

Rostering in SAM

Overview

Student, teacher, and administrator rosters may be imported into SAM from a CSV file. This is especially helpful when student and teacher data is stored in a district database or a spreadsheet program.

Rosters may be imported to create student, teacher, or administrator profiles or to overwrite existing roster data in the database. Data on servers hosted by HMH is automatically backed up, so an earlier copy of data is available should it be necessary. Data on locally-installed servers should be backed up prior to any data import.

Only SAM users with administrative permissions may perform a roster import.

Pathways

CSV Template → SAM → Roster Tab → Advanced Settings Menu → Roster Import Tool in SAM → SmartBar

Templates

Click [here](#) for a template for importing student data.

Click [here](#) for a template for importing teacher data.

Click [here](#) for a template for importing district administrator data or click [here](#) for school administrator data.

These templates are also available in the Roster Import Tool. See the [HMH Hosting User's Guide and Data Management Manual](#) for detailed template information. For more information on the database fields, see the [SAM Data Dictionary](#).

Importing the File

When the roster import file is created, import the roster using the Roster Import Tool:

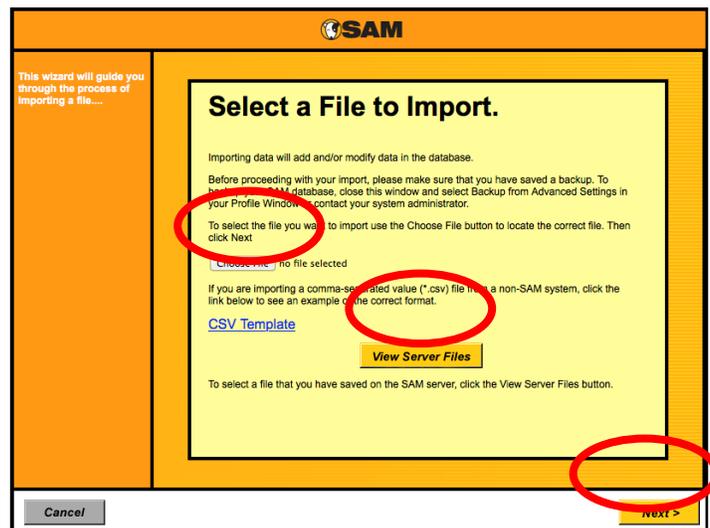
1. Double-click **My District** at the top of the SmartBar or click the Roster tab at the district level to access the district's Profile screen.

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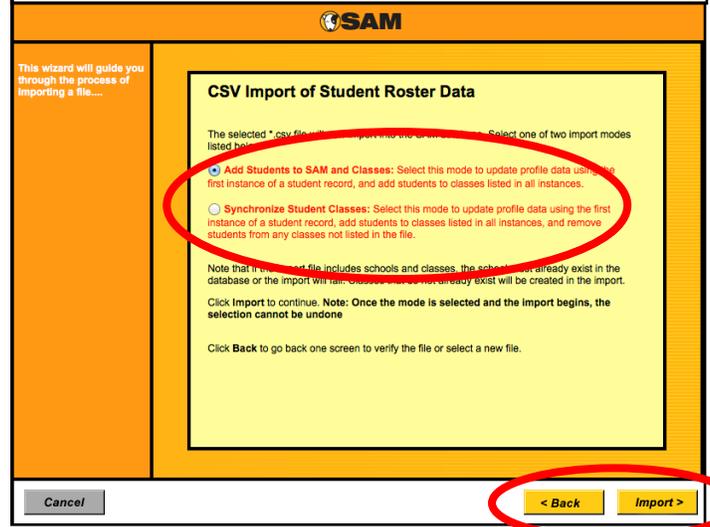
2. In the Advanced Settings menu in the lower right corner, click **Import** if importing students, **Import Teachers** if importing teachers, or **Import Admins** if importing administrators. These links open the Select a File screen.



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/Admin) 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**.



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 and the new records should appear in the SmartBar in SAM. Click **Close** to close this screen.

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Automatically Creating Classes

The SAM Import Tool can also create classes that will automatically appear in the SAM SmartBar, thus eliminating the need to manually create student and class profiles when setting up the SmartBar at the beginning of a school year.

If the schools that will hold the student and class data are already in the SAM SmartBar, then the Import Tool will create classes within that school so that each imported student can be associated with the proper class. If the class already exists, the student will just be placed in that existing class. For more information, see the [HMH Hosting User's Guide and Data Management Manual](#).

Best Practices

Best Practices for Roster Imports

- **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 will be added to the Roster Import and the older user's account will be overwritten.
- Confirm that a teacher or administrator's District User ID is the same in the import file as in the database, or it will inadvertently create a new account.
- Always back up your database before performing any file import (local customers).
- Run imports after hours when students are not using the software.
- 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. See the SAM Data Management Manual for more information.
- 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.

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Best Practices for District and School Profiles

- Under Manage Applications, select all programs that are housed on the SAM Server. This will ensure that student program data will be reported.
- Select the district's school days and hours. This is important for setting controls on student use of programs outside of school. Select the programs that require set time controls by clicking the check box next to the program.

Best Practices for Teacher Profiles

- Each teacher **MUST** have a unique District User ID and username in his or her profile. If different users have the same District User ID (e.g., John Jones and Jane Jones both having "JJones") and you attempt a Roster Import, the older one will be overwritten. If you are unsure if there are duplicate District User IDs, new User IDs may be generated automatically during the import process.

Best Practices for Class Profiles

- Class names **MUST BE** unique and descriptive. The following format for naming classes is recommended: teacher first initial and last name, period or class number, product (e.g., "SGreene_4-401_R180"). For classrooms with multiple products, use the lead product (for example: *READ 180* Universal, *System 44* Next Generation, *iRead*, *MATH 180*), or the most-used program.
- Keep program selections in the Manage Applications section of the Class Profile current and accurate to ensure proper data sorting and reporting.

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Best Practices for Student Profiles and Enrollment

- Each student User ID and username MUST BE unique.
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- If you are enrolling students in a suite of programs, make sure students are enrolled in all products in the suite (this is especially true for Next Generation users).
- Use a student ID that is consistent with your Student Information System to facilitate merging SAM and non-SAM data (like state test results) for analysis.
- When enrolling students in a Next Generation suite of programs, make sure that they are enrolled only in those programs in that Next Generation suite.