



SAM Connect User's Guide



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Overview

SAM Connect is a suite of utilities that allows districts to better manage the district's Student Achievement Manager and SAM Suite programs. SAM Connect links districts' SAM Servers to a central server over the Internet, enabling authentication for many of the web-based services and products as well as electronic software updates.

About This Manual

There are two sections to this manual, which covers establishing the district's SAM Connect account as well as using the SAM Connect services and functions:

- **Setting Up SAM Connect** explains everything customers need to do before they begin using SAM Connect, specifically:
 - **Registering SAM Servers to SAM Connect:** Districts must register each of their SAM Servers with SAM Connect in order to initiate contact between them.
 - **Creating SAM Connect Administrator Accounts:** SAM Connect requires an administrator at the district level to manage SAM Connect and establish other administrator accounts.
 - **Matching Schools:** In order for the connection between SAM Servers and SAM Connect to function efficiently, districts must correctly identify each school in SAM in the Profile and Contact tabs, so that SAM Connect matches their information to its servers.
- **Using SAM Connect** explains how to use the SAM Connect Home Screen, create additional SAM Connect administrators, and use the Update Manager and Authentication tabs.

Customers are not required to register every SAM Server at the district before they log on to SAM Connect, but it is strongly recommended. If a new SAM Server is installed later, districts may register the server at any time. However, all servers must be registered before districts may fully use SAM Connect services.



This manual covers setting up and using SAM Connect. For other SAM reference issues, see the guide below. All manuals are available at the [Product Support](#) website.

For information on:	See:
Specific settings and reports for SAM Suite programs	<i>Settings and Reports</i> manual for the specific program
Getting started in SAM and setting up accounts at the district and school levels	<i>Getting Started With Student Achievement Manager</i>
Adding and enrolling students in SAM	<i>Enrolling and Managing Students Using Student Achievement Manager</i>
The Book Expert	<i>Using the Book Expert in Student Achievement Manager</i>
Using SAM Resources	<i>Using Resources in Student Achievement Manager</i>
Setting up an aggregate server, importing or exporting records, or other administrative tasks	<i>SAM Data Management Manual</i>



Setting Up SAM Connect

Before districts may use SAM Connect, they must:

1. Register each SAM Server with SAM Connect
2. Identify at least one SAM Connect administrator (either when they register their first SAM Server or by calling Technical Support)
3. Check that SAM Connect has correctly matched their schools on its SAM Server to the SAM Connect Server

Registering District SAM Servers to SAM Connect



SAM Servers must be registered with SAM Connect to be able to use the service and receive server updates.

To register a SAM Server with SAM Connect, install SAM Server v1.9 or later on the server computer, or upgrade the existing SAM Server to v1.9 or later. After the software is installed, the installer prompts users to register the server and download a registration key. Users do not need to have administrator permissions in SAM Connect to register a server. For more information, see the [Installation Guides](#) for any Enterprise Edition or Next Generation program.



Creating SAM Connect Administrator Accounts

The user registering the server with SAM Connect becomes the SAM Connect administrator. The SAM Connect administrator may create other administrators and manage optional services, such as changing the Update Manager settings. Each district must have at least one SAM Connect administrator, but may create as many as it needs.

There are two ways to create a SAM Connect administrator account:

Create an administrator account during SAM Server installation or upgrade by checking **Request SAM Connect Account** on the Server Registration online form. See the SAM Server Installation section of any [Installation Guide](#) for more information.

OR

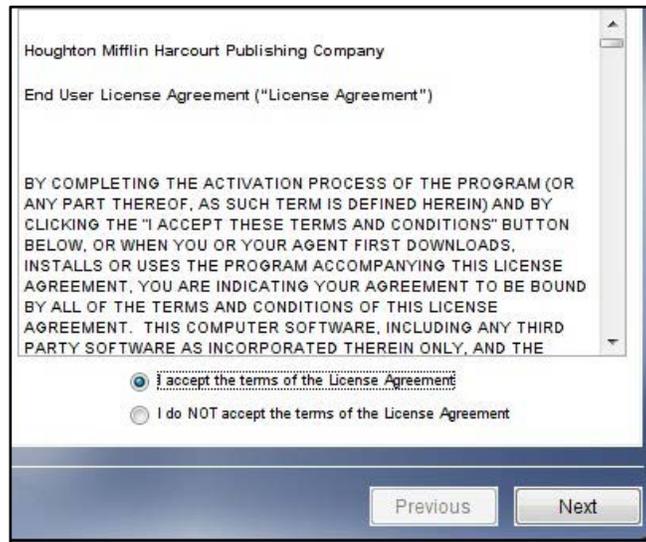
Establish an administrator account directly with Technical Support. To do this, follow these steps:

1. Contact Technical Support at 1-877-234-7323 or through the [Product Support](#) website to verify the administrator is a current district employee. This person then receives a welcome email containing a link to complete the SAM Connect Registration.

The screenshot shows a registration form with the following elements:

- Title: SAM Connect Registration
- Field 1: Password (masked with *****)
- Field 2: Confirm Password (masked with *****)
- Button: Register

2. SAM Connect automatically sets the username as the recipient's email address. Enter a password and click **Register**.



3. Use the username and password to log in to the site. If this is the first administrator in the district, the user must accept the **License Agreement**. Click the button next to **I accept the terms of the License Agreement** to accept the agreement and go on to the Home Screen of SAM Connect. Choosing **I do NOT accept the terms of the License Agreement** opens a message window that reads: "The License Agreement must be accepted in order to access this site. Log in again to accept the License Agreement."



- When the License Agreement is accepted, or if the district already has one administrator who has accepted it, the SAM Connect Home Screen appears.

With an administrator account established, the SAM Connect administrator may establish other SAM Connect administrators, opt in to optional services, and set permissions. The new SAM Connect administrator has read-only privileges until the Update Manager (page 17) is activated.

To create additional SAM Connect administrator accounts, use the Admins tab on the Home Screen (page 30).

Naming SAM Servers

Name the district's SAM Server(s) as part of the SAM Connect registration process. Naming conventions are important, as they directly affect the ability to identify servers.

Best Practices for Naming SAM Servers

- Server names **MUST BE** unique. Having two servers with the same name in the same SAM deployment will cause errors in data reporting and result in inaccurate reporting.
- Avoid generalities in naming servers (“the SAM server,” “the reading server,” “the math server”).
- Use either a district or school name in the server’s name (“Quincy District 1,” “Quincy Middle School”).
- If a server is dedicated to one program or suite of programs, use the name of the program in the name of the server (“Quincy District_R180”).



Matching Schools

District SAM Servers must be matched to SAM Connect in order for all features to fully function, as well as to authenticate and access the Interactive Teaching Systems (ITS) for *READ 180*[®] and *System 44*[®]. SAM Connect attempts to match schools based on the school name and mailing address as entered in SAM.

Registered SAM Servers synchronize with SAM Connect about once every 30 minutes. When a registered SAM Server informs SAM Connect of a change in data, SAM Connect attempts to match that school.

Next Generation Program Users: Data received in SAM Connect is reported in the Next Generation Teacher and Leadership Dashboards. 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.

If SAM Connect cannot match a school on a SAM Server, it sends an email to the SAM Connect administrator explaining the problem and providing a link to the **School Match** tab on the SAM Connect Home Screen.

There are two ways to manually match schools. **Option A** is recommended as it ensures that the match remains once it is made, even if the school's information moves to another database. Use **Option B** if SAM Connect detects mismatched schools while trying to opt in to optional services.

The screenshot shows the 'My District' profile page for Quincy School District. The page includes a navigation bar with 'Home', 'Roster', 'Reports', 'Resources', 'Books', and 'Portfolio'. The main content area is divided into sections: 'Profile for Quincy School District' with fields for Contact Name, Title, Email, Phone Number, and Number of Students; 'Usage Summary' with a 'Print Version' link; and a table of 'Programs' with columns for program name, settings, and advanced settings. The 'Advanced Settings' section includes links for Manage Licenses, Import, Import Teachers, Import Admins, Export, Manage Inactive Accounts, and Manage Student Promotions.

Option A: For each SAM Server with a non-matching school, follow these steps:

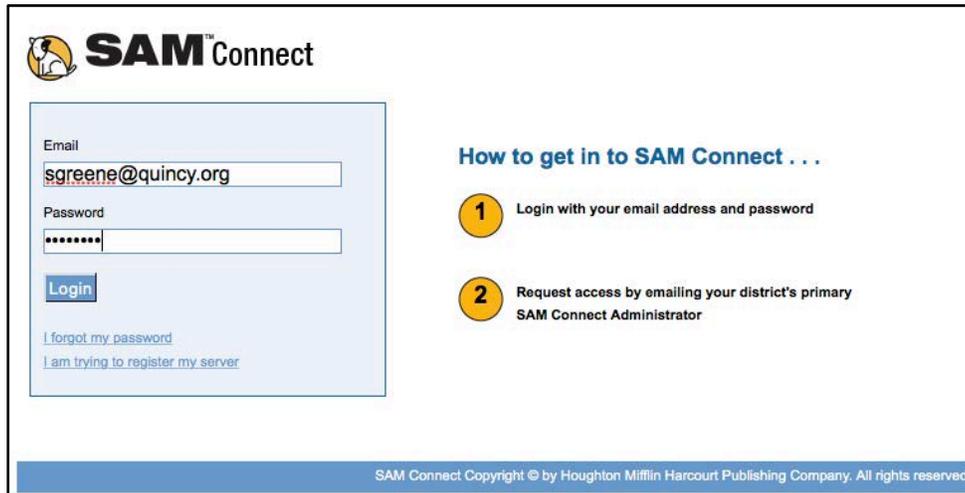
1. Double-click the school that needs to be fixed in the SmartBar in SAM to open the school's Profile Screen.



Using SAM Connect

The SAM Connect Home Screen is the web-based interface where administrators may manage their SAM Connect account and optional services.

Accessing the Home Screen



To access the Home Screen, go to this URL: <https://samconnect.scholastic.com>. Enter the email username and password and click **Login** to go to the Home tab.

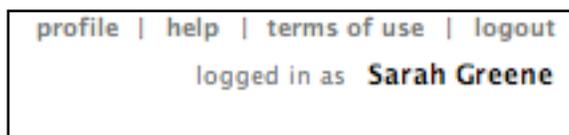
The Home Tab



The Home tab provides general overall information about SAM Connect. The five tabs access the different functions of the program. Tabs that require special permissions do not appear for administrators who do not have those permissions.



The Menu Bar



The Menu Bar appears in the upper right corner of every screen and includes the following options:

- **Profile:** This opens the **Edit Administrators** screen, displaying the data for the administrator currently logged in.
- **Help:** This opens the Frequently Asked Questions screen.
- **Terms of Use:** This links to the License Agreement accepted by the administrator when installing the SAM Server and registering with SAM Connect.
- **Logout:** This logs the user out of SAM Connect.
- **Logged In:** This displays the name of the administrator logged in.

Once a district has registered its servers and created at least one SAM Connect administrator, that district may use SAM Connect in read-only mode. Once an optional service is activated, administrators may access tabs for those services, and they are no longer read only.



The Updates Tab

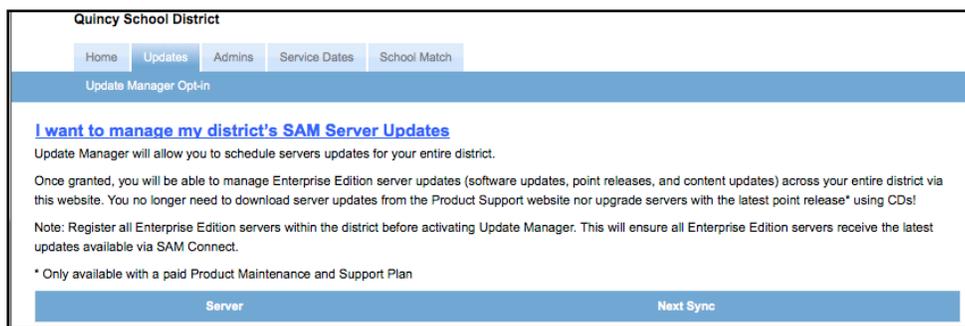
Administrators with permissions to manage optional services may view the Update Manager screens as read-only until opting in to the service.

Opting In to the Update Manager

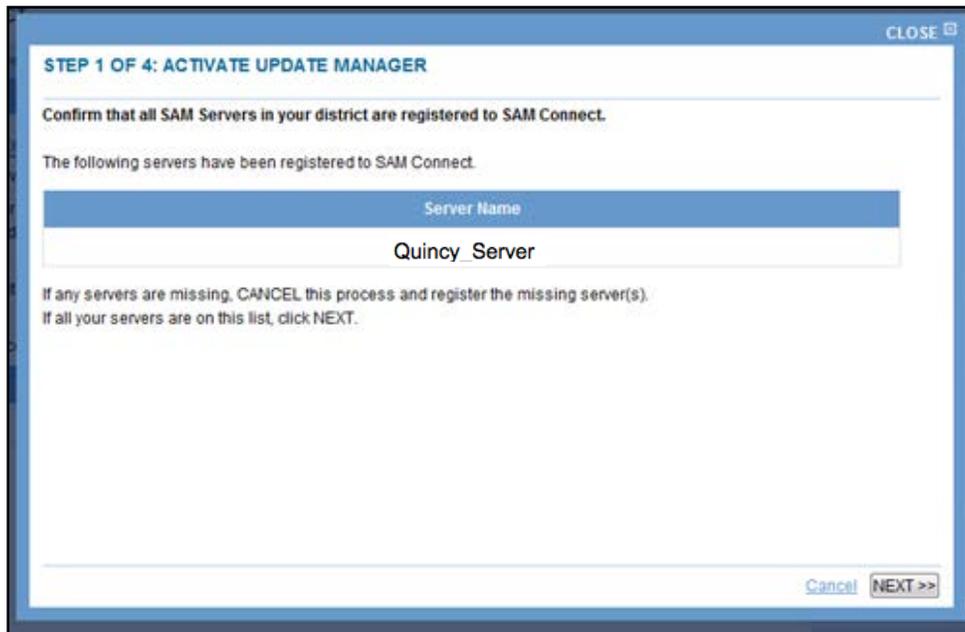
The **Update Manager** enables users to schedule server updates and *Reading Counts!* quiz updates to registered SAM Servers. To activate the Update Manager, a SAM Connect administrator with Manage Server permissions must opt in to the service. Once the Update Manager is activated, it remains active for the district and any user may schedule automatic updates for each SAM Server.

To opt in to the Update Manager:

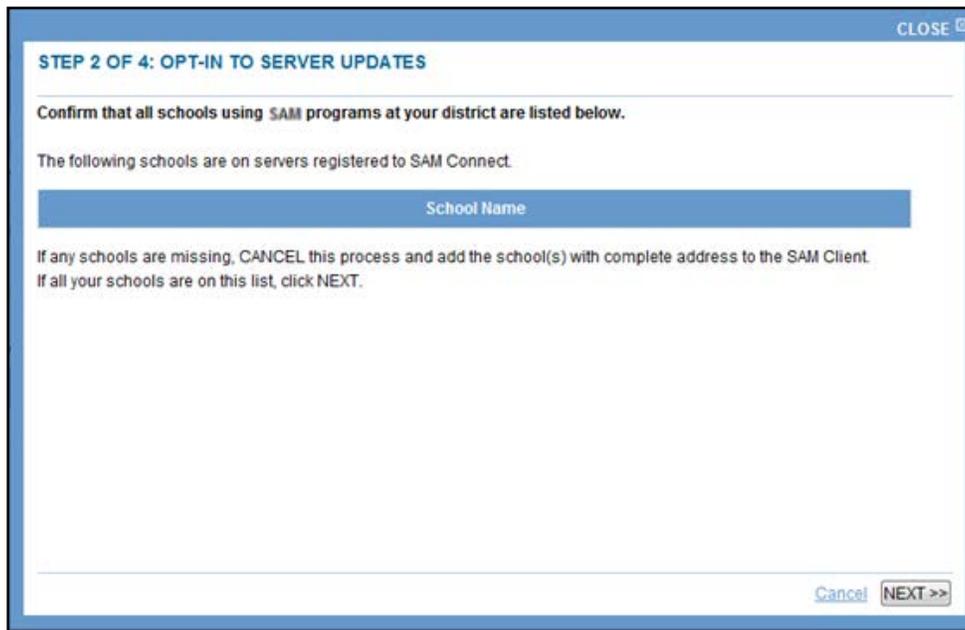
1. Register all of the district's SAM Servers with SAM Connect and log in to SAM Connect as an administrator.



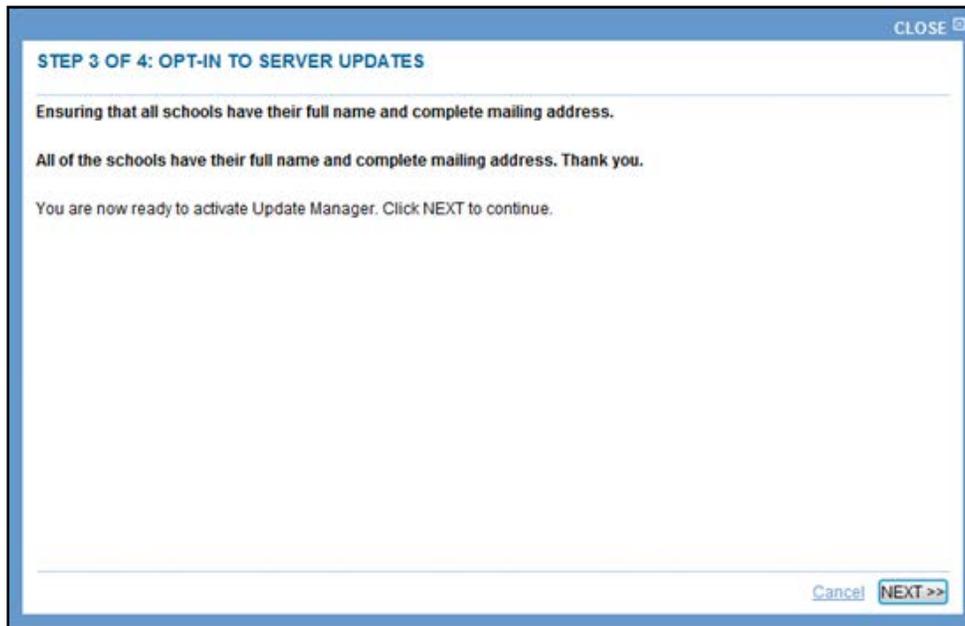
2. Click the Updates tab, then click **I want to manage my district's SAM Server Updates**.



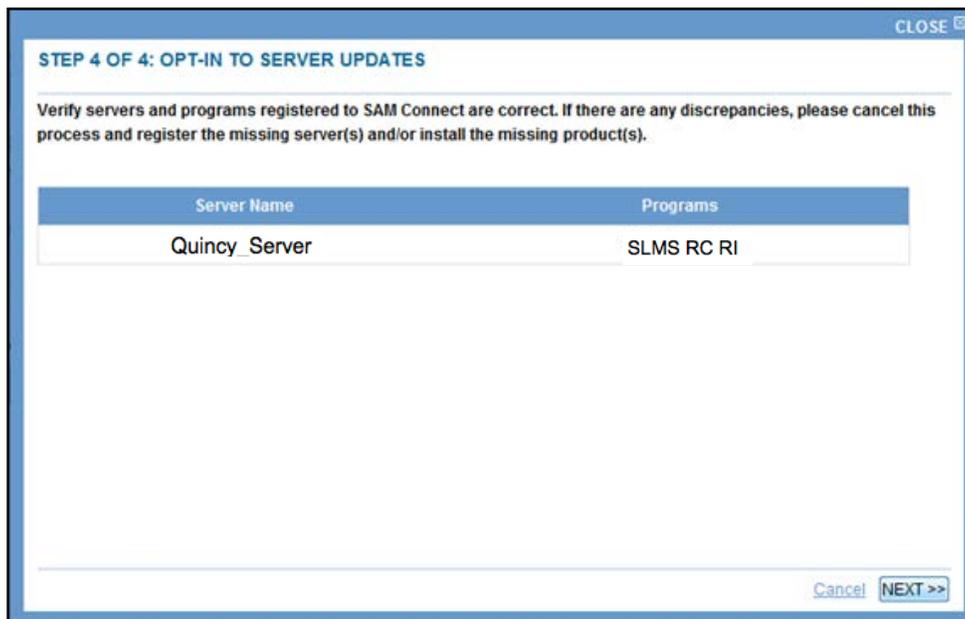
3. SAM Connect displays a list of the district's currently registered SAM Servers. If the list is complete, click **Next**. If more servers need to be added, click **Cancel** and register the missing servers with SAM Connect (page 5).



4. SAM Connect displays a list of every school name on the district's registered SAM Servers. If this list is complete, click **Next**. If this list is missing school names, click **Cancel**. A school name is missing because its SAM Server is not registered. Register the missing servers with SAM Connect (page 5).



5. SAM Connect attempts to match the schools on the registered SAM Servers. If every district school matches an existing school entry, click **Next**. If there are schools whose names or addresses don't match, SAM Connect displays their names here, as they exist on the SAM Servers. See *page 19* for instructions on matching schools.



6. SAM Connect lists each SAM Server that the district has registered with SAM Connect and the programs installed on each server. If the list is correct, click **Submit**. If there is an error in the list, click **Cancel** and contact Technical Support (*page 43*).



Quincy School District

Home Updates Admins Service Dates School Match Authentication

Dashboard Update Settings Available Updates Scheduled Updates Completed Updates RC Quiz Preferences View Servers

Confirmation: Opt-in to Server Updates
You have successfully activated Update Manager for all registered Enterprise Edition servers at the district.

Previous Next Cancel Finish

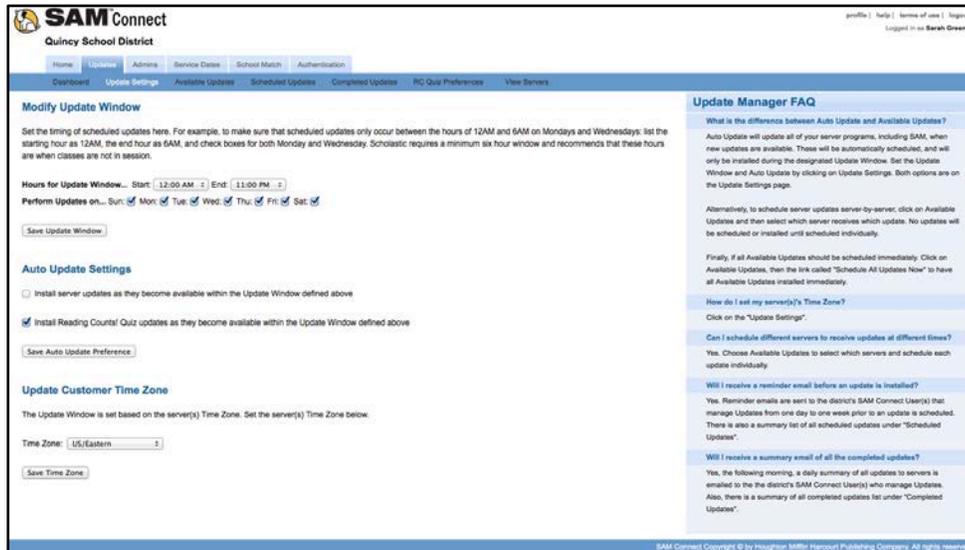
Update Manager FAQ
What is the difference between Auto Update and Available Updates?
Auto Update will update all of your server programs, including SAM, when new updates are available. These will be automatically scheduled, and will only be installed during the designated Update Window. Set the Update Window and Auto Update by clicking on Update Settings. Both options are on the Update Settings page.

7. Click **Finish** to go to the Update Settings heading to set up the Update Manager.



Setting Up the Update Manager

After opting in to the Update Manager, the Update Settings Screen appears.



These settings must be initialized before automatic updates may be scheduled:

- **Time Zone:** Select the time zone from the Update Customer Time Zone pull-down menu. Click the **Save Time Zone** button to save the setting.
- **Automatic Update Settings:** Choose to receive updates automatically or schedule the updates as they become available. Set server updates to automatically install during the Update Window by clicking the Automatic Update Settings checkbox (the default setting is unchecked, or not set to Auto Update). Click **Save Auto Update Preference** when finished.
- **Update Window:** If using Automatic Update, set the time Automatic Update should run in the **Modify Update Window** section. Set the Update Window to a day and time when students or teachers are not accessing the SAM Server. The update window must be at least six hours long. Days apply to the Start Time. Click **Mon** and set **Start** to 10 PM to set Update Window from 10 PM Monday night to 6 AM Tuesday morning (the default is Friday 11 PM to Saturday 5 AM and Saturday 11 PM to Sunday 5 AM). When finished, click **Save Update Windows Settings** to see a summary of the selection.

When Update Manager is set up, administrators with permissions to manage optional services may change the settings at any time.



Using the Updates Tab

The Updates tab is where administrators choose how to receive server updates, set the Update Window for automatic updates, and choose which servers or programs they need to update.

Only administrators with permissions to manage optional services may access this tab.

The Updates tab consists of the following screens:

- Dashboard
- Update Settings
- Available Updates
- Scheduled Updates
- Completed Updates
- *Reading Counts!* Quiz Updates
- All Servers

When users first access the Updates tab, they arrive at the Dashboard. Access the other screens by clicking the headings in the menu.



The Dashboard Screen

The screenshot shows the SAM Connect dashboard for Quincy School District. The main content area is divided into several sections:

- Update Settings:** Shows the current time zone (US/Eastern) and the designated update window (Monday 12 AM - 11 PM, Tuesday 12 AM - 11 PM, Wednesday 12 AM - 11 PM, Thursday 12 AM - 11 PM, Friday 12 AM - 11 PM, Saturday 12 AM - 11 PM, Sunday 12 AM - 11 PM).
- Available Updates:** A table listing updates that are currently available for installation.

Name	Program	Version	# Servers
SAM Server 1.10.2	sms	8869	3
FASTT Math Server 1.10.2	fm	8869	1
R180 Server Release 1.10.2	r180	8869	1
- Scheduled Updates:** A table listing updates that are scheduled for installation.

Scheduled At	Name	Program	Version	Server Name
Scheduled At	Name	Program	Version	Server Name
- Completed Updates:** A table listing updates that have been successfully installed.

Scheduled	Completed	Name	Program	Version	Server
06/22/16 (01:00:00 AM)	06/22/16 (08:19:26 AM)	FASTT Math Server 1.10.2	fm	8869	GLM
01/27/16 (03:00:00 AM)	01/27/16 (03:05:22 AM)	January 2016 6.8 monthly	smqup03	201601	HOSTED
01/27/16 (03:00:00 AM)	01/27/16 (03:41:13 AM)	January 2016 HIS monthly	smqup04	201601	HOSTED
01/27/16 (03:00:00 AM)	01/27/16 (04:15:44 AM)	January 2016 3.5 monthly	smqup02	201601	HOSTED
01/27/16 (03:00:00 AM)	01/27/16 (04:46:00 AM)	January 2016 K-2 monthly	smqup01	201601	HOSTED
- Update Manager FAQ:** A sidebar section containing frequently asked questions about update settings and schedules.

The Dashboard provides a snapshot of update settings. It has several panels:

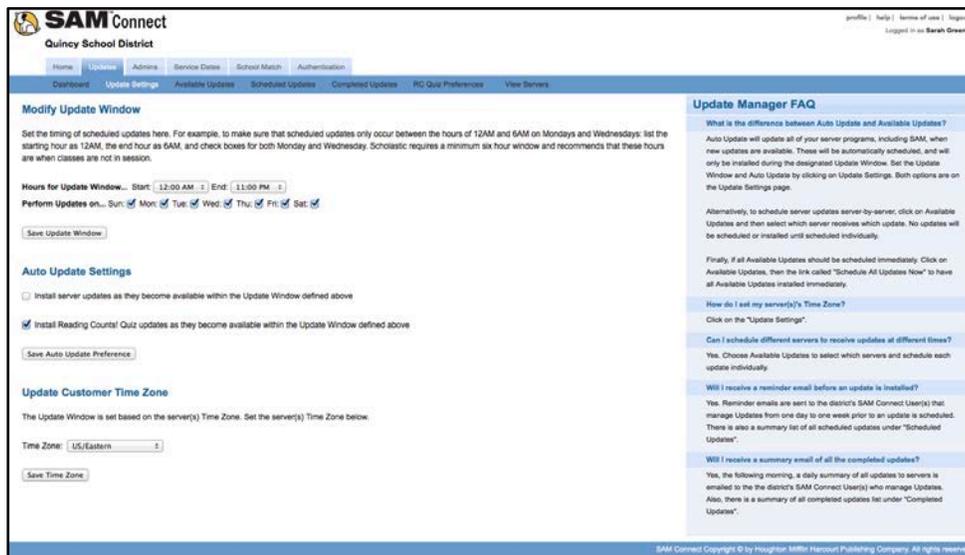
- Update Settings:** Shows the current settings for the district's Auto Update, Time Zone, and Update Window options. To change these settings, click **Update Settings** or the **Edit Settings** link to open the Update Settings Screen.
- Available Updates:** Shows which updates are currently available to the district for download to registered SAM Servers. Updates are listed by Program, Version, and the Number of Servers the update applies to. Each time the update is successfully applied to a server, the number of servers decreases by one. If the district is receiving Auto Updates, updates appear in the Scheduled Updates list instead. Click **More Details** to access the entire list in a separate screen.
- Scheduled Updates:** Shows which updates are scheduled for the district's registered SAM Servers, displayed with the Scheduled Date, Program, Version number, and Server name. Once a scheduled update is completed, the listing moves to the Completed Updates list. To access the entire list, click **More Details**.



- **Completed Updates:** Shows updates that have been applied to the district's SAM Servers, displayed with the Scheduled Date, Completed Date, Program, Version number, and Server name. To access the entire list in a separate screen, click **More Details**.
- **Snapshot:** Shows how many active SAM Servers and schools on these servers are registered with SAM Connect, as well as the district's Update Manager status.
- **Alerts:** Shows how many SAM Servers have not synchronized with SAM Connect within the last 4 hours and the last 12 hours (servers should typically synchronize approximately once every half hour). Click the number to access the **All Servers** screen for more information.



The Update Settings Screen



The Update Settings Screen enables administrators to choose whether to receive updates automatically. Administrators may also reset the Update Window and Time Zone from this screen. See *page 27* for instructions on scheduling updates.

The screen is divided into three sections:

- **Modify Update Window:** Allows users to change the times of scheduled updates. To change settings, select the day of the week and hour of the day to begin updates, and click the **Save Update Window** button to save changes.
- **Auto Update Settings:** Allows users to choose to receive updates automatically. To change the setting, click the checkbox to apply Auto Updates, or leave the checkbox empty to individually apply updates. Click **Save Auto Update Preference** to save changes.
- **Update Customer Time Zone:** Allows users to change time zone settings. To change settings, select the district's time zone and click the **Save Time Zone** button to save changes.



The Available Updates Screen

Name	Program	Version	Server Name	Action
FASTT Math Server 1.10.2	sm	8869	GLM	Schedule
R190 Server Release 1.10.2	r190	8869	operbook_server	Schedule
SAM Server 1.10.2	slms	8869	operbook_server	Schedule
SAM Server 1.10.2	slms	8869	GLM	Schedule
(SAM) v2.2.7 (N)	slms	300002	APAC Mac	Schedule
RIC Release 1.10.2	slc	8869	operbook_server	Schedule

The Available Updates Screen displays the updates that administrators may apply to district SAM Servers by Program, Version Number, and the Number of Servers to which it may be applied. Software updates are available to all users. *Reading Counts!* quiz updates are available to customers with an active *Reading Counts!* Content Renewal Plan.

Administrators may search the table to see available updates displayed by program or by server by using the Search functionality. They may adjust the number of items displayed on each page using the pull-down menu. There is also a **Schedule** link that may be used to schedule the update. Once the update is scheduled, it moves from the Available Updates Screen to the Scheduled Updates Screen (page 28). If the district is set to receive updates automatically, no updates appear on this list; available updates appear automatically on the Scheduled Updates Screen.

Administrators may apply updates in two ways:

- Schedule All Updates Now:** Click the **Schedule All Available Updates Now** link at the top of the screen to apply every displayed update to every eligible server immediately.
- Schedule Updates Individually:** Click the **Schedule** link next to the selected update to apply updates to servers individually.



The Scheduled Updates Screen

Quincy School District

Home | Updates | Admins | Service Dates | School Match | Authentication

Dashboard | Update Settings | Available Updates | **Scheduled Updates** | Completed Updates | RC Quiz Preferences | View Servers

Scheduled Updates

Scheduled At	Name	Program	Version	Server Name	Action
05/20/14 (12:00:00 AM)	SAM Server	READ 180	8864	educ-server	Cancel

Update Manager FAQ

What is the difference between Auto Update and Available Updates?

Auto Update will update all of your server programs, including SAM, when new updates are available. These will be automatically scheduled, and will only be installed during the designated Update Window. Set the Update Window and Auto Update by clicking on Update Settings. Both options are on the Update Settings page.

Alternatively, to schedule server updates server-by-server, click on Available Updates and then select which server receives which update. No updates will be scheduled or installed until scheduled individually.

The Scheduled Updates Screen displays any update currently scheduled to be applied to a SAM Server.

Once an update is applied to a SAM Server, that update moves from this list to the Completed Updates Screen. To cancel an update, click the **Cancel** link; to select a different Start Hour or Day for an update, click the **Reschedule** link.

Each row in the table represents one program update on one server. The table displays the following:

- **Scheduled At:** The Start Hour selected for the update on that server
- **Name:** The update name
- **Program:** The program being updated
- **Program Version:** The program's version number
- **Server:** The server where the update is being applied
- **Actions:** Any action taken (cancellations, reschedulings) during the update



The Completed Updates Screen

Completed Updates

Status	Scheduled At	Completed At	Name	Program	Version	Server Name
Cancelled	05/22/16 (01:00:00 AM)	05/22/16 (08:19:26 AM)	FASTT Math Server 1.10.2	fm	8809	DLM
Successful	05/11/16 (04:00:00 AM)	05/11/16 (06:22:38 AM)	May 2016 HS monthly	erou04	201605	HOSTED
Successful	05/11/16 (04:00:00 AM)	05/11/16 (05:33:10 AM)	May 2016 6-8 monthly	erou03	201605	HOSTED
Successful	05/11/16 (04:00:00 AM)	05/11/16 (05:00:44 AM)	May 2016 K-2 monthly	erou01	201605	HOSTED
Successful	05/11/16 (04:00:00 AM)	05/11/16 (04:25:08 AM)	May 2016 3-5 monthly	erou02	201605	HOSTED
Successful	04/20/16 (04:00:00 AM)	04/20/16 (06:07:02 AM)	April 2016 3-5 monthly	erou02	201604	HOSTED
Successful	04/20/16 (04:00:00 AM)	04/20/16 (05:33:56 AM)	April 2016 6-8 monthly	erou03	201604	HOSTED
Successful	04/20/16 (04:00:00 AM)	04/20/16 (05:02:42 AM)	April 2016 HS monthly	erou04	201604	HOSTED
Successful	04/20/16 (04:00:00 AM)	04/20/16 (04:25:22 AM)	April 2016 K-2 monthly	erou01	201604	HOSTED
Successful	03/12/16 (03:00:00 AM)	03/12/16 (05:35:51 AM)	March 2016 HS monthly	erou04	201603	HOSTED

Showing 1 to 10 of 21 entries

Update Manager FAQ

What is the difference between Auto Update and Available Updates?
 Auto Update will update all of your server programs, including SAM, when new updates are available. These will be automatically scheduled, and will only be installed during the designated Update Window. Set the Update Window and Auto Update by clicking on Update Settings. Both options are on the Update Settings page.

Alternatively, to schedule server updates server-by-server, click on Available Updates and then select which server receives which update. No updates will be scheduled or installed until scheduled individually.

Finally, if all Available Updates should be scheduled immediately, Click on Available Updates, then the link called "Schedule All Updates Now" to have all Available Updates installed immediately.

How do I set my server(s)'s Time Zone?
 Click on the "Update Settings".

Can I schedule different servers to receive updates at different times?
 Yes. Choose Available Updates to select which servers and schedule each update individually.

Will I receive a reminder email before an update is installed?
 Yes. Reminder emails are sent to the district's SAM Connect User(s) that manage Updates from one day to one week prior to an update is scheduled. There is also a summary list of all scheduled updates under "Scheduled Updates".

Will I receive a summary email of all the completed updates?
 Yes, the following morning, a daily summary of all updates to servers is emailed to the the district's SAM Connect User(s) who manage Updates. Also, there is a summary of all completed updates list under "Completed Updates".

The Completed Updates Screen displays each attempt to update district SAM Servers. Each row in the table lists the following:

- **Status:** The success or failure of update attempts. Failed updates instantly appear on the **Available Updates** screen
- **Scheduled At:** The time the update was scheduled to start
- **Completed At:** The time the update completed
- **Name:** The update name
- **Program:** The program being updated
- **Version:** The program's version number
- **Server Name:** The server where the update was applied



The Quiz Preferences Screen

Quincy School District

Home Updates Admins Service Dates School Match Authentication

Dashboard Update Settings Available Updates Scheduled Updates Completed Updates RC Quiz Preferences View Servers

RC Quiz Preferences

Customer configured time zone is set to US/Eastern
 SRCI Quiz Updates will automatically be installed during the following Update Window:

Monday: 7 AM - 6 PM
 Tuesday: 7 AM - 6 PM
 Wednesday: 7 AM - 6 PM
 Thursday: 7 AM - 6 PM
 Friday: 7 AM - 6 PM

Server Name	K-2	3-5	6-8	HS	Corrections	All
educ-server	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SAM Server	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All Servers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Quiz Preferences

Update Manager FAQ

What is the difference between Auto Update and Available Updates?

Auto Update will update all of your server programs, including SAM, when new updates are available. These will be automatically scheduled, and will only be installed during the designated Update Window. Set the Update Window and Auto Update by clicking on Update Settings. Both options are on the Update Settings page.

Alternatively, to schedule server updates server-by-server, click on Available Updates and then select which server receives which update. No updates will be scheduled or installed until scheduled individually.

Finally, if all Available Updates should be scheduled immediately. Click on Available Updates, then the link called "Schedule All Updates Now" to have all Available Updates installed immediately.

The Quiz Preferences Screen allows users to set preferences for using SAM Connect to automatically update *Reading Counts!* quizzes.

This service is available only to districts with an active *Reading Counts!* content plan.

Use the boxes to set the servers that will receive updated quizzes. Click **All** to have SAM Connect update all the *Reading Counts!* quizzes on a particular server, or use the boxes to select the grades on the server that will receive updated quizzes.

When finished, click **Save Quiz Preferences** to save the selections.



The View Servers Screen

Server	Next Sync
GLM (Server ID: 8067)	2016-07-11 18:32:51.0
Fast Math (Server ID: 46428)	2016-07-11 18:38:30.0
MADAR International - DataServer (Server ID: 50876)	2016-07-11 18:33:45.0
SAMLINCOLN (Server ID: 51097)	2016-07-11 18:45:54.0
HOSTED (Server ID: 99062)	2016-07-11 18:54:55.0
APAC_Mac (Server ID: 101628)	2016-05-06 17:22:31.0
openbook_server (Server ID: 108347)	2016-07-11 10:48:51.0
Quincy 1 (Server ID: 121473)	2016-05-31 20:01:27.0
Quincy 1 (Server ID: 121490)	2016-06-08 19:01:58.0
Quincy 1 (Server ID: 121492)	2016-06-17 17:32:44.0

The View Servers Screen displays every SAM Server registered for the district by server name and next scheduled synchronization.

Click the server link to view or change server specification details, including available updates, scheduled updates, completed updates, products installed, and server settings.



Scheduling Updates

There are three ways in which administrators with permissions to manage server updates may schedule updates:

- **Automatic Updates:** If administrators select the **Auto Update** checkbox on the Update Settings Screen (*page 21*), the district receives updates automatically as they become available and only during their established Update Window days and/or start times.
- **Individually Scheduled Updates:** If administrators do not select the **Auto Update** checkbox on the Update Settings Screen (*page 21*), they may apply any available update to individual servers at any time and schedule them individually.
- **Schedule All Updates Now:** If administrators do not select the **Auto Update** checkbox on the Update Settings Screen (*page 21*), they may apply every available update to every server immediately.

Automatic Updates

Administrators choosing **Automatic Updates** set their district's update settings once. To set the Auto Update settings:

1. Click the **Updates** tab.
2. Click **Update Settings**.
3. Under Modify Update Window, select the Start Hour, End Hour, and days of the week that updates are applied. These should be hours when no one is using the servers, and backups are not scheduled.
4. Click the **Save Update Window** button.
5. Under Auto Update Settings, select the check box for Install Updates.
6. Click **Save Auto Update Preference** to save and activate these settings.

Whenever a SAM Server update is available, administrators with permissions to manage server updates receive an email explaining that a new update is available. The new update appears in Scheduled Updates (*page 23*), and administrators may either reschedule the update or allow the update to proceed as scheduled.

When the servers are updated, SAM Connect sends an email to all administrators with permissions to manage optional services announcing whether or not the update was successful, and the date and time it was completed. In addition, the Completed Updates Screen lists the server, date, time, and specific update applied.



Individually Scheduled Updates

Districts that choose to control their updates directly may apply available updates individually to each server by not selecting the **Auto Updates** checkbox in the Update Settings Screen (page 21).

Administrators with permissions to manage server updates who choose to individually schedule updates receive an email alerting them that the new update is available. The update is also listed on the Available Updates Screen. To individually apply an update:

1. Click the Updates tab.
2. Click **Available Updates** (the list may be sorted by program or server and may be filtered by program).

Name	Program	Version	Server Name	Action
FASTT Math Server 1.10.2	fm	8869	GLM	Schedule
R180 Server Release 1.10.2	r180	8869	openbook_server	Schedule
SAM Server 1.10.2	sims	8869	openbook_server	Schedule
SAM Server 1.10.2	sims	8869	GLM	Schedule

3. Click the **Schedule** link next to the Update being applied to go to the Scheduling Update Wizard.

SCHEDULE UPDATE WIZARD

You have selected to schedule **SAM Server** for server: **educ-server**

Program: READ 180

Version: 1.10.1

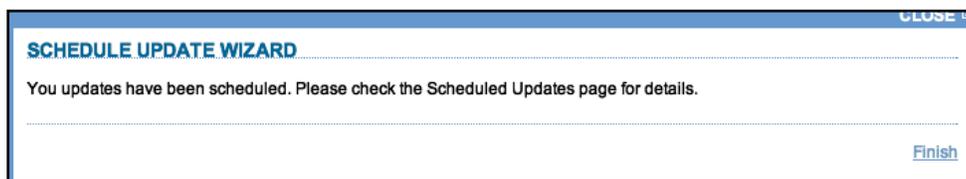
Please select time for your update below:

Month/Day/Year: MAY / 20 / 2014

Time: 12:00 AM

[Cancel](#) [NEXT >>](#)

4. Confirm the server, program, and version to be updated, then select the date and time to begin the update. Click **Next** to continue. If SAM Connect cannot update the server at the selected time (if, for example, the server cannot sync with SAM Connect), it will attempt the update again during the next day or hours allotted in the Update Window.



5. If satisfied with the selections on the Confirmation Screen, click **Finish**.

When the Individually Scheduled Update option is complete, the update moves from the Available Updates Screen to the Scheduled Updates Screen (if the update applies only to some servers, it remains on the Available Updates Screen with the number available decreased). Administrators with permissions to manage server updates receive an email explaining which servers will be updated and when. Each server downloads the update at the selected time and sends a second email confirming the process is complete. The Completed Updates Screen lists the server, date, time, and update applied.

Schedule All Updates Now

Districts that choose to update servers individually may apply available updates to every eligible server at once. Administrators for these districts should not select the **Auto Updates** checkbox in the Update Setting Screen (*page 21*).

Administrators with permissions to manage server updates will receive an email when new updates are available. Updates are also listed on the **Available Updates** screen. To apply all available server updates immediately:

1. Click the Updates tab.
2. Click **Available Updates**.
3. Click the **Schedule All Available Updates Now** link.
4. Click **OK** to update each of the listed servers with the available updates. Click **Cancel** to return to the previous screen.

After clicking **OK**, every eligible server downloads the updates upon next synchronization with SAM Connect. In other words, all Available Updates will begin to be applied to all servers within the next 30 minutes. Administrators with permissions to manage server updates receive an email explaining that the update has been completed, and the Completed Updates Screen lists the server, date, time, and specific update applied.



The Admins Tab

The Admins tab allows SAM Connect administrators to create additional SAM Connect administrator accounts as well as manage all administrator accounts.

Name	E-mail Address	Actions
Greene, Sarah	sgreene@quincy.org	edit delete

[Add Admin](#)

Admin Help

Who is an Admin User?

Anyone at the district level that should have permission to schedule when server updates are applied to any or all registered SAM EE servers, and/or anyone at the district level that should be able to add other SAM Connect Admin Users.

To create a new SAM Connect administrator account:

1. Click the **Add Admins** button from the Admins tab.

SAM Connect
Quincy School District

Home Updates **Admins** Service Dates School Match Authentication

Add Admins

* Required fields

Salutation
N/A

First Name *

Last Name *

Job Title *
Information/Technology Director

Phone Number *

Email *

Permissions

Add New Admins

Manage Licenses

Manage Updates

Manage Authentication

[Submit](#)

2. Fill in the information on the Add Admins Screen and hit **Submit**.
3. The administrator roster appears with the new administrator account listed.

To manage administrator accounts, click the **Edit** button next to the account name to edit that account's information and permissions.

To delete an administrator account, click **Delete** next to the account name.



The Service Dates Tab

SAM Connect
Quincy School District

Home
Updates
Admins
Service Dates
School Match
Authentication

Product Maintenance & Support Plans and Service Dates

Expiration Dates by District/School

Includes Product Maintenance & Support Plans, Hosting Services, Read 180 Interactive Teaching Systems (ITS), and all types of Enterprise Program Service Dates.

District/School	Type of Service	Start Date	Expiration Date
Quincy School District	READ 180 Next Generation Conversion Stage A	No Date Provided	No Date Provided
Quincy School District	System 44 Next Generation Conversion	No Date Provided	No Date Provided
Quincy School District	Premium Maintenance and Support Plan	Feb 08, 2016	Feb 07, 2017
Quincy School District	Interactive Teaching System	Feb 08, 2016	Feb 07, 2017
Quincy School District	Training Zone	Nov 17, 2015	Nov 16, 2016
Quincy School District	Interactive Teaching System	Jul 15, 2015	Jul 15, 2016
Quincy School District	Digital U	Jul 07, 2015	Jul 06, 2016

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* Premium Maintenance & Support Plans include access to software updates, maintenance releases, and the READ 180 ITS

The Service Dates tab lists all the district's subscriptions by District/School, Type of Service, and Expiration Date. There are four types of services:

- **Interactive Teaching System (ITS):** Provides teachers with online access to the *rBook® Teacher's Edition* and the *Resources for Differentiated Instruction* books, the *System 44 Teacher's Edition* and the *44Book*
- **Product Maintenance and Support Plan:** Provides districts and schools various technical support plans
- **Hosting Services:** Provides a dedicated and secure application server for schools or districts
- **Reading Counts! Quiz Subscriptions:** Provides monthly delivery of *Reading Counts!* quizzes as part of a district's Student Access Fee or District Plan



The School Match Tab

The screenshot shows the SAM Connect interface for Quincy School District. At the top, there are navigation tabs: Home, Updates, Admins, Service Dates, School Match (selected), and Authentication. Below these are sub-tabs: Unmatched, Matched, and Pending. The main content area is titled "Unmatched Schools" and contains the following text:

Below is a list of schools that could not be automatically matched to the SAM Database. Click on the Match button to manually select the matching school.

Before starting this process, it is HIGHLY recommended that you update the address and contact information for each school using the SAM client. Doing so may allow you to avoid manually matching your school(s).

Address as Entered	SAM Server Name	
Quincy School	HOSTED	
One Quincy Place		<input type="button" value="Match"/>
Quincy, NY 12000		<input type="checkbox"/> Mark as "Test School Only"

The School Match tab displays all unmatched schools in the district. The table displays the schools by address as entered in SAM (Address as Entered), and by the nickname of the SAM Server where the school is listed (SAM Server Name).

Click the **Match** button in the school's row to open the School Match Wizard, or select the **Mark as "Test School Only"** checkbox if the listed school is not an actual school (some districts create fake schools for the purpose of running reports).



The School Match Wizard

To use the School Match Wizard:

SAM Connect
 Quincy School District

Home | Updates | Admins | Service Dates | **School Match** | Authentication

Unmatched | Matched | Pending

Unmatched Schools

Below is a list of schools that could not be automatically matched to the SAM Database. Click on the Match button to manually select the matching school.

Before starting this process, it is HIGHLY recommended that you update the address and contact information for each school using the SAM client. Doing so may allow you to avoid manually matching your school(s).

Address as Entered	SAM Server Name		
Quincy School	HOSTED	Match	<input type="checkbox"/> Mark as "Test School Only"
One Quincy Place			
Quincy, NY 12000			

1. Click the School Match tab to display a list of unmatched schools. The school name is displayed as it is registered on one of the district's SAM Servers. If a district has created schools in the SAM Client merely for administrative purposes (to run different sets of reports, for instance), select the **Mark as "Test School Only"** checkbox for that school. Otherwise, click the **Match** button to open the School Match Wizard.

SCHOOL MATCH WIZARD
 QUINCY SCHOOL

Enter a ZIP code for **QUINCY SCHOOL** and click Go. A list of possible matches will appear below.

Zip Code:

|

2. Enter the ZIP code of the selected school and click **Go** to display a list of every school in the Customer Database in that ZIP code.



SCHOOL MATCH WIZARD
QUINCY SCHOOL

Enter a ZIP code for **QUINCY SCHOOL** and click Go. A list of possible matches will appear below.

Zip Code:

<input type="radio"/>	Quincy District Office	One Quincy Place, Quincy NY 12001	Available
<input type="radio"/>	Quincy School	One Quincy Place, Quincy NY 12001	Available

|

3. If the unmatched school is on the list, select the button for that school and click **Match** to open a confirmation screen.

SCHOOL MATCH WIZARD

Congratulations! You have matched Quincy School - 4/15/14 - 6/15/14 to Quincy District Office.

4. The confirmation screen lists the name as it appears on the district server and as it appears in the SAM Connect database. Click **Finish** to return to the School Match tab to match another school.



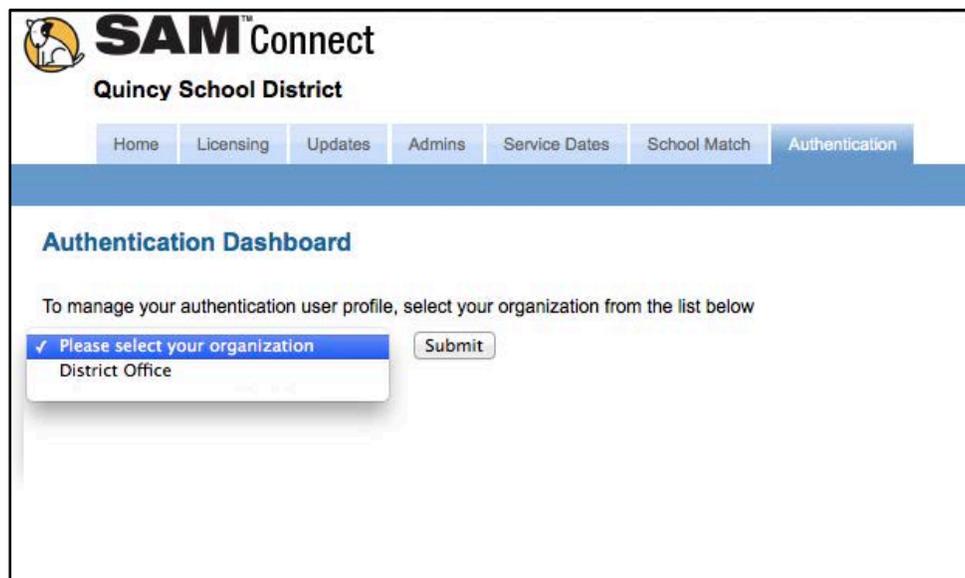
The Authentication Tab

The Authentication tab allows SAM Connect administrators to view and manage access to the district's web-based programs (including Expert 21, the Interactive Teaching System, the Training Zone, and others).

The Authentication tab works in one of two ways, depending on whether a district's servers are registered with SAM Connect:

- Schools and Districts with Registered SAM Servers:** SAM Connect administrators from districts with servers registered to SAM Connect may use the Authentication tab to view the district's web-based programs and the users in their district who have access to these programs. User information on the Authentication Tab is read-only for schools or districts with servers registered to SAM Connect. Administrators may change the displayed information in SAM (see [Getting Started With Student Achievement Manager](#)) and these changes will be reflected on the Authentication tab at the next SAM Connect update.
- Schools and Districts without Registered SAM Servers:** Administrators from districts that do not have SAM installations, or whose school or district servers are not registered to SAM Connect, may use the Authentication tab to import rosters of users or add, edit, or delete user profiles.

The Authentication Dashboard



Clicking the Authentication tab opens the Authentication Dashboard. The pull-down menu lists all schools that have purchased web-based programs (including Expert 21, the ITS, Training Zone, and others). Click the pull-down menu, then click the school name to open the School View Screen for that school. The menu also lists the District Office; select this to manage district administrators.



School View Screen

Quincy School District

District Office: Submit

Available Products and Services

Product
Interactive Teaching System (ITS)
Expert Space for Expert 21
Training Zone

Authentication User Profiles

[Add new user profile](#)

Show 10 entries

Role	First Name	Last Name	Username	Email	District User ID	Status	Action
Teacher	Rachel	Morgan	Rmorgan1	Rmorgan1@aol.com	RMorgan1	Enabled	Edit Delete
Teacher	sheila	mejias	smejias	smejias1988@gmail.com		Enabled	Edit Delete
Teacher	Maia	Lee	maialeetest	maialeetest@me.com		Enabled	Edit Delete
Teacher	Maia	Lee	maialeetesthost	maiachristinalee@yahoo.com		Enabled	Edit Delete
Teacher	Jan	Twenty-Five	Jan25	samconnect3@gmail.com		Enabled	Edit Delete
Student	Karen	Durant	kdurant11380	karendurant11380@gmail.com	11380	Enabled	Edit Delete
School Administrator	District	Administrator	dadmin		dadmin_ID	Disabled	
District Technical Administrator	Mina	LMT	LMT	lucisaysmeow@gmail.com		Enabled	Edit Delete
District Technical Administrator	Thao	Truong	ttruong	ttruong@scholastic.com	235	Enabled	Edit Delete
District Technical Administrator	Chris	Puglisi	cpuglisi	nomail@dontbotherme.com	chrispuglisi	Enabled	

Showing 1 to 10 of 57 entries

Clicking a school on 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 clickable links. Click the links to open the login screen for that program.
- Authentication User Profiles:** This table shows the profiles of the school's Authentication users (those users who have been enrolled in the school's web-based programs). If the selected school has a registered SAM server, the users will be teachers and administrators present on the SAM server associated with the school. 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 user profiles, import rosters, edit user profiles, and delete user profiles.



Importing Rosters

QUINCY SCHOOL DISTRICT

Home | Licensing | Updates | Admins | Service Dates | School Match | Authentication

QUINCY SCHOOL DISTRICT

Authentication User Roster Import

Importing a roster will add and/or modify the list of active authentication users for your school. To import a roster, you will need a comma-separated value (.csv) file. For each authentication user that you import, the following fields are required:

FIRST_NAME: Enter the user's first name.
LAST_NAME: Enter the user's last name.
USERNAME: Enter a username.
PASSWORD: Enter a password. 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.
EMAIL: Enter a valid email.
USER_ROLE: Enter "1" for teacher. Enter "2" for school administrator. Enter "3" for school technical administrator. To add district administrator, return to the school management screen on the Authentication Dashboard and select District Office from the drop down menu.

[Download a sample CSV Roster Template](#)

After you complete your roster import, you will have an opportunity to review the authentication user profiles and edit or delete any users.
 You will also be required to fix any errors resulting from incorrect formatting of your CSV file.

Please note that the combination of the user's USERNAME, FIRST_NAME, and LAST_NAME is used as the key identifier when importing. If a record in the import file contains a USERNAME, FIRST_NAME, and LAST_NAME that matches an existing authentication user profile, that profile will be updated. USER NAMES are case sensitive for this purpose only.

To select the files that you want to import, type the name of the file or use the Browse button to locate the correct file. Then click "Import CSV File".

Select CSV file: no file selected

Registering district servers with SAM Connect is recommended. Rosters from registered SAM servers are automatically imported into SAM Connect and are updated to reflect any changes. Administrators of SAM Connect accounts without registered servers may import a roster of users from a CSV file. To import a roster, select the school from the pull-down menu and click the **Import Roster** link to open the Roster Import Screen.



The CSV file should contain the following fields for each user at the school level:

- **First Name:** The user's first name
- **Last Name:** The user's last name
- **Username:** The user's username
- **Password:** Passwords must be 8 to 16 characters, one of which must be a numeral, and not use the user's first or last name or a combination of the two
- **Email Address:** The user's email address
- **User Role:** Enter "1" for teachers, "2" for school administrator, or "3" for technical administrator. To add a district administrator, return to the dashboard and select **District Office** from the pull-down menu
- **District User ID:** The unique user ID associated with each user in the district

Click **Download a sample CSV Roster Template** to view a sample of a correctly formatted CSV roster file.

Once the CSV roster file is correctly formatted, click **Browse** to select the file for importing. When the correct file is displayed in the Select CSV File window, click **Import CSV File** to import the file. To stop and restart the process, click **Cancel**. When the CSV file is imported successfully, the User Roster Confirmation Screen appears, displaying a list of all user profiles in the CSV roster file.

QUINCY SCHOOL DISTRICT

[Home](#) | [Licensing](#) | [Updates](#) | [Admins](#) | [Service Dates](#) | [School Match](#) | [Authentication](#)

QUINCY SCHOOL DISTRICT

Roster Confirmation

The CSV file has been imported.

You may edit or delete any user profiles by clicking on the options in the Actions column.

FIRST_NAME	LAST_NAME	USERNAME	PASSWORD	EMAIL	ROLE	DISTRICT_USER_ID	ACTIONS
Sarah	Greene	sgreene	W3lcome	sgreene@quincy.org	District Administrator		Edit Delete

Please note the above marked errors, fix the errors by editing or deleting the users, then submit roster.

From the User Roster Confirmation Screen, administrators may edit or delete user profiles. When all user profiles are displayed correctly, click **Submit Roster**.



If the imported roster contains formatting errors, an error message appears at the bottom of the User Roster Confirmation Screen. Use the **Edit** link to correct the highlighted errors, then click **Submit Roster** again. Click **Cancel** to cancel the import.

Each teacher profile in the district that uses web-based programs must have a unique username. If two or more teacher profiles have the same username, these accounts are temporarily disabled until the usernames are modified, either through the roster tab of SAM if the server is registered or through the edit function of the Authentication Dashboard.

When the roster is successfully imported, all users appear on the School View Screen.



Adding Users

ADD NEW USER PROFILE
✕

***required**

*First Name:

*Last Name:

*User Role:

*Email Address:

*Username:

*Password:

*Retype Password:

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.

District User ID:

Administrators from districts with registered SAM servers do not need to add users or update the user list in SAM Connect. Changes made to user profiles in SAM will be automatically updated in SAM Connect. See [Getting Started With Student Achievement Manager](#) for more information. In these districts the user list appears as read only.

Administrators of SAM Connect accounts without registered servers can add users through the School View Screen. To add a new user, click **Add New User Profile** from the School View Screen to open the Add New User Profile window.

Fill in the fields, choose the user's role from the pull-down menu (administrator or teacher), then click **Save** to save the user profile in SAM Connect. The user's profile appears on the user profile list. Click **Cancel** to return to the School View Screen.



Editing Users

EDIT USER PROFILE
✕

*required

*First Name:

*Last Name:

*User Role:

*Email Address:

*Username:

*Password:

*Retype Password:

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.

District User ID:

Administrators from districts with registered SAM servers do not need to edit user profiles in SAM Connect. Changes made to user profiles in SAM will be automatically updated in SAM Connect. See [Getting Started With Student Achievement Manager](#) for more information. In these districts the user list appears as read only.

Administrators of SAM Connect accounts without registered servers can edit user information through the School View Screen. To edit a user profile, click the **Edit** link next to the profile on the School View Screen to open the Edit User Profile window.

Edit the fields, choose a user's role from the pull-down menu if one has not been selected, then click **Save** to save the edited user profile in SAM Connect. The edited profile appears on the user profile list. Click **Cancel** to return to the School View Screen.



Deleting Users

DELETE USER PROFILE

The following user will be deleted:

First Name: Sarah
Last Name: Greene
Username: sgreene
Email: sgreene@quincy.org
Role: Teacher
District User ID:

Cancel Delete

Administrators from districts with registered SAM servers do not need to delete users in SAM Connect. Changes made to user profiles in SAM will be automatically updated in SAM Connect. See [Getting Started With Student Achievement Manager](#) for more information. In these districts the user list appears as read only.

Administrators of SAM Connect accounts without registered servers can delete users through the School View Screen. To delete a user profile, click the **Delete** link next to the profile on the School View Screen to open the Delete User Profile window.

Review the profile, then click **Delete** to delete the user profile in SAM Connect and return to the School View Screen. The deleted profile should not appear on the user profile list. Click **Cancel** to return to the School View Screen.



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.

The screenshot shows the SAM Product Support website. At the top, there is a navigation bar with 'EDUCATION PRODUCT SUPPORT' and links for 'Programs', 'Notices', 'FAQs', 'Contact Us', and 'Live Help'. The main content area is titled 'STUDENT ACHIEVEMENT MANAGER (SAM) PRODUCT SUPPORT'. It includes a 'powered by SAM' logo, introductory text about technical resources, and a section for 'FREE MONTHLY TECHNICAL WEBINARS'. A sidebar on the right lists 'INSTALLATION AND TROUBLESHOOTING TIPS'. The main content area has tabs for 'PRODUCT INFORMATION', 'SOFTWARE UPDATE', and 'MANUALS'. Below these tabs is a table of documents for download, with columns for Title, Date, Version, Size, and Pages. The table lists several documents related to SAM v2.4, including 'Getting Started', 'Enrolling and Managing Students', 'Using Resources', 'Using the Book Expert', and 'Data Management Manual'. Each document has a 'Download Now >>' link.

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.