



# Technical Implementation Guide

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## Overview: Your Guide to Technical Implementation

The *Technical Implementation Guide* is designed to guide you in setting up and running your Student Achievement Manager (SAM) implementations and SAM-based programs through the school year.

<b>SAM Platforms</b>	
Student Achievement Manager (SAM)	HMH Leader Central™
SAM Central	HMH Teacher Central™
Next Generation Dashboards	HMH Tech Central
<b>SAM-Based and HMH Central-Based Products</b>	
<i>Code X Digital</i>	<i>Phonics Inventory</i>
<i>Do The Math</i>	<i>READ 180 Next Generation</i>
<i>English 3D</i>	(including <i>rSkills</i> )
<i>Expert 21</i>	<i>READ 180 Universal</i>
<i>FASTT Math Next Generation</i>	(including Workshop Assessments)
<i>iRead®</i>	<i>Reading Counts!</i>
<i>MATH 180 (including mSkills)</i>	<i>Reading Inventory</i>
<i>Math Inventory</i>	<i>System 44 Next Generation</i>

District administrators and technical teams can program SAM to work with the SAM-based programs to manage school rosters, student enrollment and records, as well as to aggregate student data into class, school, and district-wide reports.

### SAM Components

Districts have their SAM Servers hosted at a data center. This server connects with workstations over an SSL Internet connection.

SAM and SAM-based programs are built using Internet and industry-standard technology in order to provide capacity for high levels of concurrent usage and reliability. It uses standard Internet components that simplify setup and optimize issues surrounding student access to servers. Clients run in standard web browsers and connect to servers over HTTPS.

SAM and SAM-based programs require a persistent connection to a server hosted by an HMH data center. This server, the SAM Server, combines the functions of an application server (running programs) with a database server (managing and storing data).

The SAM Server is hoisted in an HMH data center and connects to district and school workstations over an SSL Internet connection. The SAM Server houses the SAM software, the district's SAM database, SAM-based programs, and corresponding media.

Upon setup, district administrators will receive the URL of the district's hosted SAM Server.



## **Workstations**

Workstations are the desktop and laptop computers that students, teachers, and administrators use to access SAM and SAM-based programs. To access the SAM Server and the programs hosted on it, all workstations must have Internet connections and a browser program (Mozilla Firefox, Google Chrome, Microsoft Edge, or Safari) installed.

For the system requirements for workstations, see the [SAM Suite System Requirements and Technical Overview](#) at the [Product Support](#) website (*page 27*).

**iPad®:** Many SAM-based programs, including *READ 180* Universal, *System 44* Next Generation, *iRead*, *MATH 180*, *Reading Inventory*, *Reading Counts!*, and SAM Central, are iPad compatible. These programs take advantage of iOS technology and should be used to complement desktop and laptop use. See the individual program documentation at [the Product Support](#) website (*page 27*) for more information on using programs on the iPad.

## **SAM Connect**

SAM Connect authenticates users and grants access to online products such as SAM Central, the Teacher and Leadership Dashboards in Next Generation programs, and the Interactive Teaching System (ITS).



## Using the Student Achievement Manager

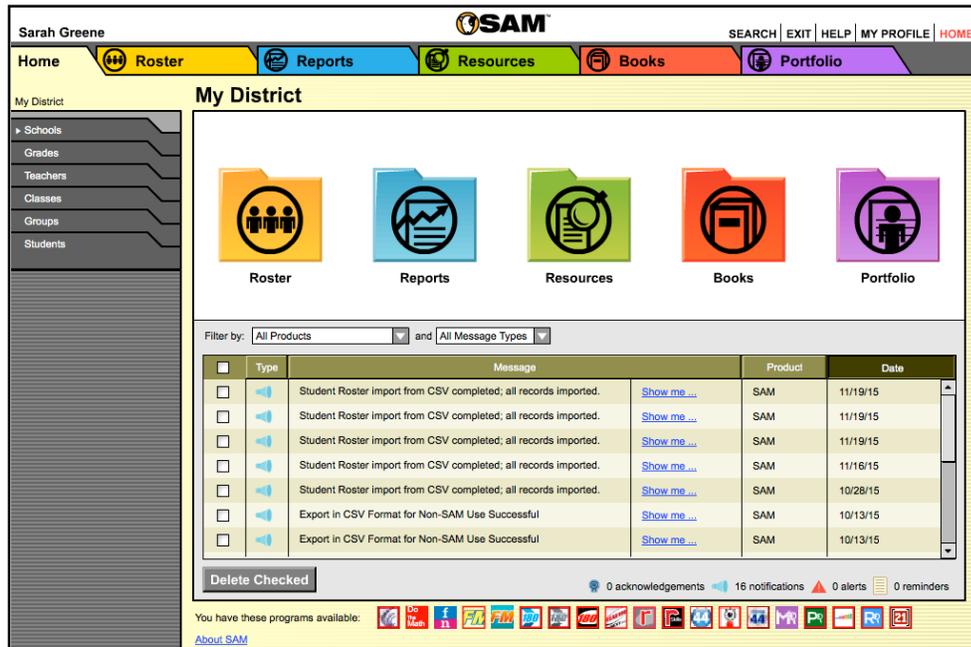


Figure 1 SAM Home Page

SAM is the database program and data manager that links all SAM-based programs. Proper set-up and maintenance, including scheduling and performing specific tasks during the school year and at the end of the school year, are vital to keeping up a successful SAM implementation. This manual shows you how to do that by:

- Describing the steps to implement a SAM implementation
- Guiding year-round technical procedures
- Referencing best practices to implement and maintain SAM

Districts using the Student Digital Portfolio, a feature in *System 44 Next Generation*, see an additional SAM tab, the Portfolio tab.



Figure 2 SAM Tabs

Only teachers with students enrolled in Next Generation programs as well as *iRead* and *MATH 180* are able to access the functions on the Portfolio tab. For information on using the Portfolio tab, see the [SAM Settings and Reports](#) manual for that program.



SAM consists of several components, all of which are accessible from the home page:

The SmartBar (*right*) is the quickest way to access rosters and reports for districts, grades, teachers, classes, and students. Single-click an entry in the SmartBar to reveal which programs the district, teacher, class, group, or student is enrolled in, or double-click a SmartBar entry to open the profile for that entry.

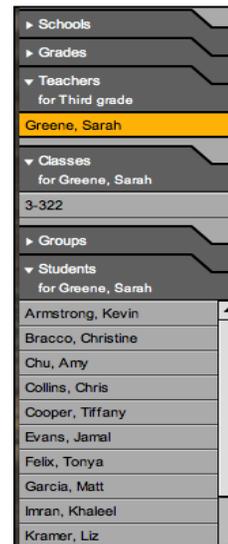


Figure 3 SmartBar

The Home Page Buttons (*below*) access the four main areas of SAM: **Roster**, **Reports**, **Resources**, and **Books**.

- Roster provides detailed information about students, groups, classes, grades, teachers, and schools
- Reports accesses the different reports for each installed program
- Resources displays classroom, student, and professional development resources available in SAM for each program
- Books is for use with *Reading Counts!* (RC!). It contains the RC! Quiz Manager and a link to the Book Expert Online.



Figure 4 Home Page Buttons

The Message Center displays messages generated through SAM, such as alerts and acknowledgments that reflect students' work in the programs and notifications of SAM system activity such as imports, exports, and backups.

<input type="checkbox"/>	Type	Message	Product	Date
<input type="checkbox"/>		System backup finished	<a href="#">Show me...</a>	SAM 03/04/09
<input type="checkbox"/>		System backup finished	<a href="#">Show me...</a>	SAM 03/04/09
<input type="checkbox"/>		System backup finished	<a href="#">Show me...</a>	SAM 10/15/08
<input type="checkbox"/>		System backup finished	<a href="#">Show me...</a>	SAM 10/15/08

Figure 5 Message Center

The Quick Links in the top-right corner go directly to the Search, Home Page, Help Page, profile, or to exit SAM.



Figure 6 Quick Links



## Using SAM Connect

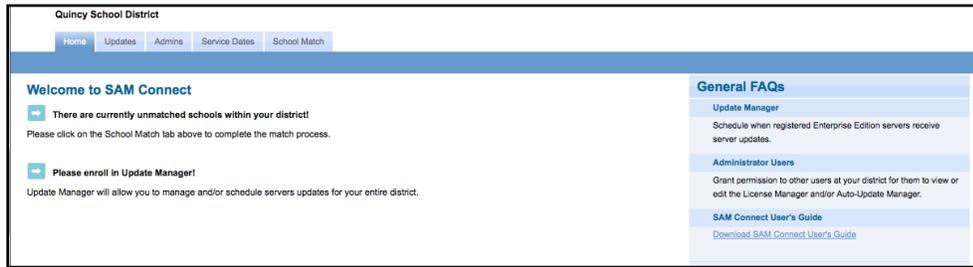


Figure 7 SAM Connect Welcome Page

SAM Connect processes student data and user authorizations that are vital to the functioning of several SAM-based programs. Through SAM Connect:

- Users may access Web-based programs and components such as the Teacher and Leadership Dashboards and Interactive Teaching System
- Teacher and Leadership Dashboards in Next Generation programs and SAM Central class screens display accurate data on student usage and performance in the software
- Licenses may be added or converted as districts require by pushing them directly to the SAM Server

SAM Servers check in with SAM Connect every 25 minutes to collect and update licensing data and check username and passwords for authentication.

SAM Connect updates student data on the Teacher and Leadership Dashboards in Next Generation programs once a week. Data in SAM Central is updated in real time (aggregated data is updated nightly). Student data from unmatched servers will not be updated, and will therefore result in incomplete Dashboard data and inconsistent eReads access.

## The Authentication Dashboard

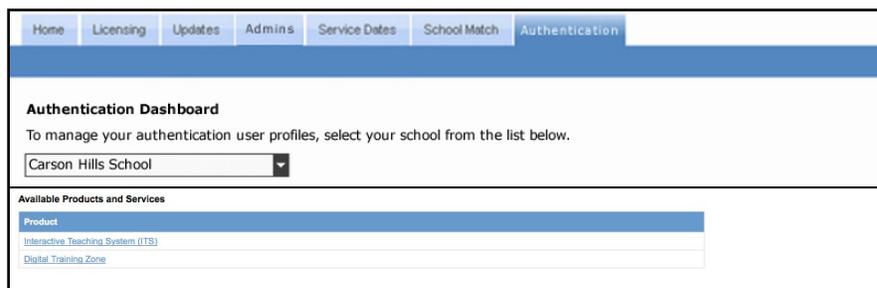


Figure 8 Authentication Dashboard

The Authentication Dashboard allows SAM Connect administrators to view access to the district's Web-based programs and services (including SAM Central, the Teacher and Leadership Dashboards in Next Generation programs, *iRead*, *MATH 180*, the Interactive Teaching System, and others). See the [SAM Connect User's Guide](#) for more information on using the Authentication Dashboard.



## Product Support Website

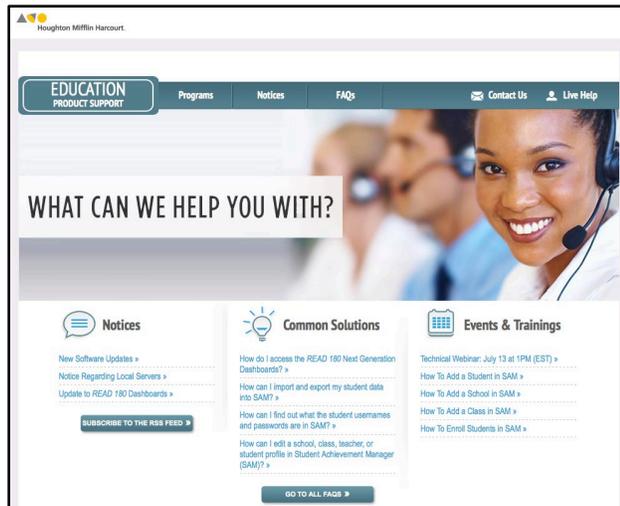


Figure 9 Product Support Website

The Product Support website ([hmc.com/education/productsupport](http://hmc.com/education/productsupport)) is your source for all product information, updates, software manuals, and guides. **All the manuals mentioned in this guide are available for download as PDFs from the website.**

### Using the Website

The website home page is organized by program. Scroll over the **Programs** tab to view the program menu. Click the program name to go to the product support area for that program.

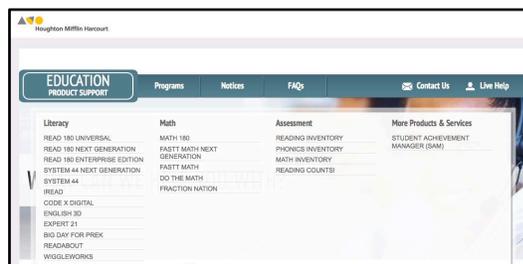


Figure 10 Program Menu on Product Support Website

On the home page you will also find product bulletins and announcements. Click the link to view the announcement.



### Tech Tip

Be sure to check the Product Support website regularly for release notes and updated documentation.



## Software Manuals, Guides, and Product Information

The screenshot shows the Houghton Mifflin Harcourt product support website. The main heading is "READ 180 NEXT GENERATION PRODUCT SUPPORT". Below this, there is a "NEED HELP?" section with a "Contact Us" link. A navigation bar at the bottom of the content area has three tabs: "PRODUCT INFORMATION", "SOFTWARE UPDATE", and "MANUALS". The "MANUALS" tab is active, displaying a table of documents for download. The table has columns for Title, Date, Version, Size, and Pages. The documents listed are:

Title	Date	Version	Size	Pages
<b>READ 180 Next Generation v2.4 Installation Guide</b>				
Whole Book	01-01-16	v2.4	1.7mb	49
<b>READ 180 Next Generation v2.4 Software Manual</b>				
Whole Book	01-01-16	v2.4	4.6mb	78
<b>SAM Settings and Reports for READ 180 Next Generation v2.4</b>				
Whole Book	01-01-16	v2.4	2.2mb	60

Figure 11 Product Page on the Product Support Website

Every program has a **Software Manual** that explains how to use the program.

Programs that work with SAM also have specific manuals, called **SAM Settings and Reports**, that describe how to enroll students in programs and set individual program settings through SAM, as well as describe the SAM reports for the program.

Programs have other documents, such as release notes, system requirements guides, data dictionaries, end user license agreements, and other guides, which describe or update different functions in SAM-based programs. Click the **Product Information** tab to access these documents.

All of these manuals, guides, and documents may be downloaded as PDFs from the [Product Support](#) website. Click the **Manuals** tab from any program’s product support page to access the list of manuals for that product.



## Website Username and Passwords

Title	Date	Version	Size	Pages	
<b>READ 180 Next Generation v2.4 Installation Guide</b>					
Whole Book	01-01-16	v2.4	1.7mb	49	<a href="#">Download Now &gt;&gt;</a>
<b>READ 180 Next Generation v2.4 Software Manual</b>					
Whole Book	01-01-16	v2.4	4.6mb	78	<a href="#">Download Now &gt;&gt;</a>
<b>SAM Settings and Reports for READ 180 Next Generation v2.4</b>					
Whole Book	01-01-16	v2.4	2.2mb	60	<a href="#">Download Now &gt;&gt;</a>

Figure 12 Manuals Tab

You can access manuals and updates for any program that your school or district has purchased and registered with a username and password. To obtain a username and password, click the **Register Now** link in the password box and follow these steps:

1. Click the **Educator Registration** button in the Educators box at the left of the screen. Enter your name and email, create your username and password, and select your school or district location, then click **Continue**.
2. Select your school's state from the pull-down menu, then select your school's city, and finally the school itself from the subsequent pull-down menus. Click **Continue** when you have selected the state, city, and school.
3. Complete your profile and click **Submit**. You will now be able to use the username and password you created to access the Software Update and Manual pages for the programs your school has purchased.

## Downloading Manuals

To download manuals, click the **Manuals** tab, enter your username and password, then click the **Download Now** link next to the manual. The manual will open in a PDF.

Some larger manuals have been divided into downloadable sections for easier downloading. Complete versions are also available.



## SAM Manuals

There are several types of SAM manuals that cover the different functions and tasks that SAM can perform. The table below outlines the different SAM manuals and what information they provide. Manuals are also listed by release.

For information on:	See:
Specific settings and reports for SAM-based programs	<a href="#"><i><b>SAM Settings and Reports</b></i></a> manual for the specific program
Setting up student and class profiles for <i>iRead</i> , <i>MATH 180</i> , and <i>Math Inventory</i> ; specific settings and reports for <i>iRead MATH 180</i> , and <i>Math Inventory</i> ;	<a href="#"><i><b>Using SAM Central With iRead</b></i></a> <a href="#"><i><b>Using SAM Central With MATH 180</b></i></a> <a href="#"><i><b>Using SAM Central with Math Inventory</b></i></a>
Setting up SAM accounts at the district and school levels	<a href="#"><i><b>Getting Started With Student Achievement Manager</b></i></a>
SAM Resources	<a href="#"><i><b>Using Resources in Student Achievement Manager</b></i></a>
Setting up Hosting Services and performing data-management tasks (including importing and exporting data) in a hosting environment	<a href="#"><i><b>HMH Hosting Services User's Guide and Data Management Manual</b></i></a>

Figure 13 SAM Manuals



## Planning Your SAM Implmenetation

### Checklist



**When? Six months to four weeks before school.**

Planning is key to successfully maintaining any SAM implementation. This checklist outlines the key tasks required for planning a SAM implementation. Use it to set target dates for completing each task and keep track of your progress.

Key Task	Target Date	Person/Group Responsible	Date Completed
Review the program's system requirements. ( <i>page 16</i> )			
Initiate a full technical audit ( <i>page 21</i> ).			
Conduct classroom audits to secure the appropriate technology and classroom materials ( <i>page 21</i> ).			
Select school and district SAM administrators (as necessary) and plan for accounts, profiles, and permissions ( <i>page 23</i> ).			
Select SAM Connect administrators ( <i>page 25</i> ).			

### Reviewing System Requirements

SAM is designed to handle large numbers of concurrent (simultaneous) users. SAM-based programs include the following features:

- Simplified Annual Yearly Progress (AYP) reporting—you can import and export student AYP data, and filter reports by AYP groups

### Data Centers

Data Centers that host SAM-based programs are constantly adjusted to accommodate concurrent users. However, end user performance will be affected by the factors listed above, particularly bandwidth.

Download and review the [SAM Suite System Requirements and Technical Overview](#), available on the Product Information tab on the [Product Support](#) website, for the latest system requirements for SAM-based programs.



## District Technical Audits

When a school or district purchases SAM-based programs, a technical audit will be performed to assess the school or district's technology infrastructure and make recommendations for meeting the system requirements of SAM-based programs.

Technical audits are designed to:

- Ensure that you can run the SAM-based programs
- Help identify hardware needs

Choose a deployment option prior to beginning the Technical Audit.

## Conducting the Audit

When a technical audit is requested, you will receive an email with a link to the Tech Audit Questionnaire. You have 10 days from purchase to complete the questionnaire. If the Tech Audit questionnaire is not received in that time, the district will be contacted to discuss the audit.

When the questionnaire is received, Technical Support will contact you to review the audit and, if necessary, recommend hardware improvements or upgrades to bring your district infrastructure into compliance with the System Requirements.

## Maximizing Your Resources

If your school or district does not have enough computers for all of the students enrolled in SAM and SAM-based programs, you may want to designate computers by program and set up a computer center in a classroom. Computers may be designated by program or by subject area (reading, math). As students move from English language arts (ELA) classes to math classes, they use the designated computers.

## For More Help With Your Technical Audit

Call the Tech Audit Team at 1-888-557-7299 (select option 1) for help with your technical audit.

## Setting Up Your Administrator Team

Depending on your district's size and needs, appointing an administrator team to help run the district's SAM implementation is recommended.

Set the individual responsibilities of your team members to meet the priorities and needs of the district. Most districts' technical coordinators assign members of the SAM administrator team one of the four remaining types of SAM accounts:

- **Teachers:** These are for classroom-based users, including teachers and teaching assistants.
- **School Administrators:** School administrators have administrative responsibilities for multiple educators within a single school.



- **School Technical Administrators:** School technical administrators are the primary technical contacts for schools using SAM-based programs.
- **District Administrators:** District administrators have administrative responsibilities for various school administrators.

Set yourself up as the Technical Coordinator, with responsibilities and permissions for being the primary technical contact for your district. Have regular meetings with your administrator team to share and discuss upcoming tasks, issues that may arise, or any problem that needs to be brought to the attention of Technical Support.

A large implementation (greater than five schools) will require at least one SAM administrator for each school.

### **Permissions**

For security purposes, SAM uses permissions to allow different levels of access to SAM data. Permissions are based on account type, but they may be customized depending on the particular needs of the school or district (for example, if a teacher in a school is also the school or district's technical administrator).

Customize user permissions in the user's profile screen in SAM. To learn how to access a user's profile screen and set permissions, see [Getting Started With Student Achievement Manager](#) at the [Product Support](#) website.



Default permissions for each type of user are as follows:

	<b>SAM Permissions/ Responsibilities</b>	<b>Teachers</b>	<b>School Administrator</b>	<b>District Administrator</b>	<b>Technical Coordinator</b>
<b>Student Settings</b>	<ul style="list-style-type: none"> <li>• Student Profiles</li> <li>• Program Usage</li> <li>• Program Settings</li> <li>• Grading Tools</li> <li>• Student Reports</li> <li>• Resources and Standards</li> </ul>	√	√	√	√
<b>Class &amp; Group Settings</b>	<ul style="list-style-type: none"> <li>• Class/Group Profiles &amp; Rosters</li> <li>• Program Usage</li> <li>• Program Settings</li> <li>• Class/Group Reports</li> <li>• Resources and Standards</li> </ul>	√	√	√	√
<b>Teacher Settings</b>	<ul style="list-style-type: none"> <li>• Teacher Profiles</li> <li>• Class/Group Assigned</li> <li>• Program Usage</li> <li>• License Availability</li> <li>• Resources and Standards</li> </ul>	√	√	√	√
<b>Grade Settings</b>	<ul style="list-style-type: none"> <li>• Grade Profiles</li> <li>• Teacher Lists</li> <li>• Program Usage</li> <li>• License Availability</li> <li>• Resources and Standards</li> </ul>		√	√	√
<b>School Settings</b>	<ul style="list-style-type: none"> <li>• School Profiles</li> <li>• Grade Lists</li> <li>• Program Usage</li> <li>• License Availability</li> <li>• Aggregated School Reports</li> <li>• Resources and Standards</li> </ul>		√	√	√
<b>District Settings</b>	<ul style="list-style-type: none"> <li>• District Profile</li> <li>• School Lists</li> <li>• Program Usage</li> <li>• License Availability</li> <li>• Aggregated District Reports</li> <li>• Resources and Standards</li> </ul>			√	√
<b>Advanced Settings</b>	<ul style="list-style-type: none"> <li>• Manage Licenses</li> <li>• Manage Enrollment</li> <li>• Create/Delete Accounts</li> <li>• Import/Export Data</li> <li>• Backup Database</li> <li>• Promote Students</li> <li>• Use SAM Server Utility</li> </ul>			√	√



## **SAM Connect Administrators**

In addition to district and school administrators, it is also important to establish SAM Connect administrators. It is recommended that the technical coordinator setting up SAM also be the lead SAM Connect Administrator.

When you register the server with SAM Connect, you become the SAM Connect Administrator with the following permissions:

- Add new SAM Connect administrators
- Edit other SAM Connect administrator accounts
- Manage authentications

When adding new SAM Connect administrators, you may assign any or all of these permissions, or change the permissions, to the SAM Connect administrator accounts you create. See the [SAM Connect User's Guide](#) for more information on creating administrator accounts.

## **Contacting Technical Support**

If you or your district technical support team cannot resolve any issue, contact Technical Support through the Education Product Support website ([hnhco.com/productsupport](http://hnhco.com/productsupport)) or by phone at 1-800-283-5974.



## Setting Up Your SAM Implementation

### Checklist



**When? Four to two weeks prior to the first day of school.**

Once planning is completed, there are several steps to setting up the SAM implementation in your district or school.

This checklist outlines the major tasks required for setting up your SAM implementation. Use it to set target dates for completing each task and track your progress.

Key Task	Target Date	Person/Group Responsible	Date Completed
Activate or convert licenses ( <i>page 33</i> )			
Import student and teacher data into the SAM database ( <i>page 35</i> )			
Review data best practices ( <i>page 37</i> )			

### Matching Schools

In order to connect your server with your customer account in the database, all schools in the district must be registered with SAM Connect.

When registering the server, SAM Connect will attempt to auto-match every school on the district server. If SAM Connect cannot match a school, it sends an email to the administrator explaining the problem and providing a link to the School Match tab on the SAM Connect Home screen. You must then manually match the school.

In Next Generation programs, data received in SAM Connect is reported in the Next Generation Teacher and Leadership Dashboards or SAM Central. In order for this data to be reported correctly and accurately, it is vital that the SAM Servers that communicate with SAM Connect be properly matched. Data from unmatched servers will be incomplete and can possibly result in inaccurate analysis.



## Using the Authentication Tab in SAM Connect

The Authentication Tab allows SAM Connect administrators to view the district’s Web-based programs (including SAM Central, the Teacher and Leadership Dashboards in Next Generation programs, *iRead*, *MATH 180*, , *Do The Math*, the Interactive Teaching System, and others).

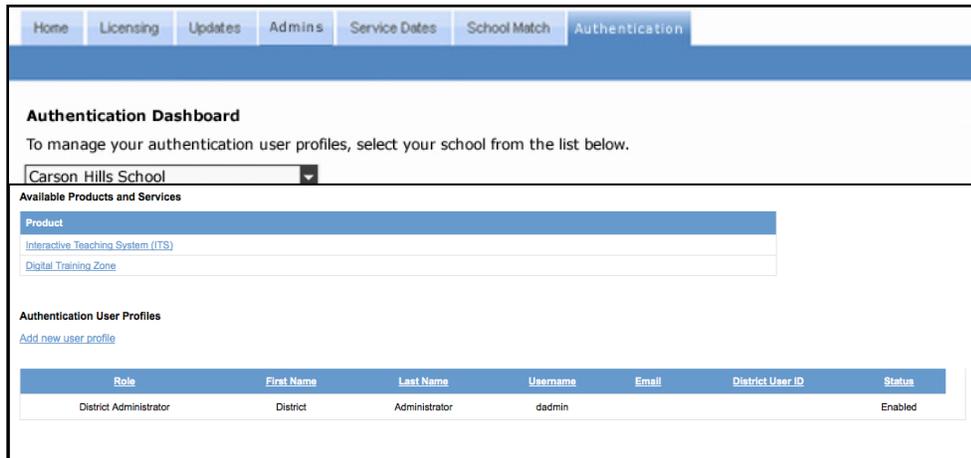


Figure 14 School View Screen on the Authentication Dashboard in SAM Connect

Clicking the Authentication Tab opens the **Authentication Dashboard**. The pull-down menu lists all schools with registered SAM servers or with SAM Connect accounts, as well as the District Office. Clicking a school from the pull-down menu opens the **School View screen**. The School View screen contains two tables:

- **Available Products and Services:** This table shows the Web-based programs purchased by the district as links that open the program’s login screen.
- **Authentication User Profiles:** This table shows all of the selected school’s users who are able to access these programs. The table will be read-only since user profiles are edited in SAM. If the school has a non-registered SAM account, then the table will have live links to add new users, import rosters, edit user profiles, and delete user profiles.



## Activating Licenses

To enroll students in SAM Suite programs, there must be an active license for each student in each program. Licenses may be activated manually or through SAM Connect.

### Activating Through SAM Connect

To activate licenses through SAM Connect:

1. Confirm that the SAM Server is registered with SAM Connect and that all schools are matched.
2. Contact Customer Service at 1-877-234-7323, and provide the representative with the school or district address, ZIP code, and the name of the server. The representative will activate licenses through SAM Connect.

## Importing Data Into SAM

When the SAM Server is connected, the necessary licenses are activated, password defaults, and all SAM software is working properly, the next step is to import student, teacher, and administrator data into SAM. Roster imports may also need to be performed during the school year. Plan ahead and notify your team prior to performing the import. Updates to the same user IDs do not impact data.

Student data may be stored in existing SAM databases, in district records, or in documents formatted into comma-separated value files (\*.csv).

### Formatting Files for Roster Imports

Before using the roster import feature in SAM, make sure that the field names in the \*.csv files match the required SAM data fields:

- **District or Student ID** (the teacher's, administrator's, or student's identification number in SAM or in other student information systems)
- **First Name**
- **Last Name**
- **Username** (the student's SAM username or username in the student information system)
- **Grade** (for student imports)



### Best Practices for Roster Imports

- **It is vital that two different users do not have the same District User IDs 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.
- Run imports after hours when students are not using the software.

See the [Data Dictionary](#) on the [Product Support](#) website for additional information.

### Using the Import Tool in SAM

Once you have created a roster import file for students and teachers, you can proceed with the roster import process by signing in to SAM. See the Roster Import section of the [HMH Hosting Guide and Data Management Manual](#) on the [Product Support](#) website for step-by-step instructions for using the SAM Import Tool.

### 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 Guide and Data Management Manual](#).



### Tech Tip

You may also import student data into a “holding” class so teachers may move those student profiles into their classes. Give the holding class a false name, such as “zzz\_Holding class,” and use the Import Tool to import those records into the holding class. This will also minimize any impact on reporting. Starting the class with “zzz” is recommended so it is easily identified and does not impact data reporting.



## Maintaining Your Data: Best Practices

It is vital to maintain good data hygiene when working with programs that report student data.

### District and School Profiles

When setting the district profile in SAM:

- Select all programs that are housed on the SAM Server. This will ensure that student program data will be reported correctly in SAM Connect.
- Check that school-year dates are consistent for all schools and classes across different servers. These dates **MUST** be consistent for accurate data reporting.
- Select the district's school days and hours and make sure they are consistent across all SAM Servers in the district. 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.

### Teacher Profiles

When setting teacher profiles in SAM:

- Each teacher **MUST** have a unique District User ID and username in their profile, regardless of which of the district's SAM Servers the teacher is on. If different users have the same District User ID servers (e.g., John Jones and Jane Jones both having "JJones") and you attempt a Roster Import, the newer profile will be added to the aggregation and 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.

### Class Profiles

When setting class profiles in SAM:

- 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 in the suite (*READ 180* Universal, *System 44* Next Generation, *iRead*, *MATH 180*, etc.), 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.

### Student Profiles and Enrollment

When setting student profiles in SAM and enrolling students in SAM Suite programs:

- Each student User ID and username **MUST BE** unique.
- If you are enrolling students in a suite of programs, make sure students are enrolled in all products in the suite
- 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.



## Running Your SAM Implementation

### Checklist



**When? During the school year.**

Once the school year begins, the focus will shift to maintaining your district’s SAM implementation and performing necessary tasks that arise during the year. Use the chart below to schedule and record your school-year tasks.

Tasks	Scheduled Day(s)/Time	Person/Group Responsible	Date(s) Completed
Providing Technical Support (Page 43)	As Needed		
Review Data Maintenance Best Practices (page 44)	Monthly/As Needed		

### Providing On-Site Technical Support

The district’s technical coordinator or district administrator is the first go-to source for technical support for teachers and school SAM administrators. Establishing lines of communication with SAM users is important.

Follow these steps to establish clear communication with SAM users in your district:

- Establish more than one form of communication (dedicated phone line, email, text). Ask and note which method is the most effective for each user.
- Provide contact information to teachers, principals, and administrators in your district who are using SAM and SAM Suite programs.
- Use more than one method of communication. Multiple reminders help everyone!
- Keep a log of each classroom using the SAM implementation, and record important dates, goals, and objectives of each classroom.

In addition to communicating with SAM users in your district, you are also the district’s contact person for Technical Support. Your first step should always be calling the Help Desk at 1-800-283-5974. Keep this information at hand for questions and troubleshooting information.



## Working With Technical Support

You can contact Technical Support at any time at 1-800-283-5974. However, most technical support issues can be best solved at the school or district level. It is good practice to develop a protocol or flow chart for dealing with technical issues and circulate the protocol to the teachers and administrators in the district. Every district has different needs and resources; use these in developing the protocol.

It is also important to assess the following questions before contacting Technical Support:

- **What diagnostics has the teacher performed?** Ask the teacher what steps he or she has taken to solve the issue prior to contacting you.
- **Is the issue related to hardware or software?** Hardware-related issues should be directed to the hardware manufacturer's technical support team or to your district's IT team if applicable. Software-related issues should be investigated to determine if the issue is related to SAM-based programs. Technical Support can also assist with this.

Make sure to log all technical support issues, and mark when they are resolved.

## Running the SAM Implementation: Best Practices

### Data

- Confirm that all schools in the district have consistent school-year dates in the school's Profile screen.
- Confirm that all programs used by a class are checked in the Manage Applications screen of the class's Profile screen and, conversely, that all programs checked are being taught in that class.
- Check that all classes have unique names (*page 38*).
- Check that all students and teachers have unique names and unique District ID numbers (*page 38 and 39*).
- Check that there are sufficient licenses for all students in all required programs (*page 34*).

### Enrollment

- Check that all students are enrolled in their programs.
- Check that students enrolled in a product suite are enrolled in all suite programs.



## End-of-Year Tasks

### Checklist



**When? Last five weeks of the school year and early summer.**

At the end of the school year, plan and perform a series of procedures that will follow student movement from one grade to another, and aggregate student and class data from SAM.

Use this checklist to schedule these end-of-year tasks. Share these plans and dates with teachers and administrators in your district so they can better plan their SAM usage, as well as know when to expect the tasks to be completed.

Task	Target Date	Person/Group Responsible	Date Completed
Exporting Data (page 47)			
Promoting Students (page 48)			

### Exporting Data

Student data needs to be exported at the end of the school year. When students transfer out of the district, their data will need to be exported out of the school's SAM implementation. Year-end data aggregation and backups will also require data exports.

The easiest way to export data is through SAM. See the Data Export section of the [HMH Hosting Services Guide and Data Management Manual](#) on the [Product Support](#) website for instructions on exporting data through SAM.

Student roster and performance data may also be exported for use with other software programs, either with the district's own student information system or with a spreadsheet program such as Microsoft Excel.

When the export file is ready, you will see a notification in the Message Center on the SAM Home Page. Click the link in the Message Center to open the message, then click the link in the message to save the export file to a flash drive, CD-ROM, or external hard drive.



#### **Tech Tip**

**Exporting large amounts of data could take several hours; plan accordingly.**



## Promoting Students

The Manage Student Promotions Wizard in SAM allows administrators to promote students from one grade to the next at the end of the school year. Use the Wizard to promote large groups without changing every student's profile in the district database.

The Manage Student Promotions Wizard also serves the following functions:

- **Promote students** a single grade while leaving them in their current classes in the SmartBar. This could be useful if an entire class is being promoted together, but staying together as a group.
- **Remove students from all of their current classes** in the SmartBar, but leave them in SAM, accessible with the Manage Inactive Accounts function. Choosing this option creates a \*.csv file, where you can edit the grade and class names in Excel (or a similar spreadsheet program) and then use the Roster Import function to place the promoted students into new classes. See the [HMH Hosting Guide and Data Management Manual](#) for more information.
- **Remove students from the SAM implementation** entirely. This option prepares a transfer \. The Wizard creates either one file for each student or a single file containing all the students being removed at a given time.. Students are also unenrolled from SAM Suite programs, freeing up licenses associated with that student.

See the Student Promotions section of the [HMH Hosting Guide and Data Management Manual](#) on the [Product Support](#) website for instructions on using the Manage Student Promotions Wizard.

informing you that the promotions have been completed.



### Tech Tip

When saving \*.csv files, be sure to select All Files in the Save As Type pull-down menu; otherwise they will be saved as HTML files.



## Technical Support

For questions or other support needs, visit the [Student Achievement Manager Product Support](http://hmc.com/sam/productsupport) website at: [hmc.com/sam/productsupport](http://hmc.com/sam/productsupport).

The screenshot shows the 'STUDENT ACHIEVEMENT MANAGER (SAM) PRODUCT SUPPORT' website. It features a navigation bar with 'Programs', 'Notices', 'FAQs', 'Contact Us', and 'Live Help'. A 'Powered by SAM' logo is prominently displayed. The main content area includes a 'FREE MONTHLY TECHNICAL WEBINARS' section, an 'INSTALLATION AND TROUBLESHOOTING TIPS' section, and a 'PRODUCT INFORMATION' section with a table of documents.

Title	Date	Version	Size	Pages	
Click on the appropriate document to download. PS 321 WILLIAM PENN SCHOOL, edit					
<b>SAM v2.4: Getting Started with Student Achievement Manager</b>					
Whole Book	01-01-16	v2.4	1.2mb	29	<a href="#">Download Now &gt;&gt;</a>
<b>SAM v2.4: Enrolling and Managing Students Using Student Achievement Manager</b>					
Whole Book	01-01-16	v2.4	2mb	32	<a href="#">Download Now &gt;&gt;</a>
<b>SAM v2.4: Using Resources in Student Achievement Manager</b>					
Whole Book	01-01-16	v2.4	599kb	14	<a href="#">Download Now &gt;&gt;</a>
<b>SAM v2.4: Using the Book Expert in Student Achievement Manager</b>					
Whole Book	01-01-16	v2.4	883kb	24	<a href="#">Download Now &gt;&gt;</a>
<b>SAM v2.4: Data Management Manual</b>					
Whole Book	01-01-16	v2.4	2.7mb	53	<a href="#">Download Now &gt;&gt;</a>
<b>Next Generation Dashboard Guide</b>					
Whole Book	01-01-16	v2.4	1.6mb	37	<a href="#">Download Now &gt;&gt;</a>

Figure 15 SAM Product Support Website

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. You can also find answers at the [SAM Help Center](http://hmc.com/Help/SAM/Administrator/#t=SAM_Administrator_and_Teacher_Help.htm), [downloads.hmlt.hmco.com/Help/SAM/Administrator/#t=SAM\\_Administrator\\_and\\_Teacher\\_Help.htm](http://downloads.hmlt.hmco.com/Help/SAM/Administrator/#t=SAM_Administrator_and_Teacher_Help.htm)

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