manage**, 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** check box prior to clicking **Submit**.)



# HMH Platform Rostering with Clever API


## Step 2: Share Your Data in Clever

To share your data, you must set up data sharing in your Clever dashboard. HMH recommends that the data you share from Clever to HMH be set to eliminate data such as Phys 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 have purchased. Specific sharing of the data leads to quicker imports, less errors, improved security, and best in class end usability of the digital platforms.

- a. Install the HMH Core Application; for instructions see details on Clever's site: [Add or Remove Apps](#) 
- b. Refer to the instructions on Clever's site to share your data in Clever: [Sharing Permissions](#) 

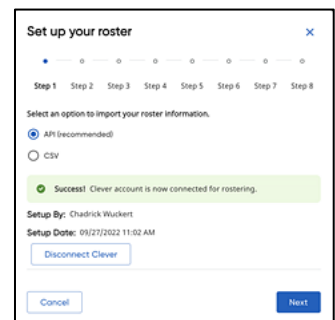
## Step 3: Setup Advanced Rostering Wizard in Ed, ThinkCentral, or Holt McDougal Online

**IMPORTANT: RISK OF DATA LOSS!** When you change rosters 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](#) .*


**Note:** You must be logged in to Ed for the remaining steps. If you are a ThinkCentral or Holt McDougal Online user and do not have an Ed account yet, contact <mailto:rostering@hnhco.com> for assistance.

- a. Log in to Ed and open the Rostering Wizard by doing the following: go to the **My Schools** page, click **Roster**, scroll to **Advanced Roster**, and click **Start Here**.
- b. Follow the Rostering Wizard set up process:
  - i. In the **School Information System (SIS)** list, select **Clever** and then click **NEXT**.
  - ii. Rostering Wizard – **Step 1: Select API** and click the **Connect to Clever** button.
    - If you have already logged in to Clever, you will automatically connect.
    - If you are not currently logged in to Clever, you will be prompted to enter your Clever login credentials.When you are connected, a success message appears.
  - iii. Click **NEXT**.
  - iv. Rostering Wizard – **Step 2: Map Schools**. Select only the schools and platforms that will be required.
  - v. 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 rosters steps are completed.



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

- vi. 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](#) .

# HMH Platform Rostering with Clever API


- vii. Rostering Wizard – **Step 5: Schedule Roster Imports**. Set the time and frequency of how often HMH should pull data to be processed.
- viii. 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.
- ix. Rostering Wizard – **Step 7: Clear your Site**. If you wish to retain historical data, select **NO**; if you wish to clear historical data on Ed, select **YES**.
- x. Rostering Wizard – **Step 8: Setup completed**. Select the box to “**Send Data to HMH Platforms now**” and click **SUBMIT** to process import files.
- xi. **Threshold Warnings** – You will potentially receive 2 Threshold Warnings.
  - **1<sup>st</sup> 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 API import this year will lose their Ed data.
  - **2<sup>nd</sup> 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.

## 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.
- **Does Clever Import administrators?** HMH only imports students, teachers, classes and rosters at this time.
- **If Clever username is blank/null in data feed and you have “username” set for the value in Define Login Options screen, what will happen?** HMH will populate the username with the SISID. This is a unique ID from your SIS that Clever shares with HMH. If you want a different value mapped to the username field, you must contact Clever to make those adjustments.

## 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.