Installing the Zoom Webinar virtual instructor led training integration for your SumTotal Learning Management Suite

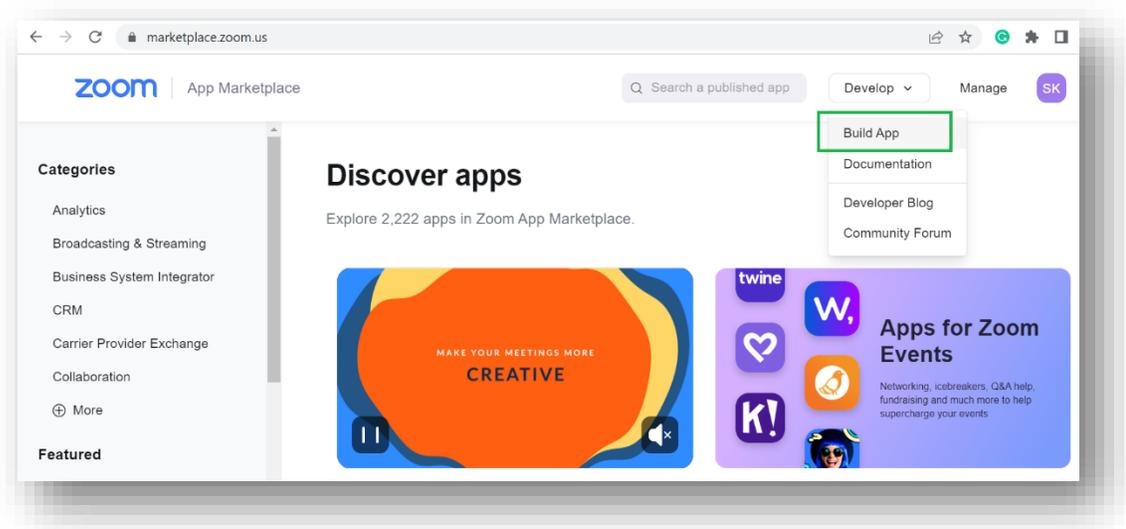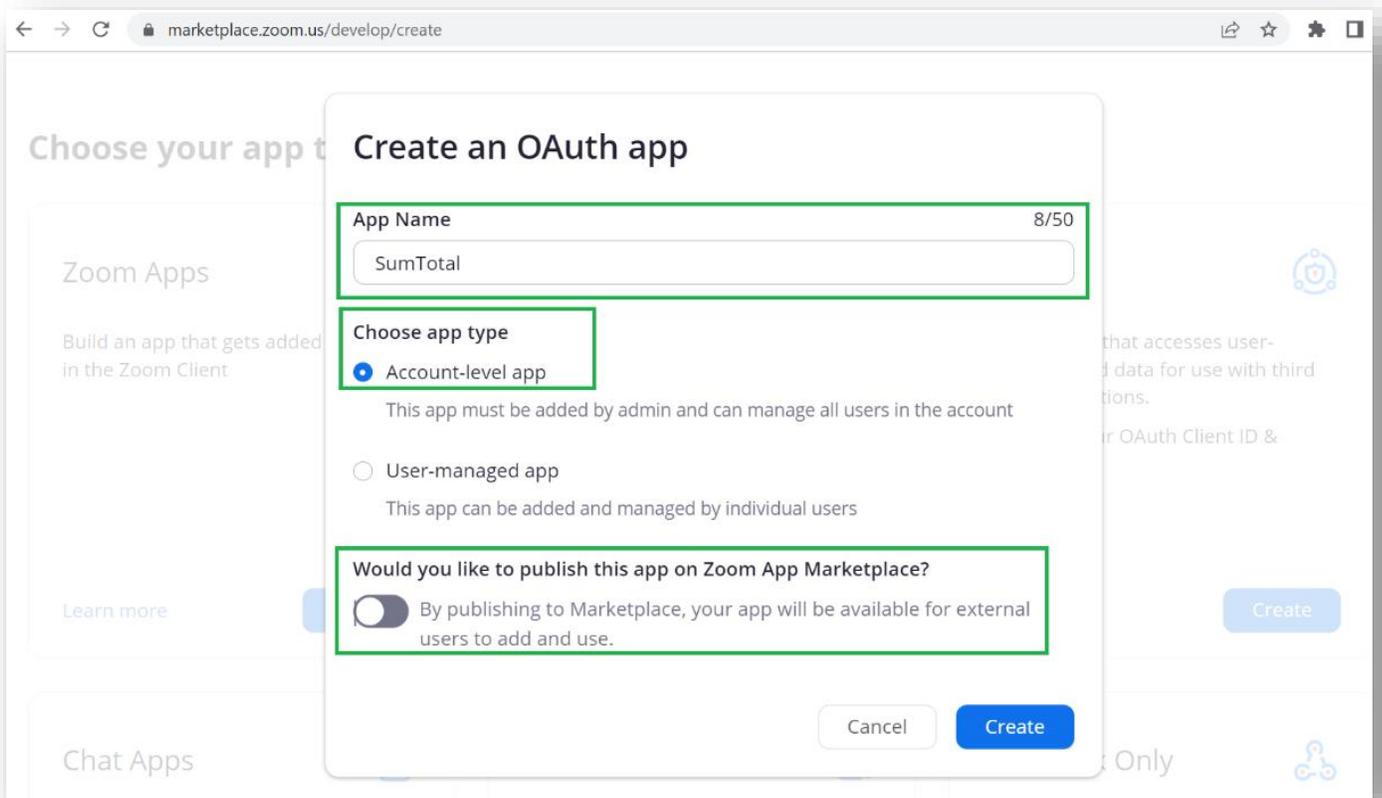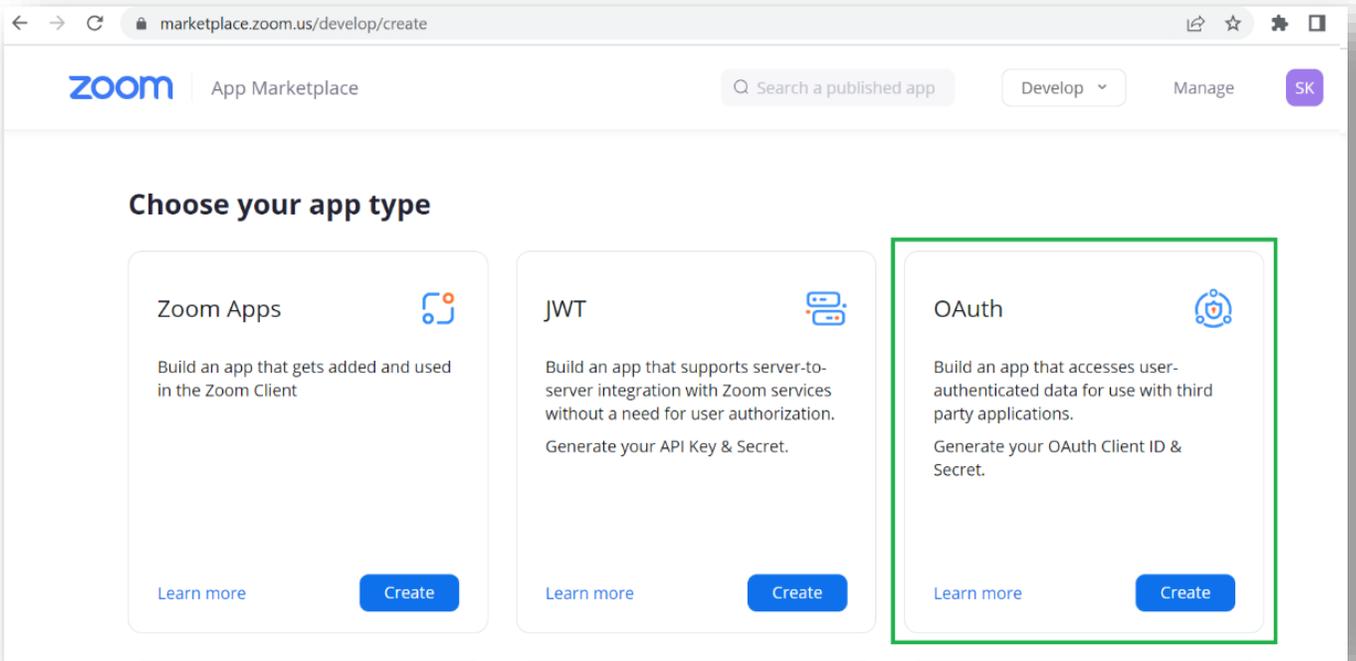Zoom Webinar Integration is available in two types: Account Level and User-Managed.

Account-level: Used by apps that run without a signed-in user present. The app acts as its own entity. Account-level apps do not require instructors to authorize their own accounts but are generally less secure.
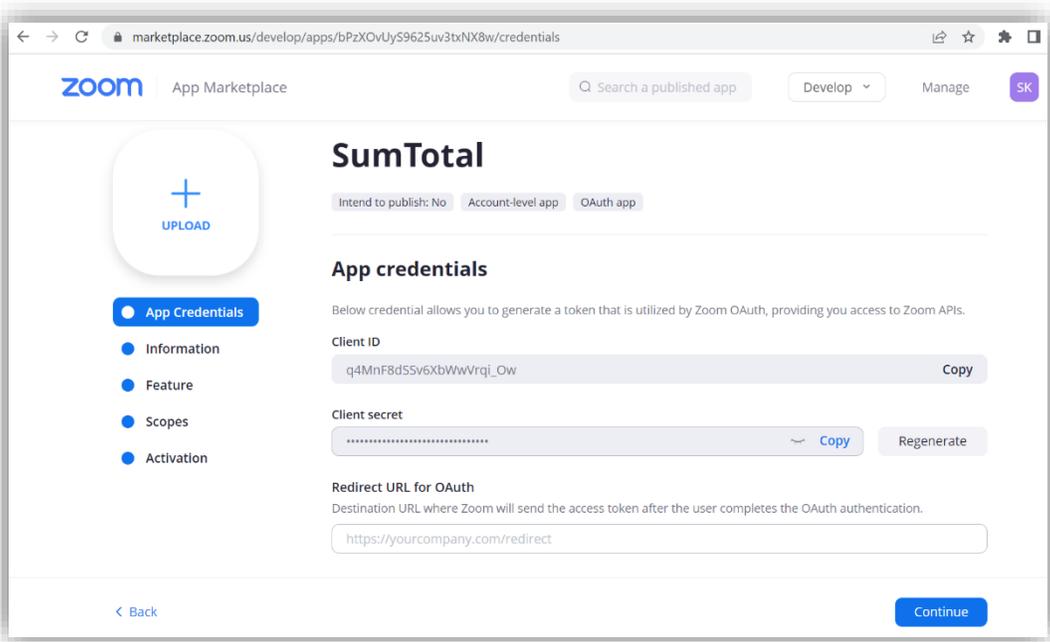
User-managed: Used by apps that have a signed-in user present. The app acts on behalf of a user. User-managed apps are more secure, as they use a token to grant access only to the data of the authorized instructor(s).

## Zoom Webinar App Integration with Account-Level Management

1. You need to share information between Zoom and SumTotal during the integration process. To facilitate this, open two browser tabs or windows.
2. In the first browser tab, log in to your Zoom account, go to the App Marketplace and create an OAuth app.
   a. Name your app something easy to remember, like "SumTotal App."
   b. Select Account-level app. Option
   c. Disable "Would you like to publish this app on Zoom App Marketplace?" flag
   d. Click on create

Choose your app type

Zoom Apps
Build an app that gets added and used in the Zoom Client

Learn more   Create

JWT
Build an app that supports server-to-server integration with Zoom services without a need for user authorization.
Generate your API Key & Secret.

Learn more   Create

OAuth
Build an app that accesses user-authenticated data for use with third party applications.
Generate your OAuth Client ID & Secret.

Learn more   Create

Create an OAuth app

App Name   8/50
SumTotal

Choose app type
● Account-level app
This app must be added by admin and can manage all users in the account

○ User-managed app
This app can be added and managed by individual users

Would you like to publish this app on Zoom App Marketplace?
By publishing to Marketplace, your app will be available for external users to add and use.

Cancel   Create

3. While you are working with ZOOM Marketplace in current browser tab, open a new browser tab and login to SumTotal Application using SumTotal login account.
4. In SumTotal application, make sure that you are in a Domain where you wish to setup the ZOOM integration
5. In SumTotal application, under the header menu – click on Administration and navigate to Administration > Learning Management > Integrations > Virtual Classrooms > Zoom Settings`
6. Select "Enable Integration", to enable a connection with Zoom. Under Integration Configuration, select "Zoom Webinar" and under Zoom Application Type, select "Account Level" – this opens a pop-up to proceed, choose Yes.
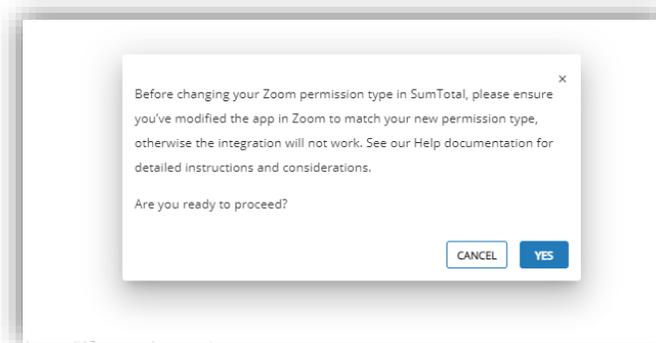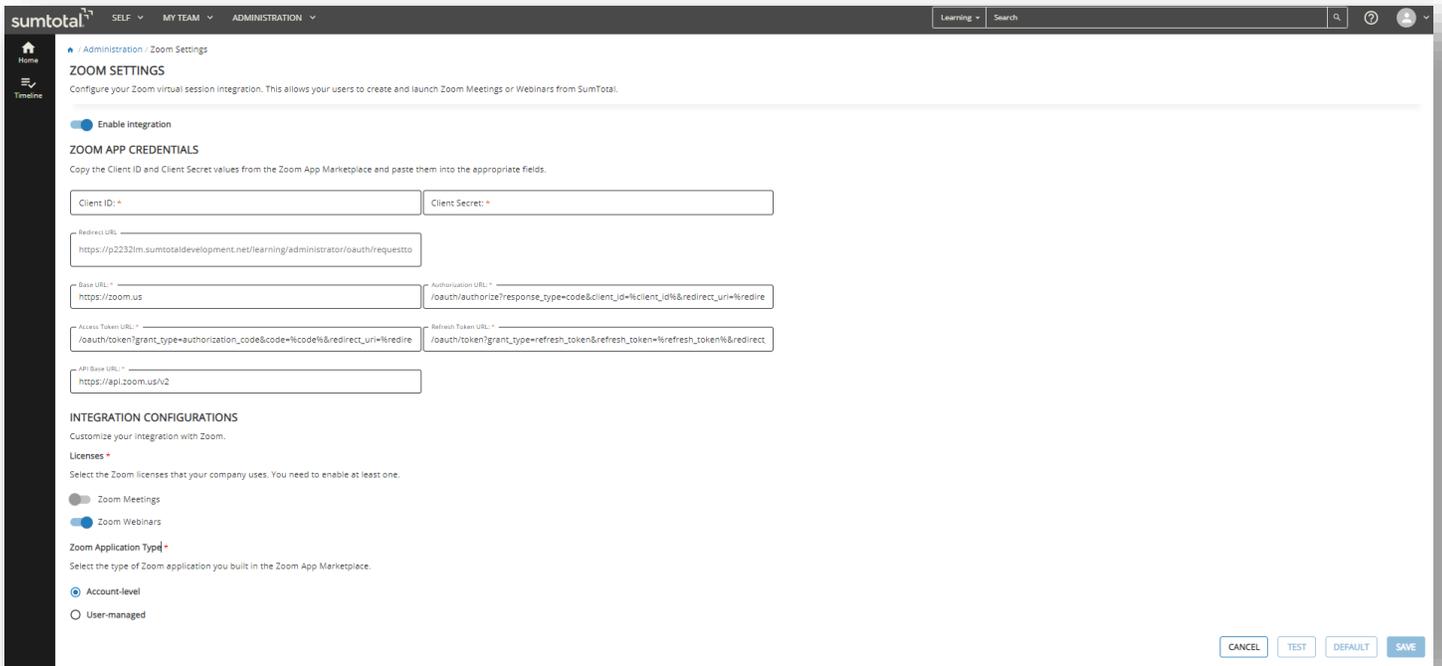
7. This loads default values for RedirectURL, BaseURL, AuthorizationURL, AccessTokenURL, RefreshTokenURL and APIBaseURL. Do not alter these default values.
8. From your new Zoom OAuth App's properties page from the other browser tab, copy the Client ID and Client Secret from the Zoom OAuth app page and paste them into the SumTotal Zoom Settings page
9. Now click on "Save" button to enable SumTotal Zoom Settings for "Account-level Zoom Webinar"
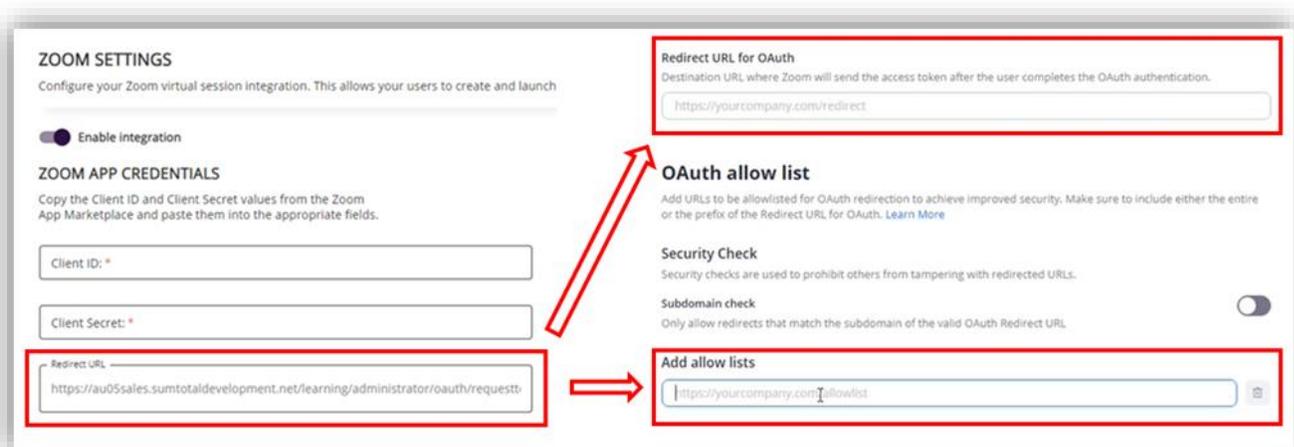
10. From the SumTotal Zoom Settings page, copy the auto-generated Redirect URL and paste it into the Zoom App, under "Redirect URL for OAuth field" under App Credentials section and also copy the Redirect URL again and paste it into the "Add allow lists" field under "OAuth allow list" and click on Save.
11. From the Zoom Apps's Information Property Page, Include Developer Name and Developer Contact Email (You may wish to provide a dummy email address). This for your reference in the event of any issues with Integration. Additionally, fill out any optional details as needed.
12. From the Zoom App's Scopes Property page, add every available property for the following scopes:
    a. Webinar | View and manage sub account's user webinars, View all user Webinars, View and manage all user Webinars
    b. User | View and Manage sub account's user information, view all user information, view users information and manage users,
    c. View all user information, view user information and manage users
    d. Role | View and manage sub account's user roles, View all user roles, View and manage all user roles
    e. Recording | View and manage sub account's user recordings, View all user recordings, View and manage all user recordings
    f. TSP | View and manage sub account's TSP account info, View TSP info, View and manage TSP info
   g. Click on Done and Continue
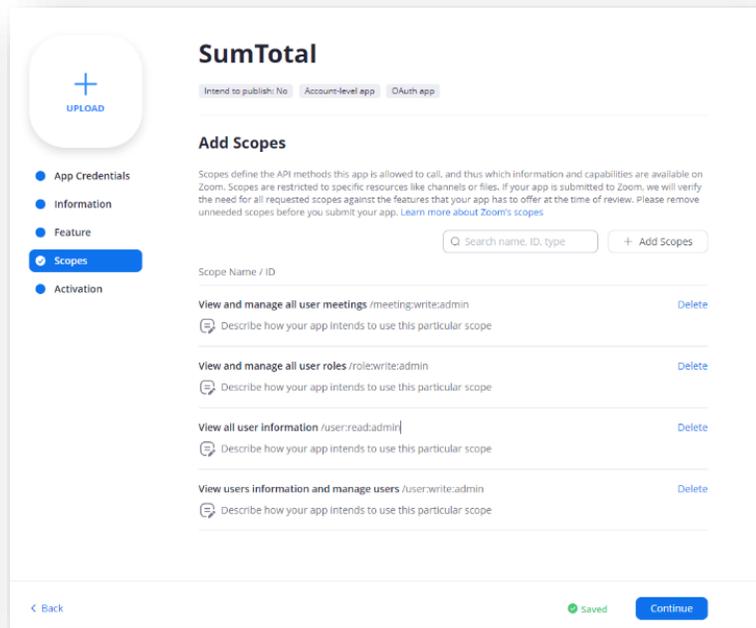
13. Under the Activation Section, click on Add button to Install the Zoom App.
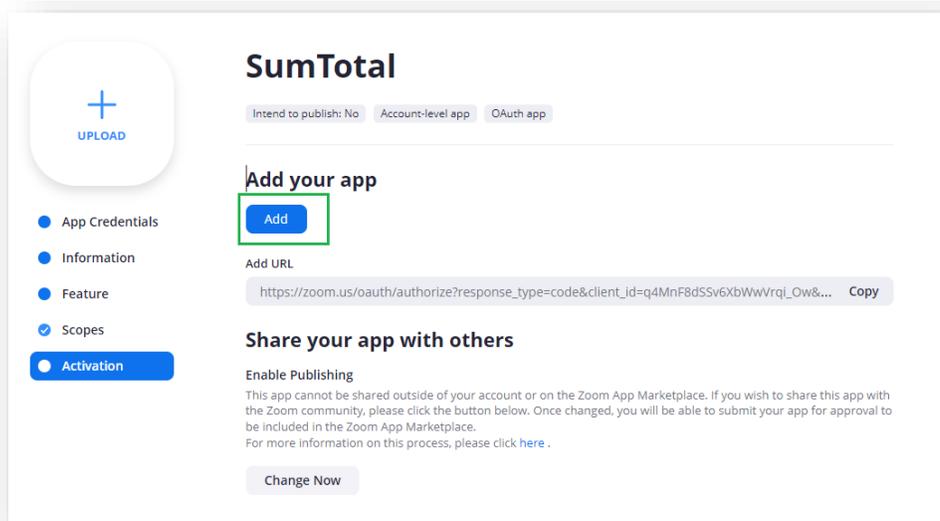
14. This will authorize the connection and loads below page. Choose Allow to complete the integration and it will take to you the SumTotal Application.
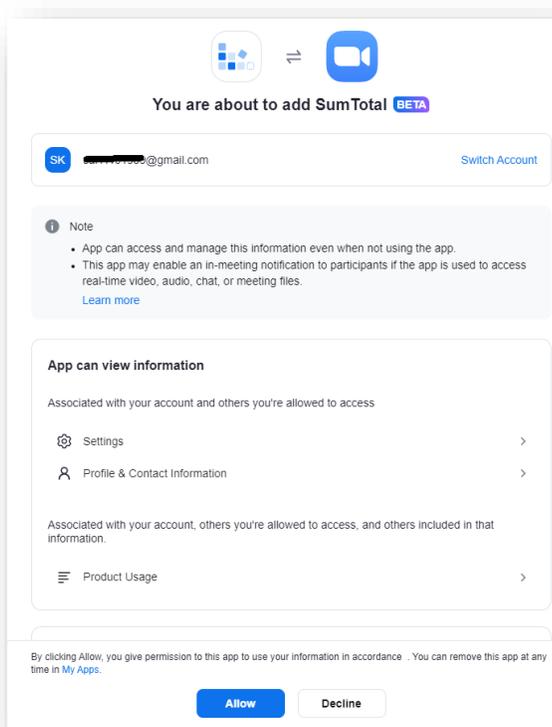
15. To verify the Zoom App Integration from SumTotal Application, Login to SumTotal App, navigate to Zoom Integration Page and Click on Test button. We get a following message. This completes the Zoom Integration for Zoom Meetings using Account-level setting.
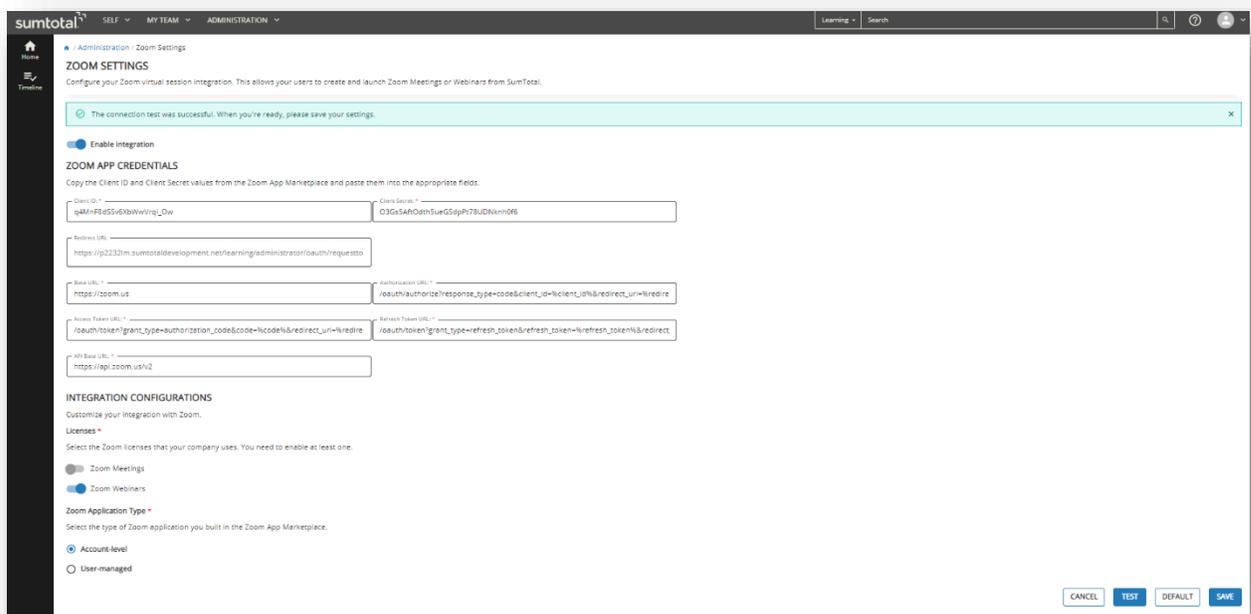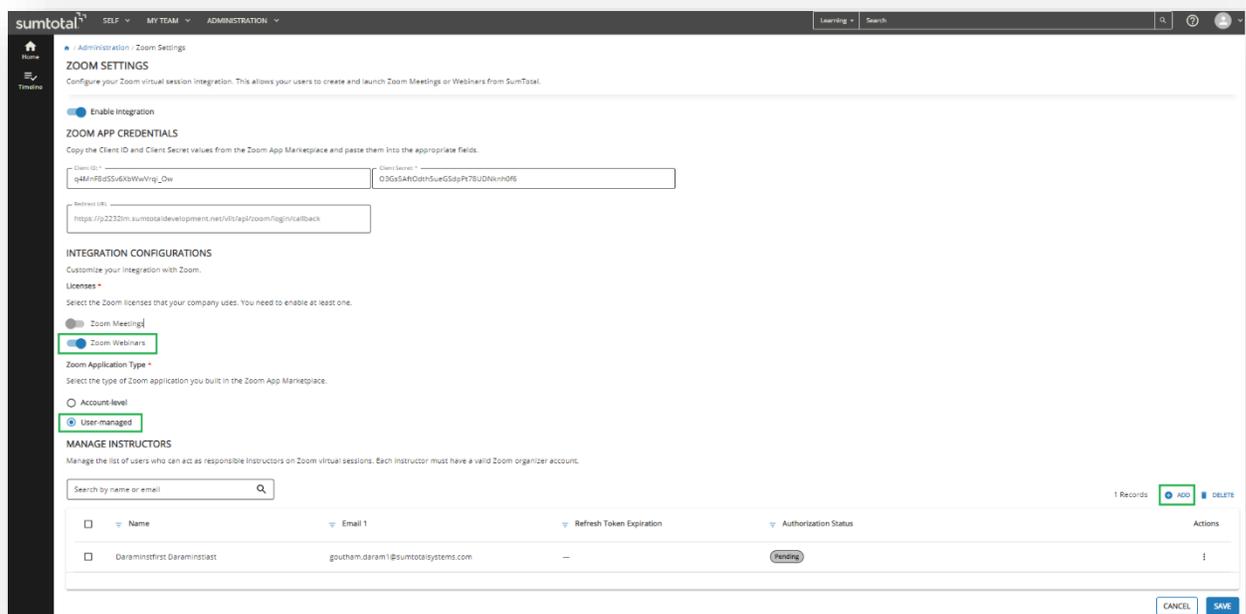
Zoom Webinar App Integration with User-Level Management

1. If you wish to manage the Zoom Webinar integration at a User-managed level, please follow the same steps provided above for all settings at Zoom App level.
2. From the Zoom App's Scopes Property page, add every available property for the following scopes for User-level option:
   a. Webinar | View and manage all user Webinars
   b. Recording | View and manage all user recordings
   c. User | View user information and manage users
   d. TSP | View and manage TSP info
3. At SumTotal app level, please choose "User-managed" under Zoom Application Type and Add the respective instructors using "Add" button. You may remove the instructor by using the "Delete" button.

Note: All users with Instructor selected on their SumTotal Administrator Profile display on this list, but only users with a Zoom licensed account can authorize their accounts and be assigned as responsible instructors. As such, please ensure you only add the users you configured in previous steps.

4. If you added any authorized instructors, inform the instructor that they need to authorize their account. This process requires them to log in to Zoom, so make sure they know which account to use.
5. After you add an instructor, the instructor must authorize their account from their Instructor Schedule.

6. If the instructor is not authorized
    a. If a training administrators cannot assign them as responsible instructors to Zoom live virtual sessions created in SumTotal
    b. The instructor cannot launch Zoom activities in SumTotal.
7. For instructions on authorizing virtual session accounts as an instructor, see the SumTotal Learning Management Instructor Guide.
8. After the instructor authorizes their account, their Authorization Status changes from "Pending" to "Authorized" and they receive a Refresh Token Expiration date. The token's expiration date is 15 years after the authorization time.

MANAGE INSTRUCTORS

Manage the list of users who can act as responsible instructors on Zoom virtual sessions. Each instructor must have a valid Zoom organizer account.

	Name	Email 1	Refresh Token Expiration	Authorization Status	Actions
☐	Bonnie Lewis	BonnieL@example...	—	Pending	⋮
☐	Chris Allen	ChrisA@example.c...	2037-09-06T04:13:37	Authorized	⋮

4 Records   ⊕ ADD   🗑 DELETE