ClassLink Setup Quick Reference Guide

Are you converting to ClassLink API from a previous rostering format?

- **If no, skip to Step 1.**

- **If yes, see instructions below for your previous format.**

  - ➢ **Previous solution was a ZIP/CSV?**

    If you are planning to use ClassLink API and were rostering in the past with ClassLink CSV, Simple File Format (SFF), or OneRoster CSV, be sure to stop the uploading of those CSV files and turn off the SFTP upload/site.

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

    a. Log in to your **ClassLink Admin Dashboard**, and search for **HMH Rostering Service**.

    b. Navigate to **Settings** and then to **SFTP Credentials**.

    c. Toggle to **Disable OneRoster Exports**.

    This stops the files from being exported for HMH rostering.

  - ➢ **Previous solution was an API?**

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

    a. Log in to Ed, Heinemann Flight, NWEA, ThinkCentral, or Holt McDougal Online and launch the rostering wizard.

    b. Skip through the wizard steps until you get to the Schedule Roster Imports ↗ step.

    c. From the **Time** list, choose **Select Time**.

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

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Step 1 – Install and Set Up the HMH Rostering Service in ClassLink

Go into **ClassLink Roster Server** and go to **Applications**. Click **Add**. Search for the **HMH Rostering Service Application**.
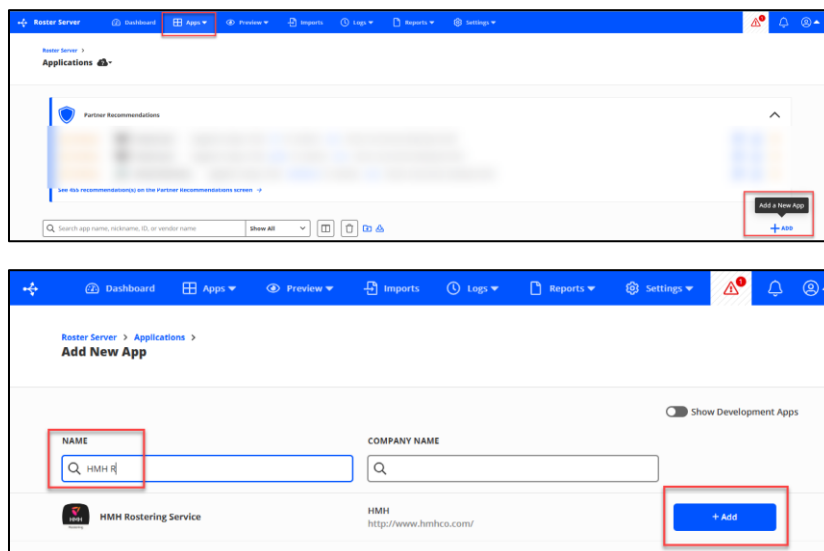
This application will support automated data ingestion to a centralized data store powering NWEA, Ed, and Heinemann Flight and will also support limited rostering data such as students, teachers, classes, and rosters to legacy platforms such as ThinkCentral and Holt McDougal Online.
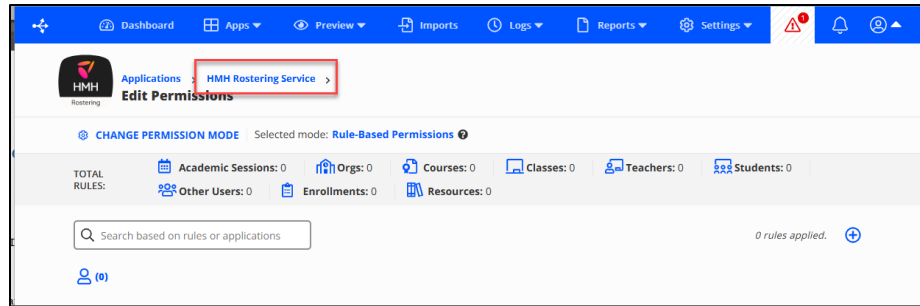
Step 2 – Share Your Data in ClassLink

a. Select **Permission Type – Rule-Based Permissions**.

b. Add all existing HMH and NWEA rules from the roster server or create any new or additional rules.
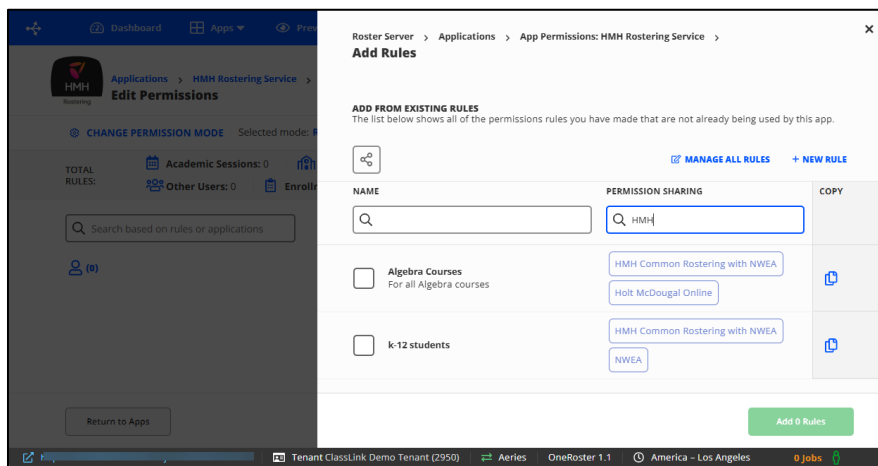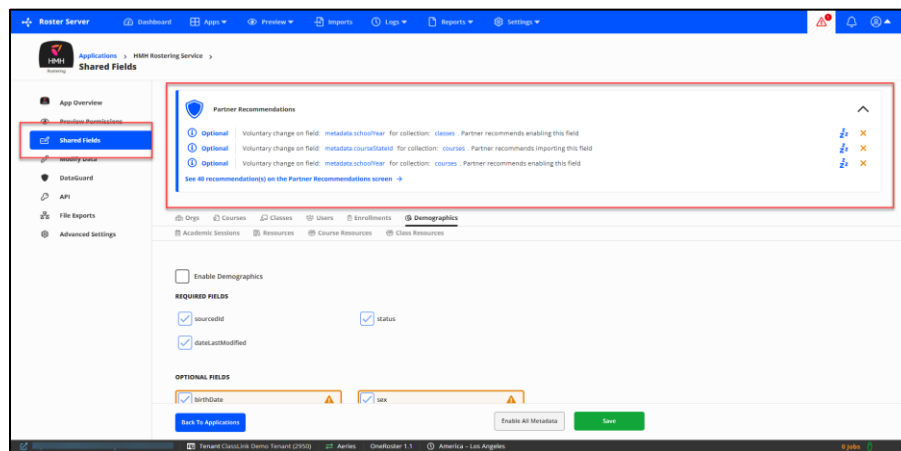

c. Click the **HMH Rostering Service** link to get to the **App Overview**.

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d. Go to **Shared Fields** to enable any additional data that HMH recommends (such as Demographics, metadata fields, and so on).

e. Be sure to share all the required and highly recommended fields listed within **Partner Recommendations**. If available, you can click the wand icon to have ClassLink select the field for you.
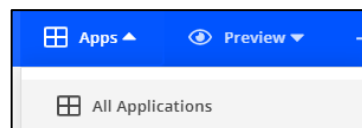

Step 3 – Copy ClassLink Key and Secret

Get the ClassLink URL, Key, and Secret for the HMH Rostering Service Application by doing the following:
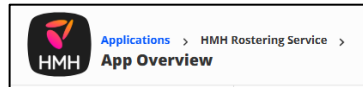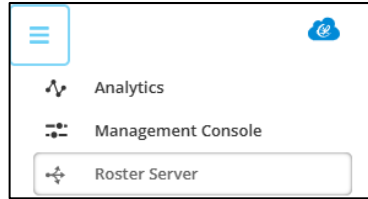
(If you are already in Shared Fields, click API in the left menu.)

a. Navigate to **All Applications**.

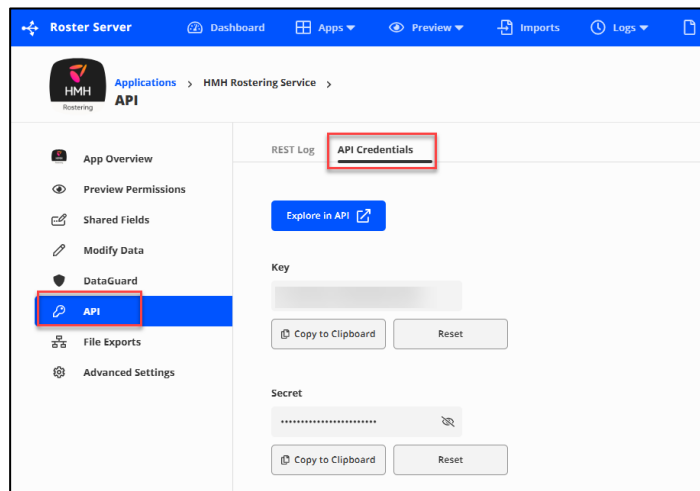b. Click the **Blue Gear** to the right of the **HMH Rostering Service Application**.

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c. On this page, select and copy the **ClassLink HMH Rostering Service URL** (bottom left corner), **Key**, and **Secret**.

d. To get the proper URL, click the URL at the bottom left of the roster server in blue and then click API in the top right. Copy the URL showing the web browser.

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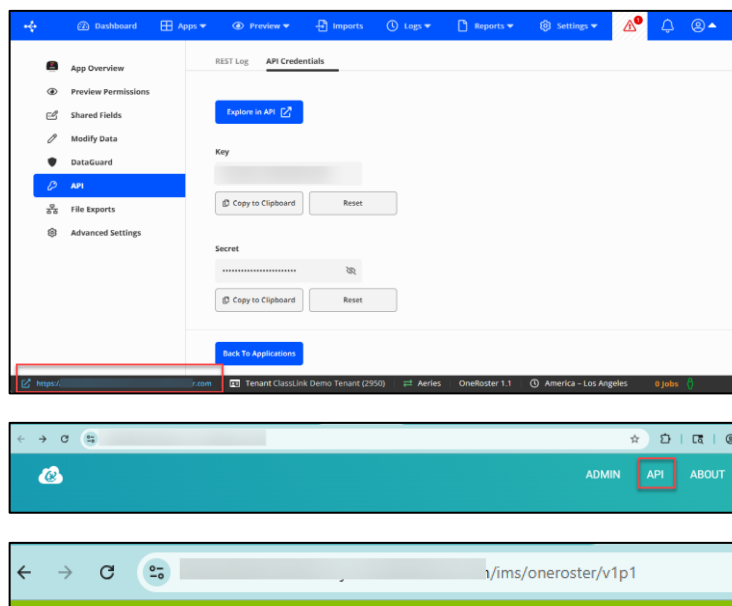
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Step 4 – Complete the Rostering Wizard

a.   Log in to an HMH supported system as an administrator with rostering rights. These systems include NWEA, Ed, Heineman Flight, ThinkCentral, or Holt McDougal Online.

b.   Once in the system, navigate to the Roster page to open the **Rostering Dashboard** and refer to the following steps for details:

Note: The steps below are also detailed in this instructional video: Rostering Wizard ↗ *(video 15:47)*

1)   **Rostering Wizard – Step 1: Setup Your Roster with ClassLink**
Select **API**, click the **Connect to ClassLink** button, and enter the **ClassLink HMH Rostering Service URL**, **Secret**, and **Key** (saved from step 3).

> **Note:** We recommend using the API over the CSV because the CSV will not support all the fields needed for NWEA and has limits on the data being passed compared to the API.

2)   **Rostering Wizard – Step 2: Map Schools**
Map any/all schools any HMH or NWEA platform might use. Any schools that you do not want rostered for HMH platforms, set to **Ignore**.

3)   **Rostering Wizard – Step 3: Define Login Options**
If using ClassLink SSO, set up URLs for Ed, Heinemann Flight, NWEA (staff only), ThinkCentral, and/or Holt McDougal Online. Make sure that the usernames defined here match your SSO usernames.

> **Note:** If you change usernames from last year to this year, the system will create new accounts on historical platforms such as ThinkCentral and Holt McDougal Online. Be sure to export data out of these systems if you plan to change usernames.

> If you want to limit who has access to each platform, we recommend that you filter the users to whom you provide the SSO launch icon inside the ClassLink SSO portal page.

4)   **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.

> If you are filtering data being sent *today*, be sure to adjust it to cover any course/class across any school that plans to use Ed, NWEA, Heinemann Flight, ThinkCentral, and Holt McDougal Online.

> **Note:** For ThinkCentral and Holt McDougal Online, 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 ↗.

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5) **Rostering Wizard – Step 5: Schedule Roster Imports**
Set the time and frequency of how often HMH should pull data to be processed.

6) **Rostering Wizard – Step 6: Manage Optional User IDs**
HMH recommends you map a field in your imported data to fields in HMH platforms. Common values include Student IDs, Staff IDs, and State IDs. While these fields are optional, they can be vital in any reports and exports you may set up to share with third-party systems.

7) **Rostering Wizard – Step 7: Define Preferences**
Since the data is coming from ClassLink 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.

8) **Rostering Wizard – Step 8: Mass Deactivate Platform Data**
If you wish to **retain historical data**, select **NO**; if you wish to clear historical data on Ed, select **YES**.

> **Note:** HMH recommends mass deactivating any/all students, teachers, classes, and rosters at the start of every school year so that your imported data is the single source of truth. This will improve data security and eliminate data redundancy. Be aware, this will deactivate any imported or manually entered accounts which can only be reactivated if they are included in the next imported upload. This step will not remove administrators. HMH recommends you manually deactivate all administrators (other than your own account) and allow the import process to automate these roles going forward. For best practices, follow this video at the **10:32 minute mark**:
> Migration to the HMH Rostering Service ⬀.

9) **Rostering Wizard** – **Step 9: Manage Student Attributes**
If you plan to use any products that require NWEA assessment solutions, you are required to share **Date Of Birth**, **Race**, **Ethnicity**, and **Gender** at a minimum. If you have student program characteristics you also want sent/shared for reporting/exporting needs, be sure to select those as well.

10) **Rostering Wizard** – **Step 10: Roles Assignment Management**
This page allows you to set rules defining the roles your users have for Curriculum (Ed/Flight) as well as Assessment (NWEA). This supports a staff account being tied to one or more roles as well as belonging to multiple schools.

>**Note:** Some systems may need to edit a rule for specific titles being sent, especially if they do not filter the users being sent to HMH.

If you define or edit a new rule, you can utilize the title-based field for required granular-level capability assignments.

If you agree with our default rules, simply make sure the rule is activated and select **Next**.

11) **Rostering Wizard** –**Setup completed**
Select the **Send Data to HMH Platforms now** check box and click **SUBMIT** to process import files.

Investigate any errors once the upload completes.

- **Threshold Warnings** – You will potentially receive a Threshold Warning on your next import due to high number of data changes. This is common for the first import of the year because all students change grade levels and class enrollments. Approve this warning.

CLASSLINK SINGLE SIGN ON (SSO) SET UP – SAML

ClassLink offers an SSO solution to support access to HMH's Ed, Heinemann Flight, ThinkCentral, and Holt McDougal Online.

See the self-service guide to setting up SSO available on ClassLink's site:
Add and Manage Single Sign On Connections

SINGLE SIGN ON (SSO) SET UP – NWEA MAP (staff only)

For setting up an SSO solution to access NWEA MAP (staff only), see the following article on NWEA's site: NWEA Connection: Single Sign On and MAP