

my **ZB** PORTAL

**District Administrator
Integrations Dashboard
Quick Start Guide**

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Integrations Set-up Checklist

Required

- [Log into ZB Portal \(required\)](#)
- [Set the School IDs for Each School in Your District \(required\)](#)
- [Set the License Start Date \(required\)](#)
- [Distribute Licenses for a District Account \(required\)](#)
- [Access the SFTP Credentials \(required\)](#)
- [Set up the SFTP Folder](#)
- [Set SourcedIDs for Each School in Your District \(required\)](#)
- [Read through OneRoster Requirements \(required\)](#)
- Place Files into the SFTP Folder (required)
- [Remediate Any Errors on the Error Table \(required\)](#)

Optional

- Add Individual Student Passwords (optional)
- [Generate \(Bulk\) Student Passwords \(optional\)](#)
- [Manage User Settings \(optional\)](#)
- [Add Additional District Administrators \(optional\)](#)
- [Assign Teacher and Class Licenses \(optional\)](#)

Getting Started

Interoperability Features Document

Please read through the Interoperability Features Document, this document goes over Zaner-Bloser's integrations options as well as the requirements for the integrations.

If this document has not been received, please reach out to the sales representative or Zaner-Bloser's Technical Support Team.

MyZBPortal.com Interoperability Features

MyZBPortal.com is Zaner-Bloser's proprietary digital product platform, serving up time-saving teacher and student materials in a clean, modern web application. Flash or Java plugins are not required to use MyZBPortal. Teachers and students who use The Superkids Reading Program, Zaner-Bloser Handwriting, Zaner-Bloser La escritura, Grammar, Usage, and Mechanics, or Spelling Connections will access digital materials via the MyZBPortal.com platform.

This Document contains information for:

- Accounts and Rostering
 - [OneRoster 1.1 .csv](#)
 - [Clever Secure Sync](#)
- Single Sign On
 - [Clever Instant Login](#)
 - [Google Single Sign-On](#)
 - [ITI 1.3](#)

Accounts and Rostering

MyZBPortal.com can roster account information with two different methods:

- OneRoster 1.1 .csv
- Clever Secure Sync

There are alternatives to using OneRoster and Clever Secure Sync, such as importing accounts and classrooms manually via spreadsheets as well as manually entering accounts and classrooms. These are available within MyZBPortal.com. Please see the [District Administrator Rostering Guide](#) or the [School Administrator Rostering Guide](#) for additional information.

OneRoster

MyZBPortal.com can automatically sync account information from compatible School Information Systems (SIS) using the OneRoster .csv Standard. We are OneRoster 1.1 .csv compliant. For more information, please review the [OneRoster 1.1 specification](#) and ensure that your files contain all the information "required" by the standard. Data syncs run daily after 5 pm Eastern.

We accept OneRoster .csv deliveries in the following way:

- SFTP (additional configuration by district/school is required). Please reach out to Zaner-Bloser's Customer Experience at tbtechsupport@zaner-bloser.net to get started with set up.

Getting Access



1

A customer places an order with Zaner-Bloser. If the order contains a digital product, the customer will choose someone to be the District or School Administrator of their account.

The **District or School Administrator** is responsible for managing user accounts and licenses.



2

After the order is processed, an activation email and available licenses email are sent to the person chosen to be the District or School Administrator.

The District or School Administrator will click on the activation link in the email to finish setting up their account.

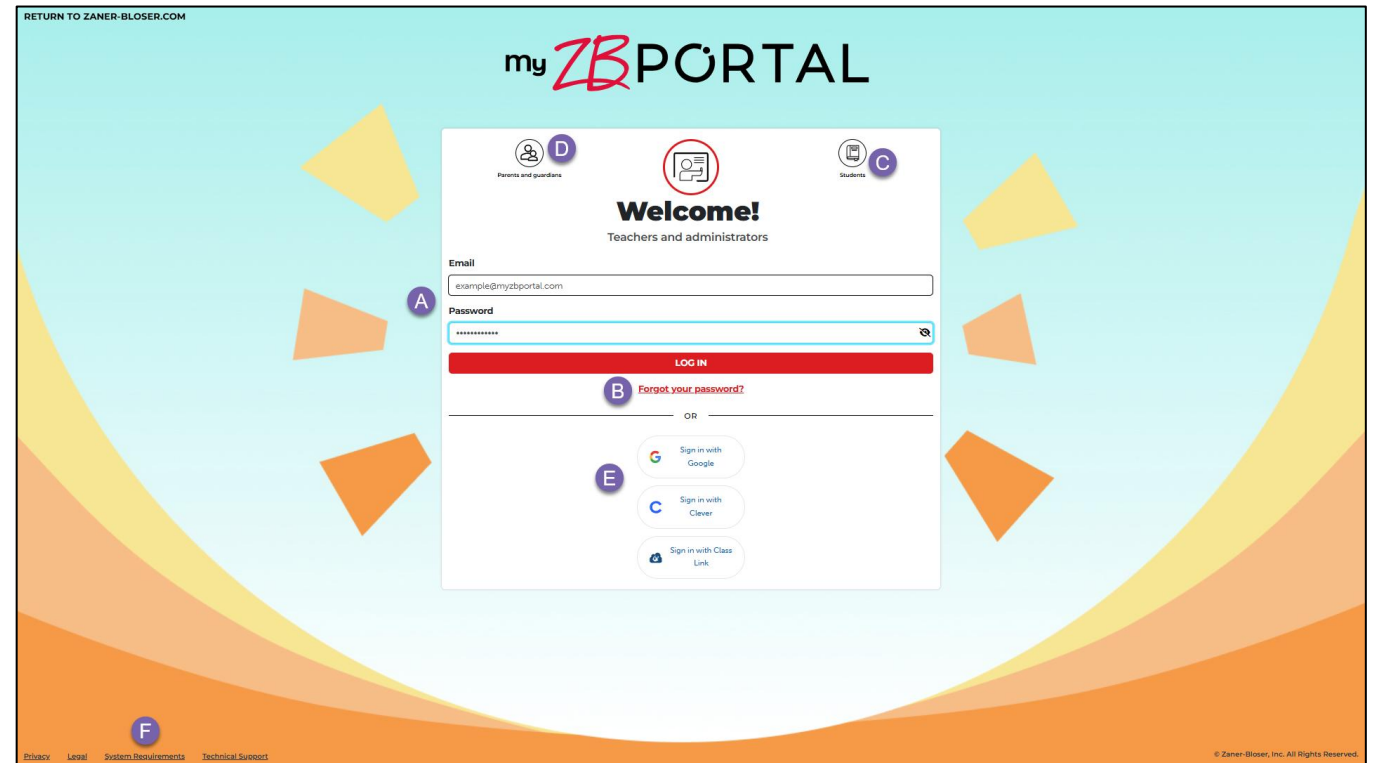


3

Once the District or School Administrator account has been set up, they will then navigate to myzbpportal.com to log in.

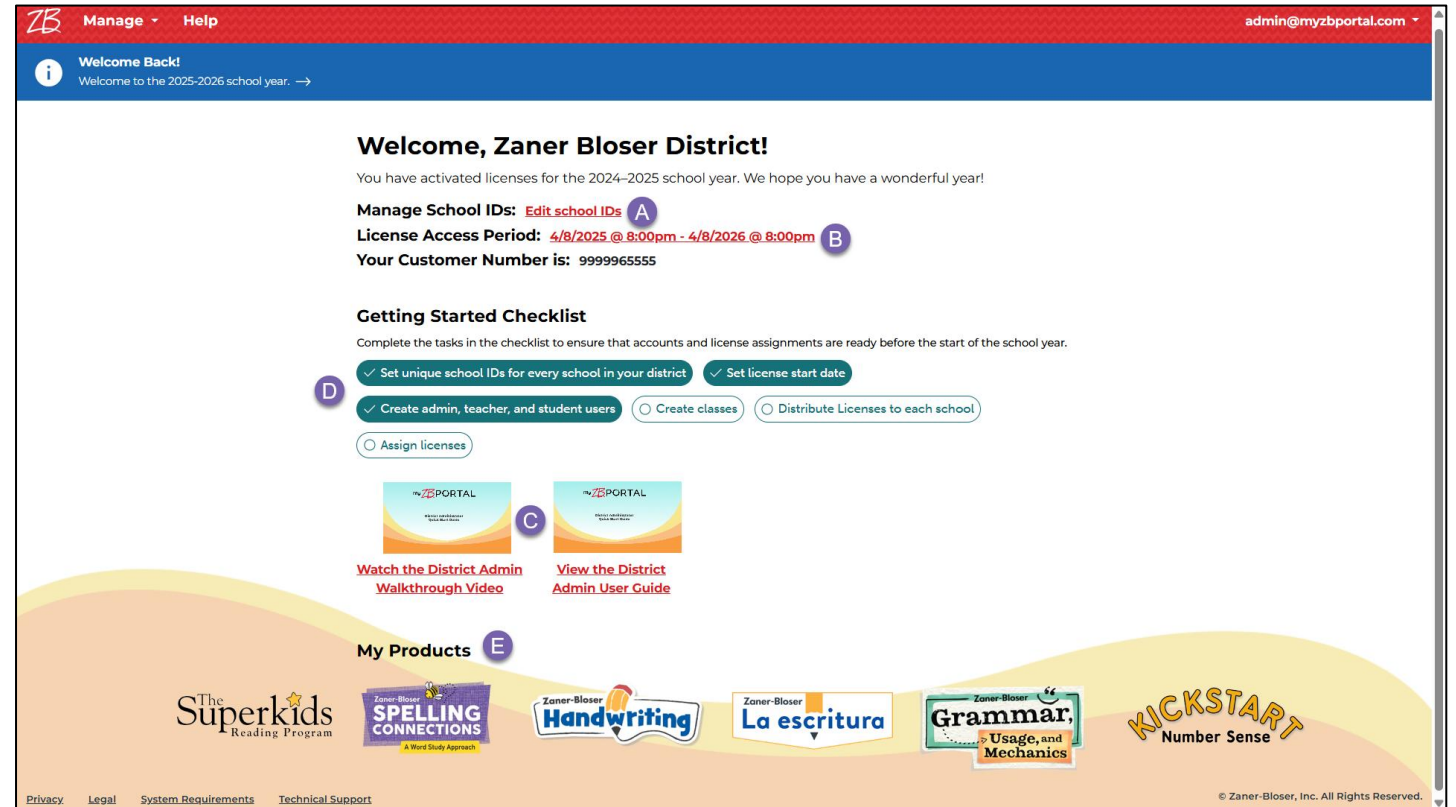
Logging In

- A** Once the account has been set up, users can log in here with their credentials.
- B** Forgot your password? No worries! Click the **Forgot Your Password** link.
- C** If students need to log in, click the **I'm a Student** link to switch to the student portal.
- D** If parents or guardians need to log in, click the **I'm a Parent** link to switch to the parent portal.
- E** These links show Zaner-Bloser's Single Sign-On Solutions.
- F** These links have important information about **privacy, legal, and system requirements**.



Navigating the Administrator Dashboard

- A Once set, this is where the **School ID** is managed.
- B Once set, this is the information for the **license access period**.
- C Watch the **Tutorial Video** or view the **District Administrator User Guide** for a quick overview of the dashboard.
- D The **Getting Started Checklist** leads Administrators through the initial setup steps.
- E This is a list of the **Programs** that the district has purchased.



Navigating the Administrator Dashboard (Continued)

F

Select **Manage** to open a menu with links to the manage accounts and licenses pages.

G

Click the **Announcement Banner** to read any announcements to Administrators.

H

The **Help** tab leads to the Tech Support Page with tutorial videos, how-to guides, and tech support contact information.

I

This is **Account** tab. Administrators can manage their personal account and log out here.

The screenshot shows the ZB Administrator Dashboard. At the top, there is a navigation bar with 'Manage' (F) and 'Help' (H) tabs. Below this is a 'Welcome Back!' banner with a 'G' icon. The main content area features a 'Welcome, Zaner-Bloser District!' message, followed by 'Manage School IDs' (with an 'Edit school IDs' link), 'License Access Period' (4/8/2025 @ 8:00pm - 4/8/2026 @ 8:00pm), and 'Your Customer Number is: 9999965555'. A 'Getting Started Checklist' section includes tasks like 'Set unique school IDs for every school in your district', 'Set license start date', 'Create admin, teacher, and student users', 'Create classes', 'Distribute Licenses to each school', and 'Assign licenses'. Below the checklist are two video thumbnails: 'Watch the District Admin Walkthrough Video' and 'View the District Admin User Guide'. The 'My Products' section displays logos for 'The Superkids Reading Program', 'SPELLING CONNECTIONS', 'Handwriting', 'La escritura', 'Grammar Usage, and Mechanics', and 'KICKSTART Number Sense'. The footer contains links for 'Privacy', 'Legal', 'System Requirements', and 'Technical Support', along with the copyright notice '© Zaner-Bloser, Inc. All Rights Reserved.'

Required Set-Up Steps for My ZB Portal

Setting the School Identifier - Required

1

Before creating any accounts, a unique school ID must be set for each school in the district. Upon first login, administrators will be prompted to set these school IDs.

2

Administrators can also click **Set Unique School IDs for Every School in Your District** from the Quick Start list

3

Enter school IDs in the text boxes.

Keep in mind:

- This school ID should be unique, but easy to remember, as students will need it to log in.*
- The School ID should only contain alphabetic characters or numbers and must be less than 16 characters in length.

4

Once the school IDs for each school have been set, click **Confirm**.

The image displays two screenshots from the ZB portal. The top screenshot shows a 'Welcome, Zaner Bloser District!' page with a 'SET SCHOOL IDS' notification modal. The modal contains the text: 'Your License School IDs need to be set. Please go to the Set School IDs page or hit cancel to dismiss this notification.' and buttons for 'CANCEL' and 'GO TO SET SCHOOL IDS PAGE ->'. The bottom screenshot shows the 'Set School IDs' page with a 'BACK TO OVERVIEW' link and instructions: 'You are required to choose a school ID before you can manage classes and accounts within a school. Students will use their school ID in combination with their username/password to log in. Input school IDs and then select "SAVE" to proceed.' Below the instructions are two input fields: 'Bloser Elementary School' and 'Zaner Elementary School'. A 'SAVE' button is located at the bottom right of the page.

*If a student-facing product is purchased.

Tips for Setting the School Identifier- Required

This is also a great time to make sure that all of the schools that you want included in the integration are listed on this page.

If there are any missing schools in your district, please [contact Zaner-Bloser Technical Support](#) to have the missing school added to your district.

The top screenshot shows the 'Welcome, Zaner Bloser District!' page with a 'GETTING STARTED CHECKLIST' and a 'SET SCHOOL IDS' notification modal. The modal contains the text: 'Your License School IDs need to be set. Please go to the Set School IDs page and hit cancel to dismiss this notification.' and buttons for 'CANCEL' and 'GO TO SET SCHOOL IDS PAGE ->'. A red circle with the number '1' is next to the notification, and a blue circle with the number '2' is next to the first checklist item: 'Set unique school IDs for every school'.

The bottom screenshot shows the 'Set School IDs' page. It includes a 'BACK TO OVERVIEW' link, a list of requirements, and instructions: 'Input school IDs and then select "SAVE" to proceed.' The requirements are: 'Each school ID must be unique within the Zaner-Bloser system.', 'Each school must have its own unique ID.', 'If another institution has claimed the school ID you chose, you will be prompted to choose another one.', and 'School IDs must contain only lowercase alphabetic characters or numbers, and it must be between 4 and 30 characters.' Below these are two input fields labeled 'School IDs' with a blue circle with the number '3' next to the first one. The first field is for 'Bloser Elementary School' and the second is for 'Zaner Elementary School'. A 'SAVE' button with a blue circle with the number '4' is at the bottom right.

Setting the School Year Start Date - Required

Once the school IDs have been set, another pop-up window will appear, prompting the Digital Administrator to set the License Start Date

All licenses purchased this school year will activate automatically on the chosen date. They will expire one year after the activation date.

If the pop-up window was closed before setting the license start date, click on **Set Your License Start Date** in the **Quick Start List**.

1

Use the calendar button to choose the school year **Start Date**.

2

Use the calendar button to choose the school year **End Date**.

3

Then click **Set License Dates**.

REQUIRED - SET LICENSE START/END DATE

Choose your school year and when your licenses will start/end

When setting the license start and end dates, please choose dates that are aligned to when your teachers will actually begin using the products.

Only one school year can be active at a time. Once set, the license start/end dates cannot be changed until they expire. Expirations can be manually triggered using the **Expire Licenses** button.

LICENSES SY 2024-2025

PRODUCT NAME	QTY	DURATION	ACTIVATES	EXPIRES	STATUS
SPELLING CONNECTIONS © 2022, GRADE 1	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE
SPELLING CONNECTIONS © 2022, GRADE 2	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE
SPELLING CONNECTIONS © 2022, GRADE 3	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE
SPELLING CONNECTIONS © 2022, GRADE 4	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE
SPELLING CONNECTIONS © 2022, GRADE 5	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE
SPELLING CONNECTIONS © 2022, GRADE 6	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE

Start Date: Choose d... 📅 End Date: Choose d... 📅 **SET LICENSE DATES**

Tips for Setting the School Year Start Date

Once set, the start date cannot be changed until the next school year.

Please keep in mind that the school year start date be different than the actual school start date, as teachers may want to get in ahead of time to set up classes and preview materials.

REQUIRED - SET LICENSE START/END DATE

Choose your school year and when your licenses will start/end

When setting the license start and end dates, please choose dates that are aligned to when your teachers will actually begin using the products.

Only one school year can be active at a time.
Once set, the license start/end dates cannot be changed until they expire.
Expirations can be manually triggered using the **Expire Licenses** button.

LICENSES SY 2024-2025

PRODUCT NAME	QTY	DURATION	ACTIVATES	EXPIRES	STATUS
SPELLING CONNECTIONS © 2022, GRADE 1	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE
SPELLING CONNECTIONS © 2022, GRADE 2	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE
SPELLING CONNECTIONS © 2022, GRADE 3	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE
SPELLING CONNECTIONS © 2022, GRADE 4	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE
SPELLING CONNECTIONS © 2022, GRADE 5	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE
SPELLING CONNECTIONS © 2022, GRADE 6	50	366	NOT ACTIVATED	NOT EXPIRED	NONACTIVE

Start Date: Choose d... End Date: Choose d... **SET LICENSE DATES**

Distributing Licenses to Schools - Required

- 1 If the district purchased licenses at the district level, click the **Distribute licenses to each school button** on the **Getting Started Checklist**.
- 2 On the Distribute Licenses page, choose a school from the **dropdown** menu.
- 3 In the box next to each license, indicate how many licenses to distribute to this school.
- 4 Click **Confirm**.

Repeat this process to distribute the licenses to any additional schools.

Note that **Teacher Licenses** are for teachers (TEs, printable resources), and **Class Licenses** are for **students** (games, activities, etc.).

The top screenshot shows the 'Welcome, Zaner Bloser District!' page. It includes a 'Getting Started Checklist' with the following items: 'Set unique school IDs for every school in your district', 'Set license start date', 'Create admin, teacher, and student users', 'Create classes', and 'Distribute Licenses to each school' (marked with a red circle '1'). Below the checklist are two video thumbnails: 'Watch the District Admin Walkthrough Video' and 'View the District Admin User Guide'.

The bottom screenshot shows the 'Distribute Licenses' page. It features a dropdown menu for 'School' set to 'ZANER ELEMENTARY SCHOOL' (marked with a red circle '2'). Below is a table with columns: LICENSE, AVAILABLE, AT THIS SCHOOL, and IN USE. The table lists various 'Spelling Connections' licenses. The 'AT THIS SCHOOL' column contains input boxes for distribution, with the first one set to '3' (marked with a red circle '3'). A red 'CONFIRM' button is located at the bottom right (marked with a red circle '4').

Accessing and Navigating the Integrations Dashboard

Integrating with My ZB Portal

We offer the following
Rostering and Single Sign-On
Integrations

Automated Rostering

- OneRoster 1.1 csv (via SFTP)

Single Sign-On (SSO)

- Clever Instant Login
- LTI 1.3
- Google

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



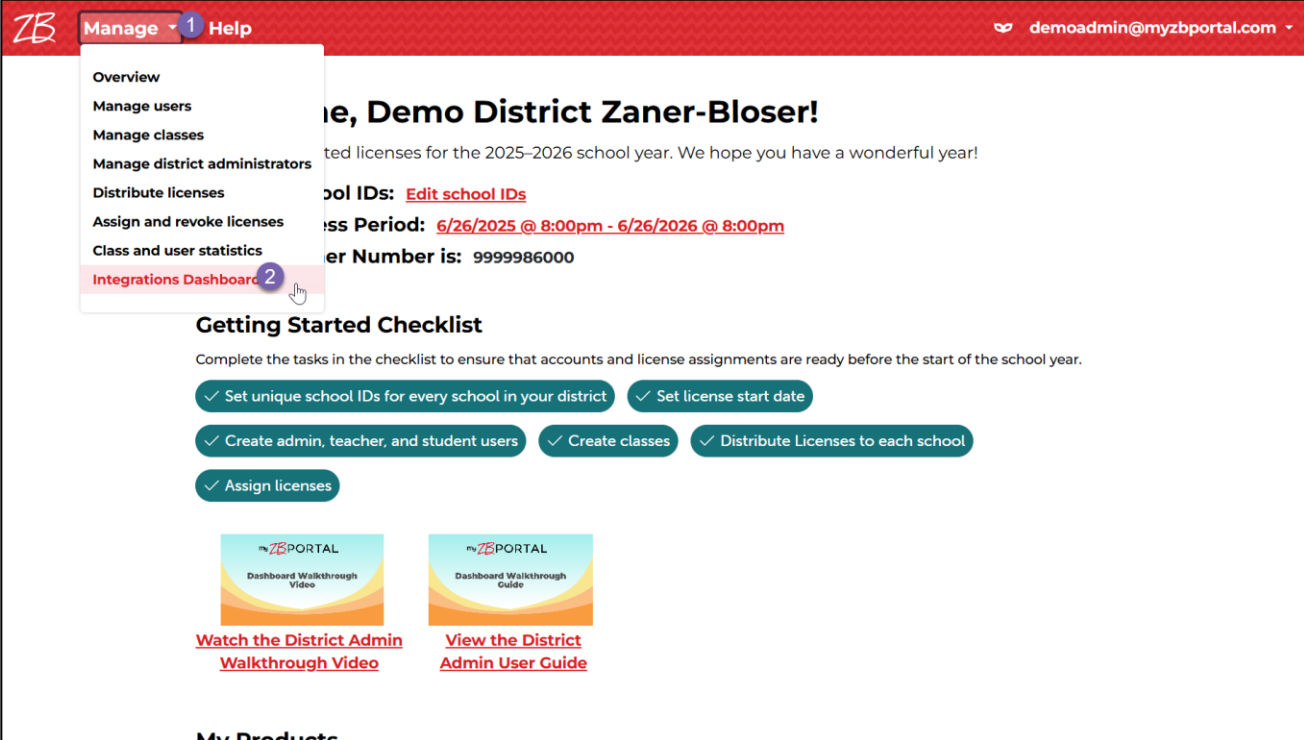
Accessing the Dashboard

After the rostering integration has been set up, the Integrations Dashboard link becomes in the Manage Menu.

1 Click on Manage.

2 Select Integrations Dashboard from the Manage Menu.

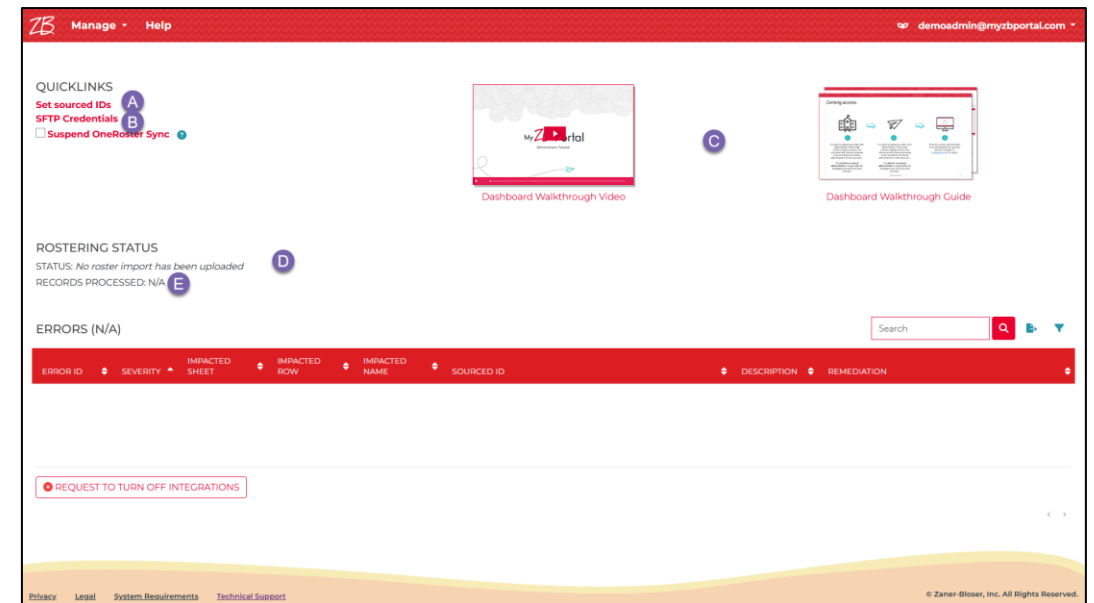
All administrators can access the dashboard once the rostering integration has been enabled



The screenshot shows the ZB portal interface. At the top, there is a red navigation bar with the ZB logo, a 'Manage' dropdown menu (indicated by a '1'), and a 'Help' link. The user's email, 'demoadmin@myzbportal.com', is visible in the top right. Below the navigation bar, the main content area displays a welcome message for 'Demo District Zaner-Bloser!' and a 'Getting Started Checklist' with several completed tasks: 'Set unique school IDs for every school in your district', 'Set license start date', 'Create admin, teacher, and student users', 'Create classes', 'Distribute Licenses to each school', and 'Assign licenses'. Two video thumbnails are shown at the bottom, labeled 'Watch the District Admin Walkthrough Video' and 'View the District Admin User Guide'. A '2' is placed over the 'Integrations Dashboard' option in the Manage menu.

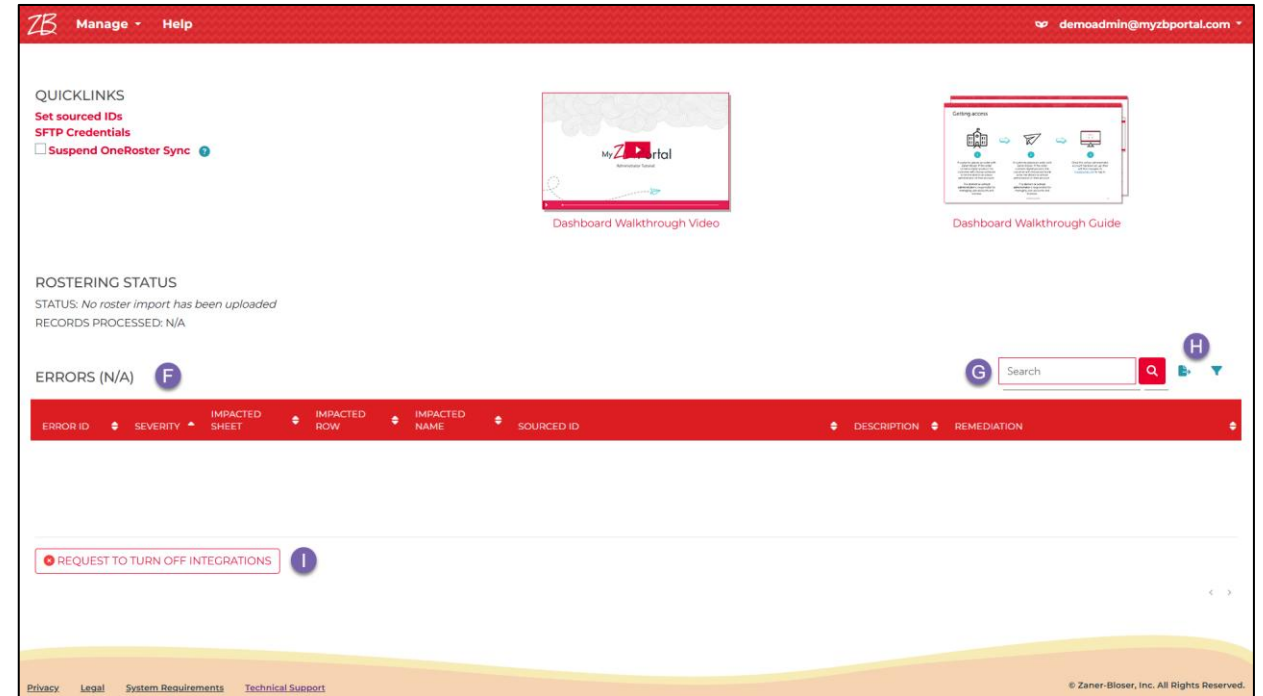
Navigating the Dashboard

- A** In the Quick Links box, the Digital Administrator can set the sourcedIDs for each school. These IDs can be entered manually or imported using a .csv file.
- B** To enable secure file transfers, Tech Support can assist with setting up an SFTP folder, or Digital Administrators can click the **SFTP Credentials** link to configure it themselves.
- C** For Additional Assistance, Digital Administrators can click on the Dashboard Walkthrough Video or Guide
- D** In the Status section, Digital Administrators can monitor the last time the files were processed and the status. (In Process, Completed, Completed with Errors, Failed)
- E** The Records Processed section displays how many records were processed.



Navigating the Dashboard (continued)

- F** Once the OneRoster files have finished processing, the error table will populate. Additional details are available in the table on page 36.
- G** Digital Administrators can search for specific errors using the search box.
- H** The Error Table can also be filtered and exported as needed.
- I** To request that the integration be turned off, select the **Request to Turn Off the Integration** button.



SFTP Folder

Setting up the SFTP Folder

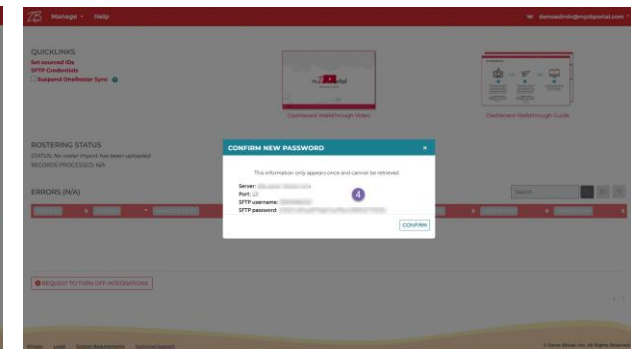
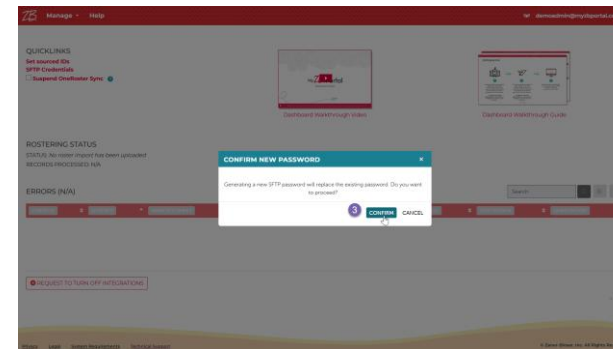
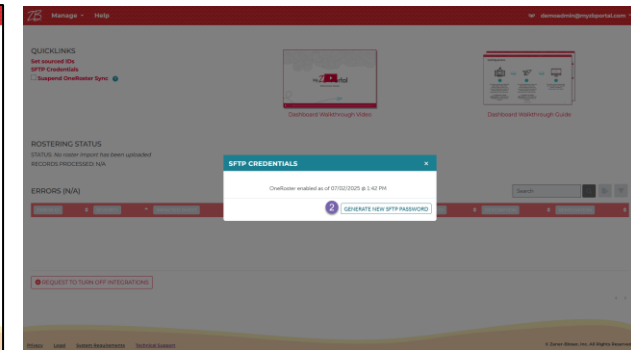
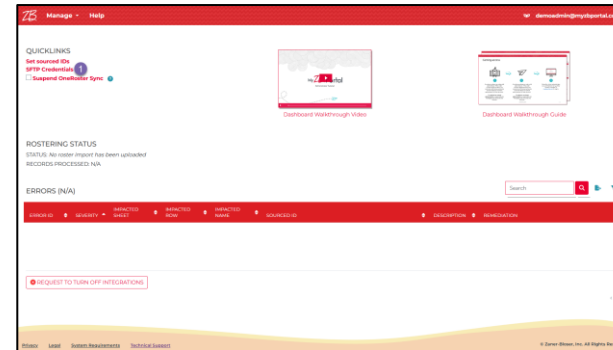
Once your integration has been set up, go to the Integrations Dashboard to generate the SFTP Credentials.

- 1 Click on the SFTP Credentials Link.
- 2 In the pop-up box, click on the **Generate New SFTP Password**.
- 3 Next Click On **Confirm**.

The system will provide the following credentials:

- The server
- The port
- The SFTP username
- The SFTP password.

- 4 Please input these credentials into your chosen SFTP client (or SIS, if your SIS has an embedded SFTP client).



Setting the Sourced IDs

Setting School Sourced ID (required)

1 The next step is to click on **Set Sourced IDs** to assign a unique Sourced ID to each school in the district. These Sourced IDs serve as identifiers for each school and should match the corresponding IDs in the users.csv file.

This table displays all the schools in the district. If a school is missing from the listing, please [contact Zaner-Bloser Technical Support](#).

2 To upload the school IDs, use the preformatted sourced IDs template.

3 Or sourcedIDs can be added manually. Click on the pencil icon and edit box will appear.

The digital administrator can also search for a school within the district.

Manage Help demoadmin@myzbportal.com

< BACK TO INTEGRATIONS DASHBOARD

SET SOURCED IDS

Enter sourced IDs for your institution. If you do not see all your schools, please contact Technical Support (zbtechsupport@zaner-bloser.net).

no file chosen CHOOSE FILE UPLOAD

Download the sourced IDs template.

Only show schools with sourcedIDs

Search

SOURCED ID	SCHOOL ID	INSTITUTION
	superschool	Superkids Demo School
0000	teaschool	TEA School
	zbdemo	Demo School
0	zbtxdemo	TX Demo School

Privacy Legal System Requirements Technical Support © Zaner-Bloser, Inc. All Rights Reserved.

Requirements for the OneRoster Files

Tips for Data in the Files

Once the Source IDs have been set, it is now time to place the first set of files.*

Here are some tips for what kind of data to include in the files:

- Only send classes and users that are using Zaner-Bloser programs. We typically will not need Art, Science, PE, or Mathematics classes
- Only send over the grade levels that are using Zaner-Bloser programs. Typically, the grade levels we support are Grades K-6.
- Double check that the grade level codes match the [Common Education Data Standards](#) codes.

*We are only able to accept .csv deliveries to via the SFTP folder and we are unable to accept .csvs that do not adhere to either the OneRoster format.

Requirements for OneRoster Files

When providing OneRoster csvs for daily sync, please ensure the following:

- All csvs must be bundled into a zip file named “oneroster.zip” and placed directly onto the SFTP. Please do not create subfolders for the zip file on the SFTP.
- Any new zip files must completely replace existing zip files on the SFTP. If two or more zip files exist, there will be a conflict. Please ensure that only one zip file exists on the SFTP at a time.
- Teacher users who are new to ZB Portal will automatically receive setup emails after the initial sync.

*We are only able to accept .csv deliveries to via the SFTP folder and we are unable to accept .csvs that do not adhere to either the OneRoster format.

Required OneRoster Files

Required OneRoster files:

- manifest.csv
- orgs.csv
- users.csv
- classes.csv
- enrollments.csv

Requirements for OneRoster manifest.csv		
Header Name	Column Required To Be Filled Out	Header Required But Column Not Required To Be Filled Out
property/name	X	
value	X	

Example manifest.csv

A	B	C	D
propertyName	value		
manifest.version	1		
oneroster.version	1.1		
file.academicSessions	absent		
file.categories	absent		
file.classes	bulk		
file.classResources	absent		
file.courses	absent		
file.courseResources	absent		
file.demographics	absent		
file.enrollments	bulk		
file.lineItems	absent		
file.orgs	bulk		
file.resources	absent		
file.results	absent		
file.users	bulk		
source.systemName	ClassLink OneRoster		
source.systemCode	ClassLink		

Requirements for OneRoster orgs.csv		
Header Name	Column Required To Be Filled Out	Header Required But Column Not Required To Be Filled Out
sourcedid	X	
status		X
dateLastModified		X
name	X	
type	X	
identifier		X
parentSourcedID	X	

Example orgs.csv

A	B	C	D	E	F	G	H	I
sourcedId	status	dateLastModified	name	Type	identifier	parentSourcedId		
5000			Test 88 Di	District				
5001			New Scho	School		5000		
5002			New Scho	School		5000		

	Requirements for OneRoster users.csv	
Header Name	Column Required To Be Filled Out	Header Required But Column Not Required To Be Filled Out
sourcedID	X	
status		X
dateLastModified		X
enabledUser	X	
orgSourcedIds	X	
role	X	
username	X	
userIds		X
givenName	X	
familyName	X	
middleName		

Continued on next page

	Requirements for OneRoster users.csv Continued	
Header Name	Column Required To Be Filled Out	Header Required But Column Not Required To Be Filled Out
identifier		X
email		X
sms		X
phone		X
agentSourcedID		X
grades		X
password		X

Example
users.csv

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
sourcedId	status	dateLastM	enabledU	orgSource	role	username	givenNam	familyNan	middleNai	identifier	email	sms	phone	agentSour	grades	password
bhill@870	Active		TRUE	5001	Teacher	54182ezra	Sarai	Greenholt	Terrence		bhill@870	1-080-640	302.827.4825	x8867		
jrand@87	Active		TRUE	5002	Teacher	6147alek	Eugenia	Dickinson	Jarred		jrand@87	(561)632-6	368.117.5697	x57921		
StudentOr	Active		TRUE	5001	Student	student1	Viviane	Boyer	Elmira		student1@	1-821-671	780.227.7867		1	
bh22ill@8	Active		TRUE	5000	Administr	54182ezra	monte	miller	Terrence		bh22ill@8	1-080-640	302.827.4825	x8867		

Requirements for OneRoster enrollments.csv		
Header Name	Column Required To Be Filled Out	Header Required But Column Not Required To Be Filled Out
sourcedID	X	
status		X
dateLastModified		X
classSourcedID	X	
schoolSourcedID	X	
userSourcedID	X	
role	X	
primary		X
beginDate		X
endDate		X

Example
enrollments.csv

A	B	C	D	E	F	G	H	I	J	K
sourcedId	status	dateLastModified	classSourcedId	schoolSourcedId	userSourcedId	role	primary	beginDate	endDate	
jrand@_504	Active		SCH504		5002 jrand@8700.org	Teacher				
StudentOne_501	Active		SCH501		5001 StudentOne5000	Student				

Requirements for OneRoster classes.csv		
Header Name	Column Required To Be Filled Out	Header Required But Column Not Required To Be Filled Out
sourcedID	X	
status		X
dateLastModified		X
title	X	
grades		X
courseSourcedID	X	
classCode		X
classType	X	
location		X
schoolSourcedID	X	
termSourcedIds	X	

Example
enrollments.csv

A	B	C	D	E	F	G	H	I	J	K
sourcedId	status	dateLastModified	classSourcedId	schoolSourcedId	userSourcedId	role	primary	beginDate	endDate	
jrand@_504	Active		SCH504		5002 jrand@8700.org	Teacher				
StudentOne_501	Active		SCH501		5001 StudentOne5000	Student				

Requirements for OneRoster classes.csv Continued		
Header Name	Column Required To Be Filled Out	Header Required But Column Not Required To Be Filled Out
subjects		X
subjectCodes		X
period		X

Example classes.csv

A	B	C	D	E	F	G	H	I	J	K	L	M	N
sourcedId	status	dateLastModified	title	grades	courseSourcedId	classCode	classType	location	schoolSourcedId	termSourcedIds	subjects	subjectCodes	periods
SCH501	Active		Kindergarten 501	grade1					5001	5001			
SCH502	Active		Grade1502	grade1					5001	5001			
SCH503	Active		Grade2503	grade2					5002	5002			
SCH504	Active		Grade3504	grade2					5002	5002			
SCH505	Active		Grade4505	grade2					5002	5002			
SCH506	Active		Grade5506	grade2					5002	5002			
SCH507	Active		Grade6507	grade2					5002	5002			
SCH508	Active		Grade7508	grade2					5002	5002			
SCH509	Active		Grade8509	grade2					5002	5002			
SCH511	Active		Grade10511	grade2					5002	5002			
SCH512	Active		Grade11512	grade2					5002	5002			
SCH513	Active		Grade12513	grade2					5002	5002			
SCH514	Active		Grade13514	grade2					5002	5002			
SCH515	Active		Grade14515	grade2					5002	5002			
SCH516	Active		Grade15516	grade2					5002	5002			
SCH517	Active		Grade16517	grade2					5002	5002			
SCH518	Active		Grade17518	grade2					5002	5002			

Error Table

OneRoster Status

Once the files have been placed into the SFTP folder, Zaner-Bloser's OneRoster processor will scan the SFTP folders over night to locate any recent files that have been placed.

The OneRoster processor will run any files that are in the folder and make updates to users and classes.

The last time the files were processed, and the status of the sync will show in the Status Section. (In Process, Completed, Completed with Errors, Failed)

How big the changes are will determine how long it takes to processor to run, so small amounts of data will only take a few moments to run, and big amounts of data could run for a few hours.

Navigating the Error Table

Once the OneRoster Processor has completed processing the files, the Error Table will populate with errors. If no errors were generated, it will be empty.

A This is the Error ID, it is the number code of the error. This is a ZB-provided code and does not have relevance outside of ZB Portal.

B The severity of the error will show how severe the error was.

- **Critical** - failed the entire process
- **Data Error** - didn't fail the entire process but caused some data to not be processed

C Impacted sheet will guide you to the specific sheet where the error is

(continued on next page)

The screenshot shows the ZB Portal interface with a red header. The main content area includes a 'QUICKLINKS' section with 'Set sourced IDs', 'SFTP Credentials', and 'Suspend OneRoster Sync'. Below this is a 'ROSTERING STATUS' section with a progress indicator and 'RECORDS PROCESSED: 3090 / 6711'. The 'ERRORS (3621)' section is highlighted with a red bar and contains a table with the following data:

ERROR ID	SEVERITY	IMPACTED SHEET	IMPACTED ROW	IMPACTED NAME	SOURCED ID	DESCRIPTION	REMEDATION
EnrollmentsCsv5012	Data Error	Enrollments.csv	Row 2367	2025-06-03	[Redacted]	EndDate is in the past.	The enrollment EndDate for this user is in the past. This enrollment will not be applied.
EnrollmentsCsv5012	Data Error	Enrollments.csv	Row 3230	2025-06-03	[Redacted]	EndDate is in the past.	The enrollment EndDate for this user is in the past. This enrollment will not be applied.

Below the table is a button labeled 'REQUEST TO TURN OFF INTEGRATIONS'. The footer contains links for 'Privacy', 'Legal', 'System Requirements', and 'Technical Support', along with the copyright notice '© Zaner-Bloser, Inc. All Rights Reserved.'

Navigating the Error Table (Continued)

- D** The impacted row will narrow down the row that is impacted.
- E** If applicable, the impacted name will show you what is impacted by the error.
- F** **Sourced ID** is this user/class/institution's associated sourced ID.
- G** **Error description** is a friendly description of the error.
- H** **Remediation** is an explanation of how to resolve the error.

The screenshot displays the ZB MyZportal interface. At the top, there are navigation links for 'Manage' and 'Help', and a user email 'demoadmin@myzbportal.com'. Below this, there are 'QUICKLINKS' for 'Set sourced IDs', 'SFTP Credentials', and 'Suspend OneRoster Sync'. There are also two 'Dashboard Walkthrough' options: a video and a guide. The 'ROSTERING STATUS' section shows the process initiated on 7/1/2025 at 8:00pm and completed with errors on 7/1/2025 at 8:12pm, with 3090 records processed out of 6711. The 'ERRORS (3621)' section features a table with columns: ERROR ID, SEVERITY, IMPACTED SHEET, IMPACTED ROW, IMPACTED NAME, SOURCED ID, DESCRIPTION, and REMEDIATION. Two error rows are visible, both for 'EnrollmentsCiv5012' with a 'Data Error' severity. The first row is impacted on 'Row 2367' and the second on 'Row 3230', both with an impacted name of '2025-06-03'. The description for both is 'EndDate is in the past.' and the remediation is 'The enrollment EndDate for this user is in the past. This enrollment will not be applied.' Below the table is a button labeled 'REQUEST TO TURN OFF INTEGRATIONS'. The footer contains links for 'Privacy', 'Legal', 'System Requirements', and 'Technical Support', along with the copyright notice '© Zaner-Bloser, Inc. All Rights Reserved.'

ERROR ID	SEVERITY	IMPACTED SHEET	IMPACTED ROW	IMPACTED NAME	SOURCED ID	DESCRIPTION	REMEDATION
EnrollmentsCiv5012	Data Error	Enrollments.civ	Row 2367	2025-06-03		EndDate is in the past.	The enrollment EndDate for this user is in the past. This enrollment will not be applied.
EnrollmentsCiv5012	Data Error	Enrollments.civ	Row 3230	2025-06-03		EndDate is in the past.	The enrollment EndDate for this user is in the past. This enrollment will not be applied.

Correcting Errors – When to Reach out for Help

When errors show up on the Dashboard, users will need to fix them by checking the details in the error table. Each error comes with a helpful **Remediation** tip to guide them through what to do. Once the issues are addressed, users should upload the corrected files, let them process, and then check the error table again.

Since the exact steps to fix errors can vary depending on the SIS being used, additional support isn't available. For help with specific errors, users should reach out to their SIS provider directly.

When to Contact Zaner-Bloser's Tech Support

If you are encountering any of the following issues, please reach out to Zaner-Bloser's Tech Support for assistance

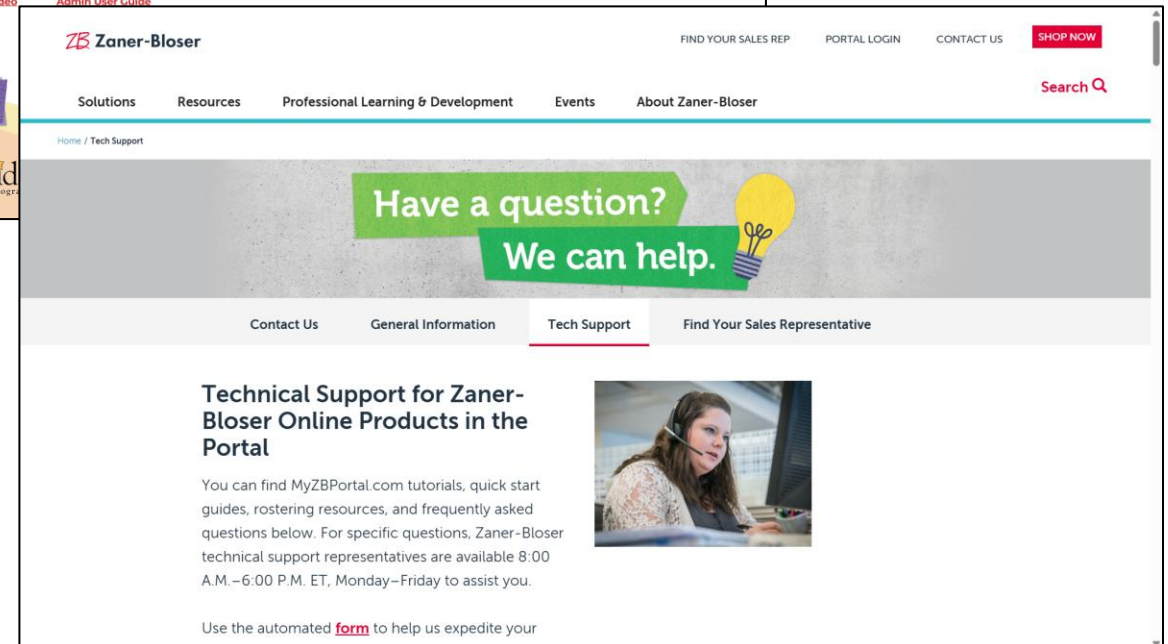
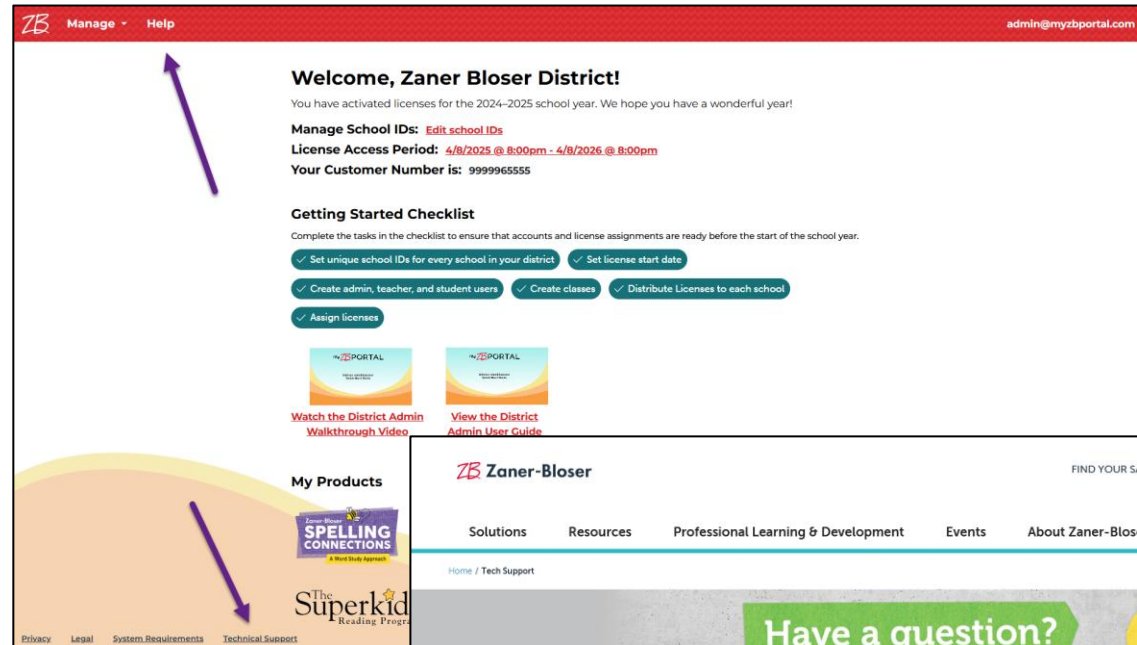
- You receive an error message to contact Zaner-Bloser's Tech Support
- Students are not rostered, and no errors exist for these students in the table.
- No one is being rostered, and no critical errors exist in the table.
- Classrooms or teachers are incorrect, and no errors exist for these in the table.
- Files are placed, but:
 - The process has not run
 - No critical errors exist in the table

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.](#)



Optional Digital Administrator Activities

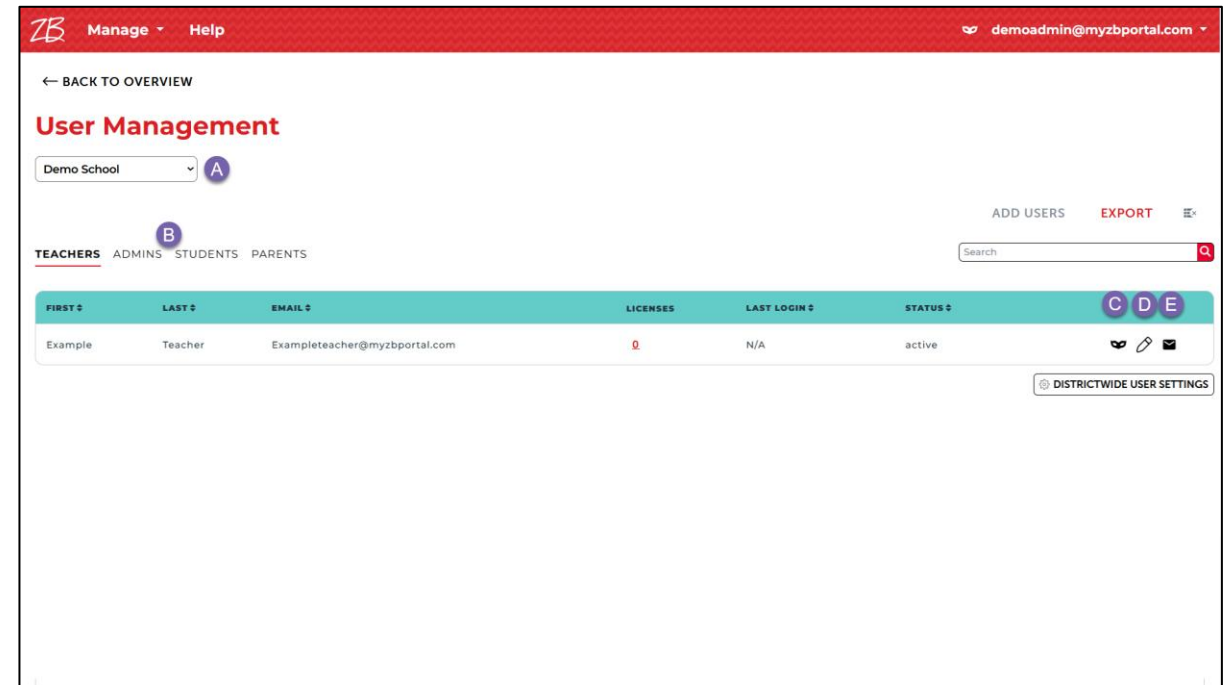
Optional Activities for Digital Administrators

As a digital administrator, there are optional activities that can be done, such as generate passwords for students, create additional district administrator accounts, manage user settings, and assign licenses.

The next few pages will go over these activities.

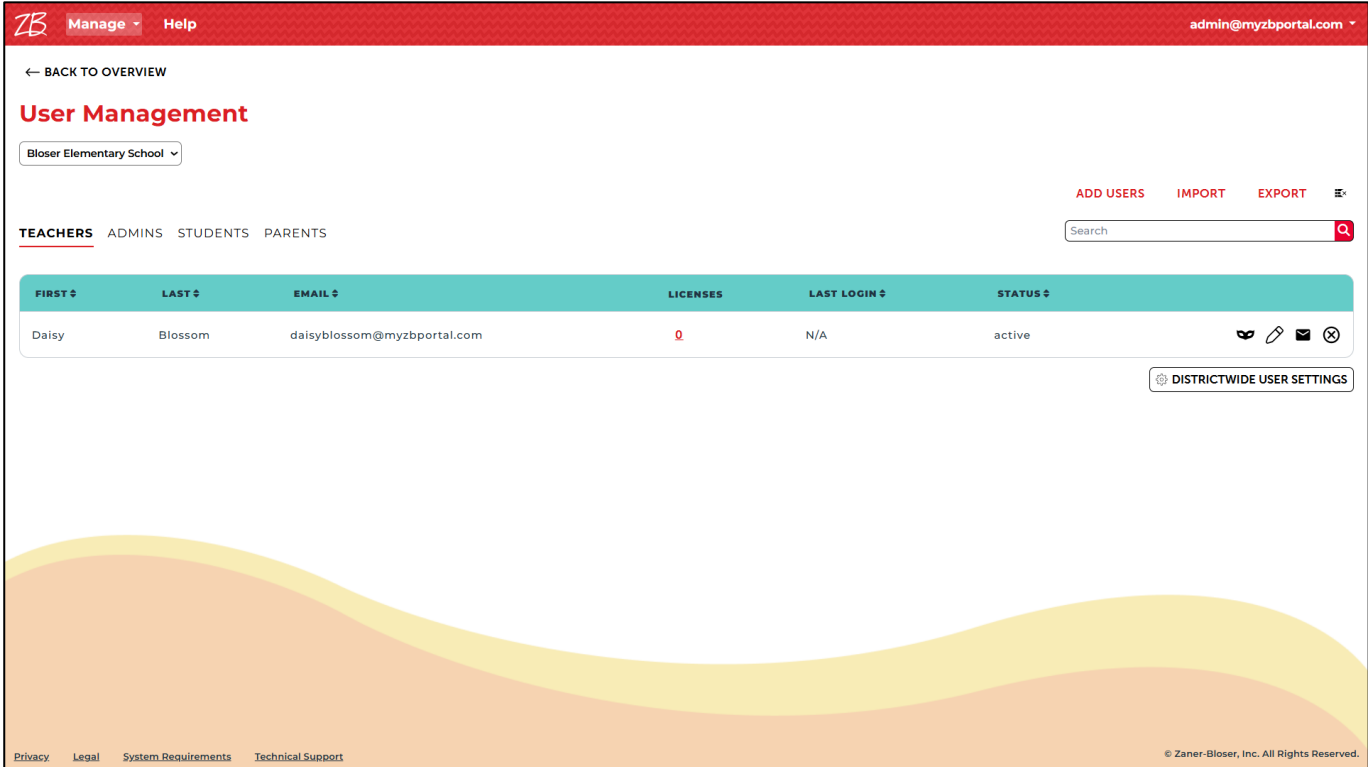
Navigating the User Management Page

- A** Digital Administrators will use the **School Dropdown** menu to toggle between schools within the district.
- B** The **Role** tabs will show the users by role for the school selected from the School Dropdown menu.
- C** Clicking on the **Mask** icon allows the Digital Administrator to Masquerade as a teacher
- D** The **Pencil** icon allows the Digital Administrator to Edit a user's information.
- E** Clicking on the **Envelope** icon will resend the users getting started email to them.



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 shows the 'User Management' page in the ZB Portal. The page has a red header with the ZB logo, 'Manage', and 'Help' menus. The user is logged in as 'admin@myzbportal.com'. Below the header, there is a 'BACK TO OVERVIEW' link and a dropdown menu for 'Bloser Elementary School'. The main content area has tabs for 'TEACHERS', 'ADMINS', 'STUDENTS', and 'PARENTS', with 'TEACHERS' selected. There are buttons for 'ADD USERS', 'IMPORT', and 'EXPORT'. A search bar is present. A table lists user information:

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

At the bottom right, there is a 'DISTRICTWIDE USER SETTINGS' button. The footer contains links for 'Privacy', 'Legal', 'System Requirements', and 'Technical Support', along with the copyright notice '© Zaner-Bloser, Inc. All Rights Reserved.'

Generating Student Passwords (bulk option)

From the Manage Users Page, passwords can be generated for students.

1

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

2

Next click on the **Students tab**.

3

Click on the **Key** icon.

4

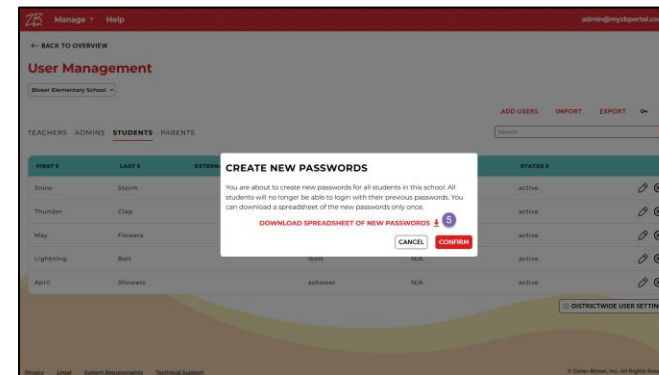
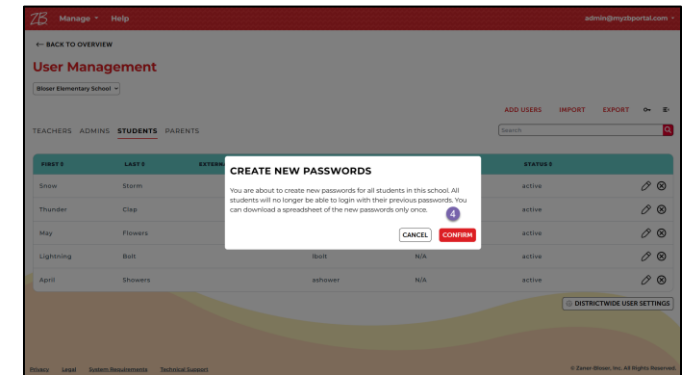
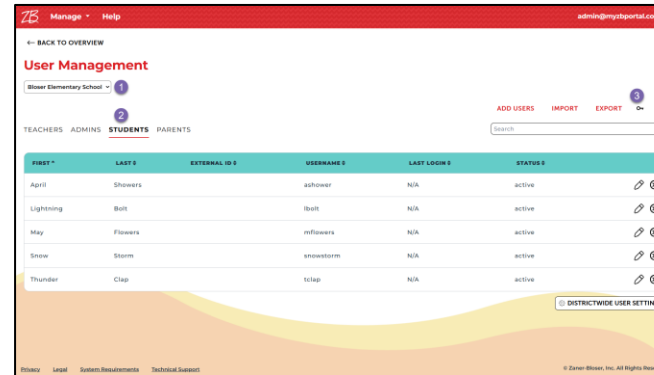
A warning pop up box will appear asking for confirmation to generate new passwords. Click **Confirm**.

5

A link to download the passwords will appear.

!

Please note: clicking this button will create new passwords for all the students in the school. These passwords will replace any passwords currently in use.



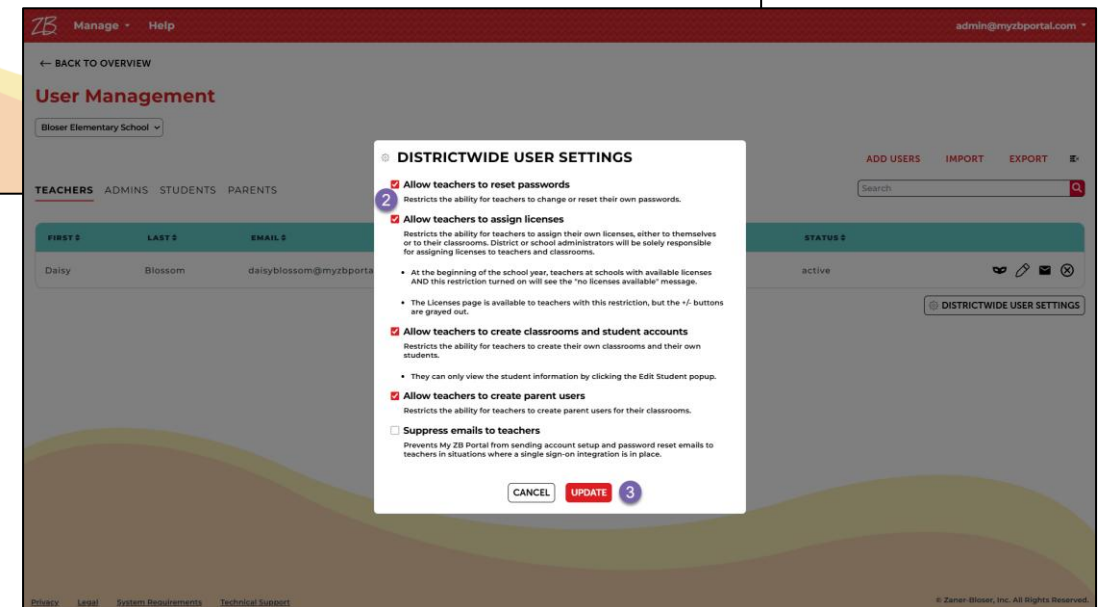
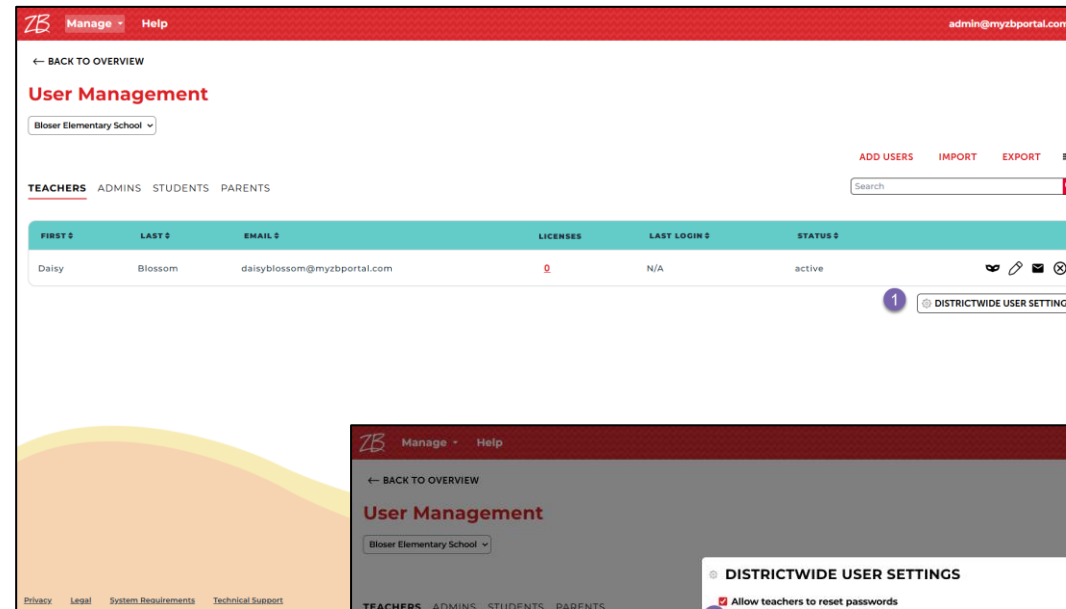
Managing User Settings

There are several configurable user settings that can control the functionality available to users in My ZB Portal.

1 Click the Districtwide **User Settings** button.

2 A box will pop with choices for various user settings. Click the box next to the selection.

3 Once finished, click **Update**.



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

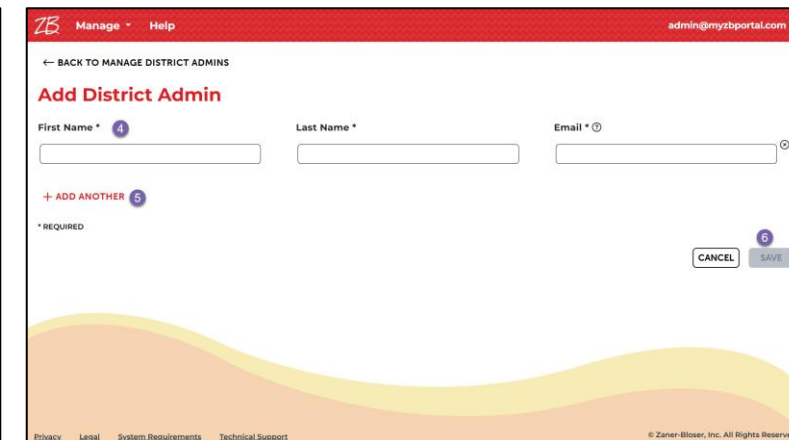
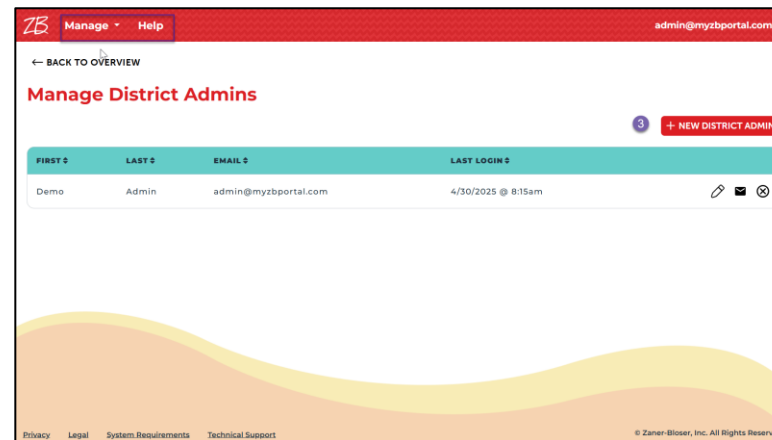
Fill in the required information.

5

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

6

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



Navigating the Licenses Page

- A** The **in-use** column shows the number of licenses used versus the number of licenses purchased.
- B** The **licenses** column will show the name of the license purchased.
 - **Teacher licenses** are assigned to teacher users and are used to grant access to digital teaching resources and printable materials.
 - **Class licenses** are assigned to classes and are used to grant students within those classes access to online games, videos, and tests.
- C** The **Activation date** is based on the license start date that was selected by a Digital Administrator.
- D** The **Expiration date** reflects the license expiration based on the license start date.
- E** The **Revoke All** button will allow for mass-revoking of all currently-assigned licenses.

The screenshot shows the 'Assign and Revoke Licenses' page for BLOSER ELEMENTARY SCHOOL. The page has a red header with 'ZB Manage Help' and 'admin@myzbportal.com'. Below the header is a 'BACK TO OVERVIEW' link. The main title is 'Assign and Revoke Licenses'. There is a dropdown menu for 'BLOSER ELEMENTARY SCHOOL' and a 'REVOKE ALL' button. The table below has columns for 'IN-USE', 'LICENSE', 'ACTIVATION', and 'EXPIRATION'. There are two rows of license data.

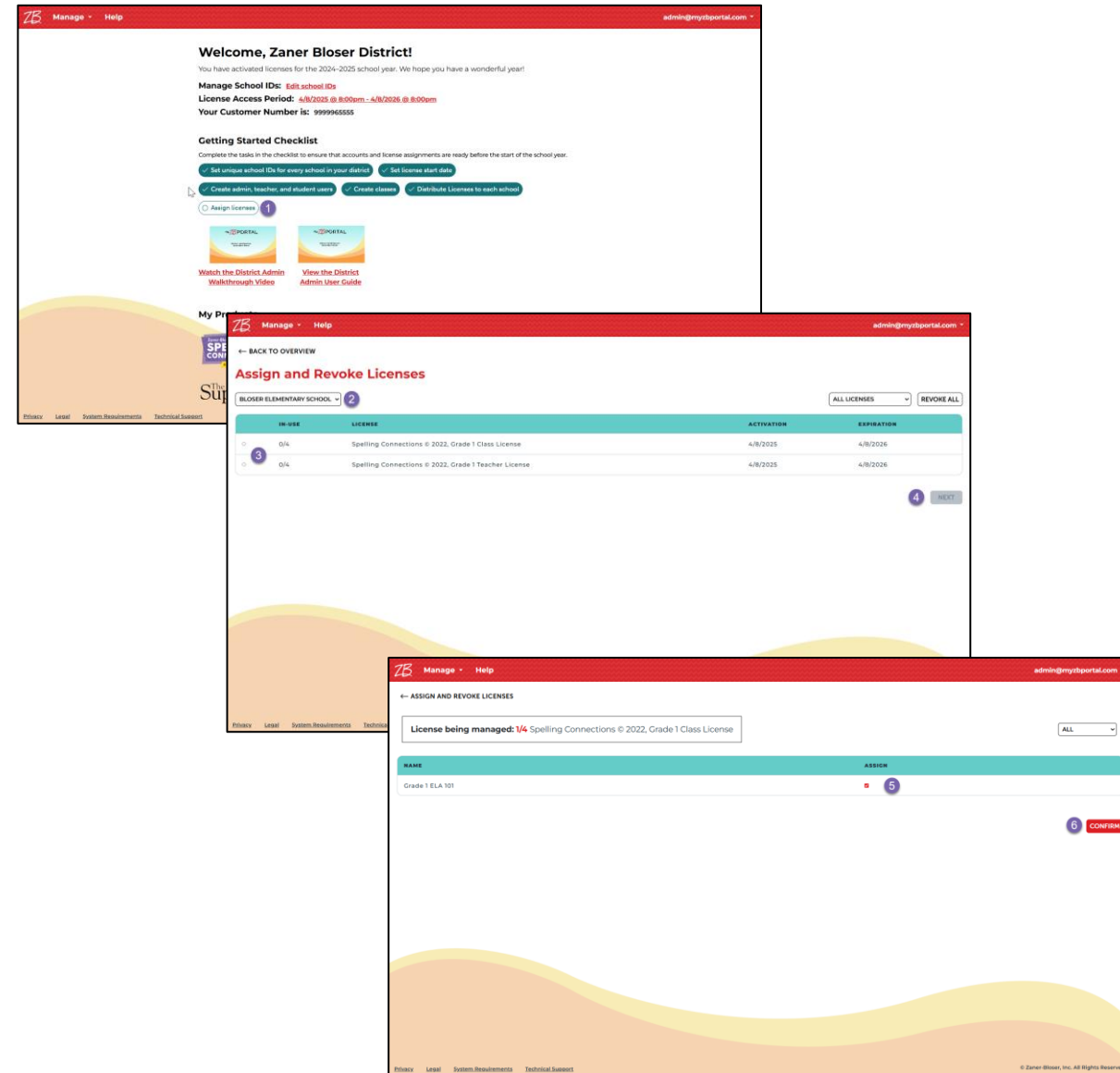
	IN-USE A	LICENSE B	ACTIVATION C	EXPIRATION D
<input type="radio"/>	0/4	Spelling Connections © 2022, Grade 1 Class License	4/8/2025	4/8/2026
<input type="radio"/>	0/4	Spelling Connections © 2022, Grade 1 Teacher License	4/8/2025	4/8/2026

At the bottom right of the table area is a 'NEXT' button. At the bottom of the page are links for 'Privacy', 'Legal', 'System Requirements', and 'Technical Support', and a copyright notice: '© Zaner-Bloser, Inc. All Rights Reserved.'

Assigning Licenses by License Type

Teachers can select their own licenses when they log on to My ZB Portal for the first time, but Digital Administrator can also assign licenses.

- 1 From the Getting Started Checklist, click **Assign licenses**.
- 2 On the Assign and Revoke Licenses page, choose a school from the **dropdown** menu.
- 3 Click the checkbox next to the name of the license to be assigned. The licenses that show in this list are licenses purchased by the school or district this year.
- 4 Click **Next**.
- 5 Click on the box in the **Assign** column beside the teacher(s) or classroom(s) to which the license should be assigned.
- 6 Click **Confirm**.



Assigning Licenses by User

Multiple licenses can be assigned to a single user at once on the Manager Users Page.

1

Click on the **Manage** tab at the top of the screen.

2

From the dropdown menu, select **Manage Users**

3

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

4

Click the **Teacher Tab**.

5

Click on the **number** in the Licenses column.

6

A pop-up will appear with a list of available licenses. Choose the license(s) to assign to the user.

7

Click **Save**.

