Clever

Preferences

- Patrons
- Items
- Circulation
- Codes
- Circulation Groups
- Z39.50
- Sounds
- Setup
- Services
- SIS Integration
- Advanced Bookings

How helpful was this page?



📜 Unknown macro: 'rate'

Tell us what we can improve.

Related Blog Posts

Blog Posts

- Blog: Winter stormsrecompute due dates created by Bethany Brown Jan 23, 2024 Alexandria
- Blog: Cleaning up the grade table—Authority Control created by **Bethany Brown** Apr 26, 2023 Alexandria
- Blog: Make a calendar just for the senior class! created by Bethany Brown Aug 02, 2022 Alexandria
- Blog: When does an overdue item become lost? created by Bethany Brown Mar 15, 2022 Alexandria
- Blog: Setting rules-Patron Policy Preferences created by Bethany Brown Mar 08, 2022 Alexandria
- Blog: Seeing double (barcodes) on patrons and items? created by Bethany Brown Feb 23, 2022 Alexandria
- Blog: Automatic email notices... What are you waiting for? created by Bethany Brown Nov 17, 2021
- Alexandria • Blog: Winter (break) is coming! Are your period due dates set? created **Bethany Brown** Oct 20, 2021 Alexandria

- Blog: Unused Barcodes: Reporting for Duty created by Bethany Brown Sep 15, 2021 Alexandria
- Blog: Introducing... FAQs! created by Morgan Jul 07, 2021 Alexandria

Save as PDF



About Clever SYSTEM-A/TT



This page has been moved to https://support.goalexandria.com/add-ons/clever/



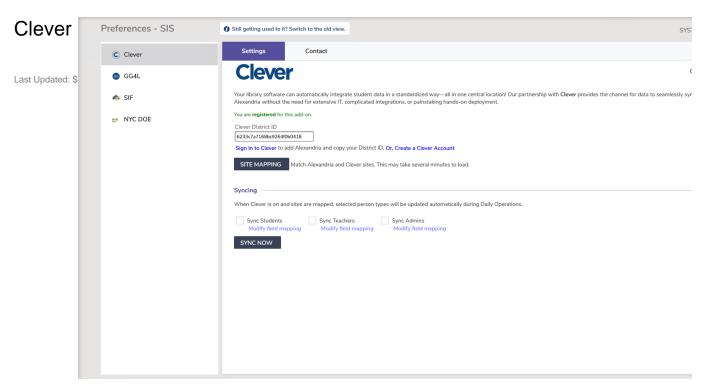
Clever is an optional Alexandria integration. Contact our Sales Team if you're interested in adding it to your library!

Managing school rosters can be a tedious, time intensive process, made even more difficult when you have to manage multiple educational programs separately. This is where Clever comes in.

Clever is a third-party service used by school districts to facilitate the secure transfer of student rosters between their school information system (SIS) and digital learning applications. Districts maintain complete control over their data, including what they send to Clever and how it is shared. Applications will only receive the data they need, nothing more. Clever only syncs roster data—no grades, attendance, health records, etc.—so you don't have to worry about the wrong information getting in the wrong hands. It's even FERPA compliant!

Our partnership with Clever can help you maintain consistent, up-to-date patron records by automatically syncing (importing) your school's teacher and student rosters to Alexandria on a daily basis. When a student moves from one school to another or changes are made to their school record, the updated information will be synced with your Alexandria patron records, eliminating data entry errors that can occur when you have to update student records in multiple applications.

If your district hasn't signed up for Clever yet, head on over to www.clever.com to learn more, or check out the Clever Help Center to get started.



How does it work?

Basically, your district data syncs with Clever, then Clever allows authorized applications to securely access the data you've specified. Changes made to your SIS will be synced with Clever, which will then be updated in your authorized applications.

Specifically, Alexandria will automatically check for any updates from Clever and then import those changes to your patron records during Daily Operations. You can also choose to manually initiate a full sync from your Alexandria account at any time in **Preferences > Extras > Clever**.

Data imported from Clever to Alexandria during a sync will overwrite matching patron data fields. If the imported data does not match an existing record, a new record will be made based on the imported data and Alexandria defaults.



Clever syncs data from your SIS to Alexandria, not from Alexandria to your SIS. Changes made to a patron's record in Alexandria will only remain changed if that field is not synced with Clever.

How do I get started?

The first thing is to sync data from your district's SIS with Clever, which is the foundation for everything Clever does. If your district is already set up on Clever then this should already be done. Follow these steps to add Alexandria to Clever:

- 1. Contact COMPanion to enable support for Clever integration.
- 2. Add Alexandria to your Clever dashboard.
- 3. Locate your Clever District ID.
- 4. Enable Clever in Alexandria.

And that's it! Alexandria will accept the request to receive data from Clever and begin automatically syncing roster information during Daily Operations.

Data Matching and Field Mapping

During the sync, Clever data is associated with Alexandria patrons by matching one or more key identifiers, including GUID, Student #, and Email. Blank fields are never used for matching.



Clever follows Alexandria's standard patron import rules, specifically those that allow the import (sync) to modify existing records. For more information, go to Import Patrons: The Rules.

Not all fields in your SIS are applicable to Alexandria, so not all student roster fields will be synced. Here's a list of the fields in Alexandria and the corresponding field in Clever that are matched during import:

Admin (Staff) Fields

Alexa ndria	Clever				
1200 GUID	School or District Admin id				
1000 Barco de	Not Mapped				
	Optional mapping to staff_id				
1001 Comm unity ID	Not Mapped				
	Optional mapping to staff_id				
1007 First Name	School or District Admin name.first				
1006 Last Name	School or District Admin name.last				
1019 Email	School or District Admin email				
1050 Site	Alexandria Site Code for the site record with the same GUID as Teacher school.				
1026 Status	1 indicates an "active" status and 4 indicates a "tobedeleted" status. These are equivalent to the "Active" and "Transferred" statuses in Alexandria.				

Teacher Fields

Alexa ndria	Clever				
1200 GUID	Teacher id				
1000 Barco de	Not Mapped Optional mapping to teacher_number, sis_id, or state_id				
1001 Comm unity ID	Not Mapped Optional mapping to teacher_number, sis_id, or state_id				
1007 First Name	Teacher name.first				
1008 Middle Name	Teacher name.middle				
1006 Last Name	Teacher name.last				
1019 Email	Teacher email				
1052 Usern ame	Teacher credentials.district_username				
1050 Site	Alexandria Site Code for the site record with the same GUID as Teacher school.				
1026 Status	1 indicates an "active" status and 4 indicates a "tobedeleted" status. These are equivalent to the "Active" and "Transferred" statuses in Alexandria.				

Alexa ndria	Clever				
1200 GUID	Student id				
1000 Barco de	Not Mapped Optional mapping to student_number, sis_id, or state_id				
1001 Comm unity ID	Not Mapped Optional mapping to student_number, sis_id, or state_id				
1007 First Name	Student name.first				
1008 Middle Name	Student name.middle				
1006 Last Name	Student name.last				
1045 Birthd ate	Student dob				
1032 Sex	Student gender				
1011 Addre ss	Student location.address				
1012 City	Student location.city				
1013 State	Student location.state				
1014 Postal Code	Student location.zip				
1019 Email	Student email				
1010 Level	Student grade				
1052 Usern ame	Student credentials.district_username				
1050 Site	Alexandria Site Code for the site record with the same GUID as Student School.				
1026 Status	1 indicates an "active" status and 4 indicates a "tobedeleted" status. These are equivalent to the "Active" and "Transferred" statuses in Alexandria.				



The Alexandria Community ID is a Terminology field, which means you can customize the field name in **Preferences > Setup > Terminology**.

Modify Student Field Mappings

Field mapping is automatically configured to match and overwrite fields in Alexandria with fields in Clever, as documented above. By default, Alexandria's Community ID and Barcode fields are not mapped with Clever. If you use these fields to identify patrons between systems, click **Modify field mapping** to customize how they're mapped with Clever.

We will not attempt to match these fields unless you map them here.

Community ID

- student_number
- sis_id
- state id

Barcode

- student_number
- sis_id
- state_id

Community ID

- teacher_number
- sis_id
- state id

Barcode

- teacher_number
- sis_id
- state_id

Community ID

• staff_id

Barcode

staff_id



Be careful! Changing how your data is mapped can help synchronize your database or wreak untold havoc. Please speak with Alexandria Customer Support before making any changes.

Frequently Asked Questions

What happens to a patron record in Alexandria when the student is removed from our school roster?

If a student record is deleted from your SIS, the patron record in Alexandria will be marked as *Transferred*. Your librarian can delete or update those records manually as needed or during end-of-year procedures.

Who do I contact for Clever technical support?

If you can't find an answer in Clever's Help Center, fill out this form and a Clever support member will get back to you.

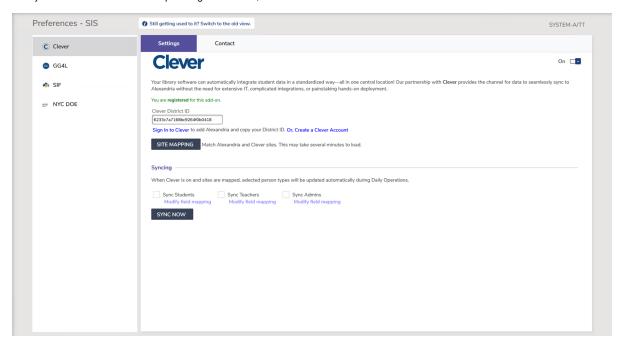
Locate District ID Locate Your Clever District ID

- 1. Click Sign In to Clever.
- Log in with your Clever username and password.
- 3. On the main window, go to the Settings tab.
- 4. Go to the Instant Login Link under Application Information. Your District ID is at the end of this URL. Click Copy.
- 5. Go back to Clever in Alexandria, and then paste the District ID or complete URL into the District ID field.

Enable Clever Enable Clever

1. District ID

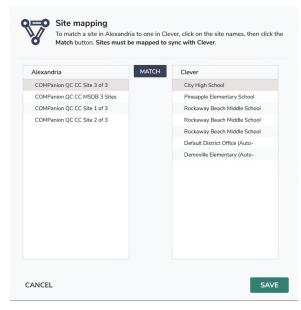
Enter your Clever District ID or complete login URL here, then click Save.

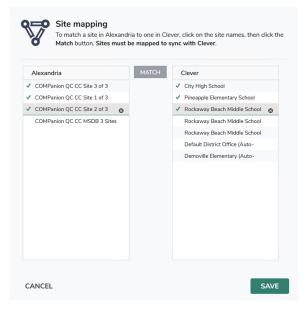


2. Site Mapping

Your sites must be mapped to sync with Clever. Select a site from the Alexandria list on the left, then select the matching site from the Clever list on the right, and then click Match. Repeat this process with all of your sites. If a site has been matched incorrectly, select the site and click the red X to clear the current match.

When you're done matching your sites, click **OK** to close the window, then click **Save**.





3. Enable Clever

Click the toggle to enable Clever, then click Save.

This option is not available until a Clever District ID has been saved and your sites have been mapped.

4. Alert

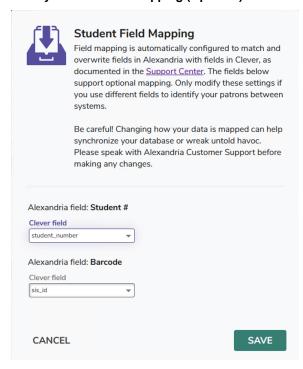
Clever and SIF cannot be enabled at the same time: When you select **Begin**, Alexandria will disable SIF and clear all Patron SIF related identifiers. The Clever system and identifiers will then be initialized. If you have been using SIF with Alexandria, select **Cancel** and call COMPanion's Customer Support team for help.

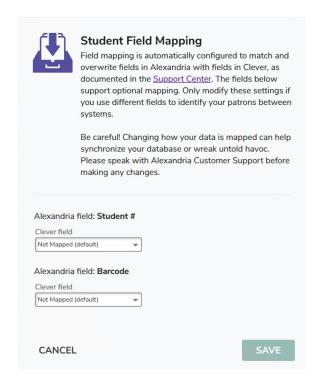
To proceed, click Begin.

5. Automatically Update During Daily Operations

Select if you want Student, Teacher, and/or Admin (Staff) data to be synced and updated during Daily Operations.

6. Modify Student Field Mapping (Optional)





Field mapping is automatically configured to match and overwrite fields in Alexandria with fields in Clever, as documented above. By default, Alexandria's Community ID and Barcode fields are not mapped with Clever. If you use these fields to identify patrons between systems, click **Modify field mapping** to customize how they're mapped with Clever.

We will not attempt to match these fields unless you map them here.

Community ID

- student_number
- sis_id
- state_id

Barcode

- student_number
- sis id
- state_id

Community ID

- teacher_number
- sis_id
- state_id

Barcode

- teacher_number
- sis_id
- state_id

Community ID

• staff id

Barcode

• staff id



Be careful! Changing how your data is mapped can help synchronize your database or wreak untold havoc. Please speak with Alexandria Customer Support before making any changes.

7. Sync Now

Save your changes, then click Sync Now.

8. Utility Queued

A dialog will pop up: The Clever Sync Utility has been queued. See Operations Management for details.

Click on the Operations Management link, select the Clever Full Sync operation, and then click to view and download the log.



Add Alexandria to Clever Add Alexandria to Clever

1. Sign in to Clever

Under the Clever District ID field, click Sign In to Clever, then log in with your Clever username and password.

2. Request the Alexandria application

In the sidebar, go to Applications > Add Applications, and then search for Alexandria.

- Have you already purchased Alexandria for use in your district? Yes
 Would you like to request a launch date for this application? No Custom Launch Date
- Click Request Application.

3. Request sent

On the next screen, click Share data.

4. Choose a sharing type

Select Share by District.

4. Sharing by District

Check the box to share all district students and classes with Alexandria.

4. Save Changes



Clever must be approved manually.

Please allow 24-36 hours for us to receive and approve your request. We'll notify you by email when this process is complete. Then, when you're ready, either give us a call to walk you through the rest of the process, or proceed by following the steps to enable Clever.