

'Access LMS Virtual Events' Zoom App Marketplace Submission

Document creation date: 6th May 2021

- 1. Installation
 - Installation via the Access LMS
 - Installation via the Zoom App Marketplace
- 2. Usage
- 3. Uninstallation
 - Uninstallation via the Access LMS
 - Uninstallation via the Zoom App Marketplace
- 3. Troubleshooting
- 4. FAQ
- 5. Contact Support

1. Installation

Installation via the Access LMS

Note: Only users within the 'Super Administrator' group can initially set up the Zoom Integration via the Access LMS or Zoom App Marketplace

1. Super Administrators must first authenticate within the Access LMS.
2. Once authentication is complete, navigate to the 'Site Settings' via the 'System' area of the navigation menu.
3. Select the *AVAILABLE FEATURES* tab and select the *Virtual Meeting Accounts* card.
 - a. Note, if you have previously set up a Zoom or other Virtual Meeting Account, the card will be within the *MANAGE FEATURES* tab.
4. Within the Virtual Meeting Accounts page, click the *Add* call to action button.
5. A prompt will appear to begin the process. Click the *Zoom* card and then click *Link Account* in the bottom right.
6. You will be automatically redirected to the Zoom OAuth login page within the same browser tab/window.
7. Log in with your Zoom admin credentials.
8. Zoom will notify you that the LMS Virtual Events app wishes to request access to your Zoom account. Once happy with the information being shared, click *Authorize*.
9. If successful, you will be re-directed back to the Access LMS and the *Add Account* prompt will re-appear notifying you that your account has been successfully linked.
10. You must now set a Display Name for this Zoom account. For example, 'Sales Team A'. Once complete, hit *Done* in the bottom right of this prompt.

Installation via the Zoom App Marketplace

1. Search for the *Access LMS Virtual Events* on the Zoom App Marketplace
2. Click the *Visit site to install* button
3. You will be re-directed to a landing page and prompted to enter your LMS site URL.
 - a. If you are unsure of your Access LMS URL, please contact your Account Manager or the Access Group Help Desk
4. Upon your LMS site URL being recognized, you will be re-directed to your LMS site. You may have to log back into your LMS account.
5. You will be re-routed to the Site Settings page you can access the *Virtual Meetings Account* card and install the app as outlined above.

2. Usage

How to use the *Access LMS Virtual Event* Zoom app:

Once you have complete the installation steps you will be able to select your Virtual Account when creating an Event. Simply follow the below steps to get started.

1. When creating an Event, select Event Type - *Virtual*
2. You will then be able to select which *Hosting Account* to use to host this Event. You can have multiple versions of Zoom accounts linked to one LMS instance.
3. Select your presenter (must be a user within the Access LMS)
4. Complete the other required specific Event information.
5. Once the Event has been created, you will be able to register your users. They will then see the meeting link within the Event landing page via Find Learning / My Activities.

There are many reasons why you may wish to link the Access LMS to your Zoom Virtual Meeting Account. Some of the most common use cases are as followed:

- You regularly organise Zoom Virtual Meetings within your organisation, with these Events being linked to further learning or as part of a training plan, which you manage within the Access LMS.

- By linking the Access LMS to Zoom, you are also able to create a Zoom Virtual Meeting event all within the same Event creation workflow within the Access LMS, saving you administration time
- If the Event detail changes (date, time etc.) you only need to update this within the Access LMS. All changes are automatically fed through to Zoom and the Meeting URL is updated to reflect this change.
- Post-event, the Attendance State of all attendees is automatically passed back to the Access LMS. This saves on human error and also administration time.

3. Uninstallation

Note: Only users within the 'Super Administrator' group can uninstall a Zoom Virtual Meeting account within the Access LMS.

The Uninstallation process is split into two parts as outlined below.

Both parts must be complete before the app is full uninstalled.

Uninstallation via the Access LMS

1. Super Administrators must first authenticate within the Access LMS.
2. Once authentication is complete, navigate to the 'Site Settings' via the 'System' area of the navigation menu.
3. Select the *MANAGER FEATURES* tab and select the *Virtual Meeting Accounts* card.
4. Within the Virtual Meeting Accounts page, click the *trash icon* next to the Zoom account you wish to uninstall.
5. You will be greeted with a Remove Account prompt. Click *Confirm* to proceed with the uninstall.
6. The Virtual Meeting Accounts page will now refresh and your original Zoom account will be no longer visible. The message No accounts found will display.

Uninstallation via the Zoom App Marketplace

1. Navigate to the *Installed App* section of your Zoom App Marketplace account. At the time of writing, the URL is <https://marketplace.zoom.us/user/installed>
2. Select the Installed App you wish to uninstall and click *Uninstall*
3. Complete the prompts requested by the Zoom App Marketplace and click *Uninstall*
4. The Zoom App Marketplace will notify you that your uninstallation has been successful.

3. Troubleshooting

Issue: There is no option for my users to join the Zoom meeting or access the Meeting Link.

Resolution: When setting up your *Event* within the Access LMS, ensure the Event Type is set to *Virtual Meeting*, the Platform *Zoom* is selected and that the *Hosting Account* is correctly set.

You can modify the *Event Type* at any point, from an Administrator account navigate to *Event* via Manage Learning and update the Event Type within the *Event Details* tab. This will automatically update the Event landing page for all users registered for the Event.

Issue: As an Administrator, how do I quickly find the Zoom Virtual Meeting Start URL or Join URL?

Resolution: Navigate to your *Event* via Manage Learning and within the *Event Details* you will find the *Start URL* and *Join URL*. Users can join the Zoom session via the *Join URL*. The Presenter can start the Zoom virtual meeting via the *Start URL*.

Issue: The attendance of my users has not been auto-completed after the event has completed.

Resolution: The Access LMS will only be able to recognize users who use the same email address within Zoom as they do within the Access LMS. Within the *Users* of the Event, you will be able to view users the LMS has been unable to match with Zoom (Users using their personal email address for the Zoom meeting for example)

The attendance of users to a Zoom event is automatically synchronized before 23:00 GMT daily. If you require a quicker synchronisation time, please click the *Sync with Zoom* button within the *Users* tab. This will automatically start the synchronisation with Zoom and will be typically completed within 15 minutes.

4. FAQ

Question: I'm unable to access the Site Settings area of the LMS to set up my Zoom Virtual Meeting account. What can I do?

Answer: Please notify your designated Access LMS Super Administrator. This may be a colleague within the Learning & Development or Human Resources area of your organisation. They will be able to update your permissions or set up the Zoom Virtual Meeting account for you.

5. Contact Support

1. Navigate to <https://access-support.force.com/Support/s/>
2. Access LMS customers must either *Register* or *log in* via links in the top right of this page.
 - a. Note: Guests / unregistered users cannot raise support requests.
3. Once logged in, Use the *All Products* filter to find the *Access LMS*
4. Click the *SUPPORT CASES* link in the top header of the screen.
5. Users can submit a Support query here.

Our Support team aim to respond to all queries within 24 hours.