Clever Setup Quick Reference Guide

Note: HMH recommends the use of Clever API over CSV as the API supports extended roles, additional IDs, and demographics/characteristics that are not currently available if choosing the Clever CSV solution.

Are you converting to Clever 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 Clever API and were rostering in the past with Clever 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 Clever CSV connections, follow these steps:

    a. Log in to your **Clever 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 ClassLink, 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.

HMH

Clever Setup Quick Reference Guide

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

If you are using Clever for the first time, you can search for the HMH Rostering Service Application.

If you already had the HMHCore app installed or the legacy NWEA rostering app, you will be prompted to upgrade, which will activate the HMH Rostering Service Application going forward.
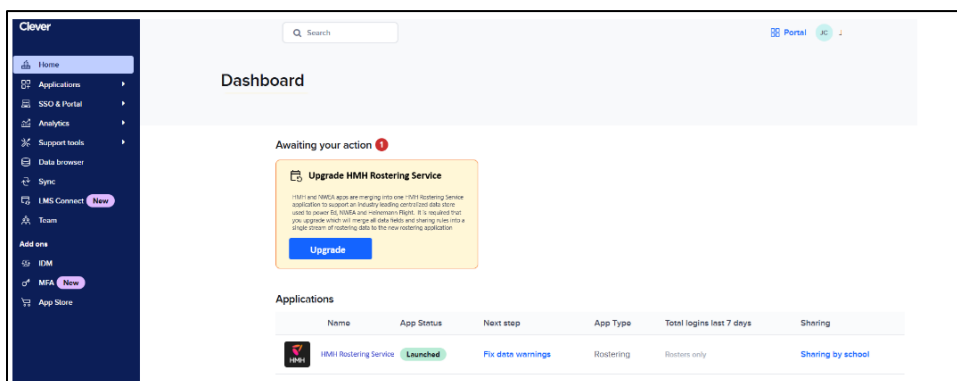
Step 2 – Share Your Data in Clever

To share your data, you must set up data sharing in your Clever Dashboard. HMH recommends you pass any/all core subject data such as Reading, Math, Science, Social Studies, Homeroom, Intervention, and anything you want to report on if using NWEA. If you wish to exclude Phy Ed, Art, Lunch, Recess, Specials, that is acceptable. Including core classes up front ensures that if you ever purchase new content, you will not be required to get involved in editing these rules again during the school year.

a.   Install the HMH Rostering Service 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 – 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:

HMH

Clever Setup Quick Reference Guide

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 Clever**
   Select **API** and click the **Connect to Clever** button.

   > **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 Clever SSO, make sure that the usernames defined here match your SSO usernames. To complete SSO set up, 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 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.

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.

   > **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](#) ⤢.

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 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.

HMH

Clever Setup Quick Reference Guide

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 are attempting to add District Admins from Clever and are using the "Default District Office" placeholder in Clever, be sure to include this school in any data sharing rules; otherwise, these accounts will not come over. This default "site" called Default District Office is for users who do not work at a school site but work in the office (such as Tech Directors). Learn more about this in these two Clever Admin Support articles:
>
>   [For SFTP districts, How do I add district offices or departments in the schools file?](#) ⬀
>
>   [Associating staff to multiple locations or the district office](#) ⬀

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**.

Clever Setup Quick Reference Guide

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.

Frequently Asked Questions

- **How does Clever Integration manage multiple roles?** The Roles Assignment Management page allows you to set rules for multiple-role access to Ed, Heinmann Flight, and NWEA. Legacy platforms of ThinkCentral and Holt McDougal Online support only teachers and student role types.

- **Does HMH support the import of administrator accounts?** On the Roles Assignment Management page, you can set rules to allow multiple-role access to Ed, Heinmann Flight, and NWEA. Legacy platforms of ThinkCentral and Holt McDougal Online will not ingest roles beyond students and teachers, so any administrator accounts on these systems will need to be managed manually.

- **Does HMH support Team Teachers?** Ed, Heinemann Flight, and NWEA support lead and team teachers. Legacy platforms of ThinkCentral and Holt McDougal Online support only the lead teacher assignment.

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

- **If Clever username is blank/null in data feed and you have "username" set for the value in Define Login Options page, 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, Heinemann Flight, ThinkCentral, and Holt McDougal Online.

See the self-service guide to setting up SAML SSO available on Clever's site: [Clever + HMH SAML Setup Guide](#)

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](#)