

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 storms—recompute 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 by [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.

Preferences - SIS Still getting used to it? Switch to the old view.

Clever
GG4L
SIF
NYC DOE

SettingsContact

Clever

Your library software can automatically integrate student data in a standardized way—all in one central location! Our partnership with **Clever** provides the channel for data to seamlessly sync Alexandria without the need for extensive IT, complicated integrations, or painstaking hands-on deployment.

You are **registered** for this add-on.

Clever District ID
6233c7a7168bc92640b0418

[Sign In to Clever](#) to add Alexandria and copy your District ID. Or, [Create a Clever Account](#)

SITE MAPPING
Match Alexandria and Clever sites. This may take several minutes to load.

Syncing

When Clever is on and sites are mapped, selected person types will be updated automatically during Daily Operations.

☐ Sync Students
[Modify field mapping](#)

☐ Sync Teachers
[Modify field mapping](#)

☐ Sync Admins
[Modify field mapping](#)

SYNC NOW

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

Student Fields

Alexandria	Clever
1200 GUID	School or District Admin id
1000 Barcode	Not Mapped Optional mapping to staff_id
1001 Community 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

Alexandria	Clever
1200 GUID	Teacher id
1000 Barcode	Not Mapped Optional mapping to teacher_number, sis_id, or state_id
1001 Community 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 Username	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.

Alexandria	Clever
1200 GUID	Student id
1000 Barcode	Not Mapped Optional mapping to student_number, sis_id, or state_id
1001 Community 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 Birthdate	Student dob
1032 Sex	Student gender
1011 Address	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 Username	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**.
2. 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**.

Preferences - SIS

Still getting used to it? Switch to the old view.

SYSTEM-A/TT

Clever

GG4L

SIF

NYC DOE

Settings

Contact

Clever

On ☐

Your library software can automatically integrate student data in a standardized way—all in one central location! Our partnership with **Clever** provides the channel for data to seamlessly sync to Alexandria without the need for extensive IT, complicated integrations, or painstaking hands-on deployment.

You are **registered** for this add-on.

Clever District ID

6233c7a7168bc9264060418

[Sign In to Clever](#) to add Alexandria and copy your District ID. Or, [Create a Clever Account](#)

SITE MAPPING Match Alexandria and Clever sites. This may take several minutes to load.

Syncing

When Clever is on and sites are mapped, selected person types will be updated automatically during Daily Operations.

☐ Sync Students [Modify field mapping](#)

☐ Sync Teachers [Modify field mapping](#)

☐ Sync Admins [Modify field mapping](#)

SYNC NOW

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**.

Site mapping

To match a site in Alexandria to one in Clever, click on the site names, then click the **Match** button. Sites must be mapped to sync with Clever.

Alexandria	MATCH	Clever
COMPanion QC CC Site 3 of 3		City High School
COMPanion QC CC MSDB 3 Sites		Pineapple Elementary School
COMPanion QC CC Site 1 of 3		Rockaway Beach Middle School
COMPanion QC CC Site 2 of 3		Rockaway Beach Middle School
		Rockaway Beach Middle School
		Default District Office (Auto-Demoville Elementary (Auto-

CANCEL

SAVE

Site mapping

To match a site in Alexandria to one in Clever, click on the site names, then click the **Match** button. Sites must be mapped to sync with Clever.

Alexandria	MATCH	Clever
✓ COMPanion QC CC Site 3 of 3		✓ City High School
✓ COMPanion QC CC Site 1 of 3		✓ Pineapple Elementary School
✓ COMPanion QC CC Site 2 of 3 ✗		✓ Rockaway Beach Middle School ✗
COMPanion QC CC MSDB 3 Sites		Rockaway Beach Middle School
		Rockaway Beach Middle School
		Default District Office (Auto-Demoville Elementary (Auto-

CANCEL

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)



Student Field Mapping

Field mapping is automatically configured to match and overwrite fields in Alexandria with fields in Clever, as documented in the [Support Center](#). The fields below support optional mapping. Only modify these settings if you use different fields to identify your patrons between systems.

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.

Alexandria field: **Student #**

Clever field


student_number

Alexandria field: **Barcode**

Clever field

sis_id

CANCEL SAVE



Student Field Mapping

Field mapping is automatically configured to match and overwrite fields in Alexandria with fields in Clever, as documented in the [Support Center](#). The fields below support optional mapping. Only modify these settings if you use different fields to identify your patrons between systems.

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.

Alexandria field: **Student #**

Clever field

Not Mapped (default)

Alexandria field: **Barcode**

Clever field

Not Mapped (default)

CANCEL SAVE

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](#).

