

my **ZB** PORTAL

School Administrator Rostering Guide

Table of Contents

Importing Users and Classes	4
---	---

Manually Adding Users and Classes	9
---	---

Rostering and Single Sign-On Integration	17
--	----

Help	19
----------------------	----

Importing Users and Classes

Importing Teacher, Student, or Admin Accounts (Step 1)

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

1

To get started, click on the **Import** button.



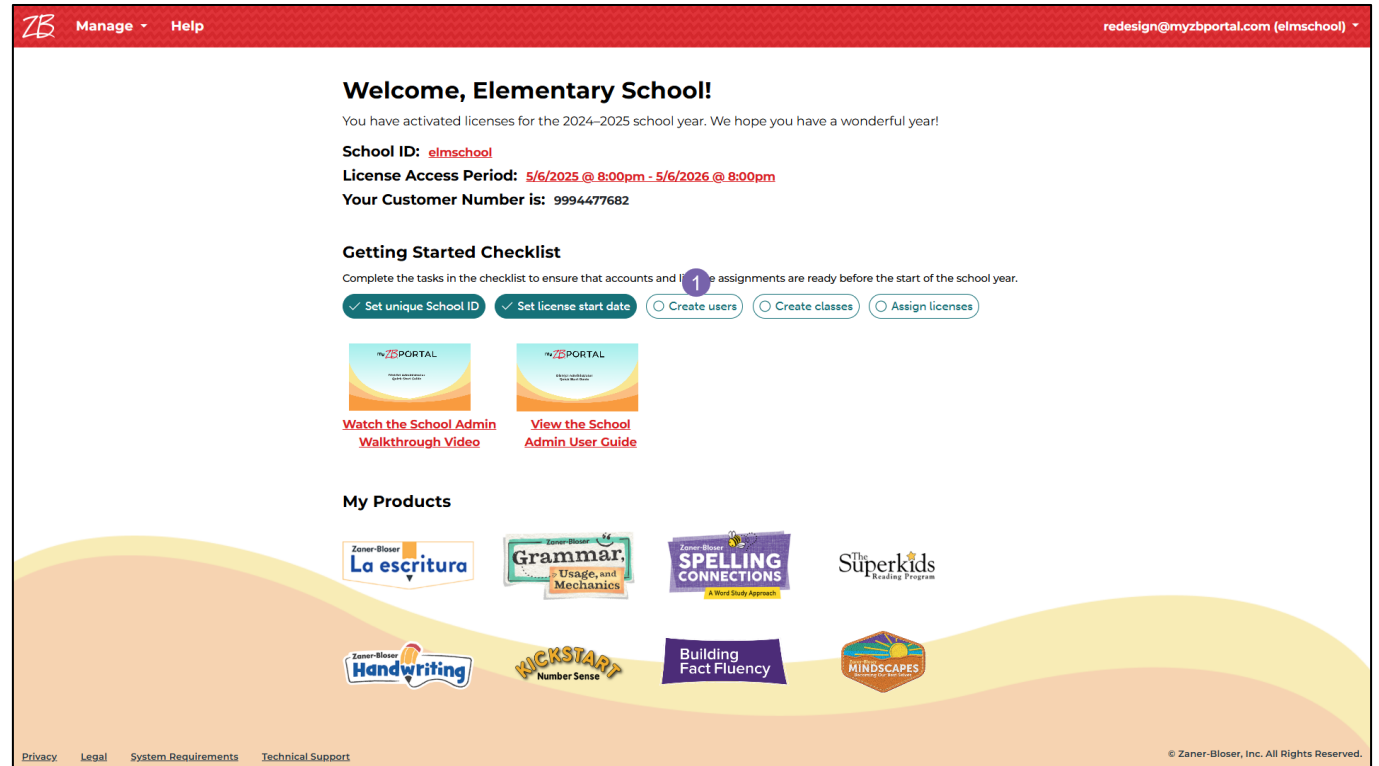
The screenshot shows the 'User Management' interface. At the top, there is a red header with the 'ZB' logo, 'Manage', and 'Help' options. Below the header, there is a navigation bar with '← BACK TO OVERVIEW' and 'User Management' in red. On the right side of the navigation bar, there are buttons for 'ADD USERS', 'IMPORT', and 'EXPORT'. The 'IMPORT' button is highlighted with a red circle and the number '1'. Below the navigation bar, there is a search bar and a list of user categories: 'TEACHERS', 'ADMINS', 'STUDENTS', and 'PARENTS'. The 'TEACHERS' category is selected. Below the categories, there is a table with columns for 'FIRST', 'LAST', 'EMAIL', 'LICENSES', 'LAST LOGIN', and 'STATUS'. The table contains one row with the following data: 'Teacher', 'Example', 'teacherexample@myzbportal.com', '0', 'N/A', and 'active'. To the right of the table, there are icons for user management (eye, edit, mail, delete) and a 'SCHOOLWIDE USER SETTINGS' button. At the bottom of the page, there are links for 'Privacy', 'Legal', 'System Requirements', and 'Technical Support', and a copyright notice: '© Zaner-Bloser, Inc. All Rights Reserved.'

Navigating to the User Management Page

The next step on the Getting Started Checklist is to create user accounts within My ZB Portal.

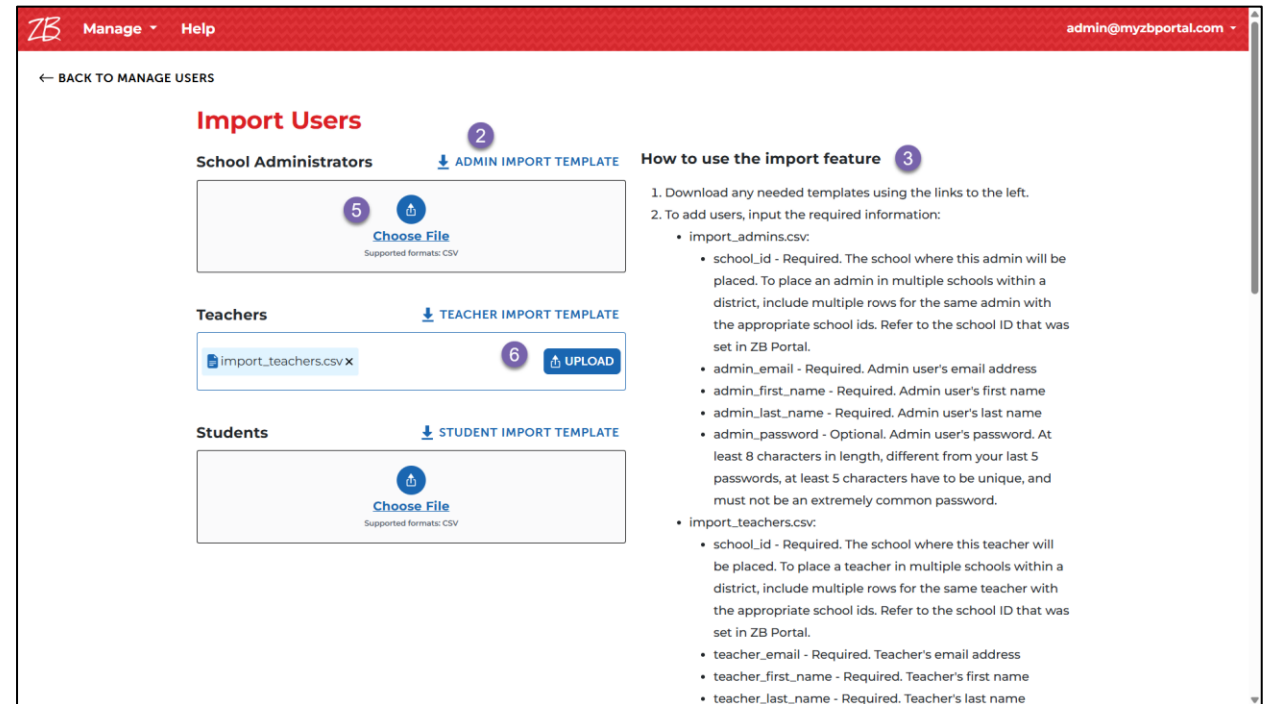
1

Click on Create Users to start setting up user accounts.



Importing Teacher, Student, or Admin Accounts (Steps 2-6)

- 2 Each section has a pre-formatted **template** that can be downloaded and used.
 - 3 This page also provides instructions and helpful definitions to help fill out the template.
 - 4 In the CSV template, fill in the required information and **Save** the file.
 - 5 Select **browse** and choose the saved file
 - 6 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_fir	teacher_las	teacher_pa	class_id	class_name	class_grade	
2	bloser	sunshine@myzbportal.com	Sunny	Sunshine					
3	bloser	cloudy@myzbportal.com	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 ID in the import sheet before uploading them, so that users and classrooms are placed in the right school.
- "School ID" refers to the ID assigned to the school 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.

Import Users

← BACK TO MANAGE USERS

School Administrators ADMIN IMPORT TEMPLATE

Choose File
Supported format: CSV

Teachers TEACHER IMPORT TEMPLATE

import_teachers.csvx UPLOAD

Students STUDENT IMPORT TEMPLATE

Choose File
Supported format: CSV

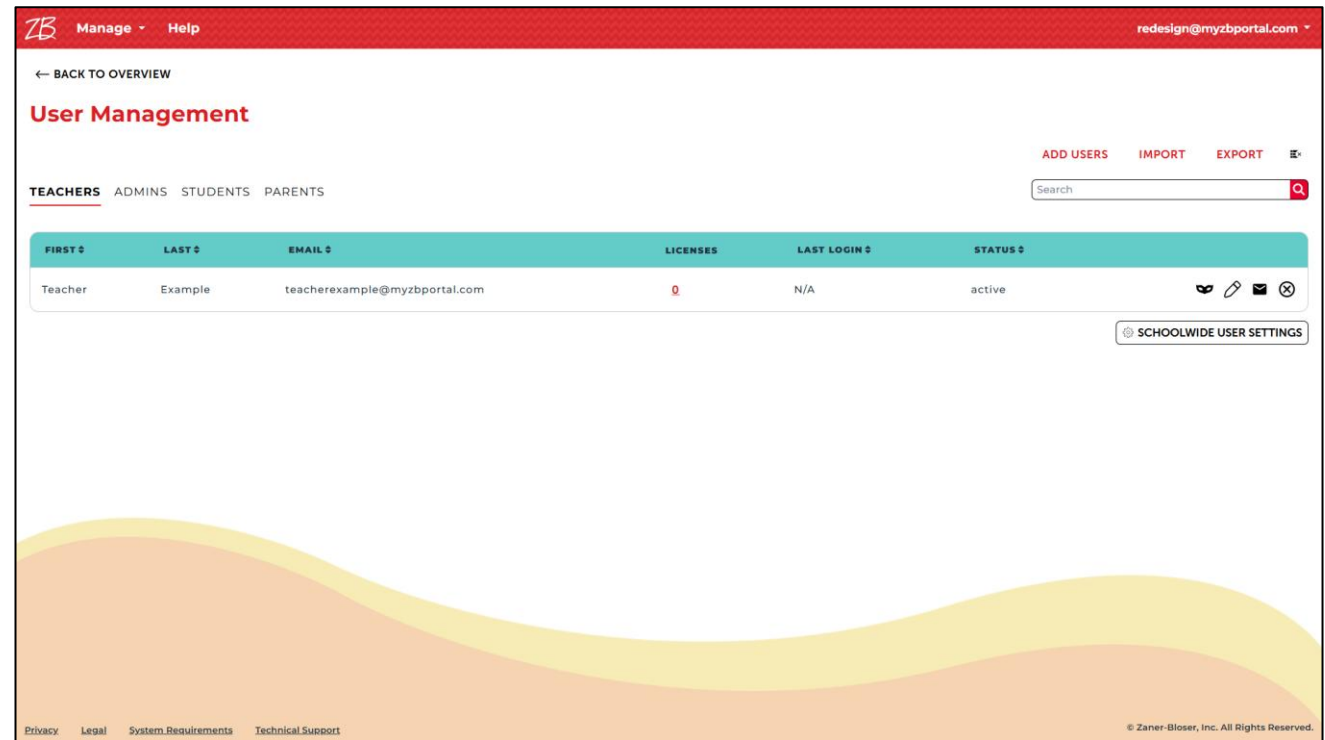
How to use the import feature

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

Tips for User Accounts

- Once added to my ZB Portal, activation emails will be sent out to the Teachers, Parents, 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.

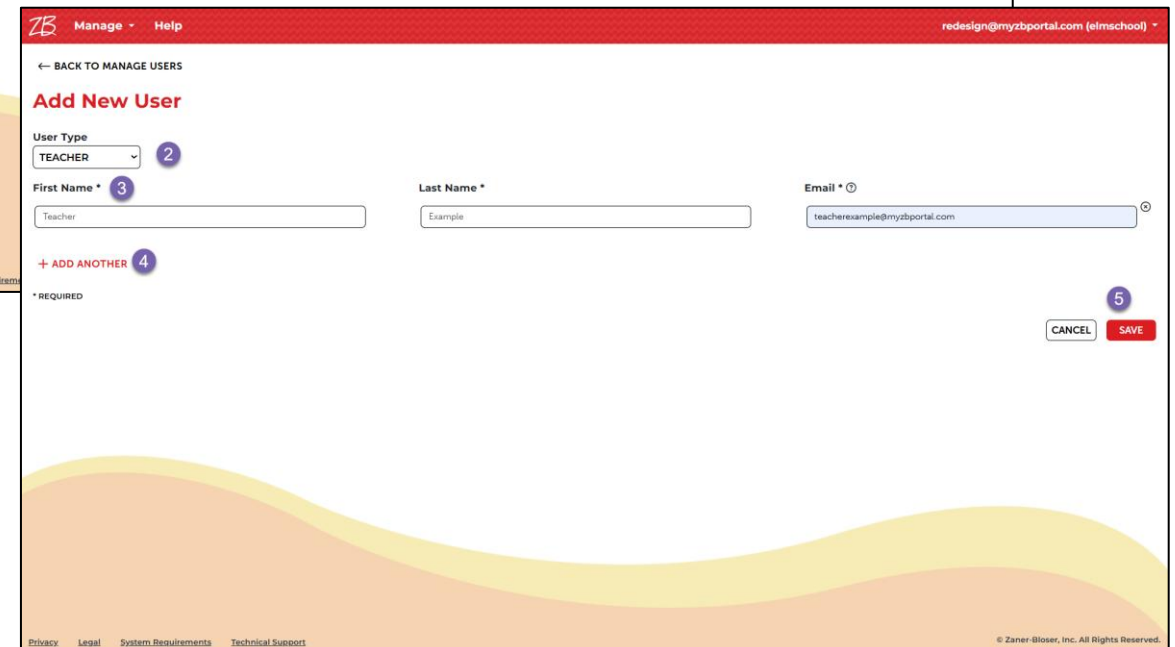
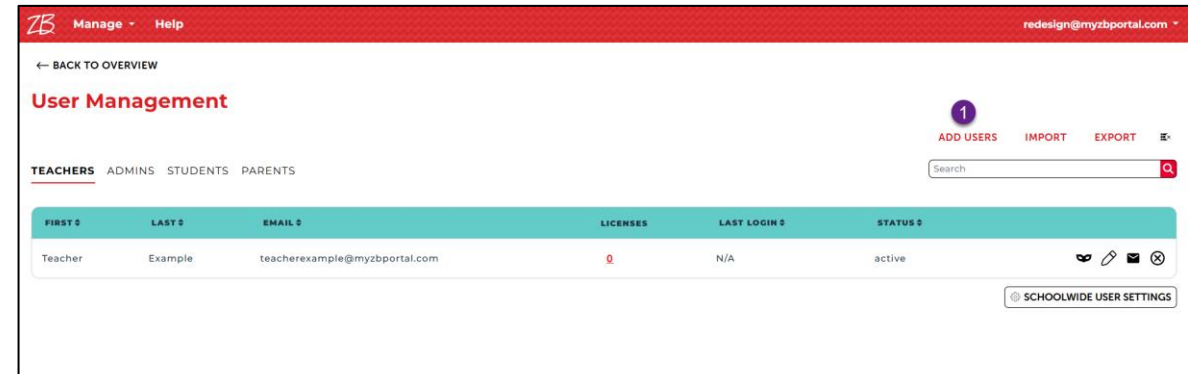


Manually Adding Users and Classes

Creating Individual Teacher Accounts

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

- 1 To get started, click on the **Add Users** link.
- 2 Select a user type from the **dropdown** menu
- 3 Fill in the required information.
- 4 To add additional teachers, click **+Add Another**.
- 5 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

To get started, click on the **Add Users** link.

2

Select a user type from the dropdown menu

3

Fill in the required information.

4

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

5

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

Manage Help redesign@myzbportal.com

← BACK TO OVERVIEW

User Management

1 ADD USERS IMPORT EXPORT

TEACHERS ADMINS STUDENTS PARENTS

FIRST	LAST	EMAIL	LICENSES	LAST LOGIN	STATUS
Teacher	Example	teacherexample@myzbportal.com	0	N/A	active

SCHOOLWIDE USER SETTINGS

Manage Help redesign@myzbportal.com (elmschool)

← BACK TO MANAGE USERS

Add New User

User Type: STUDENT 2

Student First Name * 3: Student

Student Last Name *: Example

External ID: optional

Username *: studentuser

Password: *****

Retype Password: *****

Parent First Name: |

Parent Last Name:

Parent Email:

+ ADD ANOTHER 4

* REQUIRED

CANCEL SAVE 5

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

Creating Individual Parent and Caregiver Accounts

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

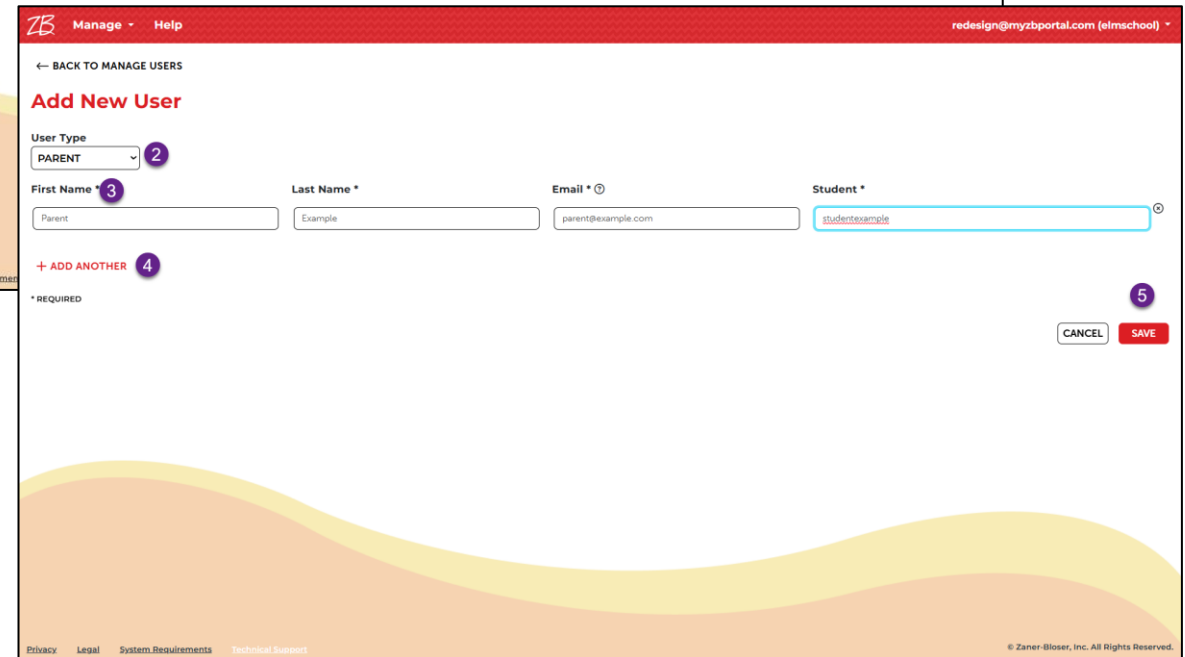
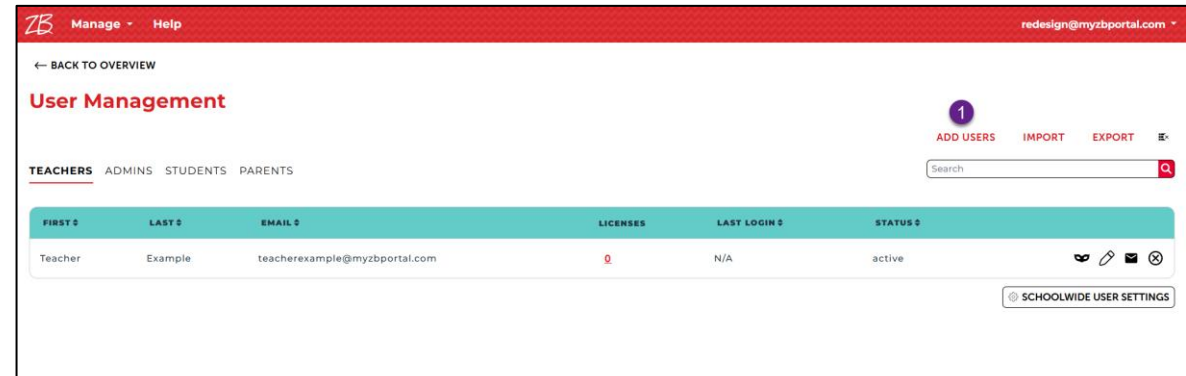
1 To get started, click on the **Add Users** link.

2 Select a user type from the dropdown menu

3 Fill in the required information.

4 To add additional parents and caregivers, click **+Add Another**.

5 Once all the parents and caregivers have been added, click on **Save**.



Creating Individual School Administrator Accounts

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

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

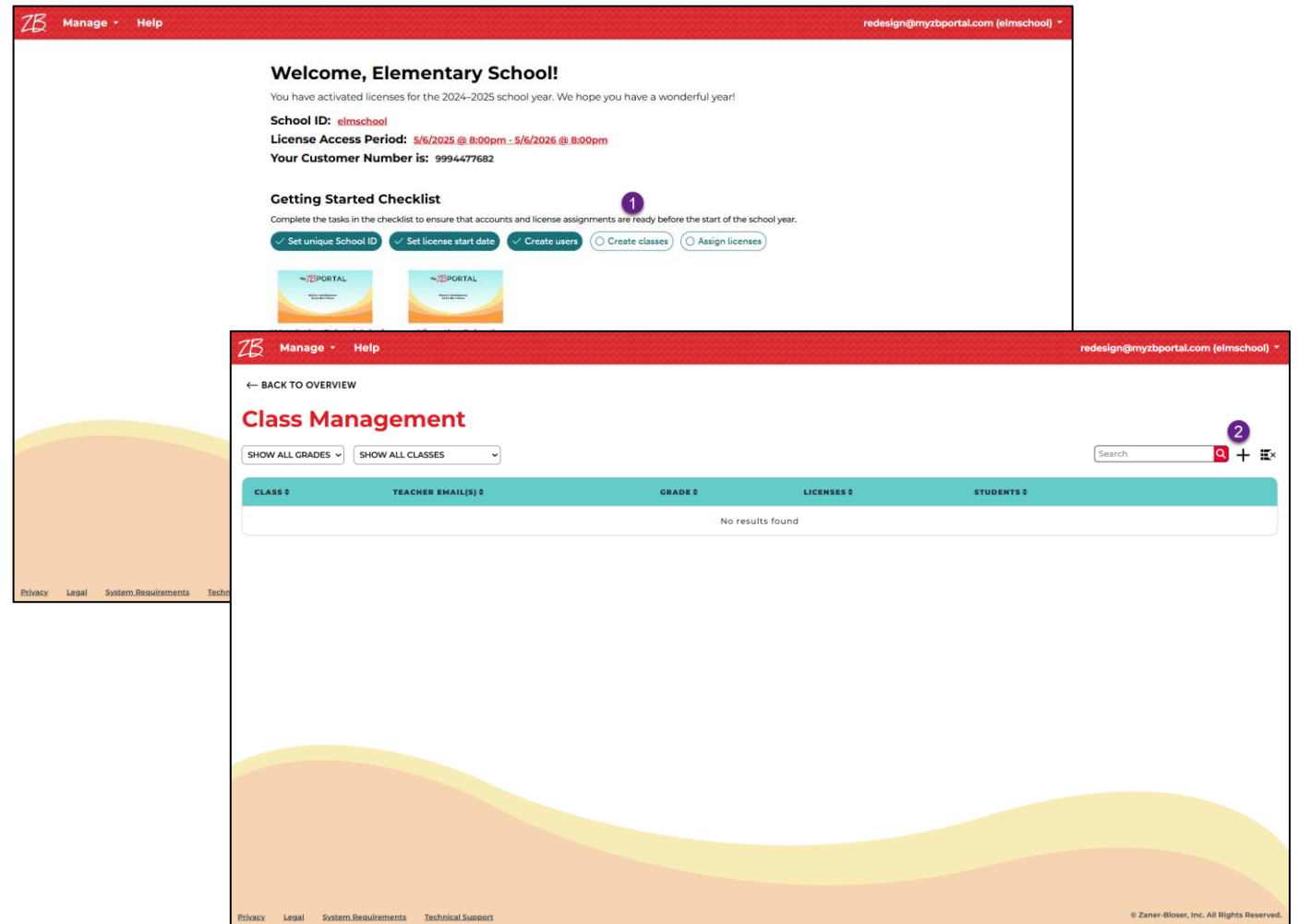
The top screenshot shows the 'User Management' page. It features a red header with 'ZB Manage Help' and 'redesign@myzbportal.com'. Below the header is a navigation bar with '← BACK TO OVERVIEW' and 'User Management'. There are buttons for 'ADD USERS', 'IMPORT', and 'EXPORT'. A search bar is present. Below the search bar is a table with columns: FIRST, LAST, EMAIL, LICENSES, LAST LOGIN, and STATUS. The table contains one row with the following data: Teacher, Example, teacherexample@myzbportal.com, 0, N/A, active. There are icons for user actions and a 'SCHOOLWIDE USER SETTINGS' button.

The bottom screenshot shows the 'Add New User' form. It features a red header with 'ZB Manage Help' and 'redesign@myzbportal.com (elmschool)'. Below the header is a navigation bar with '← BACK TO MANAGE USERS' and 'Add New User'. There is a 'User Type' dropdown menu set to 'SCHOOL ADMIN'. There are input fields for 'First Name *' (containing 'Administrator'), 'Last Name *' (containing 'Example'), and 'Email *' (containing 'example@administrator.com'). There is a '+ ADD ANOTHER' button. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

Creating Classes (Steps 1-2)

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 To create a new class, click on the **+** button.



Creating Classes (Steps 3-7)

- 3 Fill in the required information:
 - Class Name
 - Class ID (optional)
 - Grade Designation (optional)
 - Class icon (optional)
 - Teacher First Name
 - Teacher Last Name
 - Teacher Email
- 4 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.
- 5 Click **Next**.
- 6 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.
- 7 Then click **Next**.

← BACK TO MANAGE CLASSES

Add New Class

ELEMENTARY SCHOOL

ADD CLASS NAME AND TEACHER > ADD LICENSES > ADD STUDENTS

Class Name * Class ID

Grade Designation Classroom Icon

ADD TEACHER

First Name * Last Name * Email *

+ ADD TEACHER OR

* REQUIRED

NEXT

← BACK TO MANAGE CLASSES

Add New Class

ELEMENTARY SCHOOL

ADD CLASS NAME AND TEACHER > ADD LICENSES > ADD STUDENTS

ADD LICENSES

ASSIGN	LICENSE	AVAILABILITY
<input checked="" type="checkbox"/>	GRAMMAR, USAGE, AND MECHANICS © 2021, GRADE 2 CLASS LICENSE	1/50
<input type="checkbox"/>	ZANER-BLOSER HANDWRITING GRADE 1 © 2025 CLASS LICENSE	0/50
<input type="checkbox"/>	ZANER-BLOSER LA ESCRITURA © 2020, GRADE 1 CLASS LICENSE	0/50
<input type="checkbox"/>	SPELLING CONNECTIONS © 2022, GRADE 2 CLASS LICENSE	0/50
<input type="checkbox"/>	THE SUPERKIDS READING PROGRAM © 2017, GRADE 1 CLASS LICENSE	0/50

PREVIOUS NEXT

Creating Classes (Steps 8-10)

8

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.

9

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

10

Click on **Finish**.

The screenshot shows the 'Add New Class' form in the ZB portal. The form is titled 'Add New Class' and is for an 'ELEMENTARY SCHOOL'. It has a breadcrumb trail: '← BACK TO MANAGE CLASSES > ADD CLASS NAME AND TEACHER > ADD LICENSES > ADD STUDENTS'. The 'ADD STUDENTS' section is highlighted with a purple circle containing the number 8. The form contains the following fields:

- Student First Name * (with a purple circle containing 8) - Input field with 'Student' as a placeholder.
- Student Last Name * - Input field with 'Example' as a placeholder.
- External ID ⓘ - Input field.
- Username * ⓘ - Input field with 'sample' as a placeholder.
- Password - Input field with a blue border and a red asterisk, indicating a required field.
- Retype Password ⓘ - Input field with a red asterisk, indicating a required field.
- Parent First Name - Input field.
- Parent Last Name - Input field.
- Parent Email - Input field.

Below the form, there is a section for adding more students, highlighted with a purple circle containing the number 9. It includes a '+ ADD STUDENT' button, an 'OR' separator, and a 'Search Existing' input field. At the bottom right, there are 'PREVIOUS' and 'SAVE' buttons, with a purple circle containing the number 10 next to the 'SAVE' button. The footer contains links for 'Privacy', 'Legal', 'System Requirements', and 'Technical Support', along with the copyright notice '© 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.](#)

