

Simple-File Format (SFF) Rostering Path Guide

**ThinkCentral & Holt
McDougal Online**





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For
ThinkCentral & Holt McDougal Online

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Overview

This guide shows how to import rosters with class and student data into HMH ThinkCentral and Holt McDougal Online platforms using **Simple-File Format (SFF)**.

For information on using traditional rosters methods, see the [Traditional Rostering Path Guide](#).

For information on manually rosters class and student data, see the [Manual Rostering Guide](#).

Prior to using any importing method, be sure to review the [Roster and Activation Preparation Guide](#).

All of these documents are available at the HMH Back-to-School Website, backtoschool.hmhco.com.

Also refer to HMH [Online Help](#) for the latest updates and user tips to rosters processes.

Contact the HMH Rostering Group in Technical Support for additional help if needed.

- **Email:** usermaintenance-esd@hmhco.com
- **Phone:** 800.323.9239

Simple File Format (SFF) Setup Checklist

The Simple File Format rosters path is a ten-step process. Follow the guide below to complete each step. For details, click on the  to read and print the most updated information from Online Help, Consolidated step directions follow this chart beginning on p. 3.

Step	Category	ThinkCentral Online Help	Holt McDougal Online Help
1	Set up your Account		
2	Confirm setup choices		
3	Download SFF template		
4	Populate template		
5	Verify Template		
6	Zip files and submit to system		
7	Set up Automation (If Applicable)		
8	Activate Products (If not Auto-Provisioned)		
9	Schedule SSO Setup (If Applicable)		
10	Monitor Errors		

Set Up Your Account

Confirm Tech Contact who received district account setup information.

When an order has been processed, an email containing platform administrator login information for *ThinkCentral* or Holt McDougal Online is sent to the person designated as the Technical Contact on the order. The email will also contain information needed to set up accounts for others in the district.

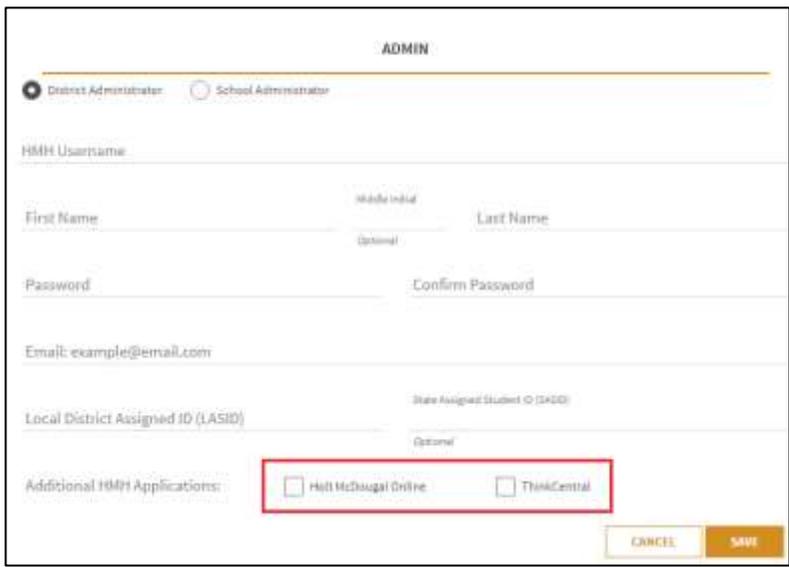
To check order status, identify who was listed as the Technical Contact on the order, or receive an administrator account, contact Digital Access and Administration via email at hmh_digital_access@hmhpub.com.

Set up Admin account with access to ThinkCentral and Holt McDougal Online.

If you already have an administrator login and are just ordering new products, you do not have to do anything; those products will become available to your teachers automatically. If you forgot your password, simply click on the “Forgot Password” link on the main login page.

If you are new to ThinkCentral or Holt McDougal Online, use the account that was provided from the new order email and create a personal District or School Admin account for yourself. Then inactivate the default account from the email. You will need a username and email that is specific to your identity—the one from the order is just a placeholder to allow you access to create your own account.

You can create admin accounts by logging into ThinkCentral or Holt McDougal Online. Both platforms will take you to the same Add Administrator screen, where you can add an account and select which platform (or both platforms) to which the admin should have access. Use the same logins for each platform.



Click [here](#) for more information about Adding Administrator Accounts in ThinkCentral.

Click [here](#) for more information about Adding Administrator Accounts in Holt McDougal Online.

Set a Default Import Administrator

The default import admin is given the responsibility of how data is added to this site and has ownership of the SFTP site for automation and final authority on any and all permissions.

Steps for setting up a default import administrator differ slightly in each application.

Click [here](#) for more information about setting a default import administrator.

Confirm Setup Choices

Discuss username/password plans (including SSO)

You will need to set a globally unique username for all users to whom you give access in the system. This means that each username is specific and cannot be used by anyone else in the world. Check [Online Help](#) for more detail about setting up usernames.

Communicate setup decisions

Having a communication plan for enrollments and product activations, login information, missing data, roles and rights, and troubleshooting flow will allow for a smoother rollout at the beginning and throughout the school year. Consider questions such as these:

- How do you plan to communicate usernames and passwords to end users? In ThinkCentral any newly-created account will receive an email from HMHCO.COM domain that will allow the user to reset the password. Holt McDougal Online does not have this notification, so you will need to share this info with users or instruct them to use the Forgot Your Password feature to reset it.
- Other communication decisions can be related to product activation and may depend on whether you are doing this for the teachers or if they will be doing it themselves.
- Will you enable the User and Class Permissions/Lockdown function, so that all edits must come through you and the Student Information System?
- Who will be responsible for activating products on the platforms?

Purge

- Confirm target date will not impact summer school or year-round sessions.
- Inform all contacts regarding data purge.
- Back up and export all data prior to the purge.
- Complete and submit [Purge Request Form](#).

Click the link to [Online Help](#) for more details.

Confirm ThinkCentral auto-provisioning is on/off as desired.

In ThinkCentral, district administrators can use the Automate Class Libraries function to automatically provide all free play products to all schools in the district. For example, a Grade 3 class will receive all

course materials for Grade 3 that have been purchased. This removes the need for administrators and teachers to mass assign content.

Automate Class Libraries

Do you want free-play products to be added automatically to all classes created in your organization?

Yes (default)

No

If you chose to turn this off, then teachers will need to activate course content themselves for their classes. Click [here](#) to see Online Help for more information. Note that the impact of your response to this question is directly correlated to how your organization imported product information. Check [Online Help](#) for more information.

Download Templates

Use the templates to format class and student data for rostering. Four files are required in all, though depending on which data is being imported all four files may not be necessary.

Imports using the SFF templates require all data be included in the import. Submitted import files become full year-to-date data files, so every import file replaces the last one imported.

Click [here](#) to download the SFF templates.

Click [here](#) to access the SFF data dictionary.

File Name	Purpose	Online Help Link
USERS.csv	Used to create and update identification and school association for students and teachers	USERS File
CLASS.csv	Used to create and update class information and school association A class is defined as a specific group of students enrolled in the same course at the same school with the same teacher during the same class period. Each class must have a unique ID.	CLASS File
CLASSASSIGNMENT.csv	Used to create and update the associations between classes, students, and teachers, effectively rendering the class rosters for each class and school within the district	CLASSASSIGNMENT File
DEMOGRAPHICS.csv	(Optional file) Used to provide demographic information for the students and classes	DEMOGRAPHICS File

Populate Templates

Export MDR School PIDS

The Market Data Retrieval (MDR) number, also known as the school personal identification number (PID), is required for data preparation and import. In SFF, the PID is required in the USERS.csv and CLASS.csv templates to establish the affiliation between students, teachers, schools, and districts.

Note: Local SIS building identification numbers cannot be used as PIDs. Only MDR PIDs can be used. You **cannot** use the local SIS building ID. Click [here](#) to go to Online Help for more information on MDF PIDs.

Populate the SFF Files

To populate the CSV files, build an extract from your Student Information System to align to the SFF templates, or use the template file and manually populate the fields.

Note: HMH recommends using Notepad or Notepad++ when editing CSV files as opposed to using Microsoft Excel®. If Excel must be used, click [here](#) for tips and recommendations for using Excel for editing CSV files.

If you are manually populating the CSV files, type or copy data into the file beginning in row 2, and note the following important points:

- The top row of each file (row 1) contains the headings for each column; this row must be retained exactly as is and not overwritten.
- Required fields must be populated.
- The completed file must contain the correct number of fields, and all fields must remain in the correct order.
- Commas must be used to separate the fields, but commas **cannot** be used within any field without quoted identifiers.
- Fields that are not required may remain empty, but even empty fields must be retained using commas. Do **not** use a space for an empty field.
- Requirements for a given field may depend upon the user role (student, teacher, class) of the row being populated. Refer to the Template File Details topic of your selected file for field-specific requirements.
- Be sure that the usernames entered are globally unique. See [Tips for Creating Usernames](#) in Online Help for recommendations.

Check for additional information and template field-level details in [Online Help](#).

Note: Once a username is set, it cannot be changed in the database. To change existing usernames in the database requires a mass purge of all the user accounts for a given role and then an import of a new file with the edited usernames.

WARNING: Simple File Format is built on the premise that all active users, classes and rosters will be included in each and every upload. **Do not submit a partial file of select users: this will deactivate all existing users on the platforms.** Check [Online Help](#) for more details.

Verify Template File Readiness

To ensure that CSV import files are set up correctly and do not contain any field length violations or formatting errors, HMH recommends using the file verification option once the CSV files are populated and condensed. Click [here](#) to go to Online Help for more information on the file verification option.

Note: The file verification option only checks the submitted file for file structure errors. Some file errors cannot be identified using the verification process, such as incorrect MDR PIDs, usernames that are not globally unique, or sending grade Pre-K students, teachers and classes to Holt McDougal Online or Grades 9–12 students, teachers and classes to ThinkCentral. These types of errors are caught only when the file is submitted for import. Refer to Online help for all platform specifics, including how to handle HMH Application fields and [Secondary or Alternate User Accounts](#).

Be sure to resolve all errors prior to submitting the roster data for importing.

Click [here](#) to go to Online Help for more information on validating file readiness.

ZIP Roster Files and Submit to System

Submit data to ThinkCentral and Holt McDougal Online

After the CSV files have been verified and all errors corrected, ZIP the files into one package. Submit the files to the platforms. Follow the same process you used for file verification without selecting the Verify File check box when uploading the file. Click [here](#) to go to Online Help for more information on submitting data to platforms.

Note: To minimize new errors being introduced, be sure to review all platform-specific restrictions and alignments.

Click to go to Online Help for more information on [Troubleshooting Errors](#) and [FAQs for Rostering on the Back to School site](#)

WARNING: During SFF uploads, the CSV import is considered a snapshot of the district or school SIS at the time of the import. Every import file submitted replaces the prior file; it does not add to it. Therefore, it is important to always submit full roster files (for example, an import of 500 users followed by an import of 15 users will result in the removal of 485 users).

If the district or school is only managing users, then uploads would not include classes.csv or classassignments.csv.

Set Up Roster Automation (If Applicable)

Larger districts or districts with high student mobility may require a regular automation schedule for data imports. In these cases, HMH recommends using its Secure File Transfer Protocol (SFTP). Click [here](#) to go to Online Help for more information on setting up roster automation.

To automate file uploads, access to export data from your Student Information System is required. You can utilize tools like WinSCP or Putty.

To learn more about import options, check out our [OLH Import Options](#) (Sections 2,3,4)

Note: Districts that want their Student Information System to be the single source of truth for all user and class information will need to implement the lockdown features. These features disable the admin or teacher's ability to manage users or classes/rosters via the user interface. If data is missing or incorrect, the end users contact the district technology coordinator to investigate if the issue is in the data feed. Setting permissions apply to both ThinkCentral and Holt McDougal Online at the same time. You cannot restrict this info per platform – it is on or off for both.

To learn more about how to set permission lockdown click on [ThinkCentral](#) or [Holt McDougal Online](#) for locking down users and classes.

Activate Product(s) (If Not Auto-Provisioned)

When students, teachers, classes and rosters are loaded, products must be activated. Activating products allows students and teachers access to them.

Products can be activated through the user interface by teachers or administrators.

In ThinkCentral, an auto-provisioning function called Automate Class Libraries is defaulted to be on. (Refer to “Confirm Setup Choices” section of this document.) If the platform administrator chose to turn this off, then teachers will need to activate course content themselves for their classes. Click [here](#) to see Online Help for more information on activating content in Think Central.

In Holt McDougal Online, administrators can select a book and activate it for a group of classes all at once (though it cannot be removed for a group of classes). Teachers may also use the new Holt McDougal Online/myhrw.com tools to activate materials by typing a title, selecting the book, selecting their classes, and clicking **Assign**. Click [here](#) to go to Online Help for more information on activating course content in Holt McDougal Online.

Schedule Single Sign-On Setup with HMH Services (If Applicable)

If you are not planning to use Single Sign-On (SSO) in the district or school, skip this step.

If you are planning to use SSO and have read the [SSO Considerations](#), then you should consult with your HMH Account Executive to get further details. Click [here](#) to go to Online Help for more information on SSO.

Monitor Errors

Error monitoring is ongoing if roster automation is in place. If you plan to automate uploads, be sure to log in daily to ThinkCentral or Holt McDougal Online and review the error reports. Correct any new errors that may come up. Click [here](#) to go to Online Help for more information on troubleshooting files.