Zoom Integration Instructions

SAFARI Montage® v8.2

Note: Configuration of the Zoom Integration must be done by an Administrator

This integration provides one click access to schedule, launch, and view previous Zoom meetings, and automatically saves Zoom meeting cloud recordings to the SAFARI Montage Learning Object Repository in the user's default school. Once saved to the LOR, meeting recordings may be managed and shared as learning objects.

The first time a user launches Zoom from SAFARI Montage, their district email address is used to associate them with a matching district Zoom account. If no matching district Zoom account exists, by default configuration, Zoom automatically creates a new account for the user.

Upon first launch, users will be reminded that it is best practice for security purposes to use a password or a lobby for Zoom meetings and to keep the school district's student privacy policies in mind when sharing any recorded content containing student images, names, voices, or work.

Requirements

- SAFARI Montage v8.2 or greater
- SAFARI Montage Interoperability Support Services
- Zoom Educational, Business, or Enterprise Subscription
- Licensed Zoom user accounts with the Cloud Recording feature are required for the cloud recording integration
- Zoom v5.0.2 or greater installed on user machines

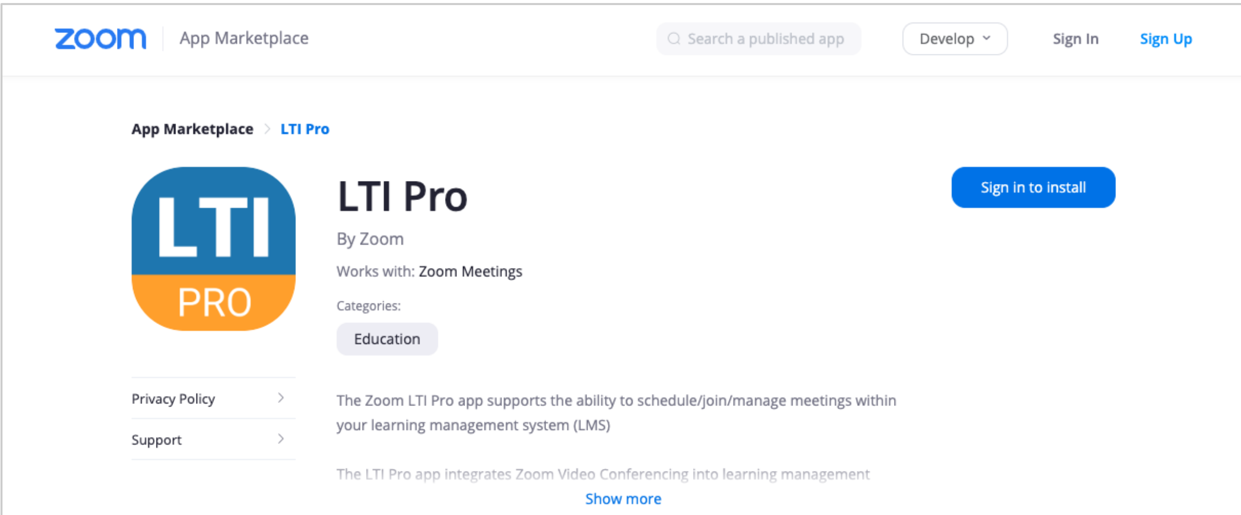
Note

- Zoom supports both cloud-based recordings and recordings saved directly to the local computer. This integration imports into SAFARI Montage only Zoom meetings that are recorded to the cloud. If the district desires that all Zoom meeting recordings be imported to the SAFARI Montage LOR by default, navigate to Zoom's **Account Management > Account Settings > Recording** tab and disable **Local Recording.**
- If the district desires that all meetings are recorded by default, Zoom administrators may additionally set all meetings to begin auto-recording when the meeting is started. To enable auto-recording when the meeting is started, navigate to Zoom's **Account Management > Account Settings > Recording** tab and enable **Automatic Recording.**
- More information about Zoom Account Settings may be found at: https://support.zoom.us/hc/en-us/articles/201363253-Account-settings
- Contact SAFARI Montage Technical Support with questions pertaining to these instructions. SAFARI Montage Technical Support is available Monday - Friday from 8 a.m. to 6 p.m. Eastern Time, and they may be contacted by telephone at 800-782-7230 or online via: http://www.safarimontage.com/support.

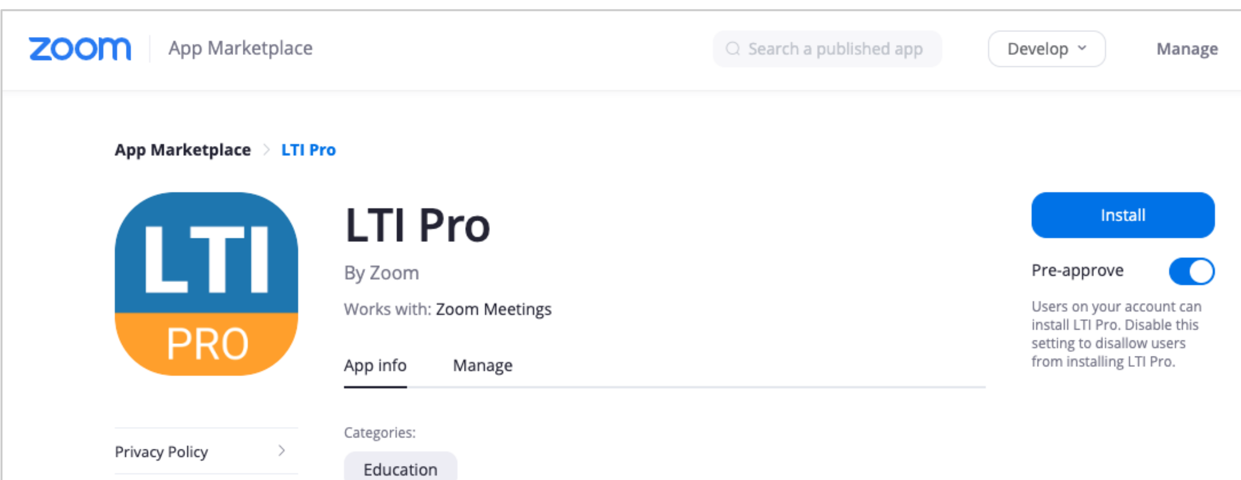
Install and Configure the Zoom LTI Pro App

Note: If you have already installed the LTI Pro app, sign into the Zoom Marketplace, navigate to Manage > Apps on Account > LTI Pro, mouse over the ellipses, and click Configure. Then skip to step 6.

1. Navigate to the **LTI Pro** app in the **Zoom Marketplace** at marketplace.zoom.us

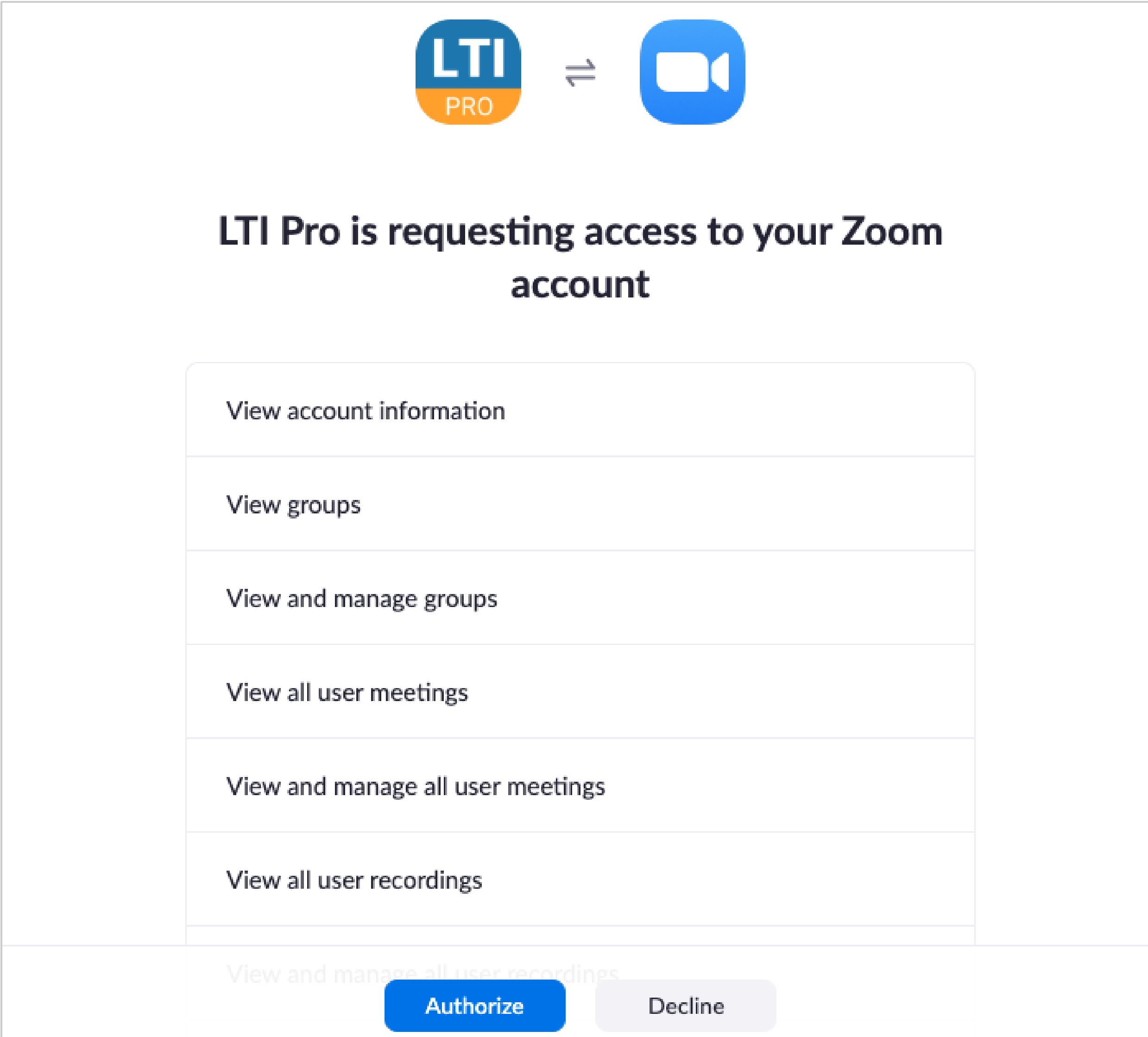


2. If you are not signed in, click **Sign in to install**
3. Enable the **Pre-approve** setting

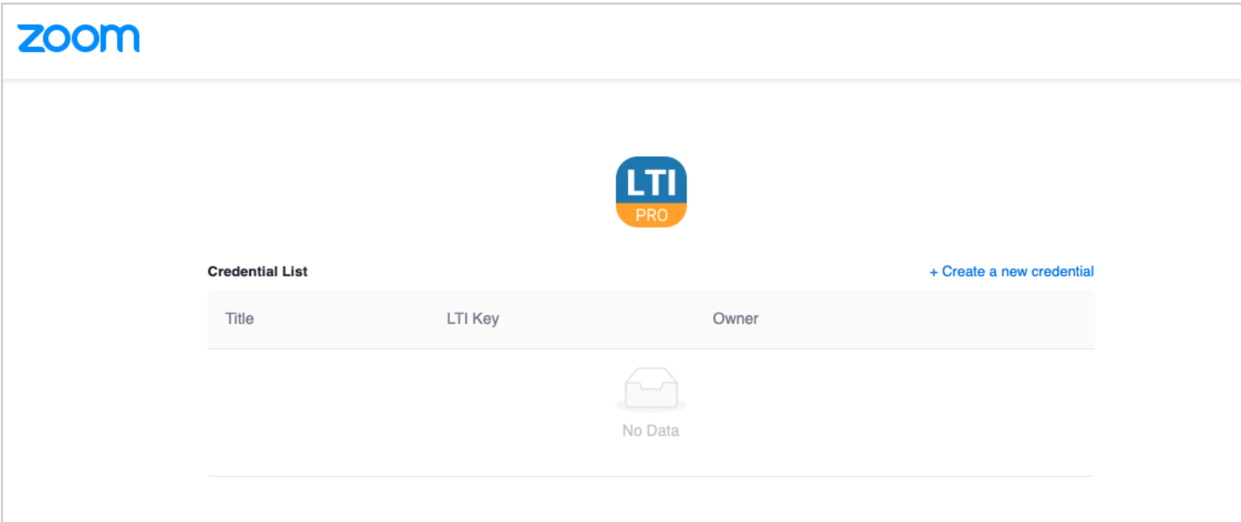


4. Click **Install**

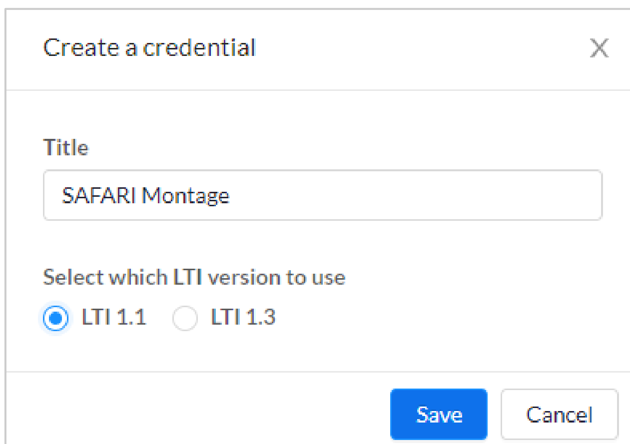
5. Review the permissions the app requires and click **Authorize**



6. Click **Create a new credential**



7. Enter the credential's title (e.g. SAFARI Montage), select **LTI 1.1**, and click **Save**



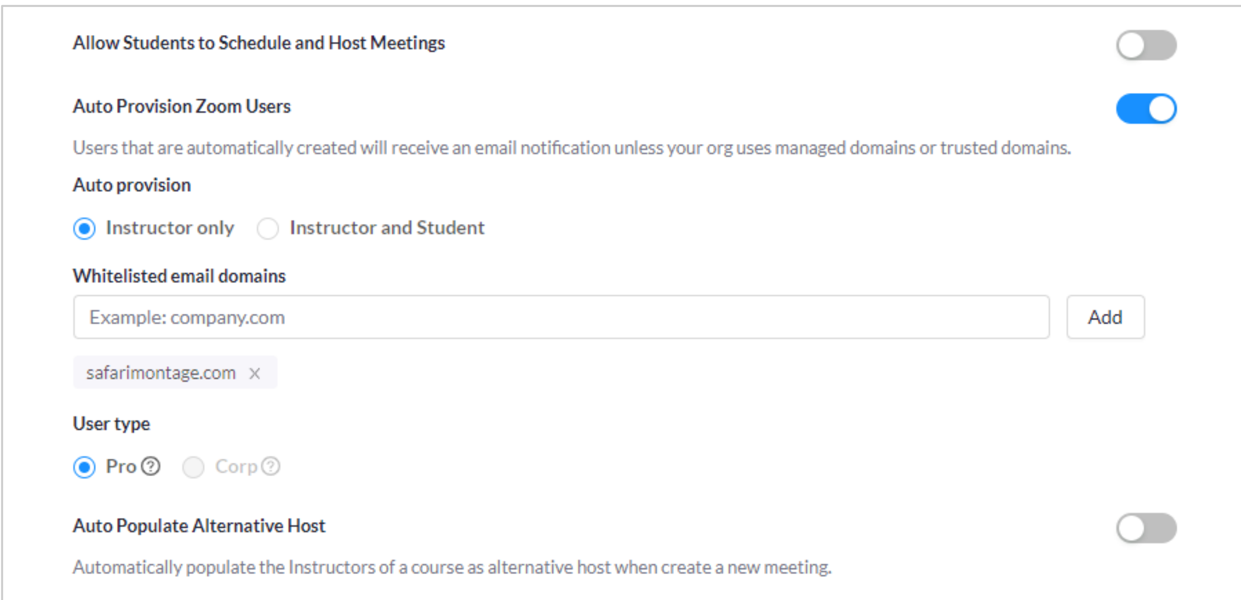
8. You will be redirected to an **LTI credentials page**. Copy the **LTI Key** and **LTI Secret**. They will be needed later. The LTI URL will always be the same.

LTI URL: https://applications.zoom.us/lti/rich

LTI Key: ______________________________

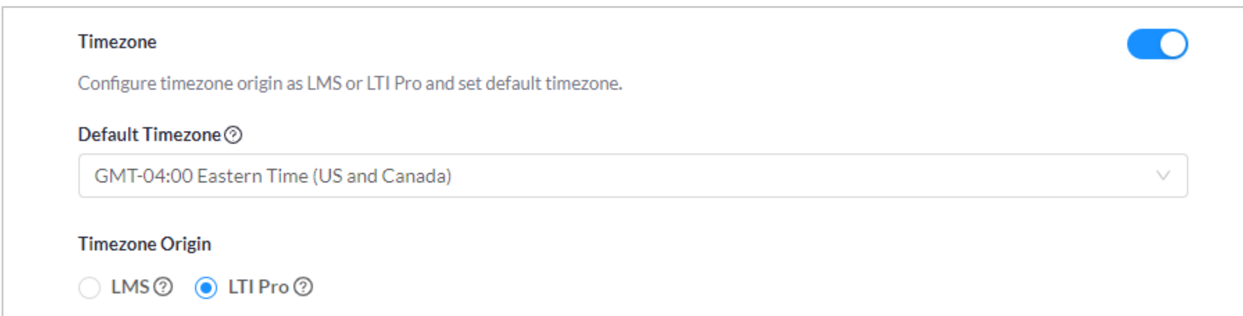
LTI Secret: ______________________________

9. Configure the LTI Pro credential
    a. Set **Auto Provision Zoom Users** to **On**
    Note: You may choose to provision accounts for Instructor only or Instructor and Student as your district requires. Remember to allow students access to the Portal link (see page 10).
    b. Add your email domains to the **Whitelisted email domains** for which user accounts should be auto provisioned
        i. Type only the domain (e.g. safarimontage.com) in the **Whitelisted email domains** field
        ii. Click **Add**
        iii. Repeat this step for all email domains you wish to provision for



c. Add the FQDN of your SAFARI Montage server to the **Approved Domains** field. Make sure all domains that can be used to access SAFARI Montage are entered in this field.

d. Timezone
   i. Select your **Default Timezone**
   ii. Select **LTI Pro** for the **Timezone Origin**



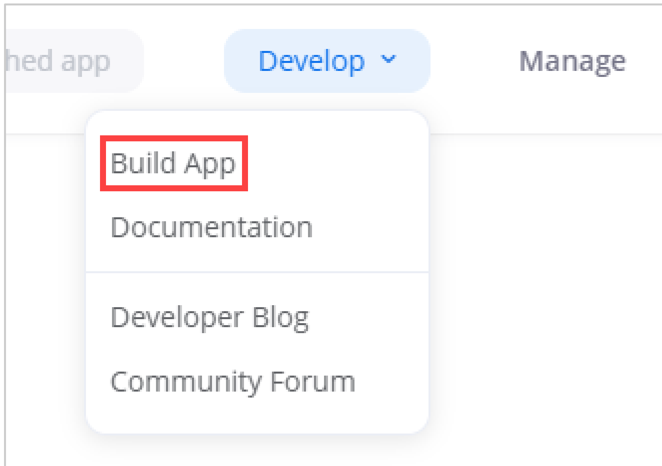
e. Leave **Identify LTI User as an instructor** and **Email Attribute Name** as their default values

f. All other configuration options may be left as their default values or changed based on district needs.

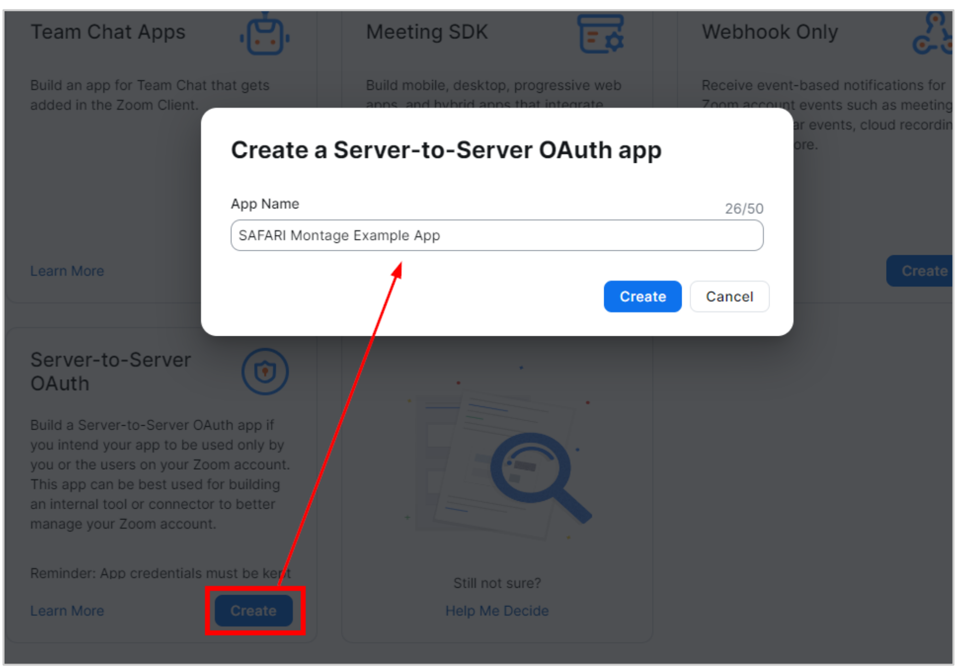
Note: Descriptions of the various configurable options can be found in Zoom's documentation at https://zoomappdocs.docs.stoplight.io/lti-pro-v2/welcome/manage-and-configure

Create a Zoom Server-to-Server OAuth App

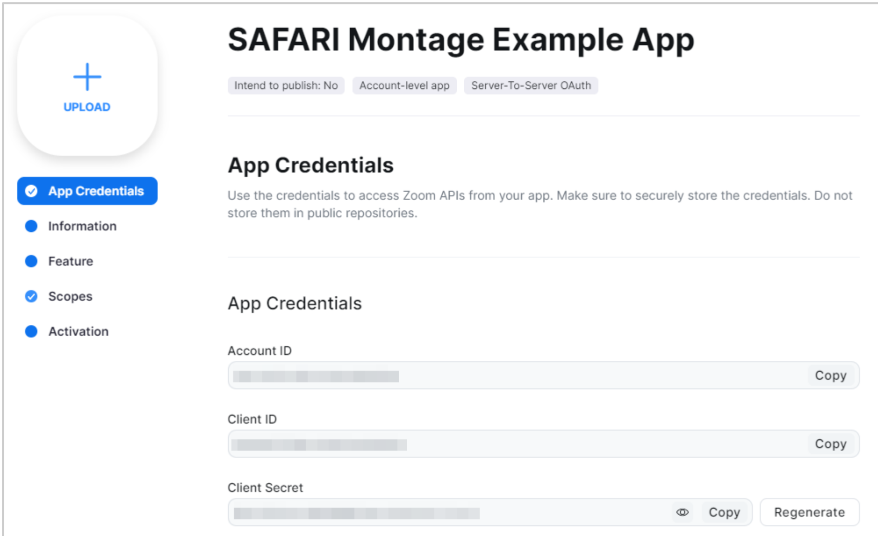
1. Sign in to marketplace.zoom.us, mouse over **Develop**, and click **Build App**



2. Scroll to the **Server-to-Server OAuth** tile, click **Create,** give your app a descriptive name, and click **Create**



3. On the **App Credentials** screen, copy the **Account ID, Client ID, and Client Secret** for use in SAFARI Montage

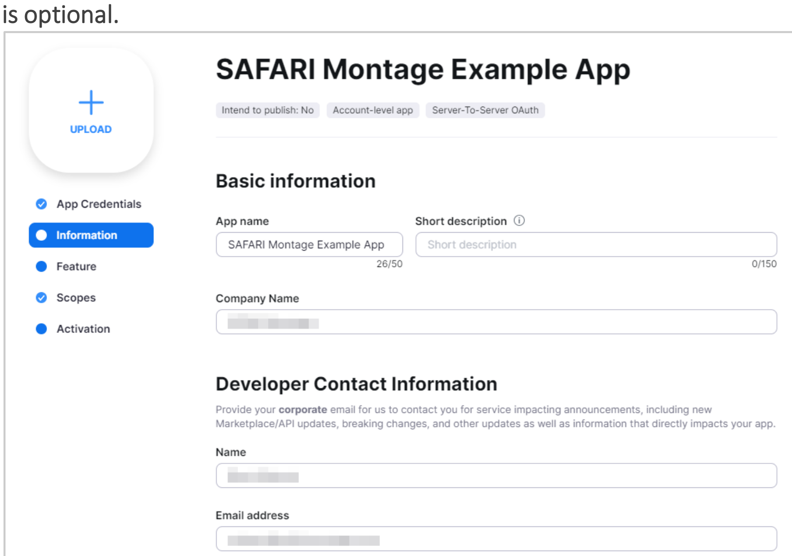


Account ID: ________________________________

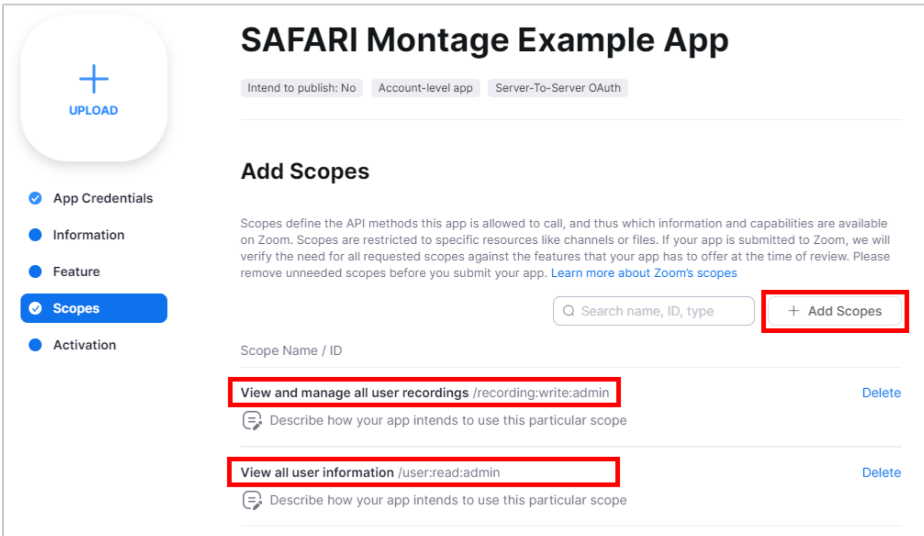
Client ID: ________________________________

Client Secret: ________________________________

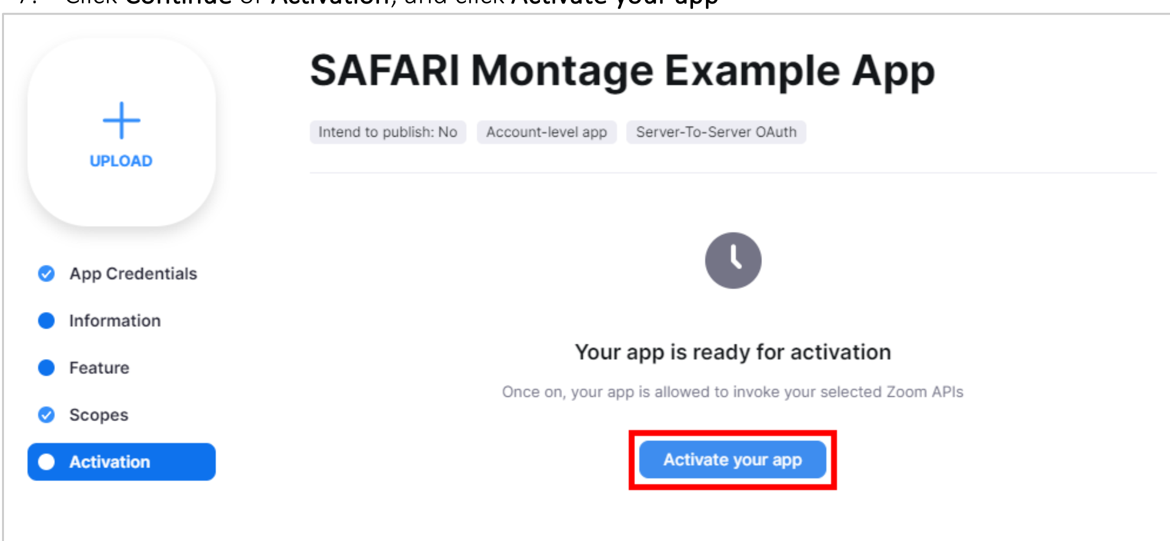
4. Click **Continue** or **Information**, and fill out the **Basic Information** and **Developer Contact Information** fields
   Note: The Company Name, Name, and Email address fields must be populated to activate the app. Short description is optional.



5. Click **Scopes**
6. Add the following two scopes to the app:
    a. Recording > View and manage all user recordings
    b. User > View all user information



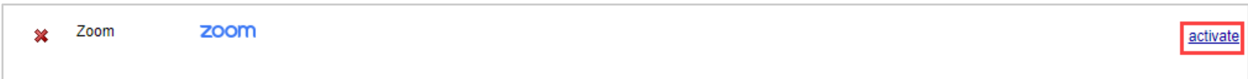
7. Click **Continue** or **Activation**, and click **Activate your app**



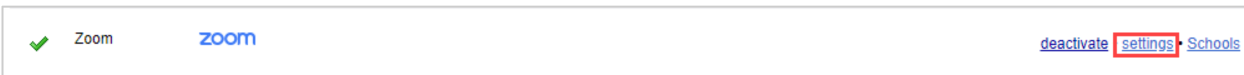
If you need to make changes to the app in the future, the app can be accessed by the user who created the app by logging into the Zoom App Marketplace and clicking **Manage**.

Configure SAFARI Montage

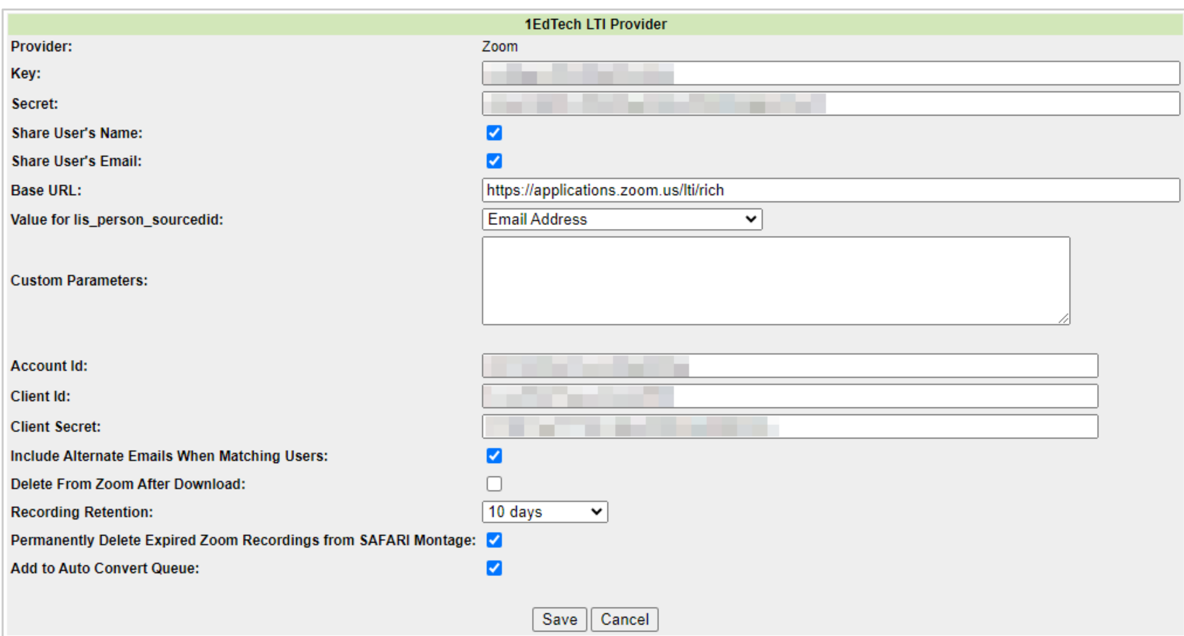
1. Enable the Zoom Integration
    a. Log in and navigate to **Admin > Interoperability Support > Services** and click the **Activate** link



    b. Click on the **Settings** link



    c. Using the LTI Key and LTI Secret from the LTI Pro App configuration:
        i. Enter the **LTI Key** in the **Key** field
        ii. Enter the **LTI Secret** in the **Secret** field
    d. Set the **Base URL** to *https://applications.zoom.us/lti/rich*
    e. Leave the **Value for lis_person_sourcedid** as **Email Address**
    f. Using the Account ID, Client ID, and Client Secret from the OAuth App configuration:
        i. Enter the **Account ID** in the **Account Id** field
        ii. Enter the **Client ID** in the **Client Id** field



        iii. Enter the **Client Secret** in the **Client Secret** field

g. Select any optional recording handling options
    i. Include Alternate Emails When Matching Users allows user accounts to be matched on the list of emails in the Alternate Emails section of the SAFARI Montage user profile
    ii. **Delete From Zoom After Download** removes the recording from Zoom cloud storage, freeing up space for new recording
    iii. **Recording Retention** allows a default expiration time to be set for imported recordings. This can be adjusted on a per-recording basis by the owner of the recording.
    iv. **Permanently Delete Expired Zoom Recordings** automatically deletes any recordings that exceed their retention period as set above
    v. **Add to Auto Convert Queue** schedules Zoom recordings to be autoconverted per Auto-Converter settings on import

h. Click **Save**

2. Configure the Zoom Integration for each School
    a. Log in and navigate to **Admin > Interoperability Support > Services** and click the **Schools** link

    b. Select which schools will have a link on the **Portal Links** page and which will have a link on the **Dashboard** (or both)
    c. Use the dropdown to restrict which user types can view the Portal and Dashboard links
        i. If you enabled Instructor and Student for auto provision on page 5, ensure the user type is set to **students and above**
    d. Click **Save**