



# Rostering and Product Activation Preparation Guide

May 2018

For use with  
*ThinkCentral, Holt McDougal Online, and  
Ed: Your Friend in Learning*

<b>Overview .....</b>	<b>2</b>
<b>Rostering.....</b>	<b>2</b>
Before You Begin .....	2
Rostering Options.....	3
File Uploads.....	3
Manual Rostering via User Interface.....	3
Key Tips.....	4
Import File Base Rostering: Factors to Consider.....	4
Manual Rostering: Factors to Consider .....	5
Managing Data .....	5
Common Errors to Avoid .....	6
Using SFF Year Over Year .....	6
Moving From SFF To OneRoster.....	7
Automating Roster Updates.....	7
Preparing Roster Files: Identities for Users and Classes.....	7
<b>Activating Product Content .....</b>	<b>8</b>
Single Sign-On (SSO) .....	8
<b>Glossary .....</b>	<b>9</b>
<b>HMH Import Management .....</b>	<b>10</b>
<b>Technical Support.....</b>	<b>10</b>

## Overview

User and class rosters may be input into Houghton Mifflin Harcourt platforms—*ThinkCentral*, *Holt McDougal Online*, and *Ed: Your Friend in Learning*—as well as affiliated platforms, such as Continuum Assessment Systems, from files generated by the district or school SIS systems. This guide is designed to provide assistance for districts or schools preparing to import rosters and activate products or manually input rosters and activation data.

Note that this guide **does not apply to districts importing rosters into other HMH platforms**, including Student Achievement Manager (SAM). For information on rostering and importing records into SAM, see the [SAM Data Management Manual](#). For information on importing rosters into other HMH platforms, contact HMH Customer Service (page 9). Note also that Single Sign-On (SSO) is not part of the rostering process but is a related service (page 6).

## Rostering

### Before You Begin

Districts and schools should assess their rostering needs prior to the upcoming school year. This assessment should include examining the district’s technical infrastructure, establishing a Platform Administrator/Technical Contact, and assembling an IT staff. The Platform Administrator is responsible for decisions and

setup related to platform use, and the Technical Contact is the point of contact for HMH. The Platform Administrator may perform both roles, or may appoint a Technical Contact. When planning for rostering and activation, districts or schools also need to take into account when the process needs to be completed, what products the district or school is currently using, which users and classes will use which products, and what information, such as user credentials and permissions, needs to be shared with which users (curriculum leaders, technical administrators, teachers, etc.). Use the checklist below to monitor roles and responsibilities as well as process milestones:

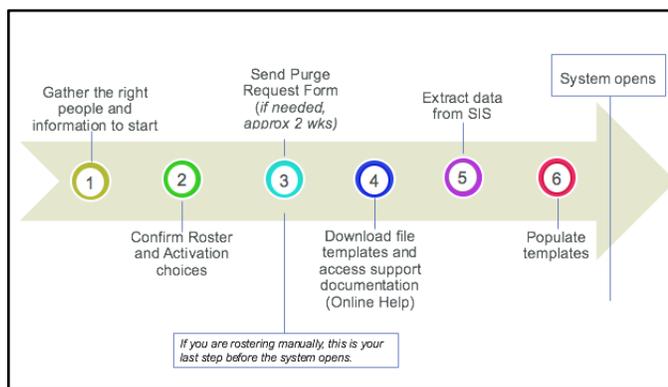


Figure 1 Suggested Rostering Timeline

Role or Responsibility	District/School Information
Platform Administrator	(name)
HMH Technical Contact	(name)
District/school personnel in decision-making process	(names)
Data entry	(names)
Milestones	District/School Information
Deadline for rostering and activation	(date)
Purchased products	(products)
Users & classes using products	(products listed by users and classes)
Information to be shared with curriculum leaders	
Information to be shared with technical personnel	
Information to be shared with teachers	

Figure 2 Roles, Responsibilities, Milestones Chart

## Rostering Options

Districts or schools may import their rosters using manual entry, CSV imports, SFTP imports, or OneRoster Bulk API.

## File Uploads

Districts or schools send CSV files formatted to match templates to HMH for importing into platforms. CSV files can be imported through the UI, and then you can publish to the HMH SFTP site for automation. Below is the list of approved CSV imports:

<p><b>Simple File Format (SFF)</b></p>	<p>SFF allows districts or schools to manage rosters in <i>ThinkCentral</i>, <i>Holt McDougal Online</i>, and <i>Ed: Your Friend in Learning</i> platforms simultaneously. (See <a href="#">Online Help</a> for information on SFF templates.)</p>
<p><b>OneRoster</b></p>	<p>Coming this summer in time for Back to School—HMH will be supporting bulk OneRoster 1.1 CSV and API ingestion. If you have an interest in using OneRoster for the new school year, be sure to consult your Account Manager who can get you started in the EARL nomination workflow.</p>
<p><b>Traditional Import (TC/HMO Only)</b></p>	<p>HMH does not encourage the use of these templates going forward and strongly insists you consider SFF or OneRoster. Using traditional roster templates for imports requires separate roster management of <i>ThinkCentral</i> and <i>Holt McDougal Online</i> platforms. <b><i>Ed: Your Friend in Learning</i> does not support traditional importing.</b> See Online Help for <a href="#">ThinkCentral template files</a> or <a href="#">Holt McDougal Online template files</a> for more information on using traditional import templates.</p>

## Manual Rostering via User Interface

Districts or schools may set up their rosters manually by adding users and classes one at a time via the platform user interface. If manually rostering to *Ed: Your Friend in Learning*, we ask that you enter the correct Student ID or Staff ID up front, which will make alignment to a file import down the road easier.

## Key Tips

### Do you have a need for Multi-Org Enrollments?

1. When using OneRoster, the system automatically assigns this account to multiple orgs for *Ed: Your Friend in Learning*. For *ThinkCentral* and *Holt McDougal Online*, the system invokes account linking where the primary org is assigned the standard username and alternate org locations are assigned that username + the MDR PID appended. Because they are all linked to the original account, SSO will work and you can profile hop from one account to the other.
2. If using SFF, check [Online Help](#) for how best to setup your files. Rostering to *ThinkCentral* and *Holt McDougal Online* requires a different username for each org location.
3. Check [Online Help](#) for instructions and tips on setting up users who may be affiliated with one school but attending classes at multiple schools.

### Do you have a need for Team Teachers?

1. *ThinkCentral* and *Holt McDougal Online* cannot support team teachers at this time. If rostering via SFF or OneRoster, team teacher records are not sent to these platforms. Refer to [Online Help](#) for additional assistance.
2. *Ed: Your Friend in Learning* supports team teacher assignment through the SFF and OneRoster import process.

### What happens when usernames change?

*ThinkCentral* and *Holt McDougal Online* do not support username changes. When this happens, the old account is inactivated and a new account is created. *Ed: Your Friend in Learning* supports username changes. Refer to [Online Help](#) for additional details.

### Import File Base Rostering: Factors to Consider

- Districts or schools that have provided delta files (partial user lists reflecting only adds, deletes, and updates) in the past must provide a full snapshot if using SFF. **Importing a delta file in SFF results in inadvertent deactivation of unlisted users.**
- The new product activation user interface eliminates the need for provisioning products to classes by adding ISBNs; therefore, neither SFF nor HMH OneRoster Agent supports file base product activation at this time.
- Neither HMH's SFF nor OneRoster import agent supports administrator management or multiple roles for a user (for example, a teacher who is also an administrator). Visit [Online Help](#) or contact HMH Customer Service for help creating login credentials in these scenarios.

## Manual Rostering: Factors to Consider

Manual rostering means administrators and teachers manually set up students, classes, and rosters by logging in and entering roster information in the platform user interface.

Districts or schools using manual rostering should be aware of the following factors:

- Manual rostering requires no template setup work; however, it is important to differentiate which user information is entered at the district level and which is entered at the school or class level.
- To avoid double enrolling students, teachers and staff should use a platform system feature that allows staff to view and pick student names already in the system to set up class rosters. Students entered multiple times will require multiple login credentials.
- Longitudinal tracking and district-level reporting are less feasible if teachers roster their own classes.
- Districts with high mobility may want to use SFF or OneRoster to import user and class data even if their districts are small. The more transient the student or teacher population of the district, the more probable the need for an automated file management system to keep data current.

## Managing Data

Districts or schools using HMH platforms may already have user and class information in their systems. For this reason, many districts and schools backup and export their data to secure media (backup server or external disc), and then purge their data from the platform server. This ensures that no old records exist at the beginning of the school year. Visit [Online Help](#) for more information on purging data. If a district or school is linking accounts, be sure that all accounts are linked or removed from the platform server. Accounts not linked after the initial SFF import will become duplicate accounts that cannot be merged.

### Does My District or School Need to Purge Data?

Purging data from platform servers may not be necessary in all cases:

- If a district or school is using HMH platforms for the first time, no purging is necessary.
- If a district or school is using the same globally unique usernames for both *ThinkCentral* and *Holt McDougal Online* and these usernames match the CSV file used in the SFF template, no purging is necessary.
- If you used SFF last year, plan to use SFF this year, and have no changes in usernames or LASIDS, no purging is necessary.
- If you used SFF last year, plan to use OneRoster this year, and use LASIDs as your Sourcelds, no purging is necessary.

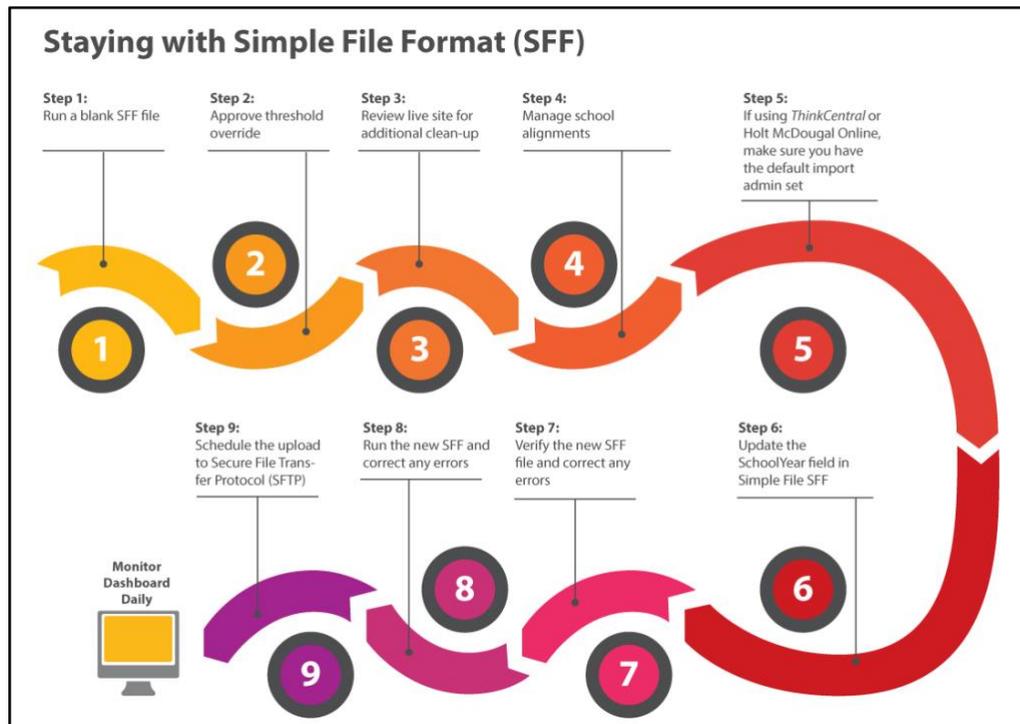
Districts or schools that need to purge data must submit a [Purge Request Form](#) specifying the extent of the data purge. Requests may take 2–10 business days to complete. The HMH Technical Contact must acknowledge on the [Purge Request Form](#) that he or she is authorized to request the purge, has agreed upon the purge with all appropriate parties in the district or school, is aware of the district's or school's data retention policies, and has taken appropriate steps to export data.

**Common Errors to Avoid**

- If rostering to *ThinkCentral* and *Holt McDougal Online*, be sure to set the Default Import Administrator in each platform.
- Use School PIDS, not District PIDS.
- If rostering via SFF:
  - Be sure the name of the file(s) match those detailed in Online Help. Example: User.csv and Users.csv are allowed. HMHUsers or MyDistrictName\_Users.csv is not allowed.
  - Use Quoted Identifiers around all fields, including header rows.
  - If using a MAC, be sure you read OLH to avoid the MAC OS folder error.
  - Validate that your HMHApplications value between Users and Classes are in sync.
  - Be sure to turn off the validation check box when you are ready to send your files to the platforms.
  - Verify that all your import files are embedded in the Zip file.
  - You do not need to submit all files. For example, if you only want to manage users, there is no need to send classes or classassignments files.

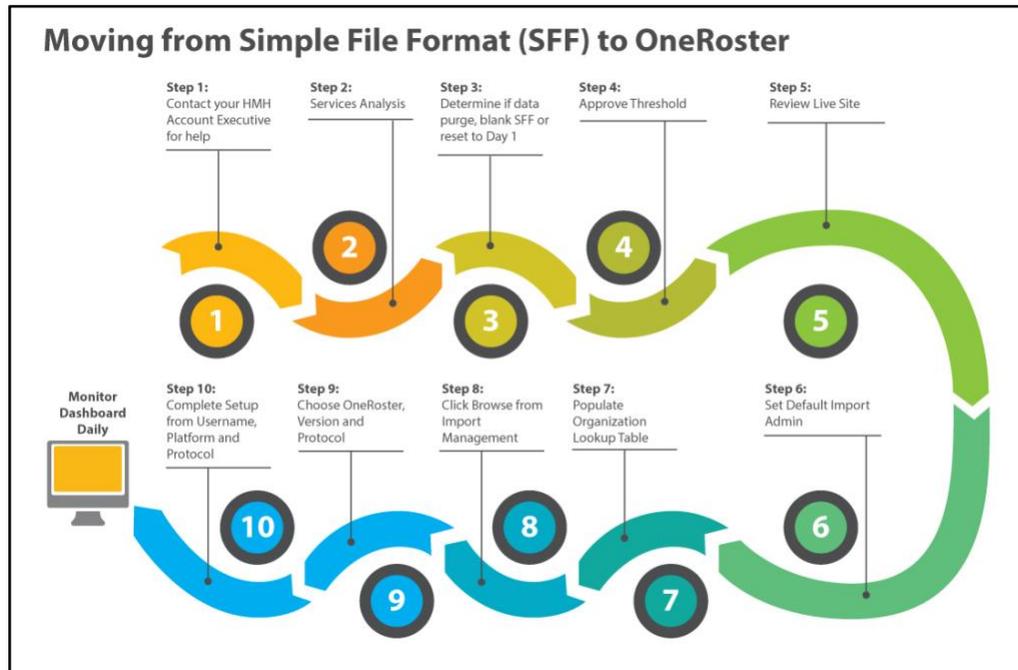
**Using SFF Year Over Year**

If using SFF year over year, follow this rostering path:



## Moving From SFF To OneRoster

If moving from SFF to OneRoster, follow this path:



## Automating Roster Updates

Districts or schools using file uploads to roster may automate their roster updates so that changes to their user and class rosters are automatically imported into the platform rather than manually entered whenever there is a change. HMH recommends automating all roster updates regardless of format (SFF, OneRoster, or traditional) for better data management. CSV imports can be automated to an SFTP site. OneRoster API can be set up using the Import Management settings. Visit [Online Help](#) for more information on these options.

## Preparing Roster Files: Identities for Users and Classes

All rostering methods require user and class identities:

### Username

Username must be globally unique. Username cannot be changed through the user interface of *ThinkCentral* and *Holt McDougal Online*.

Visit [Online Help](#) or contact HMH Customer Support (*page 9*) for more information on creating globally unique usernames.

### Class Names

Unlike usernames, class names must only be unique to a given teacher, not district unique or globally unique. However, class names must be unique over the teacher's entire tenure, meaning that a teacher's algebra class from last year must have a different class name than this year's algebra class. Visit [Online Help](#) for examples and assistance with class-name creation.

## Activating Product Content

Products must be activated for students to access and use them. Products may be activated through the platform user interface, through the roster import, or at time of purchase. The products are made available to classes, so students and teachers enrolled in the class have access to the necessary content.

By default, *ThinkCentral* will auto-allocate all on-grade material for each classroom. Products in *Holt McDougal Online* may be activated within the platforms by teachers or activated by an administrator all at once for a district or school. Products in ***Ed: Your Friend in Learning*** are activated at time of purchase by a school or district; teachers may then select or remove particular products for their classes.

To learn more about product activation, click the links below:

- *ThinkCentral*: Edit District Configuration Settings and Add Product (auto allocate products)
- [ThinkCentral: Edit Classes \(add products by class\)](#)
- *Holt McDougal Online*: Activate Products
- *Ed: Your Friend In Learning*: Manage Products

For more information on activating products using Import Management, visit [Online Help](#).

**NOTE:** Platform administrators should discuss application of automated functions as part of the decision-making process. There may be occasional instances in which teachers wish to manage activation on their own to accommodate how they introduce content to students (particularly in Grades K–3).

### Single Sign-On (SSO)

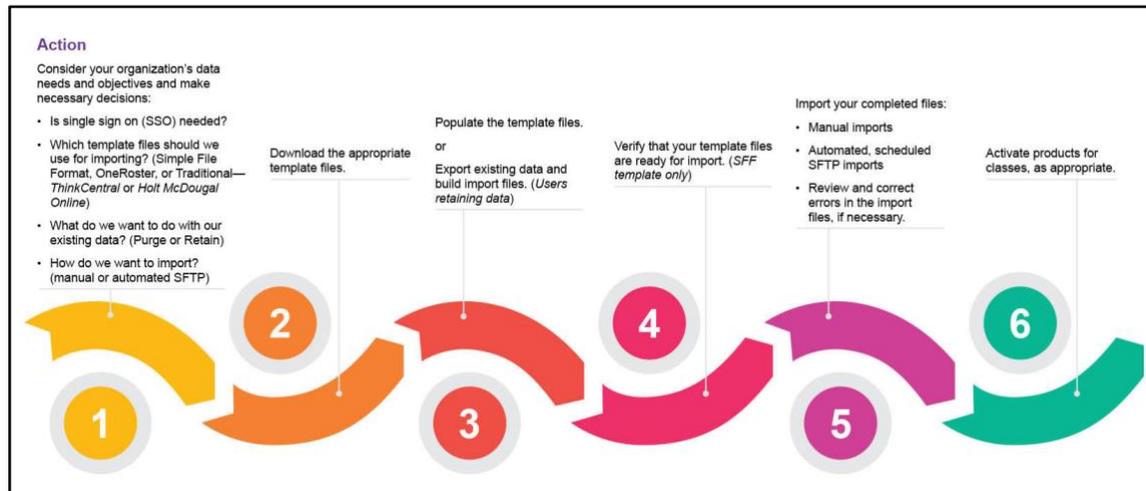
Single Sign-On (SSO) allows users to access multiple products on one login with their network credentials. It is not part of the HMH rostering process but a related service. HMH currently supports SSO protocols such as Google SSO or AD FS via SAML 2.0. To use SSO with HMH platforms, contact your Account Executive or HMH Technical Services. For more information on SSO and the implications its use may have on rostering and an extended list of IDPs, visit [Online Help](#) or contact HMH Customer Service (*page 9*).

## Glossary

Activation (of Products)	Giving classes and users access to licensed content in the system
Administrator	For the purposes of this guide, Administrator is the person who has primary responsibility for the system setup.
CSV	Comma Separated Value, the standard file format for import templates
Delta	Values that have changed (added, deleted, edited) in a database since the last time you uploaded a file
Holt McDougal Online (HMOF/MyHRW/HMO)	Holt McDougal Online, content platform for most 6–12 programs
Identity Providers	An online service or website that authenticates users on the Internet by means of security tokens (e.g., SAML 2.0)
Import	The process by which district or school data is ingested and processed in the HMH platforms. Roster documents (CSV-formatted spreadsheets) are imported into the platforms and then are visible as class and student data.
Licensing	The process of activating licenses. A license activation is required for each enrollment of each SAM Suite program (a student enrolled in three programs needs one active license for each program). Licenses may be activated manually upon installation.
Mobility	Users (particularly students) moving from one class to another within the school, from one school location to another, or in and out of district
Rostering	Generally refers to putting User and Class information into the systems
SAM	Student Achievement Manager, content platform for <i>READ 180</i> <sup>®</sup> Universal, <i>English 3D</i> <sup>®</sup> , and all SAM Suite programs.
SAM Central	The content platform for SAM Suite programs <i>iRead</i> <sup>®</sup> , <i>MATH 180</i> <sup>®</sup> , and <i>Math Inventory</i> <sup>®</sup> .
SFTP	Secure File Transfer Protocol
SFF	Simple File Format
Single Sign-On (SSO)	The technical solution that allows users to enter a single username and password to enter multiple applications
SIS	Student Information System
Snapshot	A single full picture of the SIS database as it stands at a moment in time
TC	ThinkCentral, content platform for most K–6 programs
Technical Contact	The name listed in HMH records as the recipient for license activation emails and other system-related information
Traditional Format	The method and templates used for importing rosters in previous years by HMH
User Interface (UI)	The way a person interacts with a device. The UI includes such things as screen menus, buttons, icons, keyboard shortcuts, mouse and gesture movements, online help, etc.

## HMH Import Management

The recommended workflow to prepare data and import files using HMH Import Management is provided here. Detailed instructions for each step in this workflow are available in [Import Management Help](#).



## Technical Support

For additional information or help related to these issues, contact HMH Customer Service through Online Help at <http://downloads.hmlt.hmco.com/Help/ImportMngmt/Administrator/> or at:

- Website: <https://customercare.hmhco.com/product/techsupport/CCTechSupportLandingPage.html>
- Email: [usermaintenance-esd@hmhco.com](mailto:usermaintenance-esd@hmhco.com)
- Phone: 1-800-323-9239