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Scholastic Learning Zone

SLZ Customer Service Guide

Scholastic Learning Zone

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Scholastic Learning Zone

Overview

Scholastic Learning Zone provides a single place for educators and students to access and manage their Scholastic digital suite of products. It also allows educators to perform tasks such as managing student enrolment and access to specific products.

When a school subscribes to one or more of the products in the Scholastic Learning Zone, educators and students may log into the SLZ to access these products.

Schools place orders for the Scholastic Learning Zone products through their accounts. Each account has an administrator. Customers wishing to purchase and use Scholastic Learning Zone products must establish an account, name an administrator, subscribe to products, and import users. All of these functions may be performed through the Customer Service website.

This guide will show how to use the website to establish and manage orders, accounts, users, and subscriptions.

Login to Customer Service Portal

Scholastic Learning Zone is browser-based and may be accessed from any computer with an Internet connection.
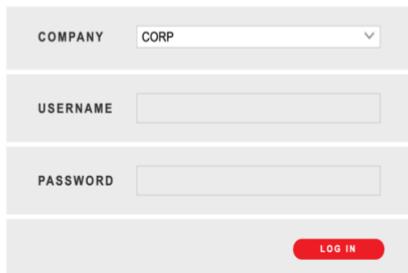
To get started with Scholastic Learning Zone, log in to the Scholastic Learning Zone Customer Service site. Enter your network credentials to **Log In**.(This is same as your Scholastic email credentials).

Home Screen

After logging in, the Home Screen is displayed. The navigation bar of the Home Screen has three areas:

- **Organizations** : Click this link in the bar to quickly create a new organization for a customer. You can also search for organizations by UCN number using the search bar.

- **Contracts** : Click this link to create new contracts

- **Reports**: Click this link to access the orders report, accounts report, or admin report.

Additionally, the Home Screen is by default set to Organizations tab and contains the search field, a link to log out of the customer service site, a link to this user guide, and a drop down menu to switch between countries.

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Order Entry Workflow

When creating an order for a new customer, use the following workflow:

1. Create New Organization

Select Create new organization button from the Organization menu in the navigation bar to create a new organization for the customer (refer Create Organization section for more details)

2. Create New Contract

Click the Create New Contract option available under the Contracts tab in the navigation bar to create an order for that customer (refer Create Contract section for more details)

3. Manage Users - Setup an Administrator

After creating a Contract, you need to setup an administrator for the respective school or organization. An administrator may create new user accounts, import user data, edit current user accounts, edit a school's educational system, move students up or down a year/grade level, organize users into classes, and subscribe users to products.
(refer Manage Users – Setup an Administrator section for more details)

4. Subscribe an Administrator

The next step is to subscribe an administrator to Scholastic Learning Zone products. You need to check and subscribe the products for which the order is placed by the school or organization. You can also add multiple administrators for a school and provide different set of product subscriptions for those administrators. The administrators can then perform admin related functions such as creating new user accounts, importing user data, subscribe users etc for the subscribed products.
(refer Subscribe an Administrator section for more details)

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Create Organization

Order Entry Workflow

1. To create a new account, select **Create New Organization** from the **Organizations** menu in the navigation bar. The Organization Manager screen opens in a new browser window.

2. Choose the country by selecting it from the dropdown menu. Do the same for the "State" field.. Select choices from the lists or type information into the fields.

3. Fill in the fields (an asterisk [*] denotes a required field). Use the dropdown menu to select the Country, State, Customer Group, Customer Type, and Organization Type.

4. To save the changes, click "Create". To cancel the changes, click the "Cancel".

5. To edit the organization details, click the edit option at the right side when you are searching for the organization

Organization Name	Org ID	UCN	Organization Address	Edit Organization
Product demo	CAN 586X	1997410	XYZ ABC , XXX	Edit

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Create Contract

Order Entry Workflow

1. Click the **Create New Contract** option available under the Contracts tab in the navigation bar to open a new order form.
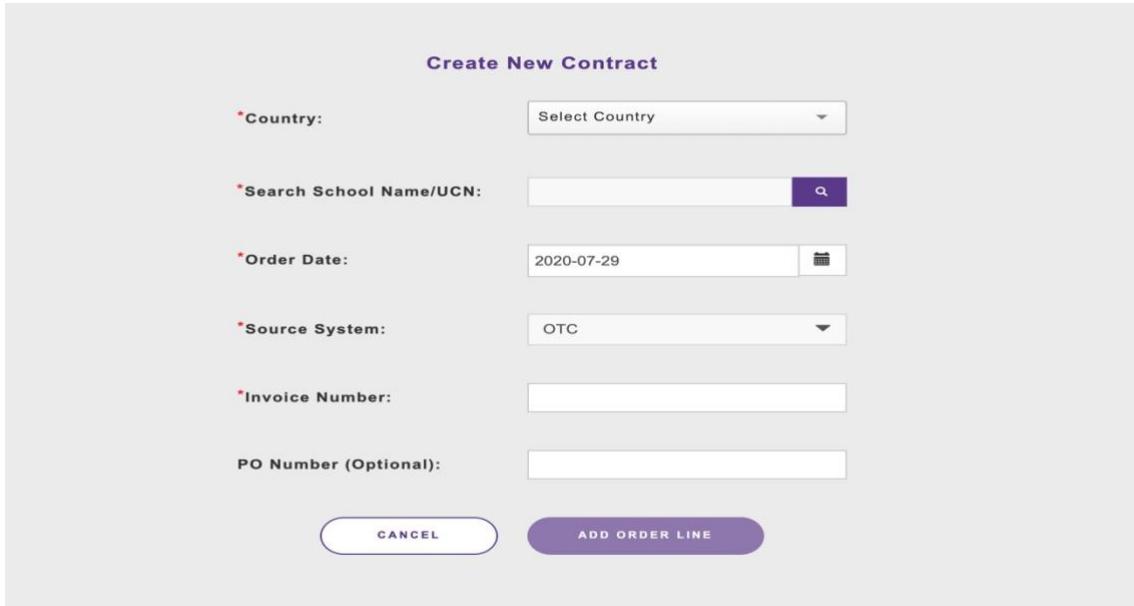
2. To create a contract, start by typing the country name in the Country Name field. The field should self-populate as the program recognizes the country name in the database.

3. Fill in the remaining fields (a red asterisk [*] denotes a required field):

   • **Organization Name**: Type in the name of the school or organization and click on the search icon.

   • **Order Date**: This field will automatically populate with today's date. To edit the date, click in the field and use the calendar widget to select the date the order is being filed.

   • **Source System Name**: Use the pull-down menu to select the order's source system (the financial order entry system).

   • **Invoice Number**: Type in the assigned invoice number or other order identifier from the order's source system.

   • **P.O. Number**: Type in the purchase order number.

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4. When the order information is entered, click **Add Order Line** to open the Create Order Line Screen. The information such as Product name, License quantity, Order Type, Sales currency etc can be selected on this screen. Please refer the below screenshot for details on information that need to be entered on this screen

5. Six types of orders can be created from Create Order Line Screen

   • **Trial** – Order is created with no invoice for the free trial purpose

   • **Normal** – First time sale for the customer without a prior trial order

   • **Conversion** – When a trial is converted into sales order

   • **Renewal** – Sales Order is being renewed for another year sale

   • **SLZ Basic** – When we are providing IP level or site level access to the library or similar type of customer

   • **Migration** - When an existing customer is migrated from a previous platform
   Include Table Access: Enable this option for schools that should have access to the app.
   **Note: Only the Literacy Pro and Math Pro products will be available for selection

6. Use the drop-down menus to fill in the fields (red asterisk [*] denotes a required field), and then click **Create Order Line** at the bottom of the screen to enter the order line, or click **Cancel** to cancel the order.

7. When the order line is added, it will appear at the bottom of the Create Order Screen.

Product	License Count	Subscription	
Literacy Pro	10	2020-08-10 to 2021-08-09	Edit Delete

8. To edit the order line, click the edit on the far right of the order line. This opens the Edit Order Line screen. Modify the order line data and click **Update Order Line** to save the edits, or click **Cancel** to close the screen without saving changes. To delete the order line, click the Delete option.

Edit Delete

Manage Users – Setup an Administrator

Order Entry Workflow

All the administrator related functionalities are available for the customer service representative as well. Please refer Educator User Guide to check all the functionalities that are available in the Manage Users Screen for the Administrator. Refer the steps below for accessing the customer's SLZ account and setting up an admininistrator

1. Search for the organization from the Search bar (refer search section for more details).

2. Click the "**Organisation Name**" link in the Search Results field to view the organization details.

Organization Name	Org ID	UCN	Organization Address	Edit Organization
Production2	CAN Y7TX	800005886	Null Drive 0 Boom town , Northwest Territories A1A 2B2	Edit
SLZ_products	AUS KGWR	800517546	Lucindale , State of South Australia 1234	Edit
Danbury Products Test School_052915	CAN K2CD	800517547	main street Argyle Shore , Province of Prince Edward Island A2S 3D4	Edit
Slz_Production_Maintence	CAN 695J	5345660	Building Street .#123,Block number 505,Testers United States of Am ,	Edit
shubhi product test	MEX WTRT	1997379	sigma centre gurgaon , 202020	Edit
Mohan Product testing	PRI 979P	1997398	123 demo account San , 0000	Edit
Product demo	CAN 586X	1997410	XYZ ABC , XXX	Edit

Viewing records 1 through 7 of 7   Export All

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3. The next screen contains all the information related to the organization

4. At the top of the screen, click the link that says "Scholastic Learning Zone" underneath Access to Customer's SLZ Account.

5. The organization's dashboard will open in a new tab or window. From here, you can "manage users and subscriptions" for the organization.

6. Now you need to set up an administrator account. To do this, begin by clicking **Manage Users** on the Dashboard. This will open the Manage User Accounts screen.
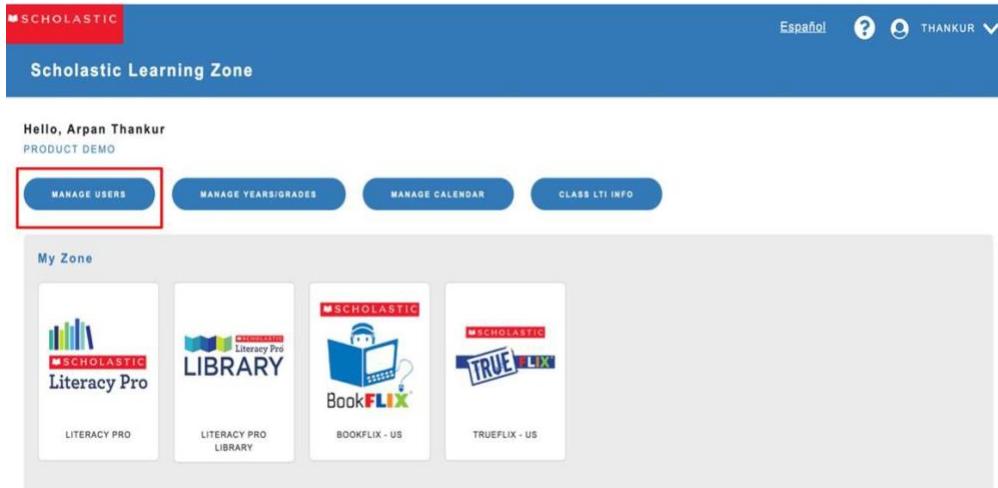
7. Use the "Student", "Teacher", and "Administrators" tabs to select which kind of user you wish to add. In this case, select **Administrator** and click **Add Manually.**

s
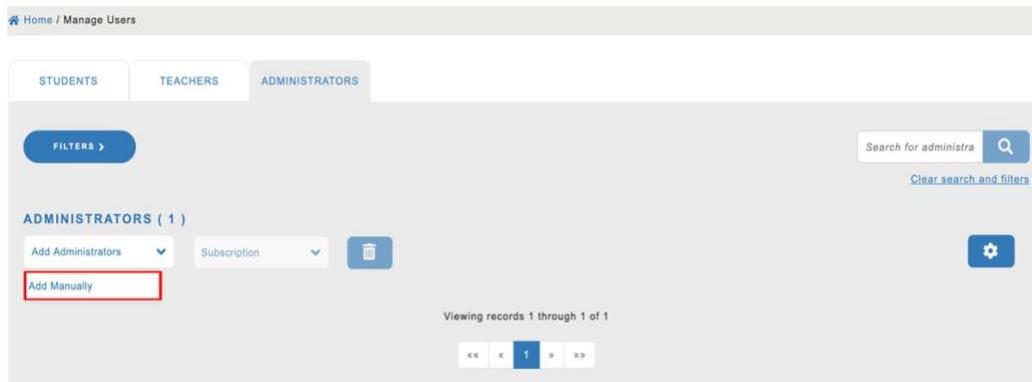
8. Fill in the various fields, being sure to create a unique username and password. Passwords must be between six and 16 characters, and must include a numeral. Username can be between 1 to 255 characters.

Add Administrator

First Name*

Middle Name

Last Name*

Email*

Username*

Subscribe to:

☐ LITERACY PRO (9 / 10)

☐ LITERACY PRO LIBRARY - US (10 / 10)

☐ BOOKFLIX - US (10 / 10)

☐ TRUEFLIX - US (10 / 10)

☐ Add another   ADD

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9. When finished, click **Done** to save the edited profile. To return to the previous screen, click **Cancel**. To add an additional administrator, tick the checkbox **Add Another** and then click on Add.

☐ Add another   ADD

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Order Entry Workflow

Subscribe an Administrator

1. Select **Manage Users** from the dashboard and navigate to the **Administrators tab.**

   Clicking on **Home** link in the upper left helps you to return to the dashboard

2. Select an administrator by clicking the box next to the administrator's name. Click on **Subscription** and **Subscribe an Administrator.**
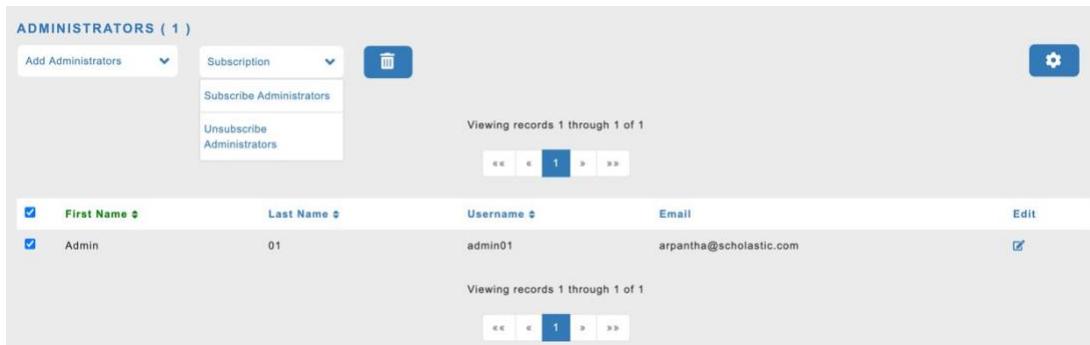

3. Select the programs you wish to subscribe the administrator to by checking the box on the upper left corners of the programs. Click **Subscribe**.

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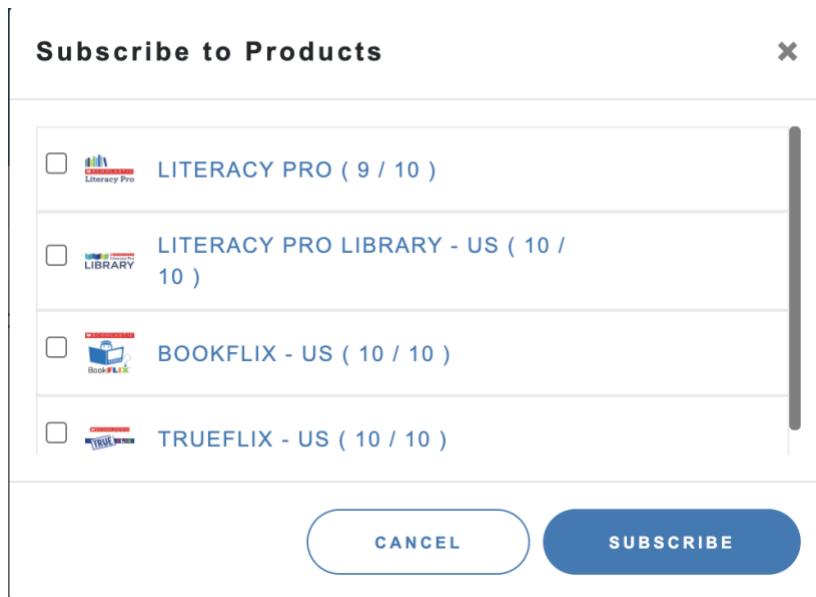
4. To subscribe all students of a specific class to the product, select the class filter on the left to display the students to be selected**.** Click on the **Subscription** tab and then choose **Subscribe Students.**

5. Tick the checkbox for the desired products. Click "Subscribe."

6. The product icons are now visible in the My Zone areas of the administrators' and teachers' dashboards.

7. To unsubscribe a teacher or administrator from a product, click back to the respective tab, check the box next to the name of the appropriate teacher or administrator, click "Subscription" then "Unsubscribe Administrators", and check the programs before clicking "Unsubscribe."

8. The Customer Service representative can also manage classes and has the same administrator privileges. Please refer **Managing your Classes** section of the

   Educator User Guide for more details

Search

Use the Search bar in the respective navigation tabs to do the following:

- Search Organizations
- Search Contracts
- Instant Search

Search Organizations

You can use the search bar available under Organizations Tab to look up for Organizations


This allows user to search for accounts using part of the organization name or the organization ID. Type in a search term and click **Search**.

The search results open in a separate browser window.

For more advanced searches, use the dropdown menus to filter by **Products**

Click the search line in column "**Organization Name**" to see detailed account information.

Organization Name	Org ID	UCN	Organization Address	Edit Organization
			Viewing records 1 through 7 of 7 Export All	
Production2	CAN Y7TX	800005886	Null Drive 0 Boom town , Northwest Territories A1A 2B2	Edit
SLZ_products	AUS KGWR	800517546	Lucindale , State of South Australia 1234	Edit
Danbury Products Test School_052915	CAN K2CD	800517547	main street Argyle Shore , Province of Prince Edward Island A2S 3D4	Edit
Slz_Production_Maintence	CAN 695J	5345660	Building Street ,#123,Block number 505,Testers United States of Am ,	Edit
shubhi product test	MEX WTRT	1997379	sigma centre gurgaon , 202020	Edit
Mohan Product testing	PRI 979P	1997398	123 demo account San , 0000	Edit
Product demo	CAN 586X	1997410	XYZ ABC , XXX	Edit
			Viewing records 1 through 7 of 7 Export All	

The Account Details Screen shows the organization's information. To setup SLZ basic order, click **on Manage Site Authentication Settings** at the bottom. To view the organization's licenses, click the **License Profile** link at the bottom of the Active Orders table.

To limit the organization's administrative functions, uncheck "Allow school to perform its own administrative functions" and/or "Allow school to manage Literacy Pro and/or SOAR settings and benchmarks." If those boxes are checked, the organizations will have full administrative access.

To resend the welcome email to an admin, click the **Send** button next to that admin's name.

To preview the organization's dashboard, manage users, and manage subscriptions, click **Scholastic Learning Zone** underneath Access to Customer's SLZ Account

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Search Contracts

Use the **Search bar** to search for current contracts. Click **Contracts** in the navigation bar to view this search bar.

This search bar at the right can be used to search by Order Number

For more advanced searches, use the dropdown menu to filter by **Date Modified, Products, CSR and Issue type.**
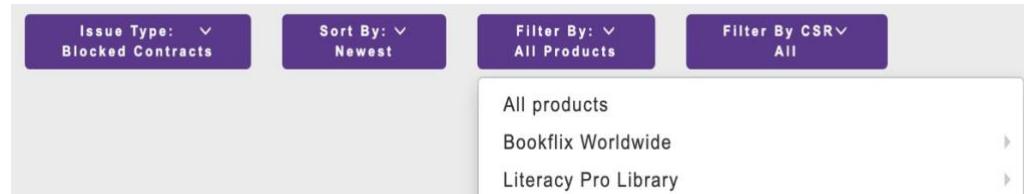
Instant Search

Instant search bar available under the Reports Tab can be used to quickly search for contracts and scholastic school accounts. Once search results are displayed, related reports can be downloaded as explained in the next section.

Accounts

Use the **Accounts** screen to search for current Scholastic school accounts. Click **Accounts** under the **Reports** tab in the navigation to open this screen.
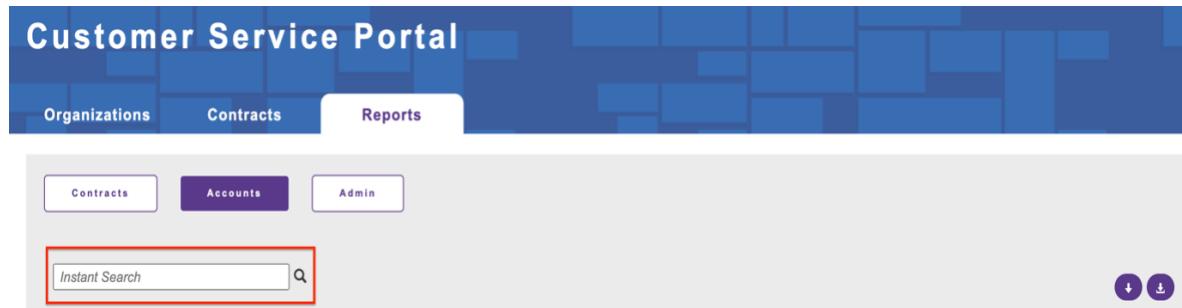
Instant search box at the top left can be used to fill keywords and perform the related search for Scholastic School Accounts. For example **Country Name** such as Canada and Australia, **Customer Name** related keywords and **UCN Numbe**r can be entered in this box to search for related accounts.
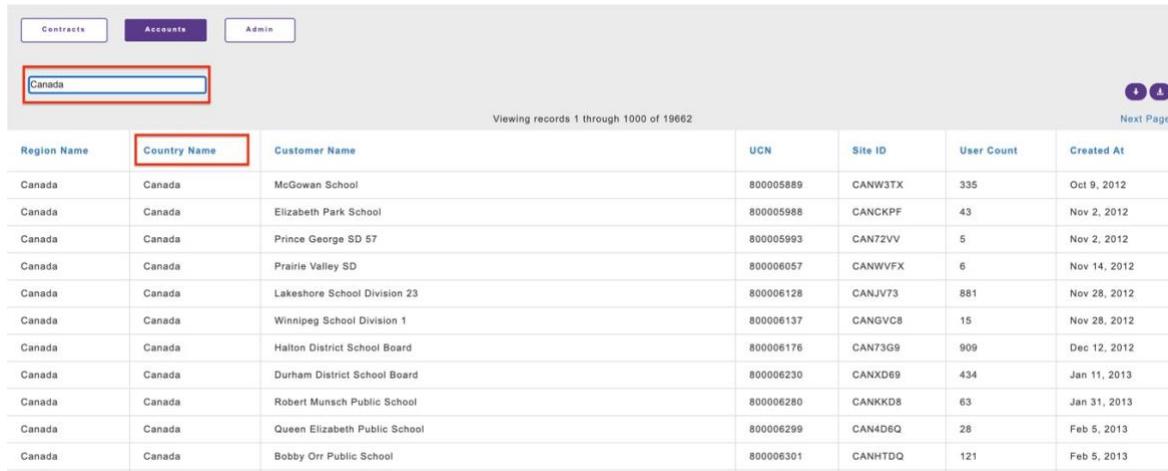
Region Name	Country Name	Customer Name	UCN	Site ID	User Count	Created At
Canada	Canada	McGowan School	800005889	CANW3TX	335	Oct 9, 2012
Canada	Canada	Elizabeth Park School	800005988	CANCKPF	43	Nov 2, 2012
Canada	Canada	Prince George SD 57	800005993	CAN72VV	5	Nov 2, 2012
Canada	Canada	Prairie Valley SD	800006057	CANWVFX	6	Nov 14, 2012
Canada	Canada	Lakeshore School Division 23	800006128	CANJV73	881	Nov 28, 2012
Canada	Canada	Winnipeg School Division 1	800006137	CANGVC8	15	Nov 28, 2012
Canada	Canada	Halton District School Board	800006176	CAN73G9	909	Dec 12, 2012
Canada	Canada	Durham District School Board	800006230	CANXD69	434	Jan 11, 2013
Canada	Canada	Robert Munsch Public School	800006280	CANKKD8	63	Jan 31, 2013
Canada	Canada	Queen Elizabeth Public School	800006299	CAN4D6Q	28	Feb 5, 2013
Canada	Canada	Bobby Orr Public School	800006301	CANHTDQ	121	Feb 5, 2013

Viewing records 1 through 1000 of 19662

Contracts

Instant search box is available at the top left side after clicking the Contracts tab under reports section Keywords for **Order Type** (NRML, CONV, TRIA etc.), **Country** (Canada,Colombia, Argentina etc.), **Product** (Literacy Pro, Bookflix etc.) can be used in the instant search box to search for related contracts.
Similarly keywords for other fields can be entered to filter the list according to keyword search.

Start Date: 2020-05-14   End Date: 2020-08-14   Q SEARCH
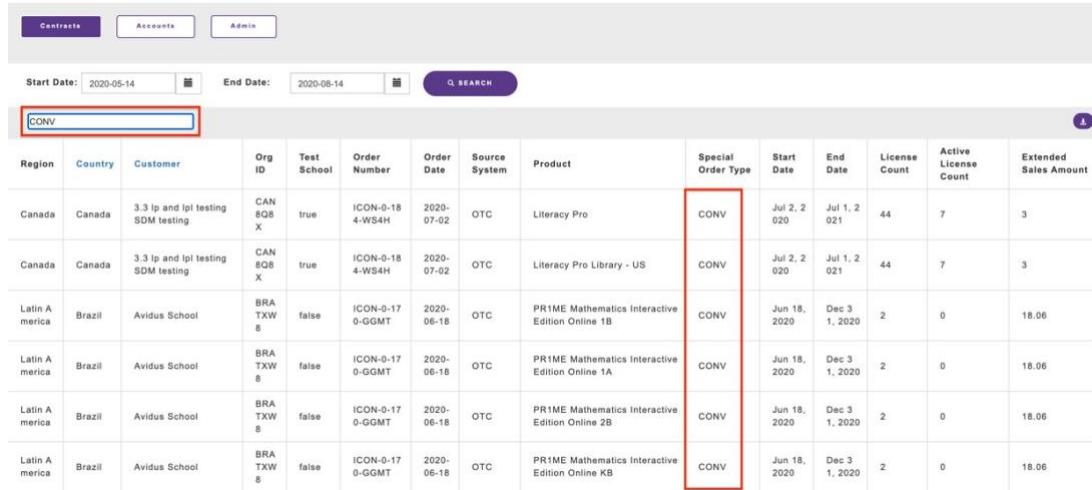
Region	Country	Customer	Org ID	Test School	Order Number	Order Date	Source System	Product	Special Order Type	Start Date	End Date	License Count	Active License Count	Extended Sales Amount
Canada	Canada	3.3 lp and lpl testing SDM testing	CAN8Q8X	true	ICON-0-184-WS4H	2020-07-02	OTC	Literacy Pro	CONV	Jul 2, 2020	Jul 1, 2021	44	7	3
Canada	Canada	3.3 lp and lpl testing SDM testing	CAN8Q8X	true	ICON-0-184-WS4H	2020-07-02	OTC	Literacy Pro Library - US	CONV	Jul 2, 2020	Jul 1, 2021	44	7	3
Latin America	Brazil	Avidus School	BRATXW8	false	ICON-0-170-GGMT	2020-06-18	OTC	PR1ME Mathematics Interactive Edition Online 1B	CONV	Jun 18, 2020	Dec 31, 2020	2	0	18.06
Latin America	Brazil	Avidus School	BRATXW8	false	ICON-0-170-GGMT	2020-06-18	OTC	PR1ME Mathematics Interactive Edition Online 1A	CONV	Jun 18, 2020	Dec 31, 2020	2	0	18.06
Latin America	Brazil	Avidus School	BRATXW8	false	ICON-0-170-GGMT	2020-06-18	OTC	PR1ME Mathematics Interactive Edition Online 2B	CONV	Jun 18, 2020	Dec 31, 2020	2	0	18.06
Latin America	Brazil	Avidus School	BRATXW8	false	ICON-0-170-GGMT	2020-06-18	OTC	PR1ME Mathematics Interactive Edition Online KB	CONV	Jun 18, 2020	Dec 31, 2020	2	0	18.06

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Customer Service Portal

Organizations   Contracts   **Reports**

Contracts   Accounts   Admin

Start Date: 2020-05-14   End Date: 2020-08-14   Q SEARCH

Instant Search

For more advanced searches, use the search to filter data by Start Date and End Dates

Start Date: 2020-05-11   End Date: 2020-08-11   Q SEARCH

Country Switch Function

The country switch function is in the header of every screen in Scholastic Learning Zone.

Scholastic   North/Central America   👤 ARPAN THANKUR   Help   LOG OUT

Select or search a Country in the list...

North/Central America
Anguilla
Antigua and Barbuda
Argentina
Aruba
Bahamas
Barbados
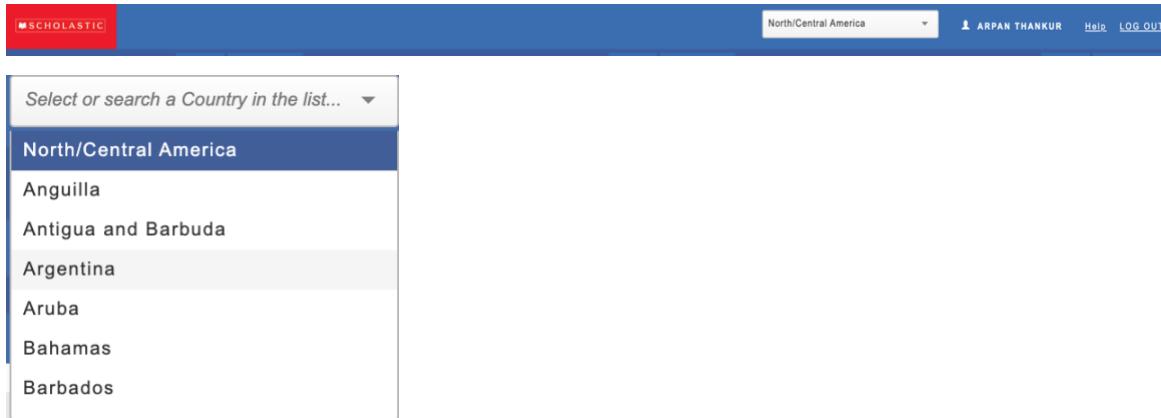
This functionality is for customer service representatives who work across multiple countries.
Use the drop-down menu to select the country of the organization that requires work. The Customer Service portal will redirect to the Customer Service portal of that country's zone.

Reports

Use the Reports menu in the navigation to download the following:

- **Contracts Report**: This is a report of all orders in a specified time period.

- **Accounts Report**: This is a report of all accounts.

- **Admin Report**: This is a report of all SLZ admins.

Contracts Report

Use the Contracts screen in the Reports tab to generate reports of orders over a given time period. Select a start and end date for your report and click **Search.** The search results will be displayed

Click **Download button at the right side** to download the report in the CSV file format to your computer

Accounts Report

Use the Accounts screen in the Reports tab to view a list of all accounts. Click **Download buttons** to download the CSV file on your computer.

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Scholastic Learning Zone

Admin Report

Select Admin screen under Reports tab from the navigation bar.
On the next screen, click the link to download the report as a CSV file.
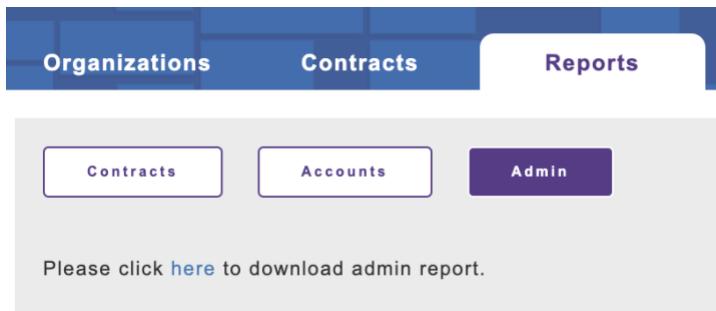
Below is the sample of Admin report in CSV format for your reference

csr_4107197_orgAdmin

School Name	City	Territory	Country Name	First Name	Last Name	User Name	Email
Smoke School	Brisbane	State of Queensland	Australia	Joe	Roberts	blindjoe	blindjoe@mailinator.com
Smoke School	Brisbane	State of Queensland	Australia	George	Crosby	crosbge01	crosbge01@mailinator.com
Smoke School	Brisbane	State of Queensland	Australia	Martin	Malone	malonma01	malonma01@mailinator.com
Smoke School	Brisbane	State of Queensland	Australia	test	site	DISABLED__211467__testsite1	test.site@mailinator.com
Smoke School	Brisbane	State of Queensland	Australia	sadmin	sadmin	sadmin	NeatGimp@mailinator.com
McGowan School	Markham	Province of Ontario	Canada	Ian	Mcgowan	imcgowan1	imcgowan@scholastic.ca
McGowan School	Markham	Province of Ontario	Canada	Ian	Mcgowan	imcgowan2	Imcgowan@scholastic.ca
McGowan School	Markham	Province of Ontario	Canada	Paul	Thullner	Pthullner	Pthullner@wsd1.org
McGowan School	Markham	Province of Ontario	Canada	GP	Teacher	Gpteacher	mcgoon99@yahoo.ca
McGowan School	Markham	Province of Ontario	Canada	Christine	Thullner	cthullner	cthullne@mts.net
McGowan School	Markham	Province of Ontario	Canada	Teacher	Teacher	Teacher11	asd@adsf.com
McGowan School	Markham	Province of Ontario	Canada	Pat	Adamson	padamson	adamsonp@gmd.ca
Elizabeth Park School	Paradise	Province of Newfoundland and Labrador	Canada	Dawn	Sinnott	DISABLED__547__dsinnott	dawnsinnott@esdnl.ca

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Group Admin

Group Admin functionality is available in Scholastic Learning Zone in order to monitor and maintain a group of schools in one interface.

1. Go to create organization and select **Group** in Organization Type. Click on create after filling data in the required fields.

2. Go to Manage Child Groups and Add Schools/Groups once the organisation is created.

3. This can be done by clicking on the Add button. The remove and clear sorting buttons are disabled since there are no child organizations that are added. Once any organization is added to the parent organization, you have the option to remove the organization from the list and clear sorting by selecting the available options on the screen. A search box is available at the right side to search for child organisations that are added.

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4. Select Country and Search for organizations to add. Click review and then save.

5. The added organizations are displayed as shown on the next page. These organizations can now be removed and the sorting can be cleared

6. Once the account has been set up, click the link that says "Scholastic Learning Zone" underneath Access to Customer's SLZ Group Admin Account.

7. The usage data shown in the dashboard page is the roll up of all usage across the schools in a group. To view details of individual school, the desired school can be selected from the drop-down list as shown in the screenshot.

8. Group Admin can perform all Admin level functions like 'Manage Users', 'Manage Years/Grades', 'Manage Calendar' etc. once the school of interest is selected

GROUPADMIN_PARENT

MANAGE USERS

You do not currently have any Scholastic tools. Please check with your administrator.

Total Usage: Last 4 Weeks

Please select a Group ▼			SINTL_UAT_Rahul ▼
	Average Session Per Student	**Average Session Time Per Student**	**Total Time Per Student**
Literary Pro	17	70	1190
Matemáticas al Máximo	23	95	2185
LIBRARY	23	95	2185

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