



Zoom Integration

Product Documentation

OVERVIEW

Thought Industries is expanding vILT capabilities by integrating with Zoom. Course Authors can create & import both Zoom Webinars & Meetings in a single offering or in a recurring offering.

In this documentation, you will find the capabilities, behaviors and guidelines for Zoom Integration.

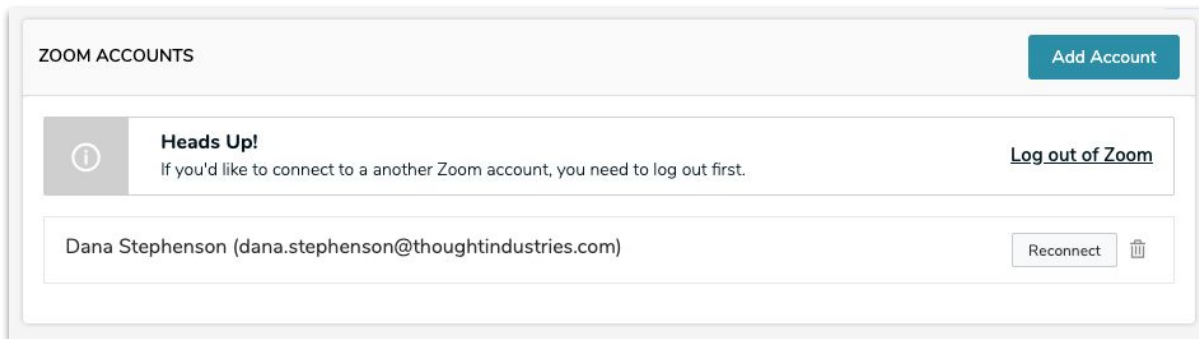
ZOOM INTEGRATION

Path: Dashboard > Settings > Integrations > Webinars

The first step to adding a Zoom Webinar or Meeting is connecting your account. *Before taking this step, please log out of Zoom first.*

To connect your Zoom Account:

1. Navigate to Settings > Integrations > Webinars.
2. Click “Add Account” in the Zoom container.
3. Log in to the Zoom account you wish to connect.
4. Click “Authorize” to allow TI Access to the Zoom account.



Note: If a Zoom account is already connected to TI, and you would like to begin using Zoom Meetings, you will need to reconnect your account in Settings > Integrations > Webinars. *Before reconnecting, you must first log out of Zoom.*

ZOOM INTEGRATION

Path: Dashboard > Content > Webinar Content

Once a Zoom account is connected, navigate to Content and follow the directions below.

To add a non-recurring Zoom Webinar or Meeting:

1. Click “Add Content.”
2. Select vILT or Webinar content type.
3. Enter a name for the webinar.
4. Select “Zoom” from the Webinar Provider drop down menu.
5. Select the “Webinar Provider Connection” account from the Webinar Connection drop down menu.
6. Select a co-organizer. (Optional - functionality only available for Zoom Webinar)
7. Select either Zoom Webinar or Zoom Meeting from the Webinar Type drop down menu.
8. Enter a Start Date/Time and an End Date/Time in the Webinar Date & Time fields.
9. Click Save.

The screenshot shows a configuration form for a Zoom webinar. It includes several sections: 'Webinar Provider' with a dropdown menu set to 'Zoom'; 'Webinar Connection' with a dropdown menu set to 'Eng TI (eng@thoughtindustries.com)'; three toggle switches for 'Enable auto-recording?', 'Disable Zoom notifications?', and 'Retrieve recording following event?', all currently set to 'No'; 'Webinar Type' with a dropdown menu set to 'Select Webinar Type'; 'Webinar Date & Time' with two input fields for 'Start Date' and 'End Date'; and a checkbox for 'Recurring Webinar' which is currently unchecked. At the bottom right, there are 'Cancel' and 'Save' buttons.

ZOOM INTEGRATION

Path: Dashboard > Content > Webinar Content

To add a non-recurring Zoom Webinar or Meeting:

1. Click “Add Content”
2. Select vILT or Webinar content type.
3. Enter a name for the webinar.
4. Select “Zoom” from the Webinar Provider drop down menu.
5. Select the “Webinar Provider Connection” account from the Webinar Connection drop down menu.
6. Select a co-organizer. (optional)
7. Select either Zoom Webinar or Zoom Meeting from the Webinar Type drop down menu.
8. Enter a Start Date/Time and an End Date/Time in the Webinar Date & Time fields.
9. Click “Recurring Webinar.”
10. Select Daily, Weekly, or Monthly from the Recurrence drop down menu.
11. Select the frequency and days of the week if required.
12. Select the type of End Date from the End Date drop down menu.
 - a. If a specific date, choose the date from the date picker.
 - b. If after a number of occurrences, enter the number of occurrences in the “After” field.
13. Click “Save.”

The screenshot displays a configuration form for a Zoom Webinar. At the top, the 'Webinar Date & Time' section contains two input fields: the first is '2020-03-31 12:00' and the second is '2020-03-31 13:00', separated by a minus sign. Below this, the 'Recurring Webinar' checkbox is checked. The 'Recurrence' dropdown menu is set to 'Weekly'. The 'Repeat Every' dropdown menu is set to '1 week'. Under 'Weekly Days', there are radio buttons for each day of the week; 'Tuesday' is selected with a green checkmark. The 'End Date' dropdown menu is set to 'End after a number of occurrence'. In the 'After' section, the number '10' is entered in a text box, followed by the label 'occurrences'. At the bottom right, there are 'Cancel' and 'Save' buttons. Below the 'Save' button, the text 'Import existing Webinar' is visible.

ZOOM INTEGRATION - OPTIONAL SETTINGS

Path: Dashboard > Content > Webinar Content

Optional Zoom Settings:

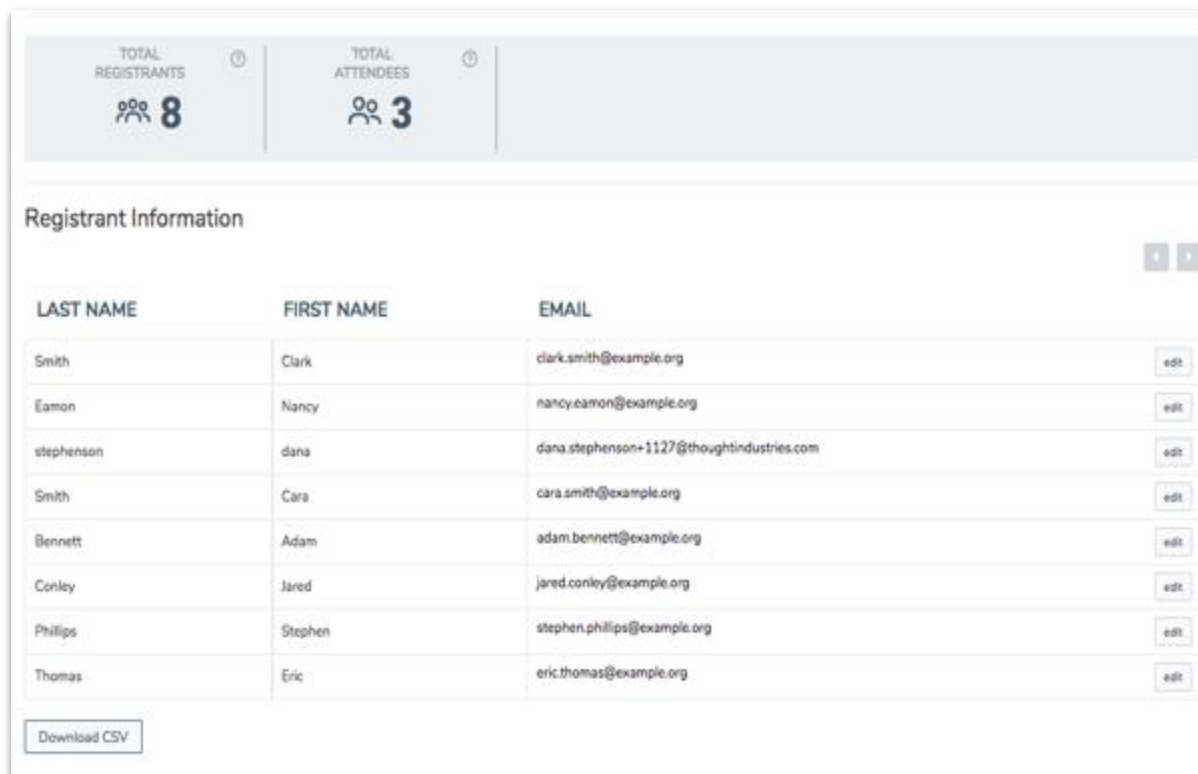
- Enable auto-recording: When enabled, the Meeting or Webinar will automatically be recorded when started. The Zoom account associated with the content must be a Zoom pro or higher.
- Disable Zoom notifications: When enabled, learners/registrants will not receive notifications from Zoom. We encourage the use of Learner Notifications if Zoom notifications are disabled.
- Retrieve recording following the event: When enabled, TI will retrieve the recording of the webinar or meeting immediately following the event. Please note, the length of the recording can delay the retrieval.
 - The default setting to retrieve recordings is to require a password. This setting can be disabled in Zoom.
 - The Email Learners tab is used to email the retrieved recordings to learners. The list of recordings is only available if the setting is enabled.

The screenshot shows a web form titled "SEND EMAIL TO CLASS". It includes several sections: "Email Recipients" with a dropdown menu set to "Email all learners" and a "Class Size" indicator showing "45"; a "Subject" text input field; "Attach Recordings" with two columns: "Available Recordings" (listing two recordings from October 21st, 2020) and "Selected Recordings" (empty), with a right-pointing arrow between them; a "Body" section with a rich text editor toolbar; "Add Button" with a text input field containing "e.g. Click Here" and the label "Optional"; and "Button URL" with a text input field containing "e.g. https://www..." and the label "Optional". At the bottom right, there are two buttons: "Send Test Email" and "Send Email to 45 Learner".

Each setting can be modified up until the start of the webinar or meeting. The settings are available on the creation page, in the Event Info Tab, and on the session creation page. The settings are not available when importing individually or in bulk.

ZOOM INTEGRATION - REPORTING

After the webinar is complete, Zoom reports back to TI the number of attendees. If a learner is reported by Zoom as attended, TI marks the learner's status for the webinar as complete. If the webinar has multiple meetings, and all meetings are required for completion, the learner will be marked as completed once the Zoom reports that the learner has attended all meetings.



The screenshot displays a reporting interface with two summary cards at the top: 'TOTAL REGISTRANTS' with a count of 8 and 'TOTAL ATTENDEES' with a count of 3. Below these is a section titled 'Registrant Information' containing a table with columns for 'LAST NAME', 'FIRST NAME', and 'EMAIL'. Each row in the table includes an 'edit' button. At the bottom left of the table area is a 'Download CSV' button.

LAST NAME	FIRST NAME	EMAIL	
Smith	Clark	clark.smith@example.org	edit
Eamon	Nancy	nancy.eamon@example.org	edit
stephenson	dana	dana.stephenson+1127@thoughtindustries.com	edit
Smith	Cara	cara.smith@example.org	edit
Bennett	Adam	adam.bennett@example.org	edit
Conley	Jared	jared.conley@example.org	edit
Phillips	Stephen	stephen.phillips@example.org	edit
Thomas	Eric	eric.thomas@example.org	edit

Notes:

- Total Attendees includes host, learners, and any panelists.
- The job to change attended learners' statuses to completed runs every hour.
- In order for Zoom's reporting to respond back to TI, the Zoom account connected to the content in TI needs to have permission to read reports in Zoom. We strongly recommend connecting admin level Zoom accounts only.