

# Zoom Integration Instructions

## SAFARI Montage® v8.2

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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

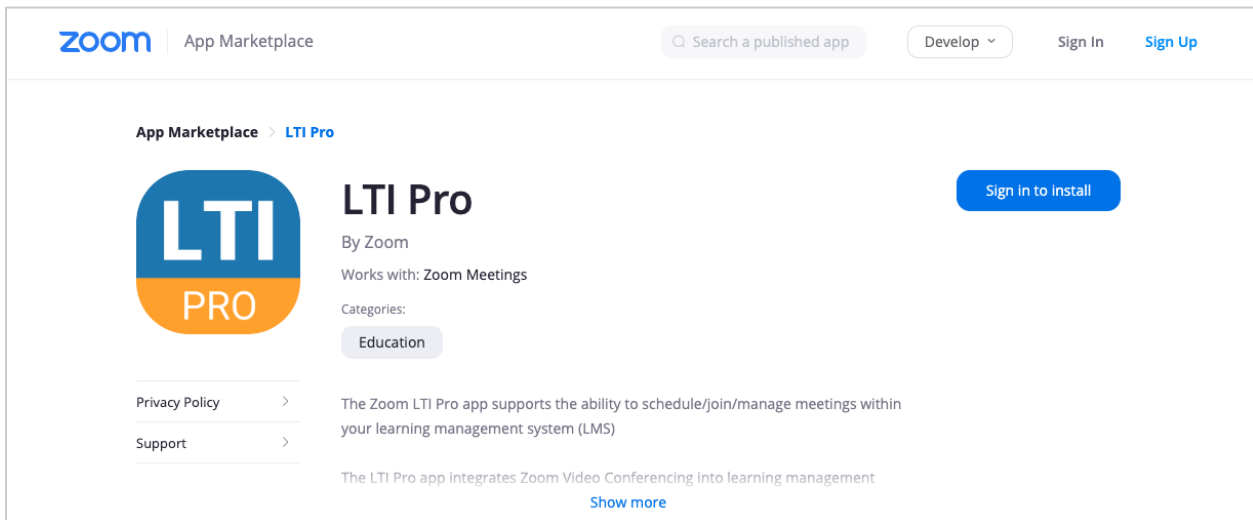
### Note

- 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>.

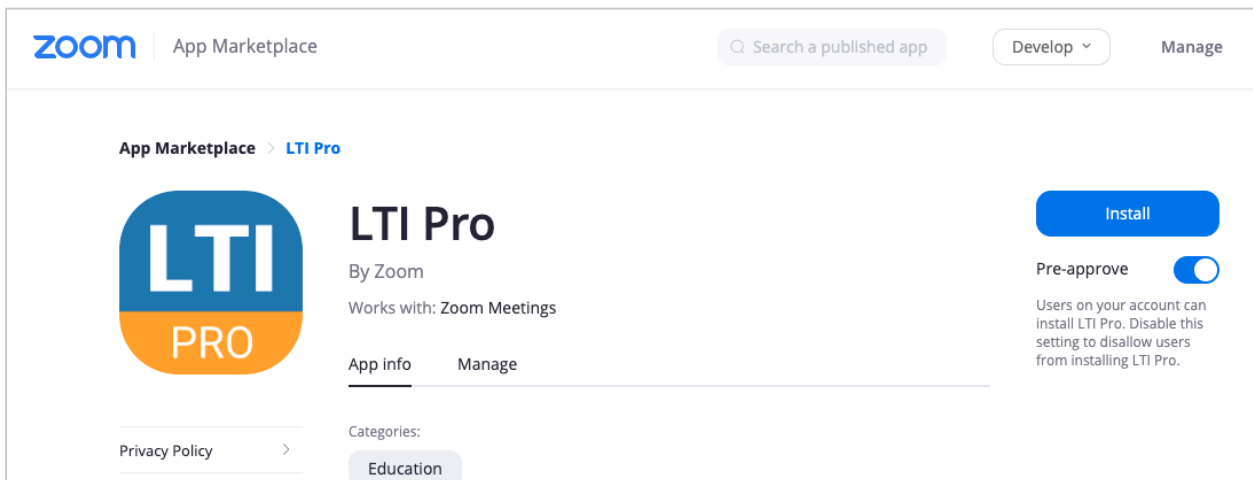
## Install and Configure the Zoom LTI Pro App

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](https://marketplace.zoom.us)

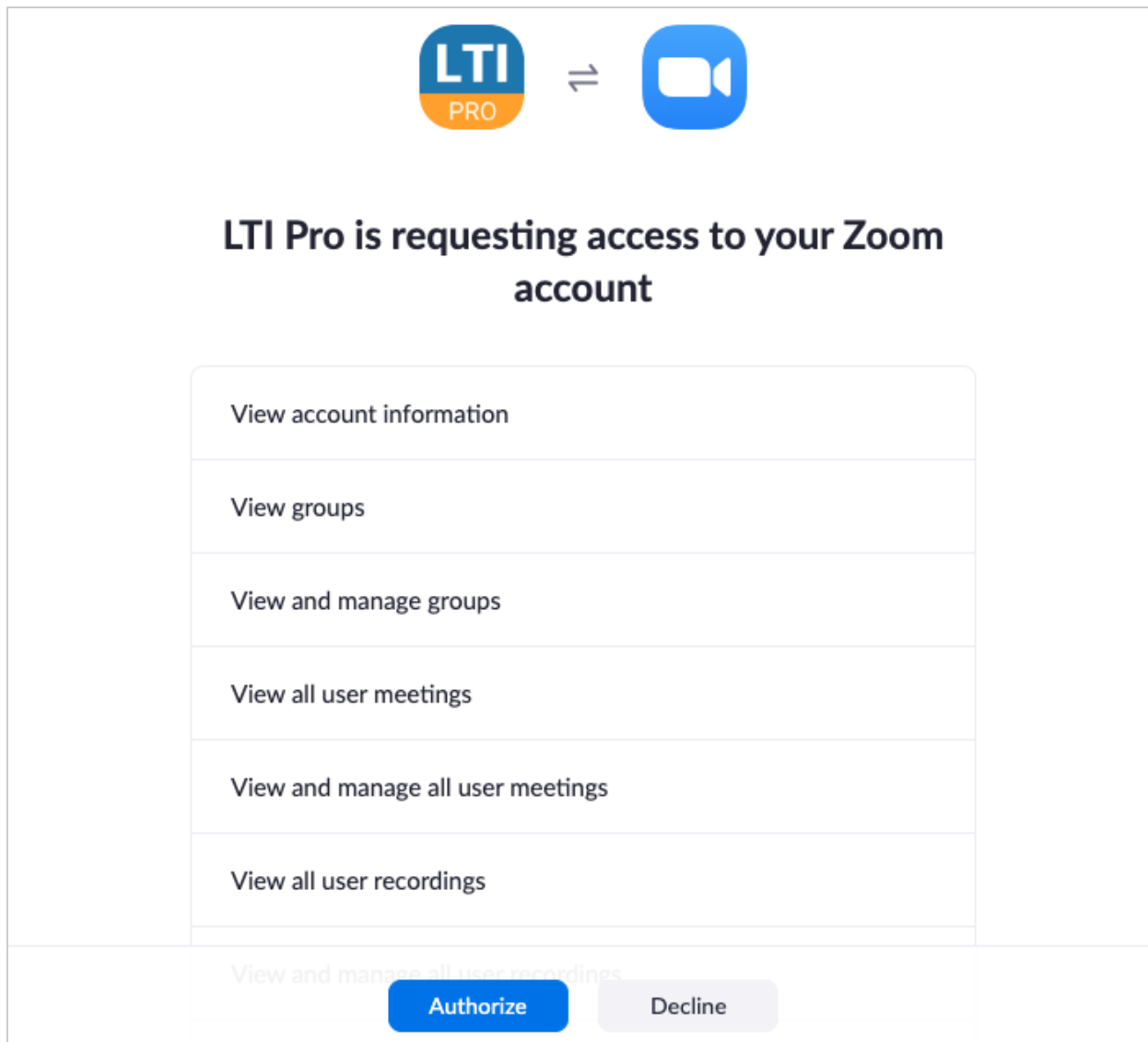


2. If you are not signed in, click **Sign in to install**
3. Enable the **Pre-approve** setting



4. Click **Install**

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

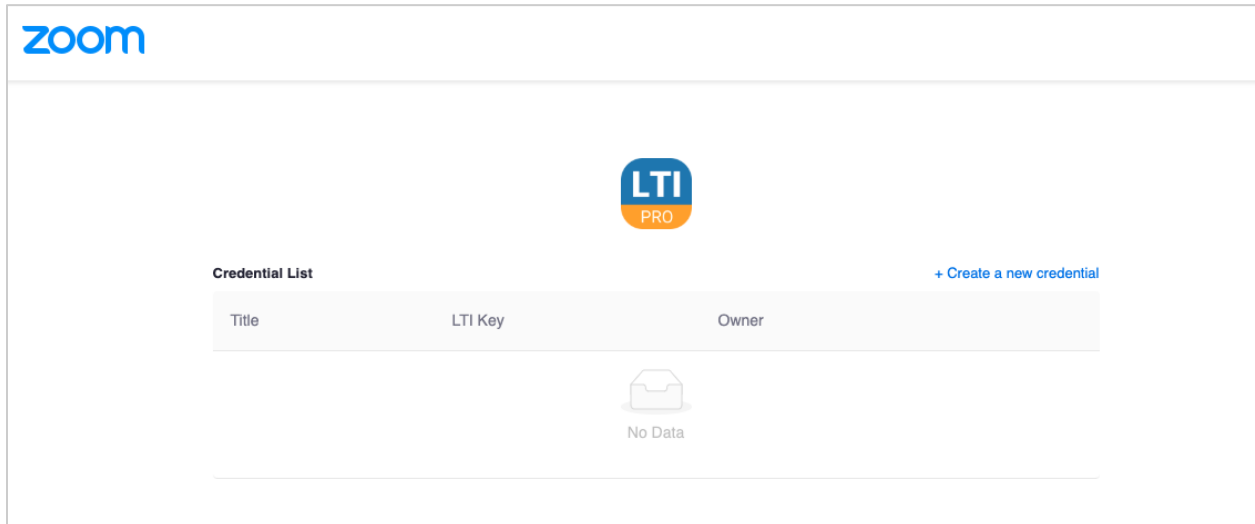


The screenshot shows an authorization interface. At the top, the LTI Pro logo (a blue circle with 'LTI' in white and 'PRO' in orange below it) is connected by a double-headed arrow to the Zoom logo (a blue rounded square with a white video camera icon). Below this, the text reads "LTI Pro is requesting access to your Zoom account". A list of permissions is shown in a table-like structure:

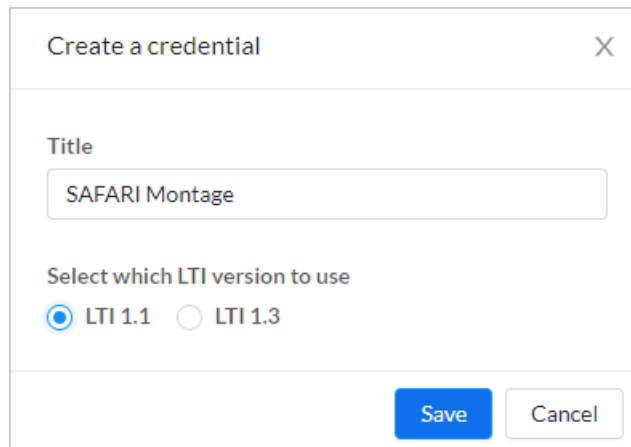
View account information
View groups
View and manage groups
View all user meetings
View and manage all user meetings
View all user recordings
View and manage all user recordings

At the bottom of the screen, there are two buttons: a blue "Authorize" button and a grey "Decline" button.

6. Click **Create a new credential**



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



The screenshot shows a 'Create a credential' dialog box. It has a title bar with 'Create a credential' and a close button (X). The 'Title' field contains the text 'SAFARI Montage'. Below this, there is a section titled 'Select which LTI version to use' with two radio buttons: 'LTI 1.1' (which is selected) and 'LTI 1.3'. At the bottom right, there are two buttons: 'Save' and 'Cancel'.

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

**Allow Students to Schedule and Host Meetings**

**Auto Provision Zoom Users**

Users that are automatically created will receive an email notification unless your org uses managed domains or trusted domains.

**Auto provision**

Instructor only  Instructor and Student

**Whitelisted email domains**

safarimontage.com x

**User type**

Pro  Corp

**Auto Populate Alternative Host**

Automatically populate the Instructors of a course as alternative host when create a new meeting.

- 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.

**Approved Domains**

Add all the domains that can be used to access the LMS. For security reasons, LTI Pro will only operate in approved domains that have been entered here.

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

**Timezone**

Configure timezone origin as LMS or LTI Pro and set default timezone.

**Default Timezone** ⓘ

**Timezone Origin**

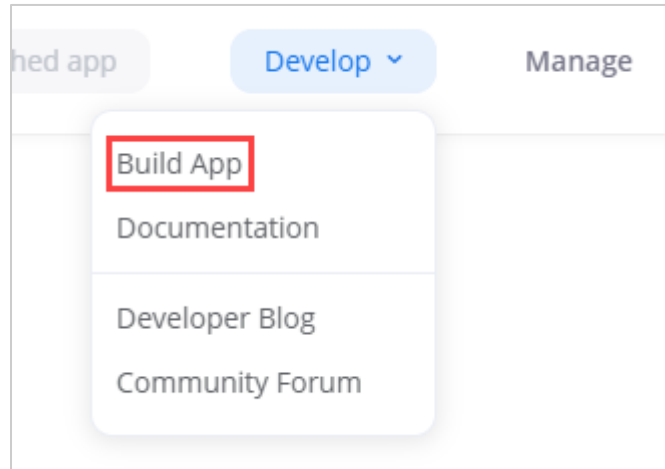
LMS ⓘ  LTI Pro ⓘ

- 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.

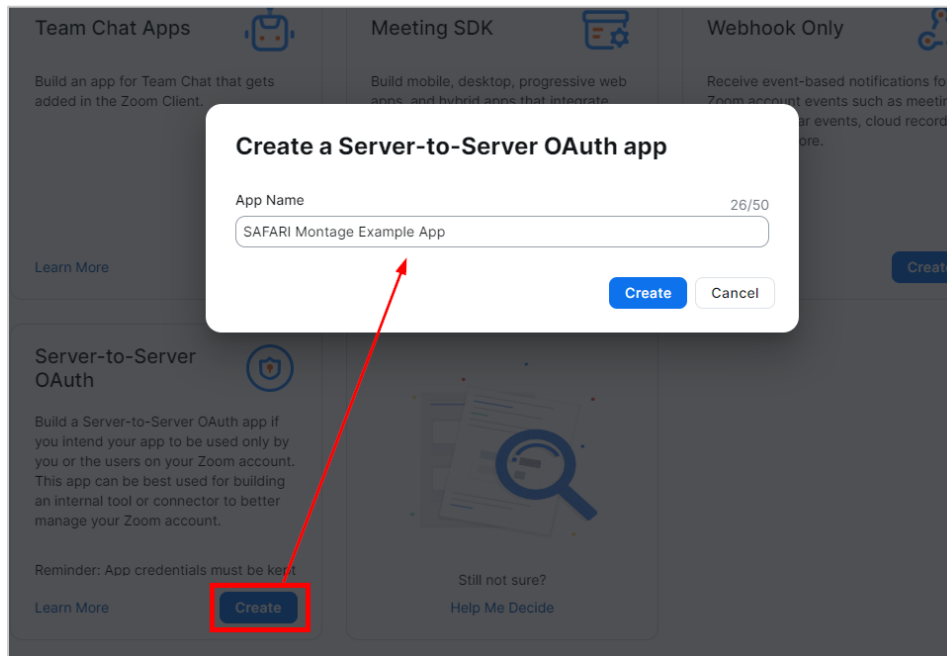
Note: Descriptions of the various configurable options can be found in Zoom's documentation at <https://zoomappdocs.docs.stoplighlight.io/lti-pro-v2/welcome/manage-and-configure>

## 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**



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

**SAFARI Montage Example App**

Intend to publish: No Account-level app Server-To-Server OAuth

**App Credentials**

Use the credentials to access Zoom APIs from your app. Make sure to securely store the credentials. Do not store them in public repositories.

**App Credentials**

Account ID  Copy

Client ID  Copy

Client Secret  Copy Regenerate

**Account ID:** \_\_\_\_\_

**Client ID:** \_\_\_\_\_

**Client Secret:** \_\_\_\_\_

- 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.

**SAFARI Montage Example App**

Intend to publish: No Account-level app Server-To-Server OAuth

**Basic information**

App name  SAFARI Montage Example App 28/50

Short description  Short description 0/150

Company Name

**Developer Contact Information**

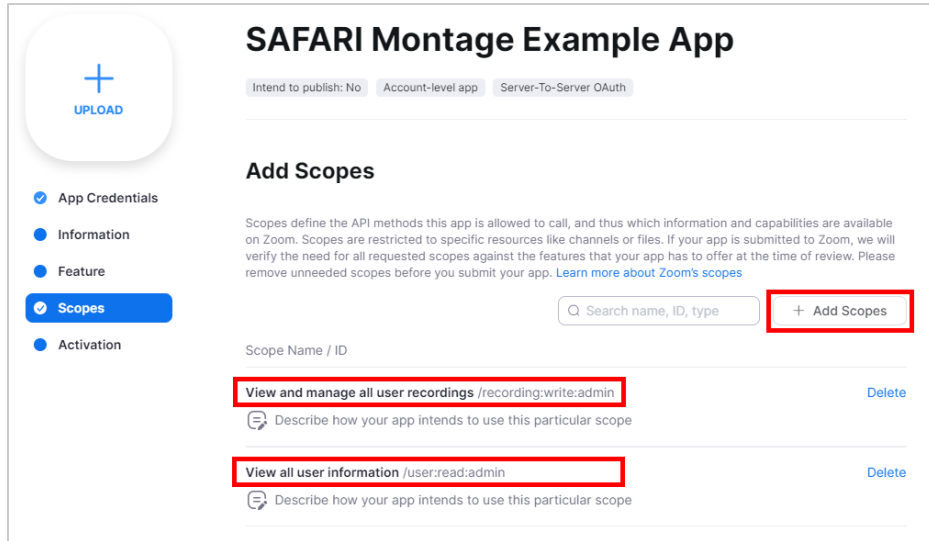
Provide your corporate email for us to contact you for service impacting announcements, including new Marketplace/API updates, breaking changes, and other updates as well as information that directly impacts your app.

Name

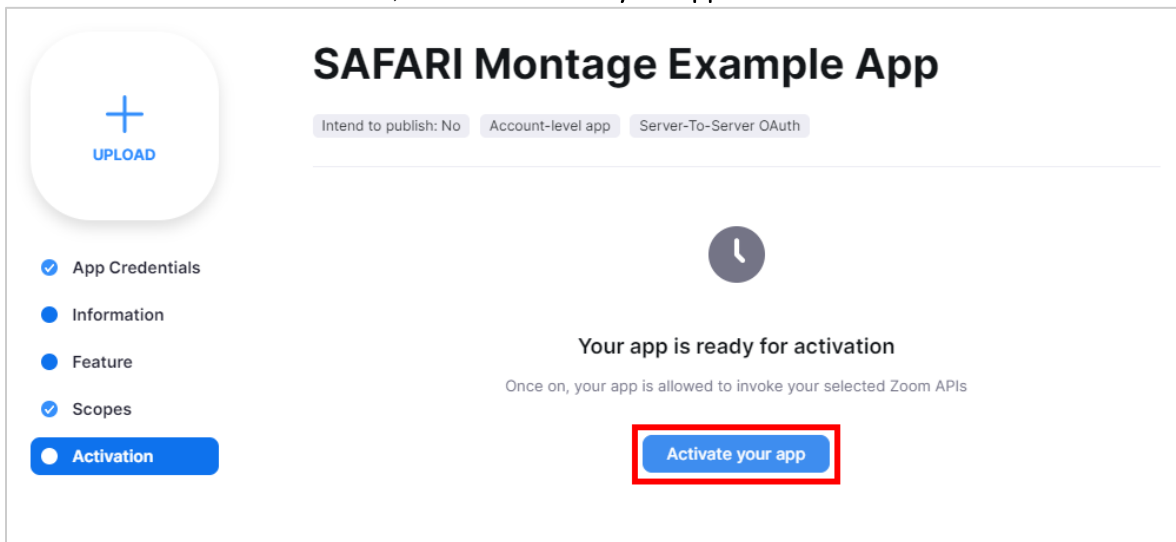
Email address



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**

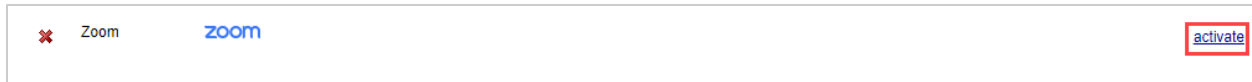


If you need to make changes to the app in the future, the app can be accessed by the user who created the app by logging into the Zoom App Marketplace and clicking **Manage**.

## Configure SAFARI Montage

1. Enable the Zoom Integration

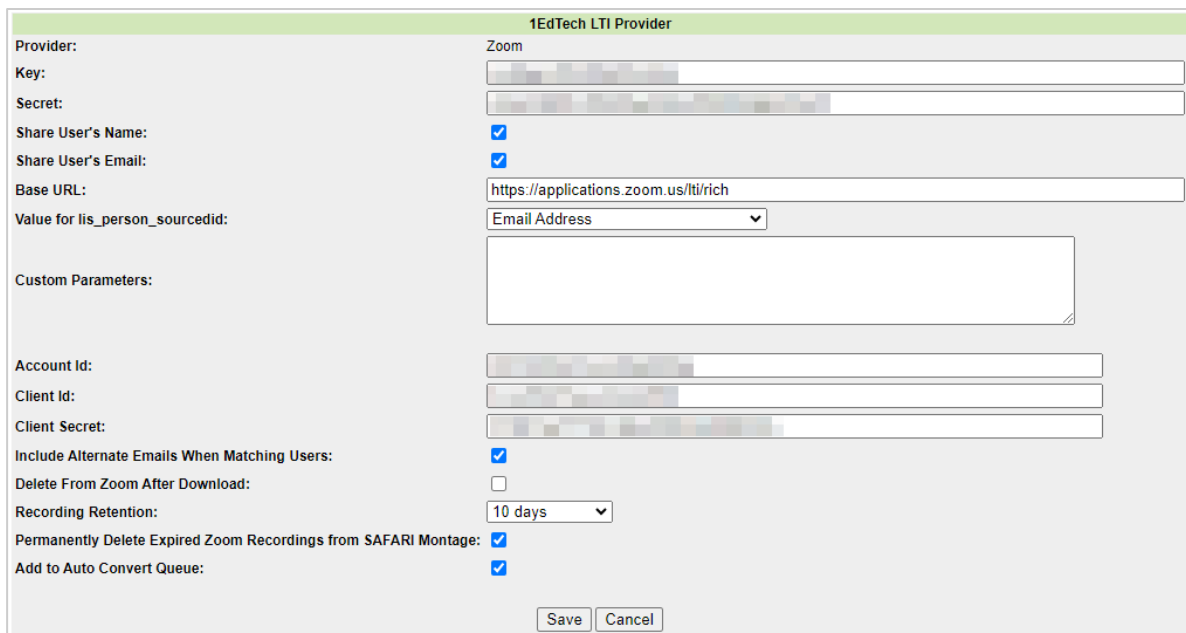
- a. Log in and navigate to **Admin > Interoperability Support > Services** and click the **Activate** link



- 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

A screenshot of a configuration form titled '1EdTech LTI Provider'. The provider is set to 'Zoom'. The form contains several fields: 'Key' and 'Secret' (both masked with grey bars), 'Share User's Name' (checked), 'Share User's Email' (checked), 'Base URL' (https://applications.zoom.us/lti/rich), 'Value for lis\_person\_sourcedid' (Email Address), 'Account Id', 'Client Id', and 'Client Secret' (all masked). There are also checkboxes for 'Include Alternate Emails When Matching Users' (checked), 'Delete From Zoom After Download' (unchecked), 'Permanently Delete Expired Zoom Recordings from SAFARI Montage' (checked), and 'Add to Auto Convert Queue' (checked). A 'Recording Retention' dropdown is set to '10 days'. At the bottom are 'Save' and 'Cancel' buttons.

- 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**

