HMH Hosting Services User's Guide

and Data Management Guide

June 15, 2016

For use with HMH Hosting Services and
Student Achievement Manager version 2.5 or later

PDF0933 (PDF)

© Houghton Mifflin Harcourt Publishing Company

Table of Contents

Overview **3**

Accessing SAM **4**

SAM Administrators 4
Getting Started in the Hosting Environment 4
Student Access Screen 5
SAM Central Access Screen 6
Initial Administrator Login 7
Editing the District Profile 9

Data Management in the Hosting Environment **10**

Deployment Options 10
Data Aggregation 11
Roster Import 13
Student Roster File Format 14
Teacher and Administrator Roster File Format 17
Importing the File 19
Data Export 21
Student Transfers 27
Student Lexile Transfers 29
Student Promotions 31
Data Migration 39

Technical Support **40**

© Houghton Mifflin Harcourt Publishing Company

Overview

Using HMH Hosting Services with HMH SAM Suite programs eliminates the need for a district to purchase or maintain application servers in order to use SAM Suite programs. The Student Achievement Manager (SAM), formerly the Scholastic Achievement Manager, is hosted from a central data center, allowing access to SAM data and reports from any computer with an Internet connection. With HMH Hosting Services, SAM functions exactly as a locally installed version of SAM would, except it does not use a local SAM Server.

Students access all programs through a browser. Districts using *READ 180*® Next Generation, *READ 180* Enterprise Edition, *System 44*®, *System 44* Next Generation, *FASTT Math* Next Generation, *iRead*™, and *MATH 180*™ should install one or more Software Media Accelerators (SMA) to ensure faster delivery of media (*iRead* and *MATH 180* require an SMA be installed). See the ***Media Accelerator User's Guide*** on the Product Support website for more information on the SMA.

For information on using SAM, check the chart below for the appropriate manual. All manuals are available on the Product Support website:

For information on:	Download this manual:
Specific settings and how to run reports for SAM Suite programs	***SAM Settings and Reports*** manual for the specific program
Getting started in SAM and setting up accounts at the district and school levels	***Getting Started With Student Achievement Manager***
Enrolling students and managing student, teacher, class, group, and school data in SAM	***Enrolling and Managing Students Using Student Achievement Manager***
SAM Resources	***Using Resources in Student Achievement Manager***
The Book Expert	***Using the Book Expert in Student Achievement Manager***
Using SAM Connect	***SAM Connect User's Guide***
Installing and using the Media Accelerator	***Media Accelerator User's Guide***

This ***User's Guide*** explains how to access and use SAM with HMH Hosting Services, as well as how to move data in the hosting environment.

© Houghton Mifflin Harcourt Publishing Company
PDF0933 (PDF)

Accessing SAM

HMH Hosting Services enables district users to sign in to their district's SAM application from any computer with an Internet connection through SAM Central.

SAM Administrators

When implementing HMH Hosting Services, it is critical that a SAM District Administrator be identified. A SAM District Administrator is a person at the district level who is authorized and responsible for:

- Creating and entering new school servers in your hosted SAM database
- Creating and managing other district- and school-level SAM administrators
- Issuing district-wide data exports

Districts are permitted to have more than one district-level SAM administrator; however, initially there must be one administrator to set up and begin using SAM in the Hosting environment. Subsequently, the SAM District Administrator may then choose to create other district-level administrators. The SAM District Administrator also receives the Hosting Activation email, which includes the student and teacher access information for your HMH Hosting Services as well as instructions on getting started.

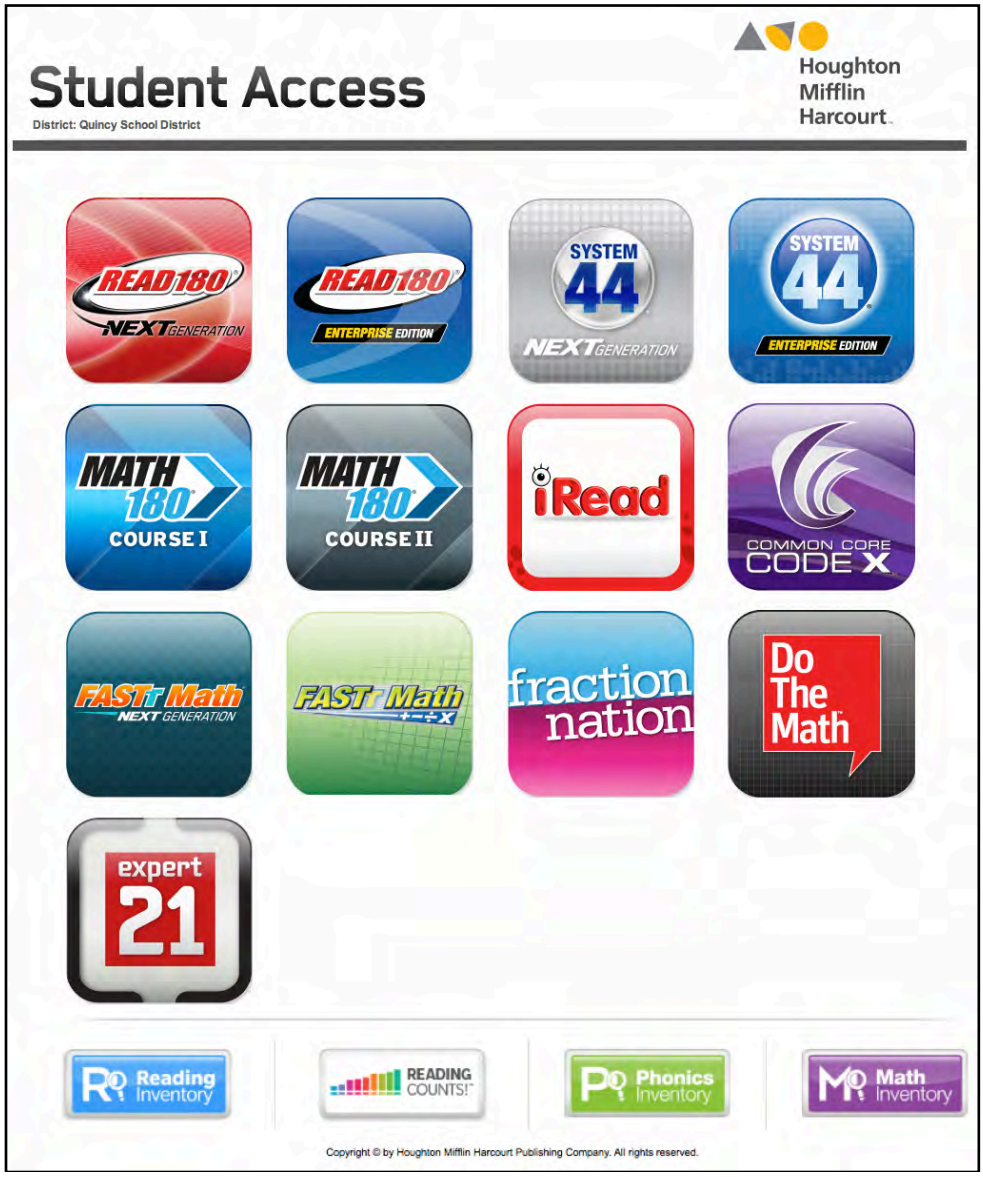
If there is no person at your district who fits this description, contact the Online License Administrator (OLA) for further information.

Getting Started in the Hosting Environment

To begin using SAM and SAM Suite programs through HMH Hosting Services, use the district-specific URLs contained in your Hosting Activation email to go directly to the Student Access screen or the SAM Central Access screen (for teachers and administrators).

© Houghton Mifflin Harcourt Publishing Company

Student Access Screen



Using the URL link from your Hosting Activation email, click to open the Student Access screen in a separate browser window. Bookmark this link on student and teacher workstations.

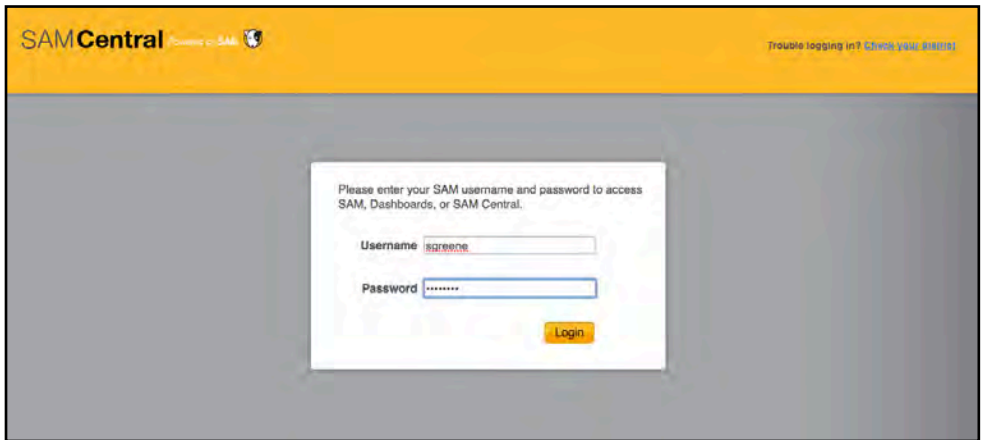
From the Student Access screen, click the program icons to go to the Login screens of the different programs.

At first login, users will be asked to accept the license agreement. Click **I Accept** to proceed to the Student Access screen.

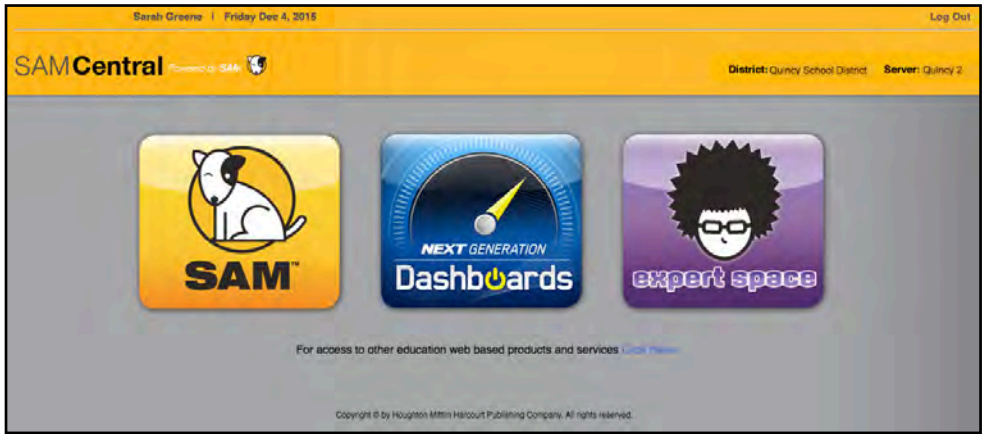
© Houghton Mifflin Harcourt Publishing Company

SAM Central Access Screen

Open the SAM Central Access screen using the URL link from the Hosting Activation email. The SAM Central Login screen appears.



Log in with your SAM username and password to open the SAM Central Access screen. Once logged in to SAM Central, there is no need to log in to individual programs.



The SAM Central Access screen displays icons for SAM and other educator programs the district is using. Click the SAM icon to launch SAM and go directly to the SAM Home screen (*page 8*). Click the other icons to launch the selected program.

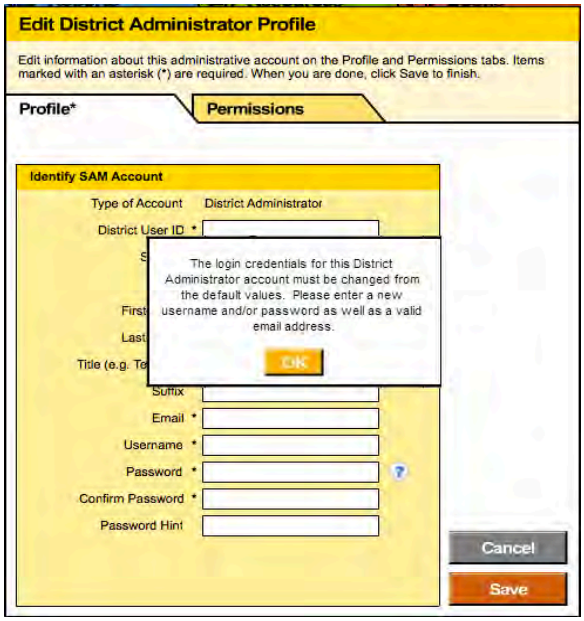
© Houghton Mifflin Harcourt Publishing Company

Initial Administrator Login

At first login after installation, administrators use the installed username and password:

- Username: dadmin
- Password: SAM@dm1n

After this login, and before accessing SAM, a prompt opens allowing the administrator to establish a unique username and password.



District administrators should fill out all the fields (asterisks indicate required fields) and create a unique username and password using the onscreen password guidelines. Scroll over the question mark icon to see the password defaults. Contact Technical Support (*page 40*) to change password defaults.

Click **Save** to save the changed settings to the district's Profile (click **Cancel** to close the window without saving changes).

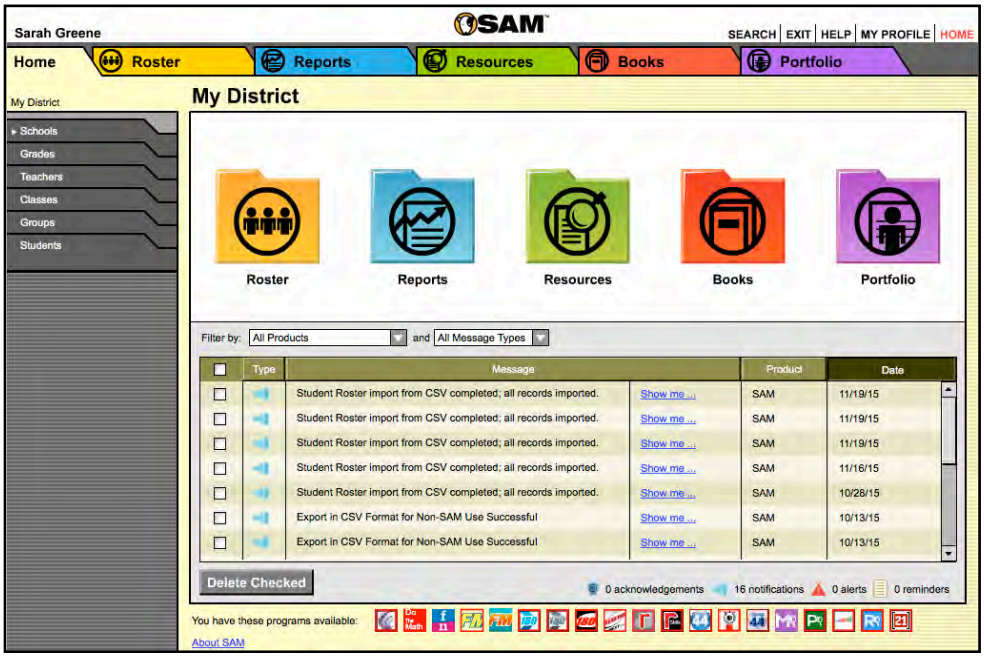
Administrator passwords must be between 8 and 16 characters and cannot be only the user's first or last name or a combination of the two. Passwords must also contain at least one uppercase and one lowercase letter and one numeral.

The default username and password will not log users in to SAM.

Tech Tip

Use the Password Hint field in the Edit Profile window to provide a password reminder for logging in to SAM in the future.

© Houghton Mifflin Harcourt Publishing Company

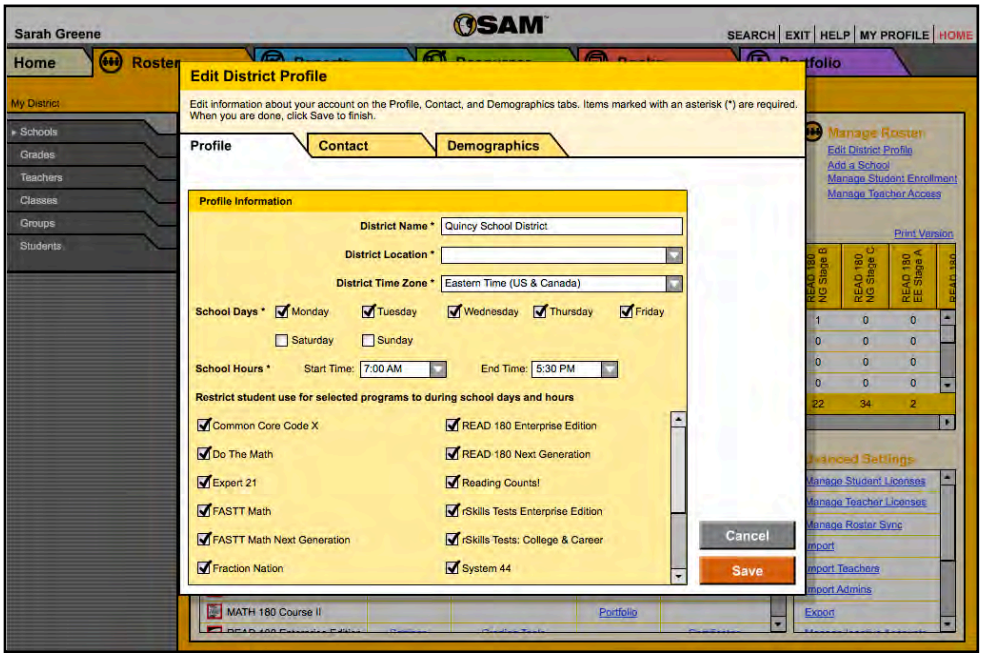


After the user logs in, the SAM Home screen appears in the browser window.

© Houghton Mifflin Harcourt Publishing Company

Editing the District Profile

Default settings in the district's Profile in SAM are visible at first login. View the district's Profile by clicking the **My Profile** link in the upper right corner of the Home screen.



By default, the settings will show school hours between 7AM and 4PM. Modify the school hours if necessary and select the programs that may be accessed during these hours by clicking the box next to the program name. This is important for setting controls on student use of programs outside of school. Restricting hours on assessment programs (*The Math Inventory*, *The Reading Inventory*, *Reading Counts!*®, *ThePhonics Inventory*) to school hours is recommended. Change other settings as necessary (such as the time zone), then click **Save** to save the changed settings to the district's Profile (click **Cancel** to close the window without saving changes).

For more information on getting started using SAM, see ***Getting Started With Student Achievement Manager.***

© Houghton Mifflin Harcourt Publishing Company

Data Management in the Hosting Environment

Managing SAM data is important for districts moving data from a local installation to a SAM Server, or for hybrid districts which access SAM both through HMH Hosting Services and their local servers.

While the types of movement are the same whether in a local or hosted environment, the methods for moving the data vary. This section contains information on how to move data using HMH Hosting Services (consult the ***SAM Data Management Manual*** for information on how to move data in an all-local environment).

Deployment Options

How a district moves SAM data depends on its deployment configuration. Districts may use one of three possible configurations, depending on whether all, some, or none of the district's SAM installations are on hosted servers or installed locally:

All Local: Every SAM installation is installed on a district server. The district has two data aggregation options:

- It can choose not to aggregate data.
- It can aggregate data onto an aggregation server installed at the district.

All Hosted: The district's entire SAM database is hosted on a data center server and there are no SAM installations on district servers. There is no data aggregation server, since the hosted server already contains all the data for the district. Running district-level reports in the hosting environment is equivalent to running district-level reports for a district-level server.

Hybrid: In a Hybrid district, some SAM installations are installed on district-level servers while others are on hosted servers. Hybrid districts have two data aggregation options:

- They may choose not to aggregate data.
- They may aggregate data onto a local aggregation server.

Data aggregation is supported in all configurations except where an aggregation server is not needed (as in an All Hosted environment).

© Houghton Mifflin Harcourt Publishing Company

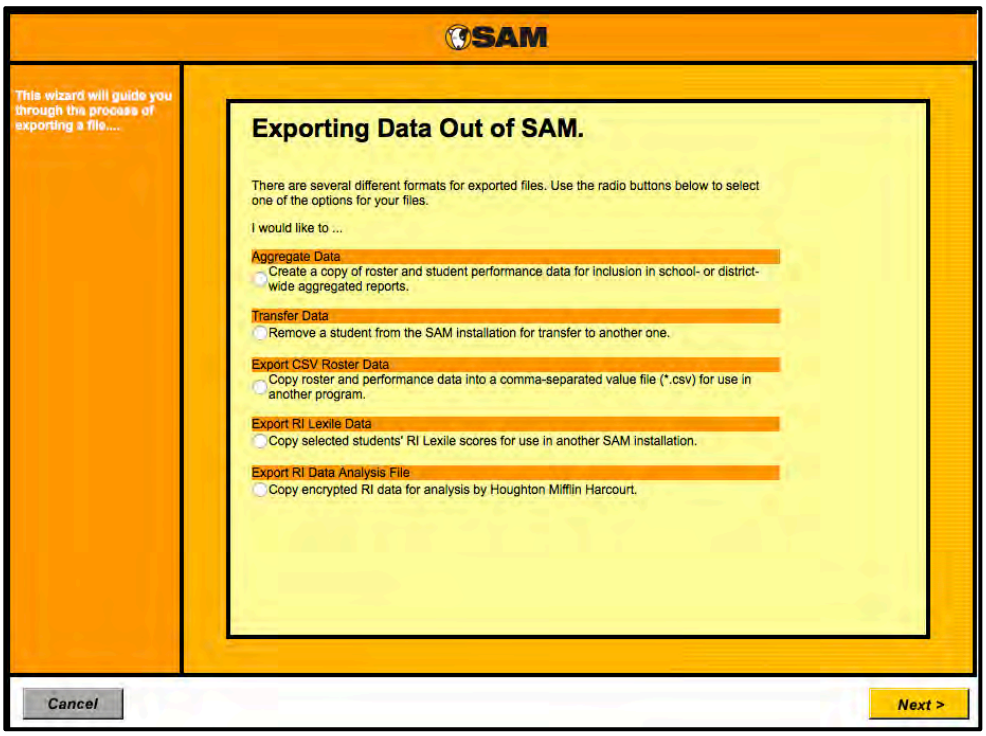
Data Aggregation

Districts in an All Hosted environment do not need to aggregate data, as all data for each customer on hosted SAM Server is captured and reported from a single SAM database. Hybrid districts may want administrators to manually aggregate data from a hosted server onto a local aggregation server. (Districts in an All Local configuration should consult the ***SAM Data Management Manual***.)

To move data from a hosted SAM Server to a local aggregation server, create a data aggregation export file from the hosted server, then import that file onto the local server.

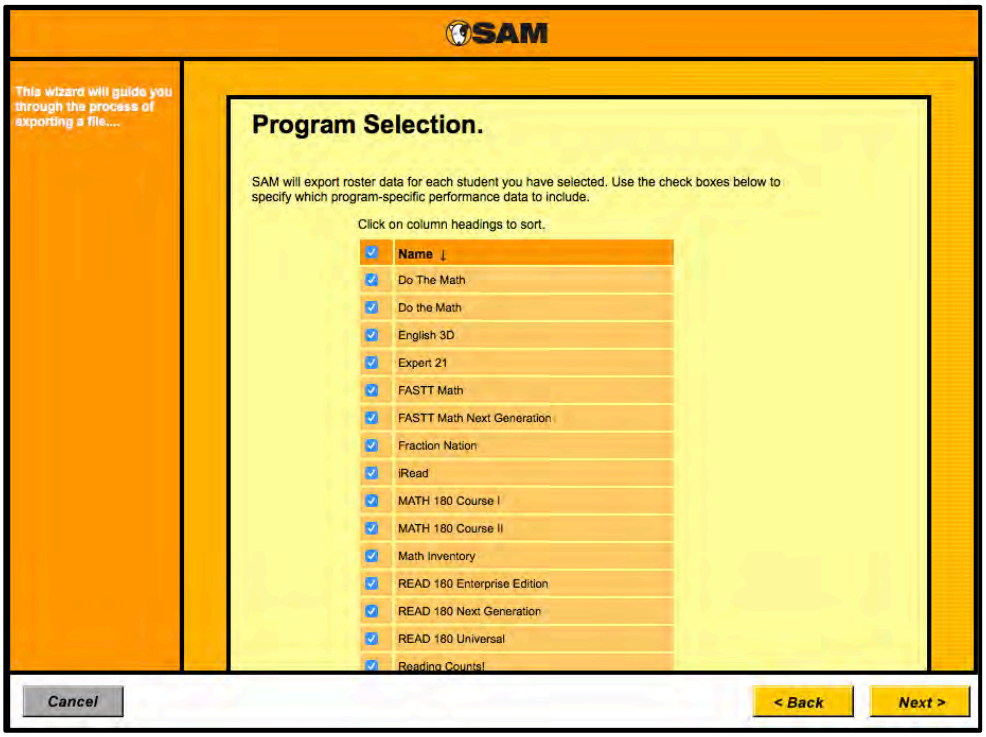
To create a data aggregation export file:

1. Double-click **My District** at the top of the SmartBar or click the Roster tab at the district level to access the District Profile screen.
2. Click the **Export** link from the Advanced Settings menu to open the Export Wizard in a new browser window.



3. Select **Aggregate Data** from the menu, then click **Next** to open the Program Selection screen.

© Houghton Mifflin Harcourt Publishing Company



4. Use the checkboxes to select the programs to include in the export file, then click **Next** to advance to the Confirmation screen.

5. Click **Export** from the Confirmation screen to create the export file.

A notification appears in the Message Center on the Home screen when the export file is ready. Click the link in the Message Center to open the Show Me screen. From this window the file may be saved to the hard drive, flash drive, or DVD.

To import the file onto an aggregation server, see Roster Import (*page 13*).

© Houghton Mifflin Harcourt Publishing Company

Roster Import

Student or teacher rosters formatted in a *.csv file may be imported into either a locally installed SAM Server or into a hosted SAM Server. The process works the same whether the district is All Local, All Hosted, or Hybrid.

Rosters may be imported to create student or teacher profiles or to overwrite existing roster data in the database. Backing up the database (on All Local or Hybrid installations) before proceeding with any file import is strongly recommended, since importing rosters modifies the database file. **Only SAM users with administrative permissions may perform a Roster Import.**

Use Roster Import to import other types of files: for example, a *.zip file as part of the Student Transfer, Student Lexile Transfer, Student Promotion, or Data Aggregation processes. For any of these processes, simply begin with **Step 2** of the import process.

Automatic Account Creation During Roster Import

District Administrators, School Administrators, and teachers with administrative permissions may use the Roster Import process to create classes and student accounts that will automatically appear in the SmartBar. This is the easiest way to avoid manual entry of accounts when setting up the SmartBar at the beginning of the school year. Students may be assigned to multiple classes or have their classes synchronized (their records added or removed from classes) during the import.

Schools must exist in SAM prior to importing students for the import process to work. The import process creates classes within that school so that each imported student may be associated with the proper class on the SmartBar.

If the necessary school name (SCHOOL_NAME) and class name (CLASS_NAME) are not included in the roster import CSV file, use the Manage Inactive Accounts function to place students in classes.

The student data import process updates all student roster data other than the SIS_ID including the username and password.

District User IDs may be generated automatically to non-student users during the import process.

© Houghton Mifflin Harcourt Publishing Company

To import a student, teacher, or administrator roster, first create a CSV file with the roster information. One CSV file may import student, teacher, or administrator roster information, but SAM cannot import students, teachers, or administrators from the same file.

If there are any errors in a CSV roster import file (for either a student, teacher, or administrator), the record for the student, teacher, or administrator with that error will fail, but the rest of the import process will proceed as usual.

In cases where one or more records cannot be imported, the Roster Import process generates two files in the original roster location: an error log ([filename]-errors-[timestamp].csv) and a CSV file that contains the records that could not be imported ([filename]-exceptions-[timestamp].csv). Open the error log and review the reasons why each problematic record failed to import, then open the CSV file, correct the records, and follow the steps to import a formatted CSV file.

Only those files that contained problems are in the log and CSV file; non-problematic records have been imported.

Student Roster File Format

Shaded fields are required; other fields are optional. Field names in the roster import file must match the Column Heads as specified in this chart. Import fields that contain special characters (other than username and password) may prevent that record from displaying in SAM.

Descriptive SAM Reference	Column Head	Data Type	Allowable Special Characters
Student ID	SIS_ID	[alpha-numeric]	None
First Name	FIRST_NAME	[alpha-numeric]	None
Middle Initial	MIDDLE_NAME	[alpha-numeric]	None
Last Name	LAST_NAME	[alpha-numeric]	None
Username	USER_NAME	[alpha-numeric]	[apostrophe], [hyphen], [space], [underscore]
Password	PASSWORD	[alpha-numeric]	[apostrophe], [hyphen], [space], [underscore], [at sign], [caret], [tilde]
Grade	GRADE	[numeric]	None
Gender: Male	GENDER_MALE	[Y/N], [y/n]	None
Gender: Female	GENDER_FEMALE	[Y/N], [y/n]	None
School	SCHOOL_NAME	[alpha-numeric]	[space], [underscore]
Class	CLASS_NAME	[alpha-numeric]	[apostrophe], [hyphen], [space], [underscore]

© Houghton Mifflin Harcourt Publishing Company

Descriptive SAM Reference	Column Head	Data Type	Allowable Special Characters
RI (Lexile) Score	LEXILE_SCORE	[numeric] 32,768<RI<32,767	None
RI Score Date	LEXILE_MOD_DATE	mm/dd/yyyy OR yyyy-mm-dd	None
Ethnicity: White/Caucasian	ETHNIC_CAUCASIAN	[Y/N], [y/n]	None
Ethnicity: Black/African American	ETHNIC_AFRICAN_AM	[Y/N], [y/n]	None
Ethnicity: Hispanic	ETHNIC_HISPANIC	[Y/N], [y/n]	None
Ethnicity: Pacific Islander	ETHNIC_PACIFIC_ISL	[Y/N], [y/n]	None
Ethnicity: American Indian/Alaskan Native	ETHNIC_AM_IND_AK_NATIVE	[Y/N], [y/n]	None
Ethnicity: Asian	ETHNIC_ASIAN	[Y/N], [y/n]	None
AYP: Economically Disadvantaged	AYP_ECON_DISADVANTAGED	[Y/N], [y/n]	None
AYP: Limited English Proficiency	AYP_LTD_ENGLISH_PROFICIENCY	[Y/N], [y/n]	None
AYP: Gifted and Talented	AYP_GIFTED_TALENTED	[Y/N], [y/n]	None
AYP: Migrant	AYP_MIGRANT	[Y/N], [y/n]	None
AYP: Students With Disabilities	AYP_WITH_DISABILITIES	[Y/N], [y/n]	None

SAM version 2.5 contains two types of student password requirements:

- **Grades Pre-K to 2**: Passwords must contain between 3 and 16 characters and cannot be only the user's first or last name or a combination of the two.
- **Grades 3 to 12**: Passwords must contain between 6 and 16 characters and cannot be only the user's first or last name or a combination of the two. Passwords must also contain at least one numeral.

Contact Technical Support (*page 40*) if password requirements need to be changed. Previously set passwords and requirements are unaffected.

Every record in the CSV import file must include all five required fields or the import will fail. The required fields are:

- SIS_ID
- FIRST_NAME
- LAST_NAME
- USER_NAME
- GRADE

© Houghton Mifflin Harcourt Publishing Company

Depending on how the roster import file is set up, students will either appear in Inactive Accounts or in the SmartBar.

- If SCHOOL_NAME and CLASS_NAME are not included, students will appear in Inactive Accounts.
- If SCHOOL_NAME and CLASS_NAME are included and if that exact school already exists in the SmartBar, students will appear in the SmartBar associated with those schools and classes. If the CLASS_NAME does not exist in SAM, the class will be created within the existing school.

Note that new classes created through the CSV import do not have a grade association, even though Grade is a required field for a class when creating it through SAM.

Column headings for optional fields do not need to be included. Optional fields for some records may be kept blank. However:

- If an optional field is blank and data exists in the database for that SIS_ID, the existing data will remain; blank fields will not overwrite existing data.
- If nothing is entered for PASSWORD and the account does not already exist, the default will be **P@5sword**.
- If a duplicate USER_NAME already exists in the database, SAM will append digits to the imported USER_NAME to render it unique. Changed usernames will be reported at the end of the process.
- If LEXILE_SCORE is included, LEXILE_MOD_DATE must also be included. This score will replace the existing Lexile value for a student only if the LEXILE_MOD_DATE is more recent than that for the existing Lexile measure.

The following is an example of a properly formatted CSV student roster import file; it includes each of the five required fields as well as Lexile measures and dates. The first row represents the column headers for the required fields plus Lexile measure and date. Student information is represented in successive rows after the headers.

SIS_ID	FIRST_NAME	LAST_NAME	USER_NAME	GRADE	SCHOOL_NAME	CLASS_NAME	LEXILE_SCORE	LEXILE_MOD_DATE
567123489	Alexander	Smith	asmith	6	Edwards Elementary	107	689	04/12/2008
6880242315	Elena	Gonzalez	egonzalez	6	Edwards Elementary	108	977	04/12/2008
7230741567	Juan	Williams	jwilliams	6	Edwards Elementary	109	1045	04/12/2008
1220884356	Terrence	Dawson	tdawson	6	Edwards Elementary	110	346	04/12/2008

© Houghton Mifflin Harcourt Publishing Company

Teacher and Administrator Roster File Format

The Roster Import process may now be used to update all information in a teacher or administrator profile provided all District User IDs match. Shaded fields are required; other fields are optional. Starting with SAM version 2.0, District User ID is a required field for teachers and administrators.

Teachers and administrators with records on more than one server in a school district must have usernames and District User ID numbers that match exactly, or their access to Interactive Teaching Services and the Training Zone will be disabled (access is re-enabled when the username and ID number are corrected).

It is vital that two different users do not have the same District User IDs on the same server when performing an import. If two users have the same District User ID, the newer user is added to the Roster Import and the older user's account is overwritten. The District User ID must also be the same in the import file as the database, or a new account will be inadvertently created.

Field names in the roster import file must match the Column Heads as specified in this chart. Import fields that contain special characters (other than username and password) may prevent that record from displaying in SAM.

Descriptive SAM Reference	Column Head (field name)	Data Type	Allowable Special Characters
Account Type	ACCOUNT_TYPE	[alpha-numeric]	None
District User ID	DISTRICT_USER _ID	[alpha-numeric]	None
Profile Services	SPS_ID	[alpha-numeric]	None
Prefix	PREFIX	[alpha-numeric]	None
First Name	FIRST_NAME	[alpha-numeric]	None
Last Name	LAST_NAME	[alpha-numeric]	None
Title	TITLE	[alpha-numeric]	None
Suffix	SUFFIX	[alpha-numeric]	None
Email	EMAIL	[alpha-numeric]	None
Username	USER_NAME	[alpha-numeric]	[apostrophe], [space], [hyphen], [underscore]
Password	PASSWORD	[alpha-numeric]	[apostrophe], [hyphen], [space], [underscore], [at sign], [caret], [tilde]
Last Coll	LAST_COLL	[alpha-numeric]	None
School	SCHOOL_NAME	[alpha-numeric]	None
Class	CLASS_NAME	[alpha-numeric]	None

School Name is not required for teachers or District Administrators, but is for School Administrators.

© Houghton Mifflin Harcourt Publishing Company

School name and class are not required fields for teacher and administrator imports; however, if these fields are left blank, the teacher or administrator profile will move to Inactive Accounts.

SAM version 2.5 teacher and administrator passwords must contain between 8 and 16 characters and cannot be only the user's first or last name or a combination of the two. Passwords must also contain at least one uppercase letter, one lowercase letter, and one numeral. Previously set passwords and requirements are unaffected. Contact Technical Support (*page 42*) for help changing password defaults.

Column headings for optional fields do not need to be included. Optional fields for some records may be kept blank. However:

- If an optional field is left blank in the CSV file and data already exists in the database for that District User ID, the existing data will remain as is; blank fields will not overwrite existing data.
- If nothing is entered for PASSWORD in the CSV file and the account does not already exist, the default will be **P@5sword**.

Below is an example of how to format a valid CSV file (note the double comma indicates a necessary but empty field) for teachers:

[Line 1]
ACCOUNT_TYPE, DISTRICT_USER_ID, SPS_ID, PREFIX, FIRST_NAME, LAST_NAME, TITLE, SUFFIX, EMAIL, USER_NAME, PASSWORD, SCHOOL_NAME, CLASS_NAME
[Line 2]
DIST_ADMIN, 141210,1024, Ms., Sarah, Greene, Teacher, Jr., sgreene@lincolnschool.edu, SarahGreene, SG024, The Lincoln School, English Class
[Line 3]
DIST_ADMIN, 56678, 1025, Mr., Jamal, Evans, Teacher, jevans@lincolnschool.edu, JamalEvans, JE555, The Lincoln School, Math Class

Correct format for district administrators and district technical administrators should look like this:

ACCOUNT_TYPE	DISTRICT_USER_ID	SPS_ID	PREFIX	FIRST_NAME	LAST_NAME	TITLE	SUFFIX	EMAIL	USER_NAME	PASSWORD	LAST_COL
DIST_ADMIN	sgreene3			Sarah	Greene	Admin		sgreene@gmail.com	sgreene	P@5sword	Y
DIST_TECH_ADMIN	jevans4			Jamal	Evans	Tech		jevans@yahoo.com	jevans	P@5sword	Y

Correct format for school administrators and school technical administrators should look like this:

ACCOUNT_TYPE	DISTRICT_USER_ID	SPS_ID	PREFIX	FIRST_NAME	LAST_NAME	TITLE	SUFFIX	EMAIL	USER_NAME	PASSWORD	SCHOOL_1	LAST_COL
SCHOOL_ADMIN	sgreene3			Sarah	Greene	Admin		sgreene@gmail.com	sgreene	P@5sword	School_name	Y
SCHOOL_TECH_ADMIN	jevans4			Jamal	Evans	Tech		jevans@yahoo.com	jevans	P@5sword	School_name	Y

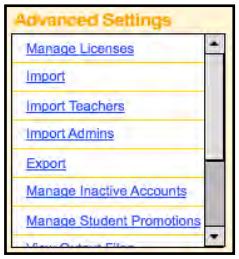
© Houghton Mifflin Harcourt Publishing Company

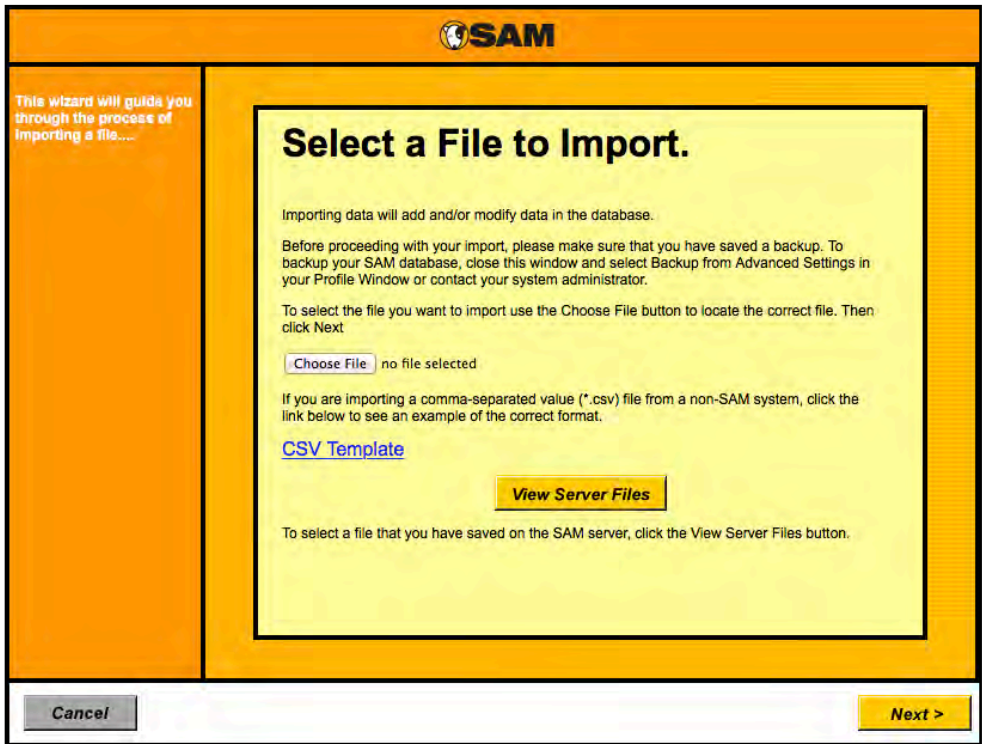
Importing the File

When the roster import file is created, import the roster:

1. Double-click **My District** at the top of the SmartBar or click the Roster tab at the district level to access the district's Profile screen.

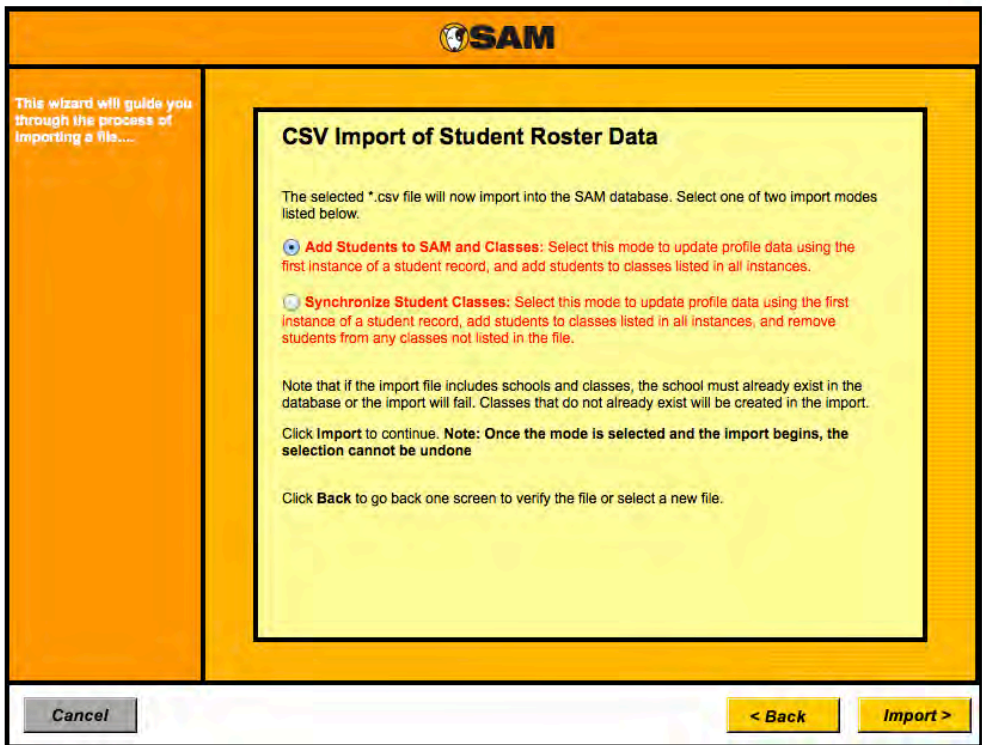
2. In the Advanced Settings menu in the lower right corner, click the **Import** link if importing students (or importing a file other than a roster import file), the **Import Teachers** link if importing teachers, or the **Import Admins** link if importing administrators. These links open the Select a File to Import screen.





3. On the Select a File to Import screen, enter the roster import file name or click the **Browse** button (or the **Choose File** button on a Macintosh) to select the roster import file. After selecting the file, click the **Next** button to open the Import Student (or Teacher) Roster Data screen. To see a template of the CSV file, click **CSV Template**. To view and select a roster import file on the SAM Server, click **View Server Files**. Select the file to import and click **Next.**

© Houghton Mifflin Harcourt Publishing Company



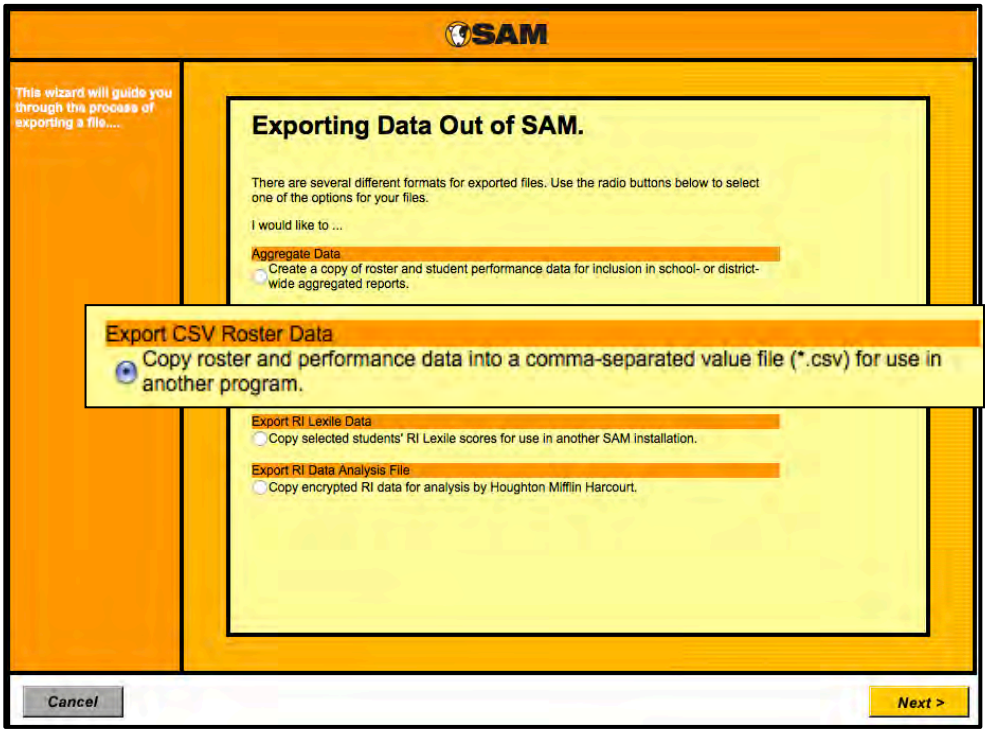
4. At the Roster Import screen, select the import mode:
   - **Add Students to SAM and Classes**: This will import records, update profile data based on the first instance of a record, and add students to classes listed in all instances.
   - **Synchronize Student Classes**: This will import records, update profile data based on the information in the first instance of a record, add students to classes listed in all instances, and remove students from classes not listed in the file.
5. Click **Back** to review and verify the name of the file or select a new file. Click **Import** to import the file.

When the import has started, the Processing Request screen appears. When the import is finished, a notification will appear in the SAM Home screen. Click **Close** to close this screen.

© Houghton Mifflin Harcourt Publishing Company

Data Export

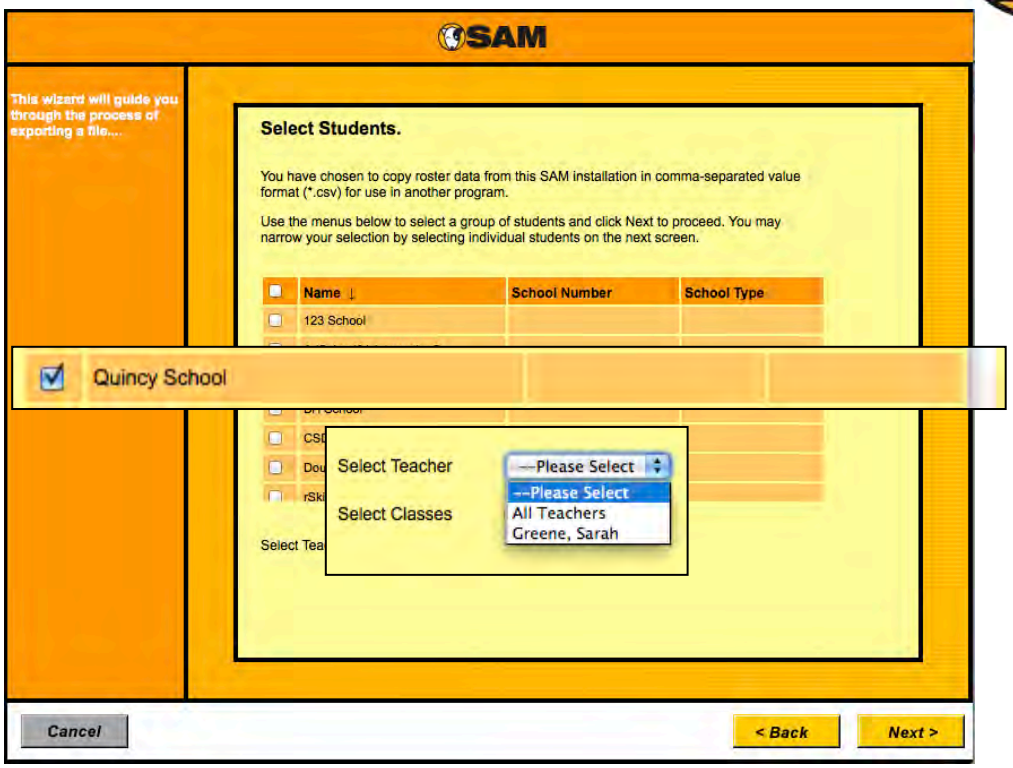
SAM users may export student roster and performance data (*.csv files) for use in other software programs, such as Microsoft Excel or a student information system (SIS). The process works the same whether the district is All Local, All Hosted, or Hybrid. However, **only SAM users with administrative permissions may perform this function.**



To export data for use in a different application:

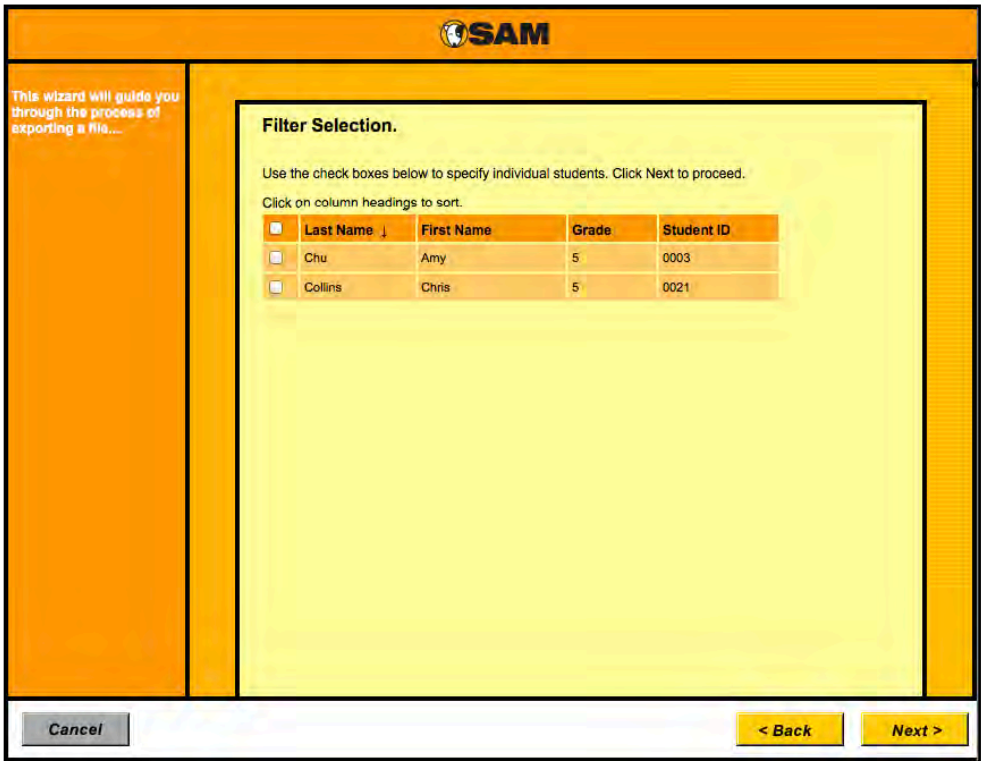
1. Double-click **My District** at the top of the SmartBar or click the Roster tab at the district level to access the district's Profile screen.
2. Click the **Export** link from the Advanced Settings menu in the lower right corner of the screen to open the Export Wizard in a new browser window.
3. Click the button to select Export CSV Roster Data and click **Next** to open the Select Students screen.

© Houghton Mifflin Harcourt Publishing Company



4. Use the pull-down menu to select the school, teacher, and classes for which the data will be exported. Click **Next** to continue. The Filter Selection screen will appear.

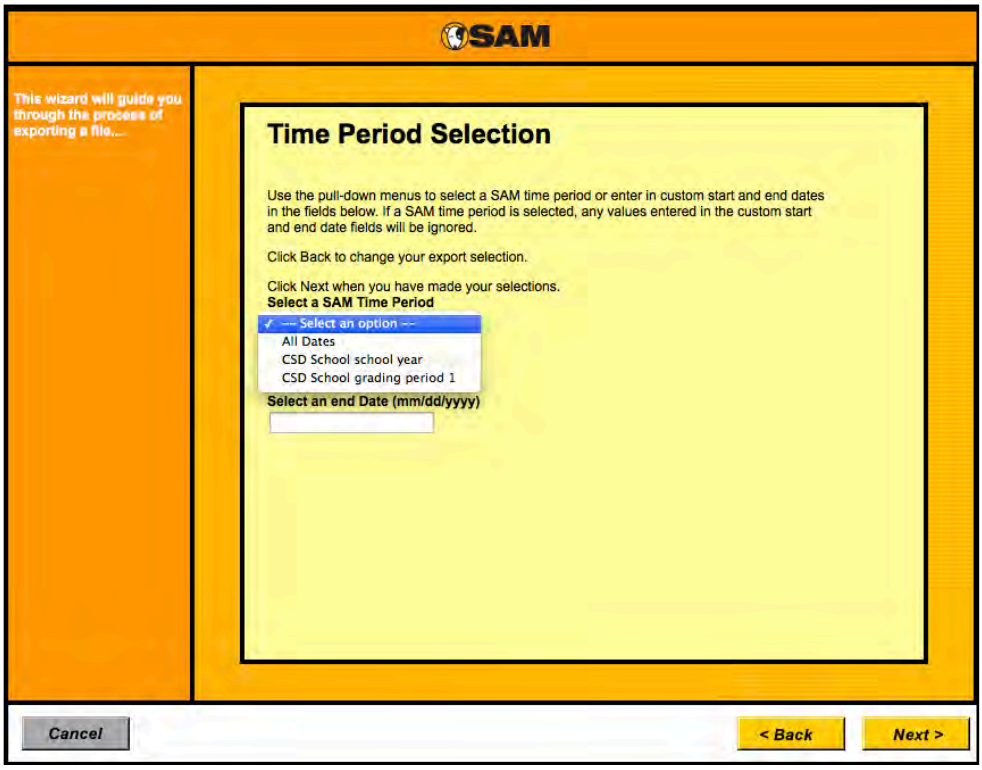
© Houghton Mifflin Harcourt Publishing Company



5. Click the checkboxes to select the students whose data will be exported. Click **Next** to continue. The Confirm Selection screen will appear.

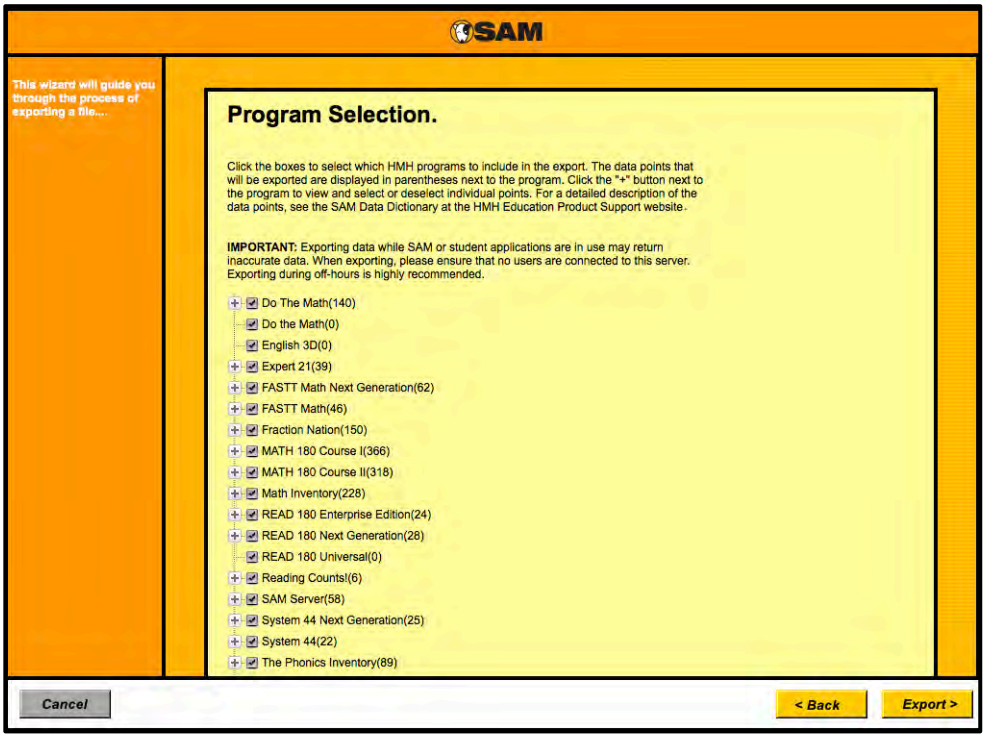
6. To change choices, use the **Back** button to return to the Filter Selection screen. If satisfied with the choices, click **Next** to open the Time Period Selection screen.

© Houghton Mifflin Harcourt Publishing Company



7. Use the pull-down menu to select an existing time period or enter a start date and an end date. Click **Next** to open the Program Selection screen.

© Houghton Mifflin Harcourt Publishing Company

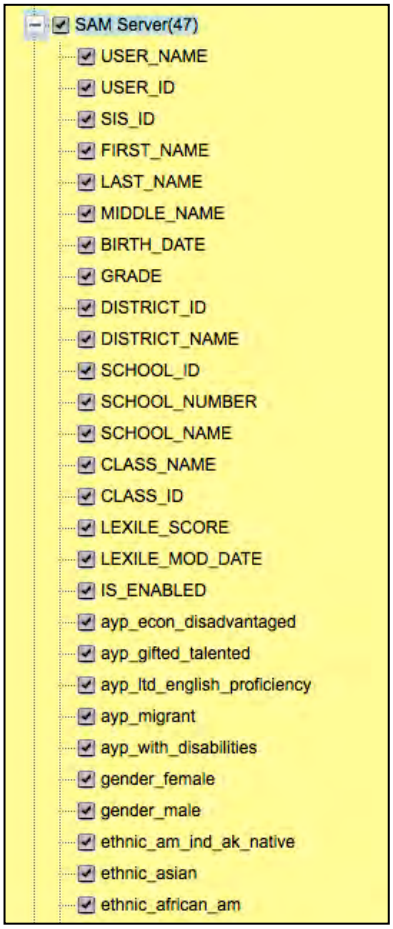


8. Click the boxes to select which programs to export data from, then click **Export**. The data points to be exported are displayed in parentheses next to the program.

© Houghton Mifflin Harcourt Publishing Company

9. Click the "+" button next to the program name to drill down through the data points and select or deselect individual points. Note that some versions of Microsoft Excel are limited to 256 columns; if the number of data points exceeds this, some columns will not be displayed in that application, though all of the data will be contained in the CSV file. When all selections are made, click **Export**.

10. The Processing Request screen opens and the export request will begin to process. Close the browser window to return to SAM.



A notification will appear in the Message Center on the Home screen when the export file is ready. Exporting a large file may take some time.

Access the file by clicking the **Show Me** link in the Message Center. This opens a new browser window. From this window the file can be saved to a specific location or to portable media, such as a flash drive or CD-ROM.

Selected data points are available for both local and hosted installations, and may be selected individually. SAM Server (profile) data may be excluded when exporting application data, which may be useful if exporting to a target where students should be anonymous. However, this may also render product data unidentifiable, depending on the data points selected. Check with Technical Support at 1-800-283-5974 with any questions or concerns.

For repetitive data points, such as tests or topics, de-selecting one will exclude it for each of the repeating sets. As noted above, a running total of the selected data points is displayed at the bottom of the screen, with a warning if the total exceeds 256.

© Houghton Mifflin Harcourt Publishing Company

Student Transfers

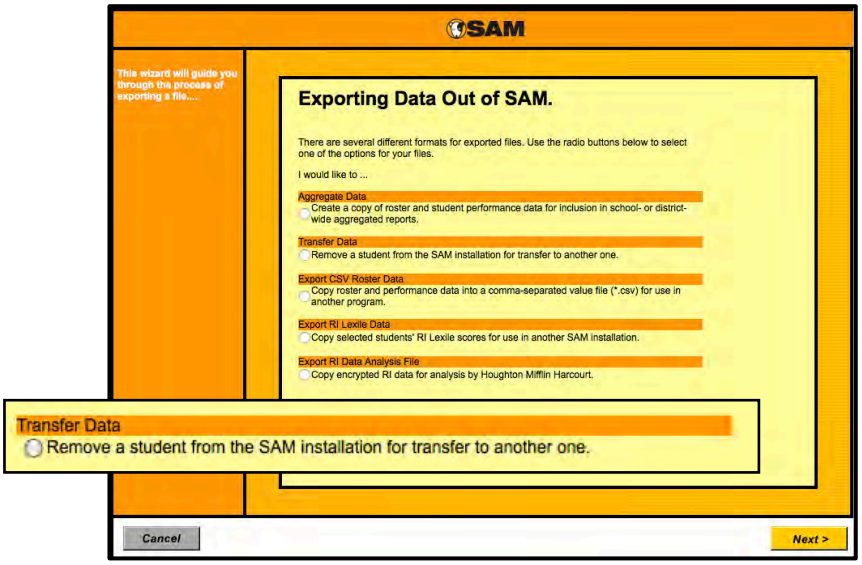
If a student transfers from one school to another, the student's data may be transferred out of one SAM installation and into another SAM installation. The process works the same whether the district is All Local, All Hosted, or Hybrid.

The Student Transfer process removes **all** performance records (including *READ 180* Success Zone and *System 44* Success Strand fluency recordings) from the student's current school and prepares a file that imports that student's data into another SAM database.

The Student Transfer export helps teachers or administrators who aggregate data across several SAM installations maintain "clean" databases for aggregation.

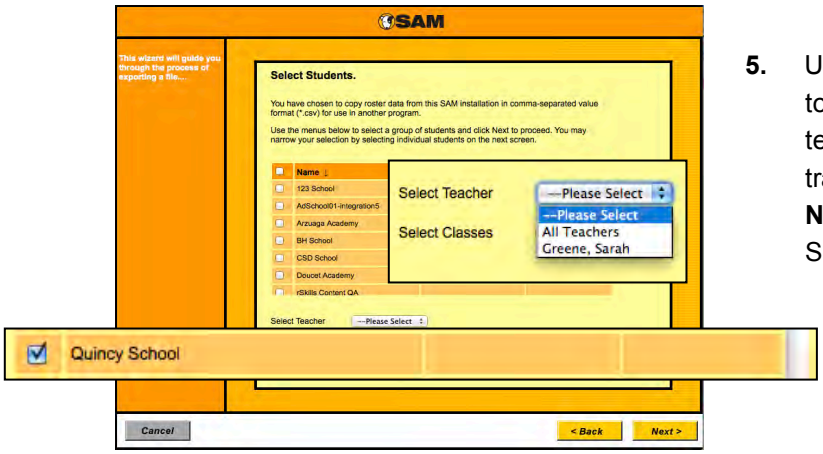
To export data for transfer:

1. If using a local server, back up all stored data before exporting any files.
2. Double-click **My District** at the top of the SmartBar or click the Roster tab at the district level to access the district **Profile** screen.
3. Click the **Export** link from the Advanced Settings menu in the lower right corner of the screen to open the Export Wizard in a new browser window.

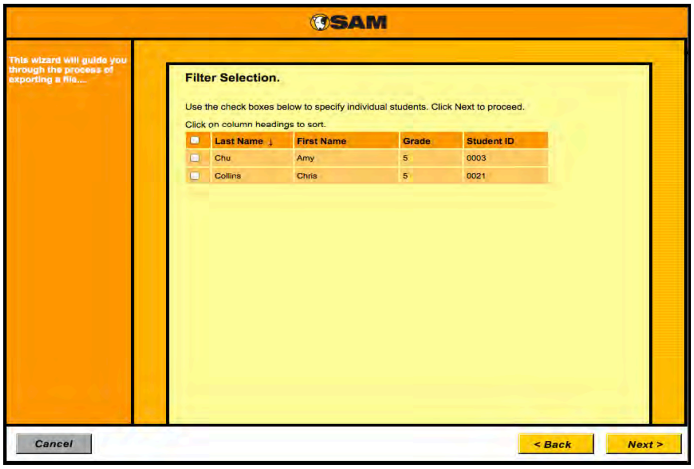


4. Click the button to select **Transfer Data** and click **Next** to open the Select Students screen.
5. Use the pull-down menus to select the school, teacher, and classes to transfer out of SAM. Click **Next** to open the Filter Selection screen.

© Houghton Mifflin Harcourt Publishing Company



5. Use the pull-down menus to select the school, teacher, and classes to transfer out of SAM. Click **Next** to open the Filter Selection screen.



6. Click the checkboxes to select those students to transfer out of this SAM installation. To select all students, click the checkbox at the top of the left column. Click **Next** to open the Confirm Selection screen.

7. To change choices, use the **Back** button to return to the Filter Selection screen. If satisfied with the choices, click **Export** to continue. A notification appears in the Message Center on the SAM Home screen when the export file is ready. Larger files will take more time.

Click the link in the Message Center to open the Show Me window. From this window the *.zip file may be saved to a specific location or to portable media, such as a flash drive or CD-ROM. See Roster Import (*page 13*) for instructions on how to import the student transfer file into another SAM installation.

© Houghton Mifflin Harcourt Publishing Company

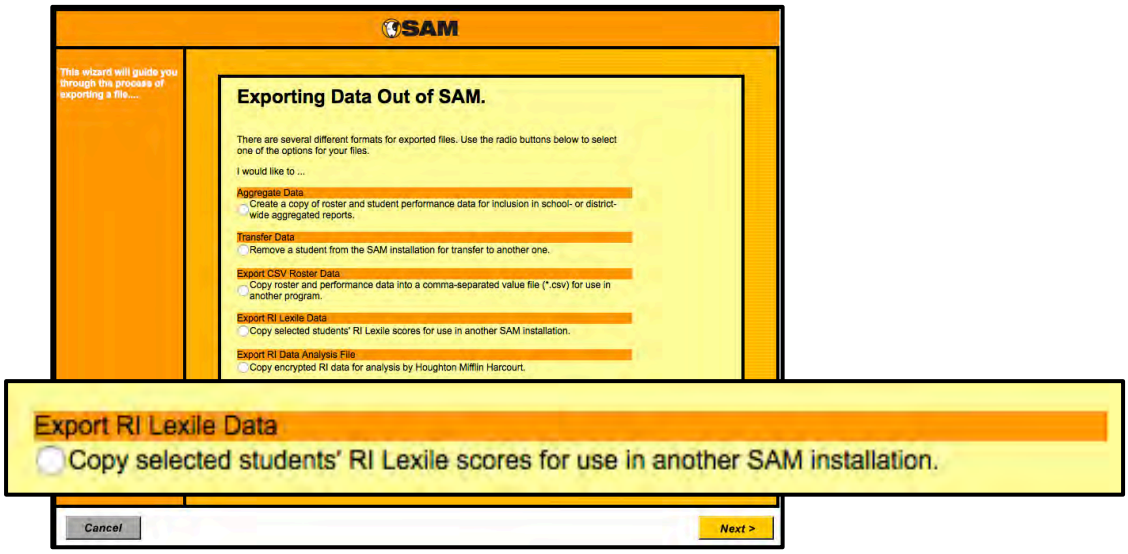
Student Lexile Transfers

Many schools have separate SAM installations for *The Reading Inventory*, *READ 180*, and other applications that use Lexile measures to determine student placement. This may require transferring a student's *Reading Inventory* test score from one SAM installation to another. The Student Lexile Transfer process transfers a student's Lexile measure from only the most recent *Reading Inventory* test, not all test scores. The Lexile Transfer may also transfer a Lexile measure into a SAM installation that does not have *The Reading Inventory* installed. The process works the same whether the district is All Local, All Hosted, or Hybrid.

Unlike Student Transfer, the Student Lexile Transfer does **not** remove a student's profile or performance data from the current SAM installation.

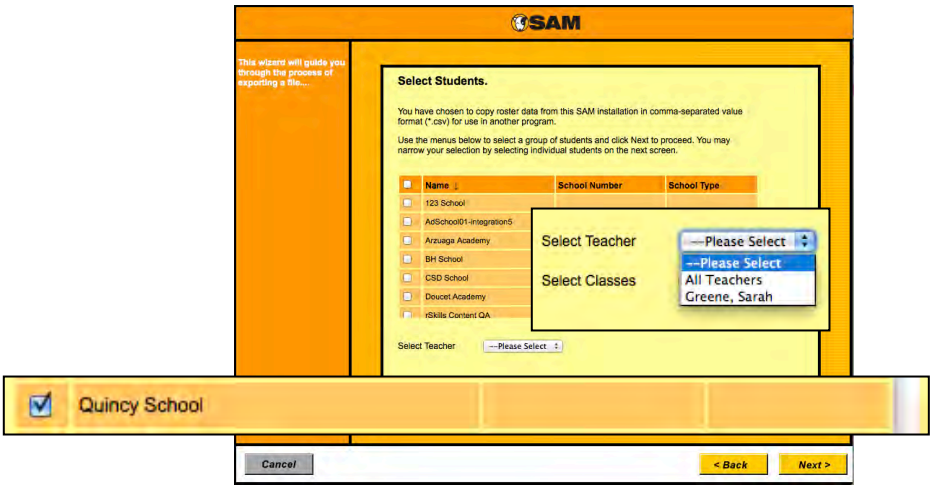
To export Lexile measures:

1. Double-click **My District** at the top of the SmartBar or click the Roster tab to access the District Profile screen.
2. Click the **Export** link from the Advanced Settings menu to open the Export Wizard in a separate browser window.

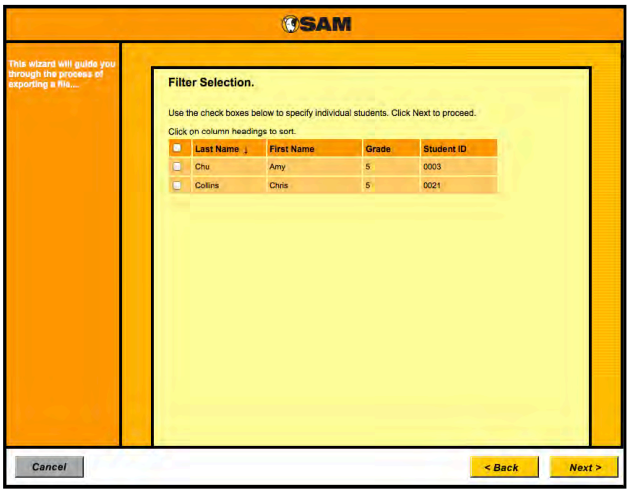


3. Click the radio button to select **Export RI Lexile Data** and click **Next** to open the Select Students screen.

© Houghton Mifflin Harcourt Publishing Company



4. Use the pull-down menus to select the school, teacher, and class that contain the students' Lexile measures to be exported. Click **Next** to open the Filter Selection screen.



5. Click the checkboxes to select those students whose Lexile measures are to be exported. To select all students, click the checkbox at the top of the left column. Click **Next** to continue. To change choices, click **Back** to return to the Select Students screen.

6. Click **Export** to continue. The program begins creating the export file and the Processing Request screen appears. Close the browser window to return to SAM.

When the export file is ready, a notification appears in the Message Center (this may take some time if exporting a large file). Click the link in the Message Center to open the Show Me screen. From here the file may be saved to a specific location on a hard drive, or on a flash drive or CD-ROM.

See Roster Import (*page 13*) for instructions on how to import the Lexile transfer file into another SAM installation.

© Houghton Mifflin Harcourt Publishing Company

Student Promotions

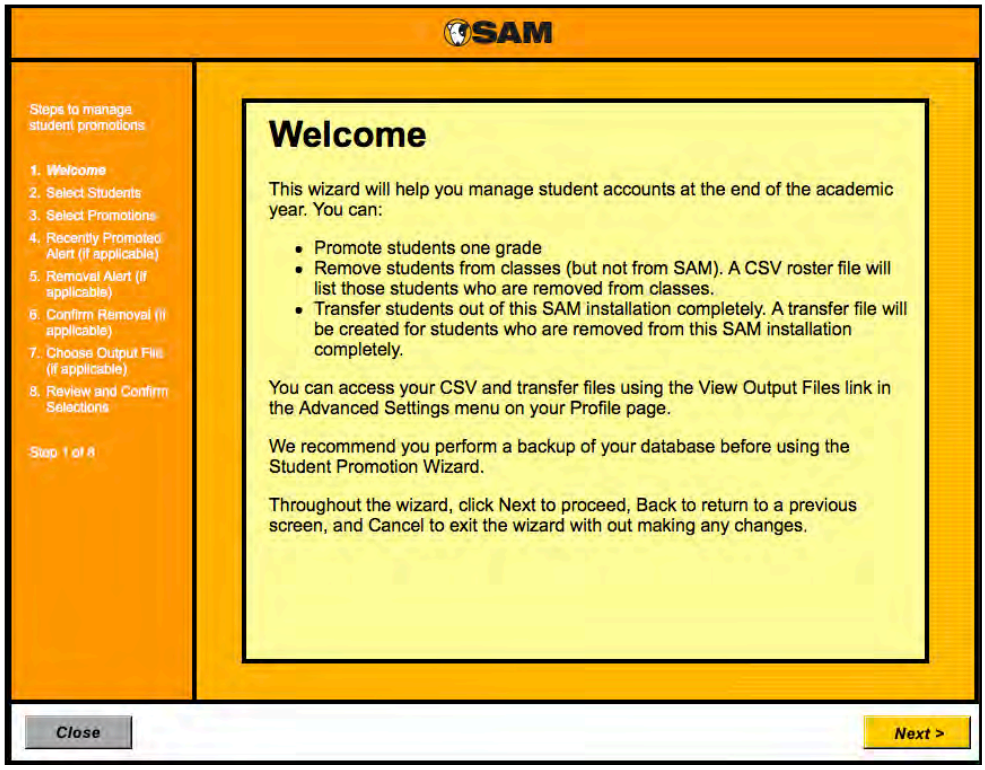
The Manage Student Promotions Wizard is a convenient way to promote large groups of students from one grade to the next in preparation for a new school year. The process works the same whether the district is All Local, All Hosted, or Hybrid, although All Hosted districts should not use the **Remove Students from the SAM Installation** option unless they are removing students who have graduated out of the district.

The wizard allows administrators to:

- Promote students a single grade while leaving them in their current classes in the SmartBar.
- Remove students from all of their current classes in the SmartBar, but leave them in the SAM installation, accessible with the Manage Inactive Accounts function. This choice automatically creates a *.csv file that makes it easy to edit the grade and class names in Excel or a similar spreadsheet program. Using the Automatic Account Creation process (described in the Roster Import section), SAM places the promoted students into new classes.
- Remove students from the SAM installation entirely. This process prepares a transfer file to move students to a different SAM installation. The wizard creates either one file for each student or a single file with all students being removed at a given time. Use these files to transfer students to another SAM installation. NOTE: Districts should not use this option if their SAM Server is hosted unless they are removing students who have graduated out of the district.

Do not perform any student promotions while the SAM database is in use. Only run student promotions when no other users are logged in to SAM.

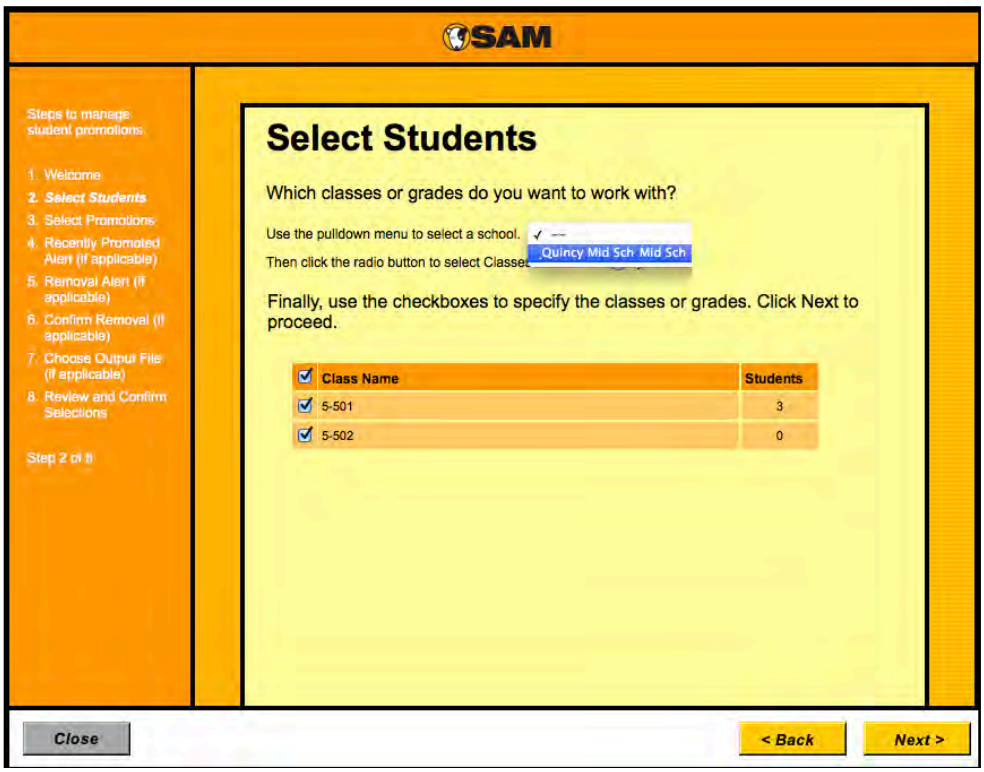
© Houghton Mifflin Harcourt Publishing Company



To use the Manage Student Promotions Wizard:

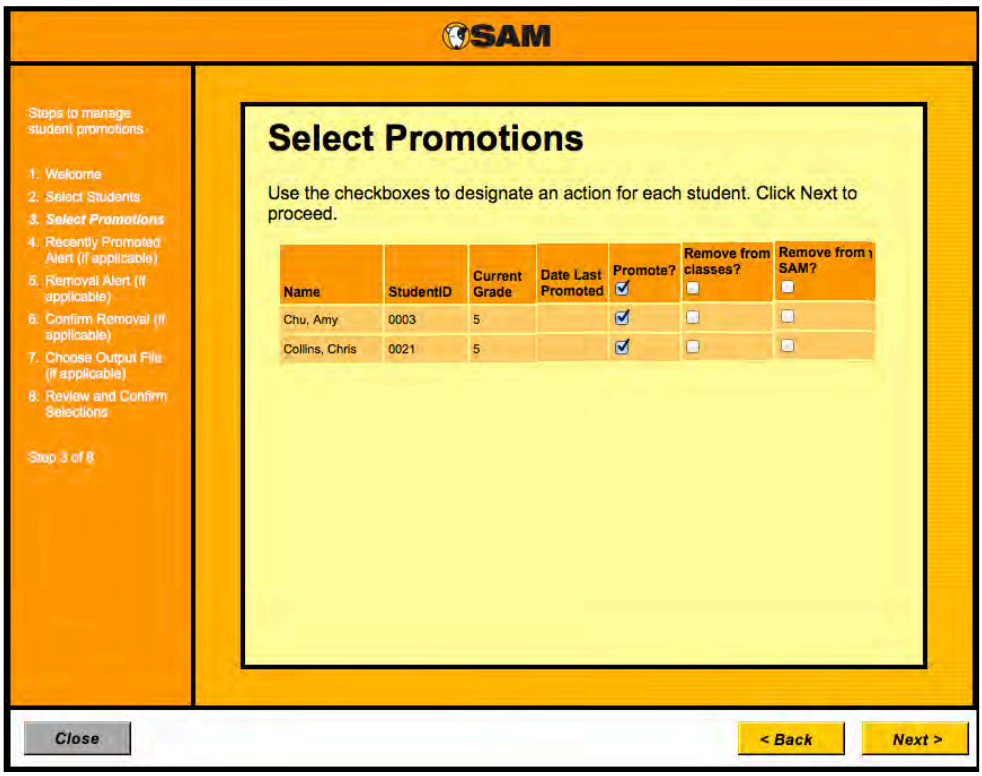
1. Backup data if using a local server.
2. Double-click **My District** at the top of the SmartBar or click the Roster tab at the district level to access the District Profile screen.
3. Click the **Manage Student Promotions** link in the Advanced Settings menu to open the Manage Student Promotions Wizard.
4. Click **Next** to open the Select Students screen.

© Houghton Mifflin Harcourt Publishing Company



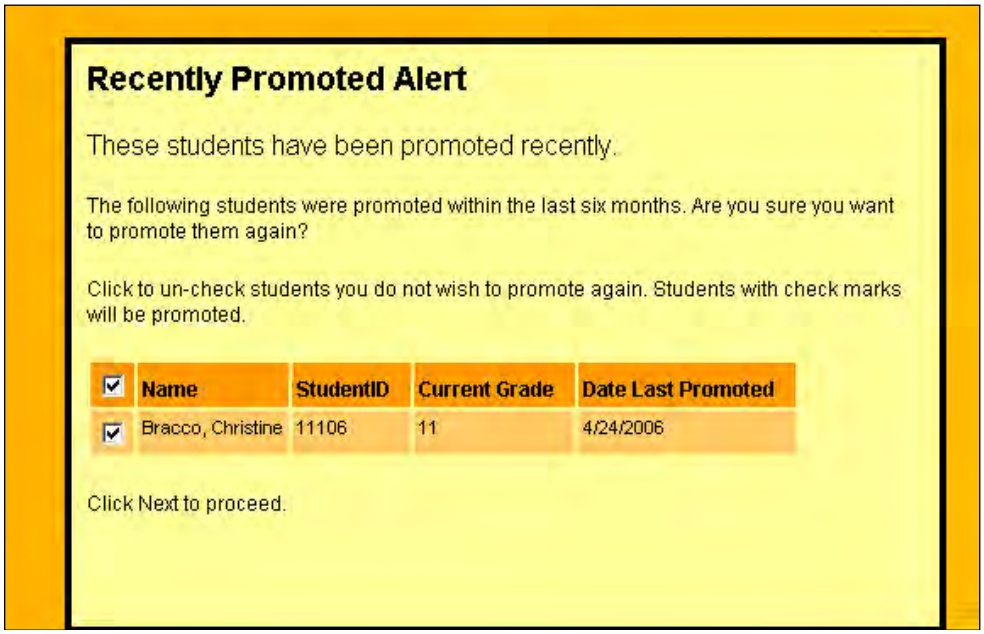
5. Use the pull-down menu to choose a school, then select **By Class** or **By Grade** to choose a class or grade to promote. Use the checkboxes to select the specific grade(s) or class(es) for promotion. To select all choices, click the checkbox at the top of the column. Click **Next** to open the Select Promotions screen.

© Houghton Mifflin Harcourt Publishing Company

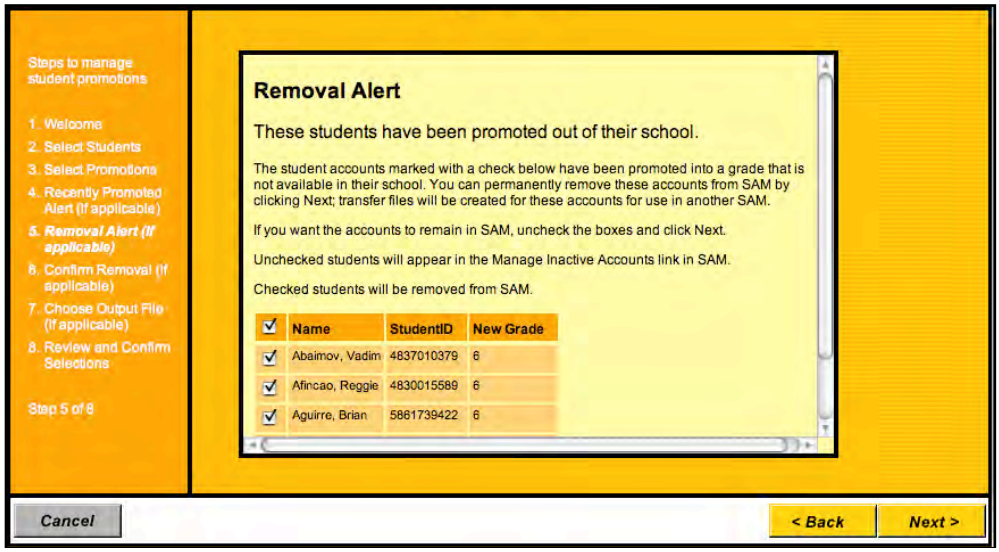


6. The Select Promotions screen shows all students available for promotion based on the previous selections. Click column heads to sort data based on that category. Check the boxes to choose which students to promote, remove from classes, or remove from SAM. Click **Next**.
   - **Promoted** students advance to the next grade but remain in their classes on the SmartBar. Combining this choice with the Remove From Classes option removes students from classes as well.
   - **Remove from Classes** means the student no longer appears in the SmartBar associated with any classes and is unenrolled from SAM Suite programs, freeing up licenses associated with that student. Student accounts may still be accessed using the Manage Inactive Accounts function, and a *.csv file is automatically created to facilitate placement of those students in new schools and classes. Use the **View Output Files** link to access the *.csv file.
   - **Remove from SAM** removes students' accounts from the SAM database and includes them in a SAM transfer file (*.zip) so they may be imported into different SAM installations. Students removed from SAM are also removed from the SmartBar and unenrolled from SAM Suite programs, freeing up licenses associated with the student. **Hosting districts should not use this option unless they are removing students who have graduated out of the district.**

© Houghton Mifflin Harcourt Publishing Company

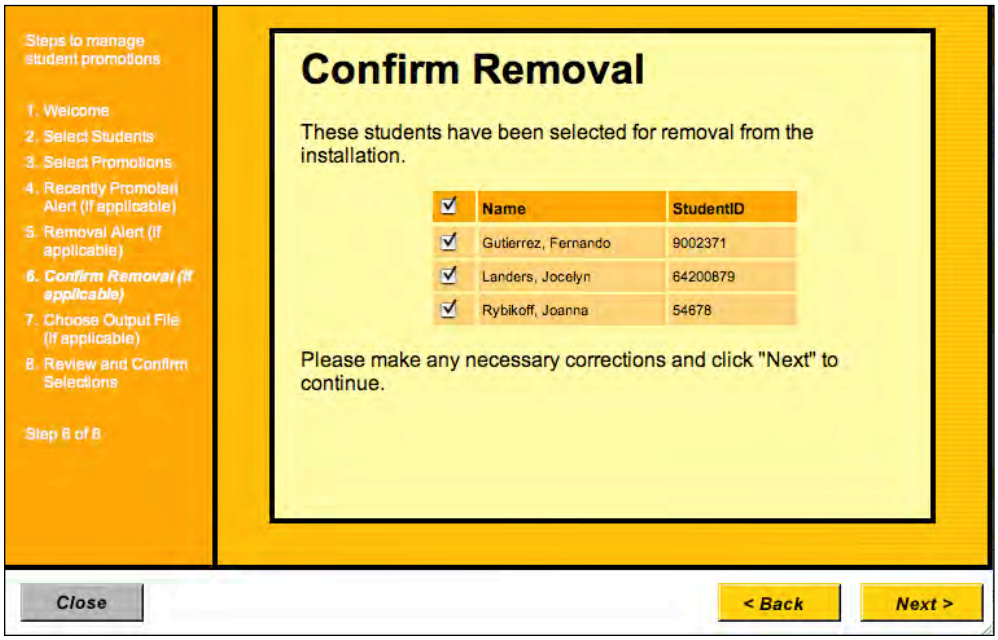


7. Selecting a student for promotion who was promoted within the last six months prompts a warning screen. Click the boxes to deselect any students who should not be promoted again. To select all choices, click the checkbox at the top of the column. Click **Next** to proceed.



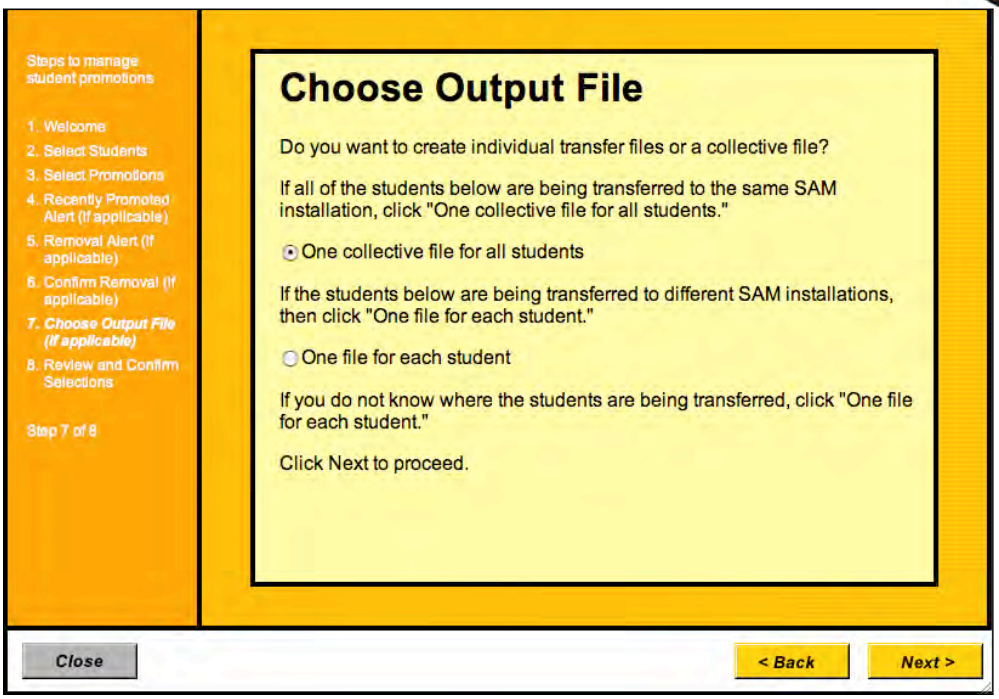
8. Promoting students into a grade not in the existing SAM installation prompts a warning screen. Click the checkboxes to deselect students that are not being promoted to move these students to Inactive Accounts and remove them from SAM. To select all choices, click the checkbox at the top of the column. Click **Next** to proceed.

© Houghton Mifflin Harcourt Publishing Company



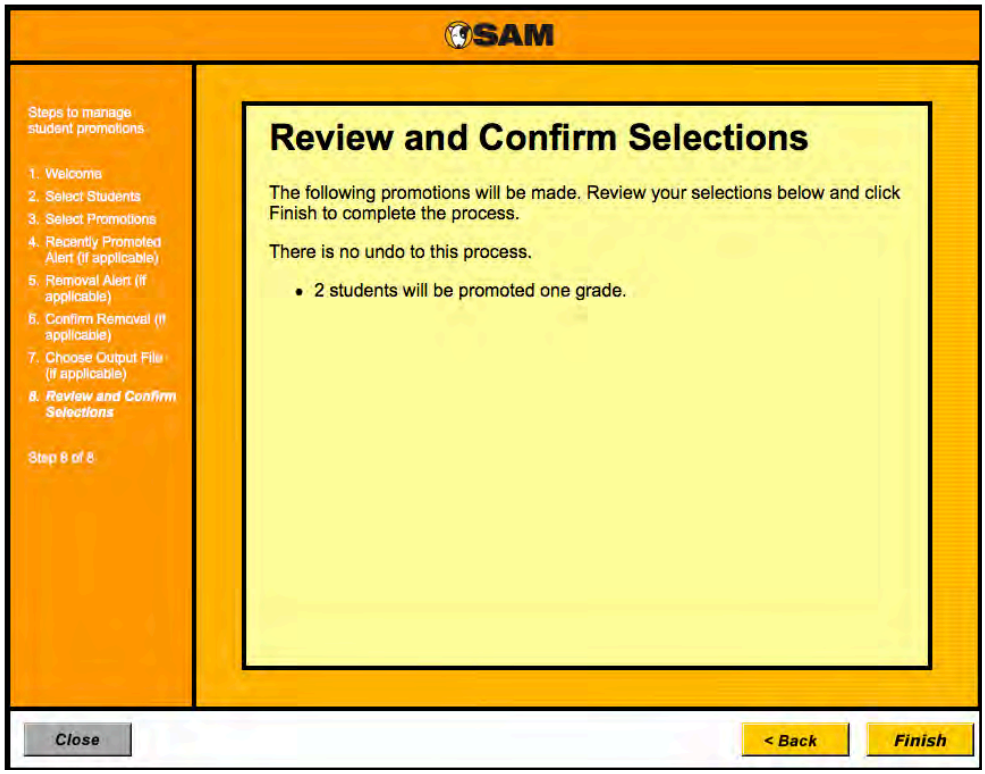
9. Click the checkboxes to choose the student to be removed from the SAM installation. To select all students, click the checkbox at the top of the left column. These students are removed from the SmartBar and moved to Inactive Accounts. Click **Next** to continue.

© Houghton Mifflin Harcourt Publishing Company



10. The **Choose Output File** screen allows users to create either a collective transfer file for all students (for example, if all students are going to the same school) or individual files for each student (if students are going to different schools). Click the button to select which type of file to create. Click **Next** to open the Final Confirmation screen.

© Houghton Mifflin Harcourt Publishing Company



11. Review and verify all information, and if necessary click the **Back** button to return to any screen and make changes. Click **Finish** to complete the Student Promotion process.

If the records of promoted students need to be imported into another SAM installation, check the Message Center or View Output Files to access the *.zip file containing these records.

© Houghton Mifflin Harcourt Publishing Company

Data Migration

Data Migration transfers students' performance and roster data from a Student Management System (SMS) installation to a local SAM installation or a hosted SAM Server.

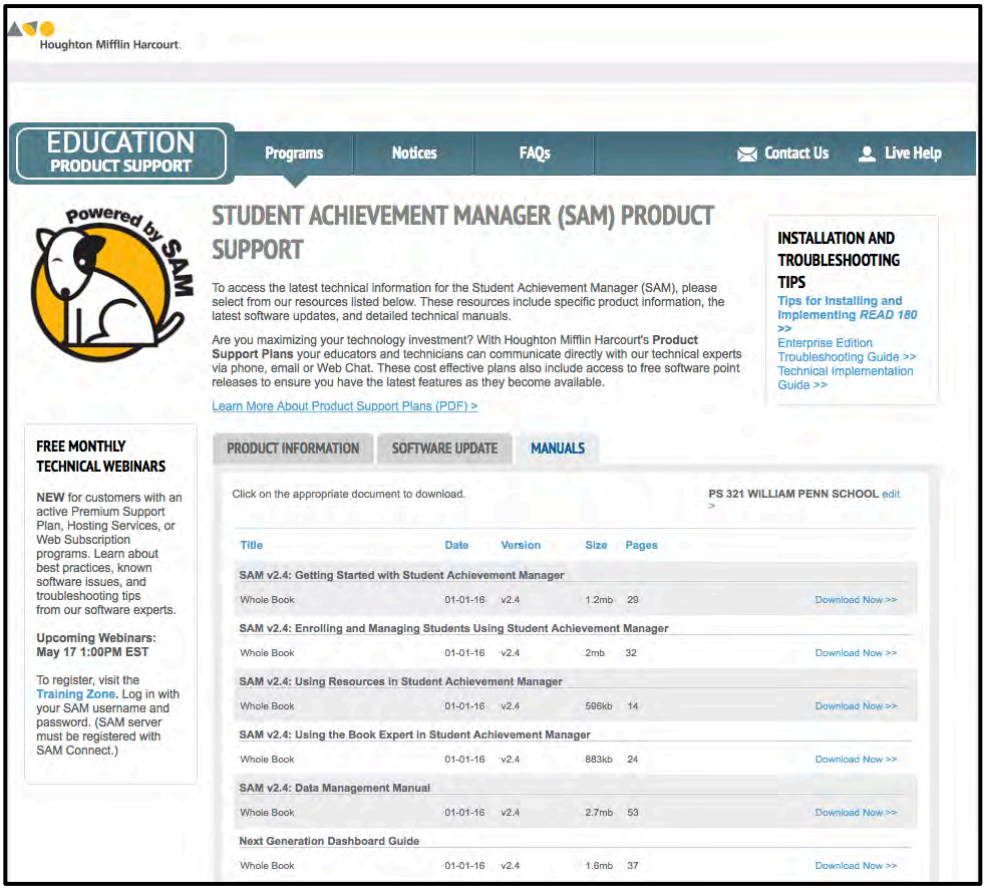
HMH Hosting Services customers cannot migrate local SMS data directly to a hosted SAM Server. Consult Technical Support (*page 42*) for help migrating SMS data into a hosted SAM Server.

Districts that have both a local SMS server and a local SAM server should see the ***Data Management Manual*** for instruction on migrating data to both local and hosted installations.

© Houghton Mifflin Harcourt Publishing Company

Technical Support

For questions or other support needs, visit the Student Achievement Manager Product Support website at: hmhco.com/sam/productsupport.



At the site, users will find program documentation, manuals, and guides, as well as Frequently Asked Questions and live chat support.

For specific questions regarding the SAM, contact customer service to speak to a representative at: 1-800-283-5974.

For specific questions about using SAM and SAM Suite programs, click **Help** in the Quick Links section along the top of any screen in SAM.

© Houghton Mifflin Harcourt Publishing Company