

my **ZB** PORTAL

# **District Administrator Rostering Guide**

# Table of Contents

---

<a href="#">Importing Users and Classes</a>	3
---	---

---

<a href="#">Manually Adding Users and Classes</a>	7
---	---

---

<a href="#">Rostering and Single Sign-On Integrations</a>	17
---	----

---

<a href="#">Help</a>	19
----------------------	----

---

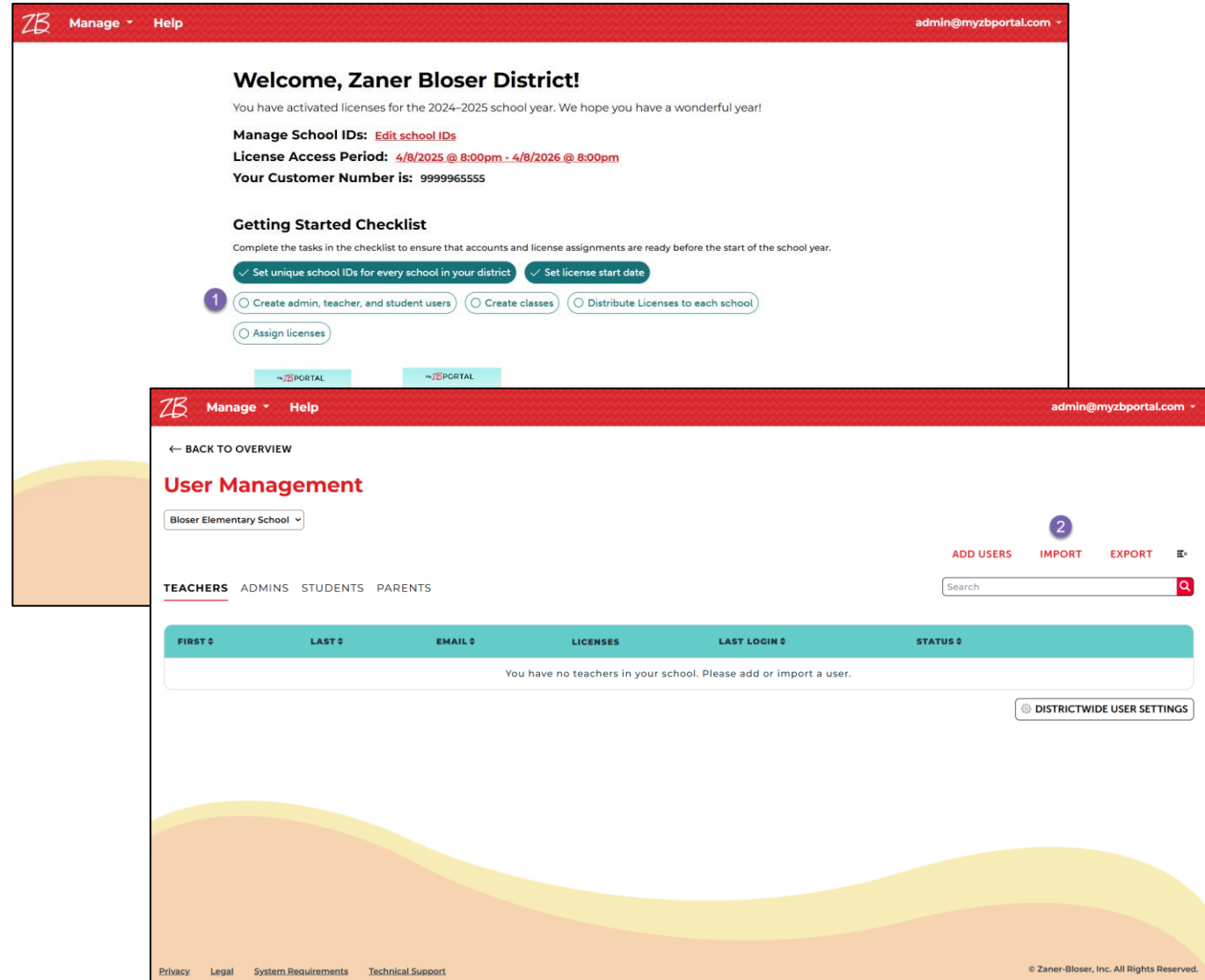
# Importing Users and Classes

# Importing Teacher, Student, or Admin Accounts (Steps 1-2)

Importing a spreadsheet is the easiest way to create accounts for multiple teachers, students, or admins at once.

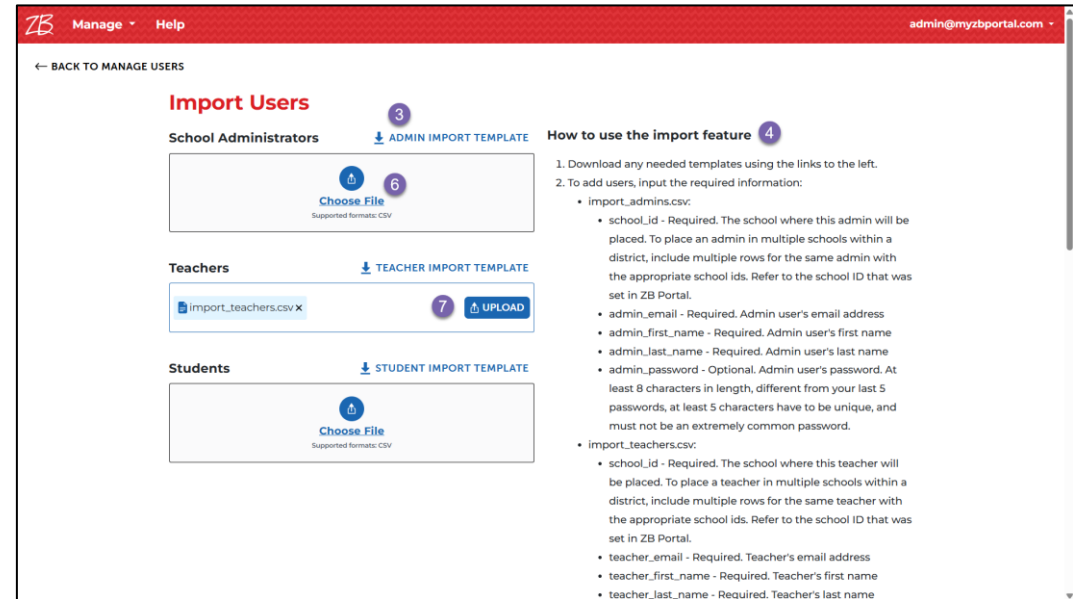
1 Click on **Create admin, teacher, and student users** to get started.

2 Next, click on the **Import** button.



# Importing Teacher, Student, or Admin Accounts (Steps 3-7)

- 3 Each section has a pre-formatted **template** that can be downloaded and used.
  - 4 This page also provides instructions and helpful definitions to help fill out the template.
  - 5 In the CSV template, fill in the required information and **Save** the file.
  - 6 Select **browse** and choose the saved file
  - 7 Finally, click **Upload**.
- Repeat as necessary throughout the year to create new accounts.



	A	B	C	D	E	F	G	H	I
1	school_id	teacher_email	teacher_first	teacher_last	teacher_password	class_id	class_name	class_grade	
2	bloser	<a href="mailto:sunshine@myzbportal.com">sunshine@myzbportal.com</a>	Sunny	Sunshine					
3	bloser	<a href="mailto:cloudy@myzbportal.com">cloudy@myzbportal.com</a>	Cloudy	Cloud					
4									
5									
6									
7									
8									
9									
10									

# Tips for the Import Page

Here are some tips for importing:

- Please ensure the accuracy of the school IDs in the import sheet before uploading them, so that users and classrooms are placed in the right school.
- "School ID" refers to the IDs assigned to the schools in the district when the account was set up.
- If students were imported without passwords, the passwords will need to be added either manually or via import before the students can log in.
- District Admins cannot be imported. To create and manage District Administrator accounts, use the Manage District Administrators page.

**Import Users**

← BACK TO MANAGE USERS

**School Administrators** [ADMIN IMPORT TEMPLATE](#)

**Teachers** [TEACHER IMPORT TEMPLATE](#)

**Students** [STUDENT IMPORT TEMPLATE](#)

**How to use the import feature**

1. Download any needed templates using the links to the left.
2. To add users, input the required information:

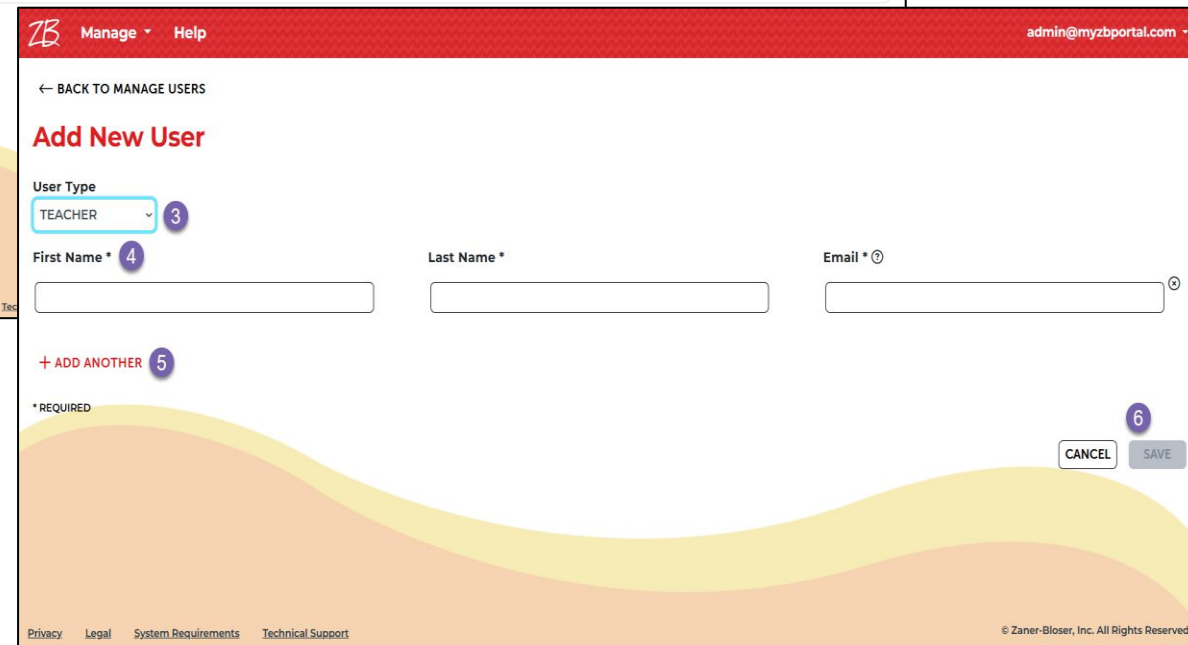
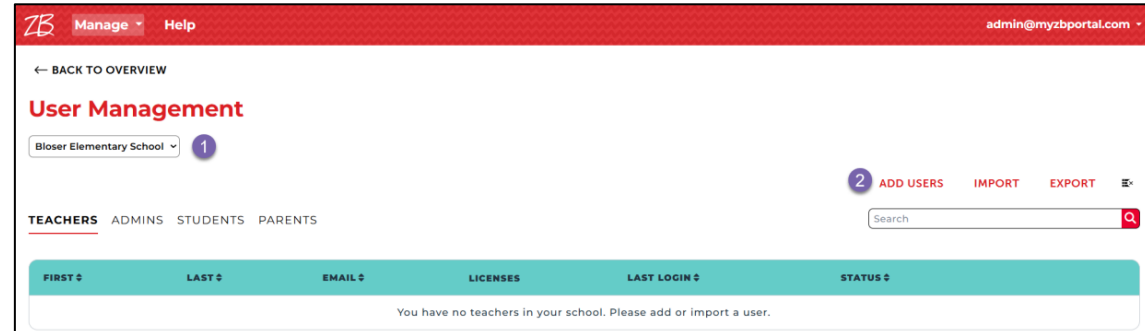
- import\_admins.csv:
  - school\_id - Required. The school where this admin will be placed. To place an admin in multiple schools within a district, include multiple rows for the same admin with the appropriate school ids. Refer to the school ID that was set in ZB Portal.
  - admin\_email - Required. Admin user's email address
  - admin\_first\_name - Required. Admin user's first name
  - admin\_last\_name - Required. Admin user's last name
  - admin\_password - Optional. Admin user's password. At least 8 characters in length, different from your last 5 passwords, at least 5 characters have to be unique, and must not be an extremely common password.
- import\_teachers.csv:
  - school\_id - Required. The school where this teacher will be placed. To place a teacher in multiple schools within a district, include multiple rows for the same teacher with the appropriate school ids. Refer to the school ID that was set in ZB Portal.
  - teacher\_email - Required. Teacher's email address
  - teacher\_first\_name - Required. Teacher's first name
  - teacher\_last\_name - Required. Teacher's last name

# **Manually Adding Users and Classes**

# Creating Individual Teacher Accounts

From the Manage Users Page, teacher accounts can be created individually.

- 1 Choose a **school** from the dropdown menu.
- 2 Next click on the **Add Users** link.
- 3 Select a user type from the **dropdown** menu
- 4 Fill in the required information.
- 5 To add additional teachers, click **+Add Another**.
- 6 Once all the teachers have been added, click on **Save**.



# Creating Individual Student Accounts

From the Manage Users Page, student accounts can be created individually.

1

Choose a **school** from the dropdown menu.

2

Next click on the **Add Users** link.

3

Select a user type from the dropdown menu

4

Fill in the required information.

5

To add additional students, click **+Add Another**.

6

Once all the students have been added, click on **Save**.

The image displays two screenshots of the ZB Manage Users interface. The top screenshot shows the 'User Management' page for 'Bloser Elementary School'. It features a navigation bar with 'Manage' and 'Help' options, and a user email 'admin@myzbportal.com'. Below the navigation, there's a 'BACK TO OVERVIEW' link and a 'User Management' title. A dropdown menu shows 'Bloser Elementary School' with a '1' next to it. To the right, there are buttons for 'ADD USERS' (with a '2'), 'IMPORT', and 'EXPORT'. Below these is a search bar. A table header is visible with columns: 'FIRST', 'LAST', 'EMAIL', 'LICENSES', 'LAST LOGIN', and 'STATUS'. The table content shows a message: 'You have no teachers in your school, Please add or import a user.' and a 'DISTRICTWIDE USER SETTINGS' button.

The bottom screenshot shows the 'Add New User' form. It has a navigation bar with 'Manage' and 'Help' options, and a user email 'admin@myzbportal.com'. Below the navigation, there's a 'BACK TO MANAGE USERS' link and an 'Add New User' title. The form includes a 'User Type' dropdown menu set to 'STUDENT' (with a '3'). Below it are fields for 'Student First Name \*' (with a '4'), 'Student Last Name \*', 'External ID', 'Username \*', 'Password', 'Retype Password', 'Parent First Name', 'Parent Last Name', and 'Parent Email'. At the bottom of the form, there is a '+ ADD ANOTHER' button (with a '5') and 'CANCEL' and 'SAVE' buttons (with a '6'). A '\* REQUIRED' label is also present.

# Creating Individual Parent and Caregiver Accounts

From the Manage Users Page, parent and caregiver accounts can be created individually.

- 1 Choose a **school** from the dropdown menu.
- 2 Next click on the **Add Users** link.
- 3 Select a user type from the dropdown menu
- 4 Fill in the required information.
- 5 To add additional parents and caregivers, click **+Add Another**.
- 6 Once all the parents and caregivers have been added, click on **Save**.

← BACK TO OVERVIEW

**User Management**

Bloser Elementary School 1

2 ADD USERS IMPORT EXPORT

Search

TEACHERS ADMINS STUDENTS PARENTS

FIRST LAST EMAIL LICENSES LAST LOGIN STATUS

You have no teachers in your school. Please add or import a user.

DISTRICTWIDE USER SETTINGS

← BACK TO MANAGE USERS

**Add New User**

User Type 3

STUDENT

Student First Name \* 4

Student Last Name \*

External ID

Username \*

Password

Retype Password

Parent First Name

Parent Last Name

Parent Email

5 + ADD ANOTHER

\* REQUIRED

CANCEL SAVE 6

Privacy Legal System Requirements Technical Support

© Zaner-Bloser, Inc. All Rights Reserved.

# Creating Individual School Administrator Accounts

From the Manage Users Page, school administrator accounts can be created individually.

1

Choose a **school** from the dropdown menu.

2

Next click on the **Add Users** link.

3

Select a user type from the dropdown menu

4

Fill in the required information.

5

To add additional School Administrators, click **+Add Another**.

6

Once all the school administrators have been added, click on **Save**.

Manage Help admin@myzbportal.com

← BACK TO OVERVIEW

## User Management

Bloser Elementary School 1

2 ADD USERS IMPORT EXPORT

Search

TEACHERS ADMINS STUDENTS PARENTS

FIRST	LAST	EMAIL	LICENSES	LAST LOGIN	STATUS
You have no teachers in your school. Please add or import a user.					

DISTRICTWIDE USER SETTINGS

Manage Help admin@myzbportal.com

← BACK TO MANAGE USERS

## Add New User

User Type  
STUDENT 3

Student First Name \* 4

Student Last Name \*

External ID

Username \*

Password

Retype Password

Parent First Name

Parent Last Name

Parent Email

5 + ADD ANOTHER

\* REQUIRED

6 CANCEL SAVE

Privacy Legal System Requirements Technical Support

© Zaner-Bloser, Inc. All Rights Reserved.

# Creating Additional District Administrator Accounts

There can be up to 20 District Digital Administrators for the district.

1

To create additional District Digital Administrators, click on the **Manage** tab at the top of the screen.

2

From the dropdown menu, select **Manage District Administrators**.

3

Then click the **+New District Admin** button.

4

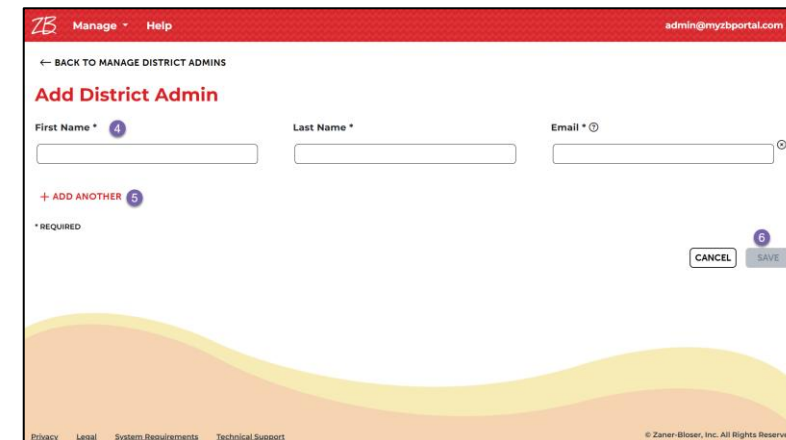
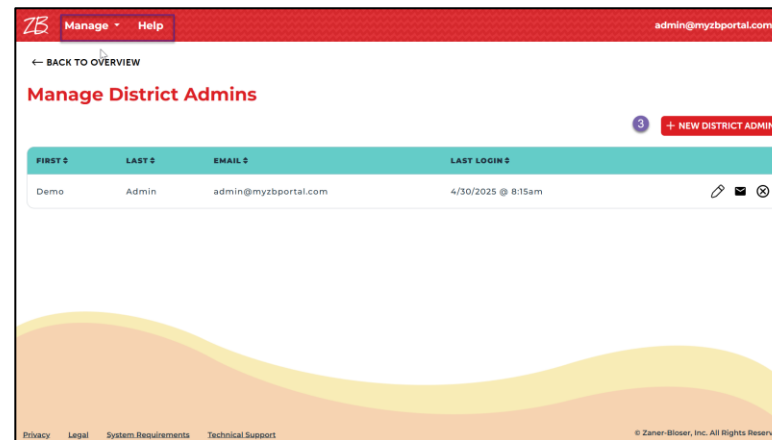
Fill in the required information.

5

Click **+Add Another** to add additional Administrators.

6

Once all the district administrators have been added, click on **Save**.



# Tips for User Accounts

- Once added to my ZB Portal, activation emails will be sent out to the Teachers, Parents, and District and School Administrators. They will contain a link that will allow the teachers to set up their account.
- The teacher will need to give the student their username, password, and school ID to be able to log in, unless a Single Sign-On Integration has been set up. Teachers can also print out a QR Code for students to use to log in from their Classes page.

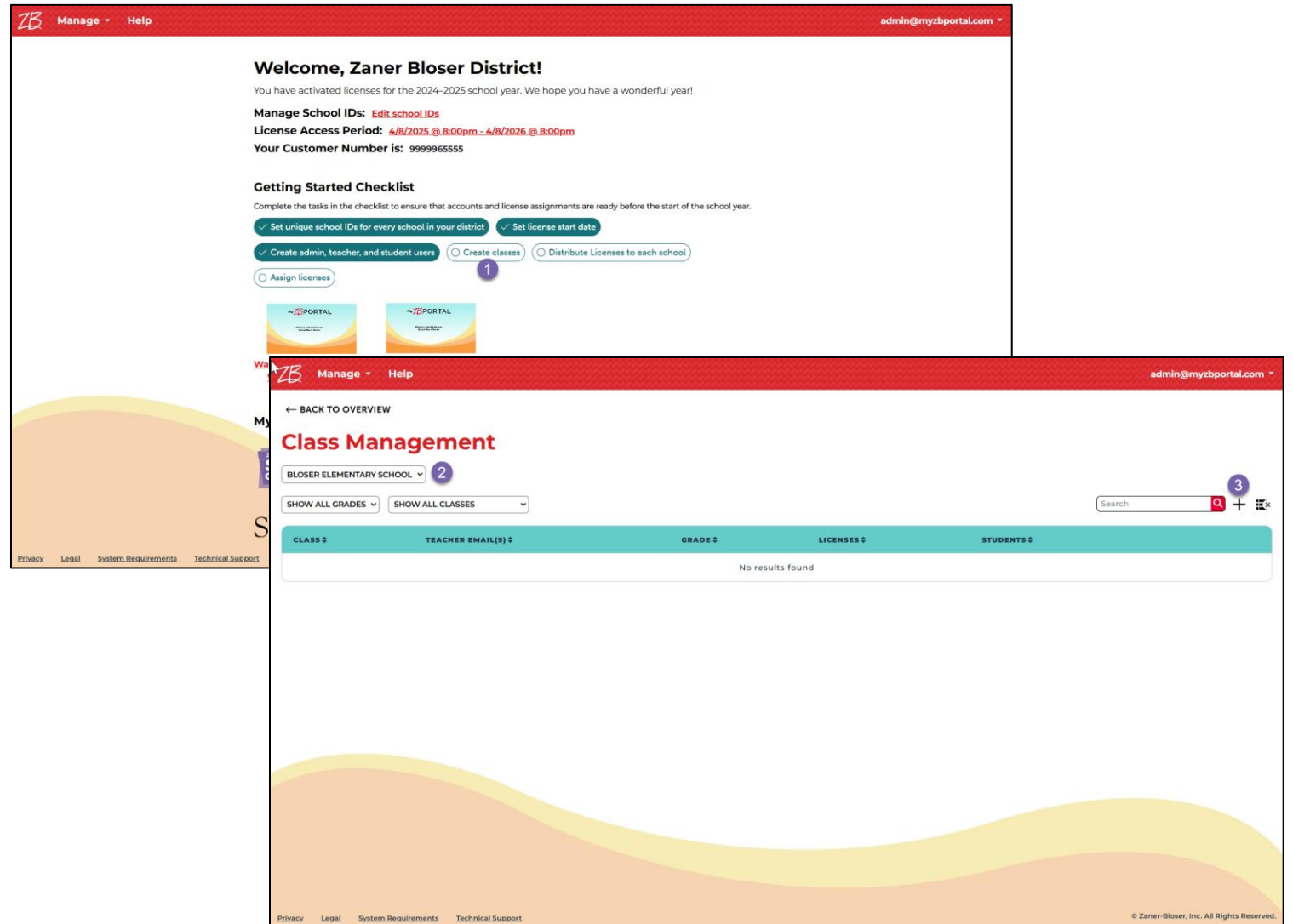
The screenshot displays the 'User Management' interface for 'Bloser Elementary School'. At the top, there is a navigation bar with 'ZB', 'Manage', and 'Help' options, and the user email 'admin@myzbportal.com'. Below this, a 'BACK TO OVERVIEW' link is present. The main heading is 'User Management', followed by a dropdown menu for the school name. On the right side, there are buttons for 'ADD USERS', 'IMPORT', and 'EXPORT', along with a search bar. Below the search bar, there are tabs for 'TEACHERS', 'ADMINS', 'STUDENTS', and 'PARENTS'. The 'TEACHERS' tab is selected. A table lists user information with columns: 'FIRST', 'LAST', 'EMAIL', 'LICENSES', 'LAST LOGIN', and 'STATUS'. The table contains one entry: Daisy Blossom, with email daisyblossom@myzbportal.com, 0 licenses, and a last login of N/A. The status is 'active'. To the right of the table row are icons for user actions. At the bottom right of the table area, there is a 'DISTRICTWIDE USER SETTINGS' button. The footer of the page includes links for 'Privacy', 'Legal', 'System Requirements', and 'Technical Support', and a copyright notice for Zaner-Bloser, Inc.

FIRST	LAST	EMAIL	LICENSES	LAST LOGIN	STATUS
Daisy	Blossom	daisyblossom@myzbportal.com	0	N/A	active

# Creating Classes (Steps 1-3)

If the Digital Administrator did not set up a rostering integration or import classes, Administrators can create individual classes to grant students access to digital materials. Teachers can also create their own classes unless the option has been restricted in user settings.

- 1 Click on **Create Classes** to get started.
- 2 On the Manage Classes page, choose a school from the **dropdown** menu.
- 3 To create a new class, click on the **+** button.



# Creating Classes (Steps 4-8)

- 4 Fill in the required information:
  - Class Name
  - Class ID (optional)
  - Grade Designation (optional)
  - Class icon (optional)
  - Teacher First Name
  - Teacher Last Name
  - Teacher Email
- 5 Use **+ Add Teacher** to add additional teachers to the class. There can be up to 5 teachers managing a single class.  
  
Or search for an existing teacher by typing in the text box.
- 6 Click **Next**.
- 7 On the Add Licenses page, choose the class license(s) for this class. Class licenses will grant all the students in the class access to digital materials.
- 8 Then click **Next**.

# Creating Classes (Steps 9-11)

9

Fill in the required information:

- First Name (the student's first name)
- Last Name (the student's last name)
- External ID (the student's school ID). This is not mandatory but can assist with identification across systems (such as an SIS).
- Username (the student's username). The student will use the username to log in.
- Password (password for the student). The password must contain at least eight characters and be different from the user's five previous passwords.

Or search for an existing student by typing in the text box.

10

Click **+Add Another** to add additional students to the class.

11

Click on **Finish**.

The screenshot shows the 'Add New Class' form in the ZB portal. The form is for Blosor Elementary School and is titled 'Add New Class'. It shows the 'ADD STUDENTS' section with fields for Student First Name (Snow), Student Last Name (Storm), External ID, Username (snowstorm), Password, Retype Password, Parent First Name, Parent Last Name, and Parent Email. A search bar is also present. The form includes a 'PREVIOUS' button and a 'SAVE' button. A red banner at the top contains 'ZB Manage Help' and 'admin@myzbportal.com'. A footer at the bottom contains '© Zaner-Bloser, Inc. All Rights Reserved'.

# **Rostering and Single Sign-On Integrations**

# Integrating with My ZB Portal

We offer the following  
Rostering and Single Sign-On  
Integrations

## Automated Rostering

- OneRoster 1.1 csv (via SFTP)
- Clever Secure Sync

## Single Sign-On (SSO)

- Clever Instant Login
- LTI 1.3
- Google

To get started, [contact Zaner-Bloser Technical Support](#)



**Help**

# Finding Help

Click the **Help Link** or the **Technical Support** for help with My ZB Portal.

This page contains links to user guides, tutorial videos, FAQs, and contact information.

For additional assistance, [contact Zaner-Bloser Technical Support.](#)

