# New Year Rollover Checklist

We are excited to support you and your district in a successful Back to School season. This New Year Rollover document will guide you on your rostering path, depending on what you used last year and what template you will be using this year. Visit our Back to School site to learn more! This document will help you review:

☐ **Key Points**
☐ **Rostering Pathways**
- **Migrating from SFF to OneRoster**
- **Staying on Simple File Format (SFF)**
- **New HMH Product User**
- **Traditional File Import Transitioning**

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# Key Points

Here are some key points to remember when preparing for the new school year:

- **Plan ahead:** Often districts have training, so teachers are back in session two weeks before the first day of school. Having active teacher accounts in the system allows them to do a walkthrough of the site. Expect limited scheduling until you are 24–48 hours before the first day of school.
- **Automating File Imports:**
  - **Secure File Transfer Protocol:** Larger districts or districts with higher student mobility may require a regular automation schedule for data imports. HMH® has a Secure File Transfer Protocol (SFTP) server for just this purpose. Instructors used to doing SFTP will likely need to log in to the platform at least once to approve the threshold due to limited scheduling.
  - Turn on Data Editing Permissions/Lockdown if you plan to automate file imports.
  - Learn more about automating imports in our Online Help for Import Management.
- **Data Maintenance:** Inform end users of changes such as mass inactivation or purging of data on specified dates.
- **Rostering:** Decide what rostering path you wish to take for the new school year.

**Additional Notes:**

- **Single Sign On:** Do you plan to use SSO? Learn more about SSO in our Online Help for Import Management. Additionally, if you are planning to use Google® as your SSO provider, click here for information on Self-Service setup.
- **Multiple Schools:** If you need users tied to more than one school and are using SFF, visit Online Help for more information.

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## Rostering Pathways

Here are four pathways for mass importing users to help you identify the best options for your organization.

- Migrating from SFF to OneRoster
- Staying on Simple File Format (SFF)
- New HMH Product User
- Traditional File Import Transitioning
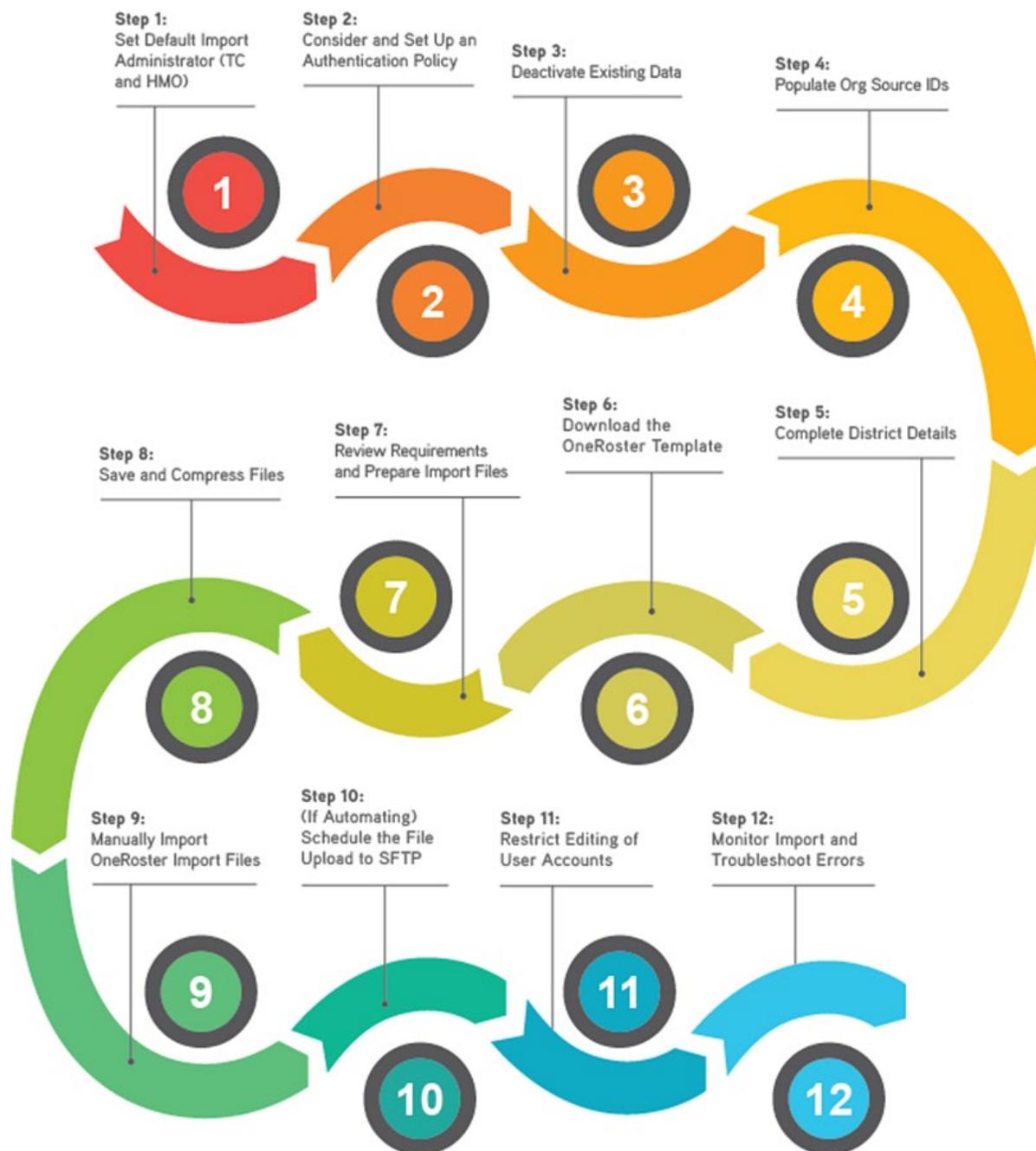
## Migrating from SFF to OneRoster

Customers on Simple File Format (SFF) last year that want a single standard like OneRoster to be used across all instructional software systems will choose this route. Follow the steps below for rostering success.  Do you plan to opt-in to the Renaissance Learning® and HMH partnership that integrates Renaissance® Star assessments and the HMH *Into Learning*™ programs? If yes, be sure to look into using OneRoster 1.1 for both vendors for the best Back to School experience. Additionally, HMH has added a new feature to help assist in customers attempting to use OneRoster CSV import by allowing them to pre-screen the import file for basic errors before attempting to submit the file to the platforms (*ThinkCentral*, *Holt McDougal* Online (my.hrw.com), and *Ed: Your Friend in Learning*). To learn more about this feature offering, please visit our Online Help.  Click here for more information on the Renaissance Learning integration.

## Staying on SFF

Most organizations that used Simple File Format (SFF) last year will plan to stay on SFF this year. Double check you have your **HMHApplications Id** set correctly in case you have products that may be used on *Ed: Your Friend in Learning*® this year. Follow the steps below for a successful rostering experience.
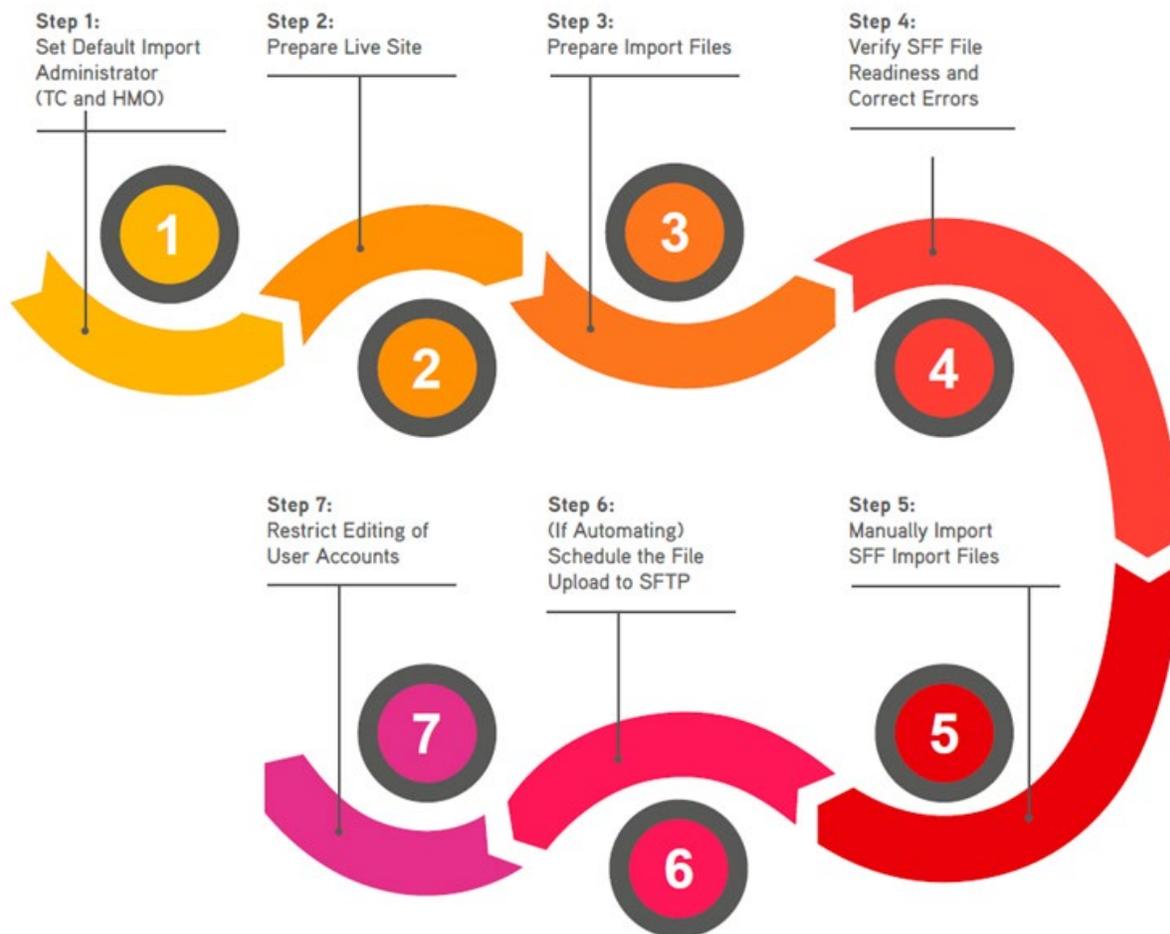
# New Year Rollover Checklist

## Moving from Simple File Format to OneRoster CSV

**Step 1:**
Set Default Import Administrator (TC and HMO)

**Step 2:**
Consider and Set Up an Authentication Policy

**Step 3:**
Deactivate Existing Data

**Step 4:**
Populate Org Source IDs

**1**

**2**

**3**

**4**

**Step 8:**
Save and Compress Files

**Step 7:**
Review Requirements and Prepare Import Files

**Step 6:**
Download the OneRoster Template

**Step 5:**
Complete District Details

**8**

**7**

**6**

**5**

**Step 9:**
Manually Import OneRoster Import Files

**Step 10:**
(If Automating) Schedule the File Upload to SFTP

**Step 11:**
Restrict Editing of User Accounts

**Step 12:**
Monitor Import and Troubleshoot Errors

**9**

**10**

**11**

**12**

# New Year Rollover Checklist

## Staying with Simple File Format (SFF)

**Step 1:**
Set Default Import Administrator (TC and HMO)

**Step 2:**
Prepare Live Site

**Step 3:**
Prepare Import Files

**Step 4:**
Verify SFF File Readiness and Correct Errors

1

2

3

4

**Step 7:**
Restrict Editing of User Accounts

**Step 6:**
(If Automating) Schedule the File Upload to SFTP

**Step 5:**
Manually Import SFF Import Files

7

6

5

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## New HMH Product User

If all of your schools have never used HMH products such as *ThinkCentral*, *Holt McDougal*™ Online (my.hrw.com), or *Ed: Your Friend in Learning*, you have the flexibility in choosing a template that works best for your needs. OneRoster offers the standards-based approach using CSV or API and is likely to be used across multiple vendors. Simple File Format (SFF) can also be used but is unique to HMH platforms alone.

## Traditional File Import Transitioning

We strongly recommend customers using Traditional File Imports for ThinkCentral and Holt McDougal Online (my.hrw.com) consider moving to a more common solution such as Simple File Format (SFF) or OneRoster. Traditional files can only be loaded to the specific platform and are limited in the features that can be supported. Additionally, these files cannot be used to roster to *Ed: Your Friend in Learning*.

## Additional Helpful Resources for Back to School

There are several helpful resources that can help you transition to the new school year. We've outlined some of them below for your benefit:

**Service Status Page**
Our Service Status Page provides availability updates for HMH's main platforms. Check this page if you're not able to access your platform or if you're experiencing a degradation of service to see if there is an unscheduled issue or if the platform is undergoing scheduled maintenance.

**HMH Service Status Notification Center**
Our Service Status Notification Center allows you to enter your contact information and select the platform(s) you use to receive an email when there is scheduled maintenance or unscheduled events that may affect your access to HMH online content.

**Product Technology Snapshot**
Find the technical specifications for Houghton Mifflin Harcourt® programs, platforms, and mobile applications to ensure your school or district is using the right browser, operating system, or device when using an HMH program or platform.

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### Back to School Website
Our [Back to School website](#) contains all of the resources, tools, updates that help you plan for Back to School 2019. Resources include rostering resources, training & courses, platform and program resources, and more.

### Online Help
Our [Online Help](#) site has a wealth of resources to provide quick access to help you in using HMH platforms and programs.

### Contact Us
Do you have a question? Do you need help with something? Do you need to place an order? Make sure to [contact us](#), and we can help you.