



User Guide

How To Integrate Zoom with SuccessFactors

Version	1.0
Prepared by	Vera Kaltovich and Tonya Asmolskaya

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1. Introduction

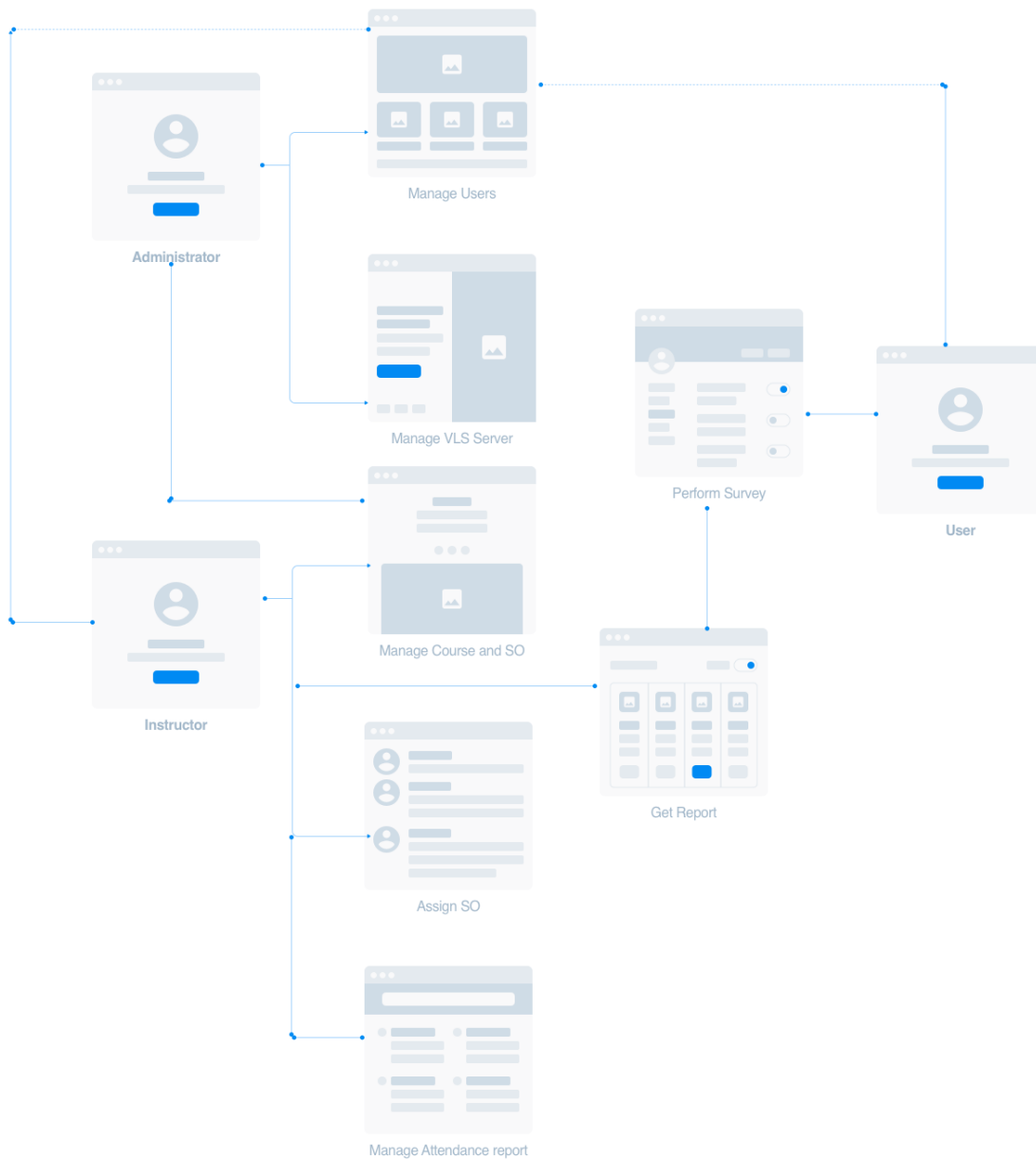
The purpose of this User Guide is to help the user use the system effectively, safely and congenially, and understand the technicalities of how the system is constructed.

The documentation provides sections for each of the requirements appropriate to this system and describes “what” the system should do, not “how” it is accomplished. To achieve these objectives, the User Guide translates the vision for Application into specifications and expresses the detailed requirements of the system. Quality Assurance specialists use these requirements to plan suitable test scenarios and specifications to ensure the system meets these goals.

2. Business objectives

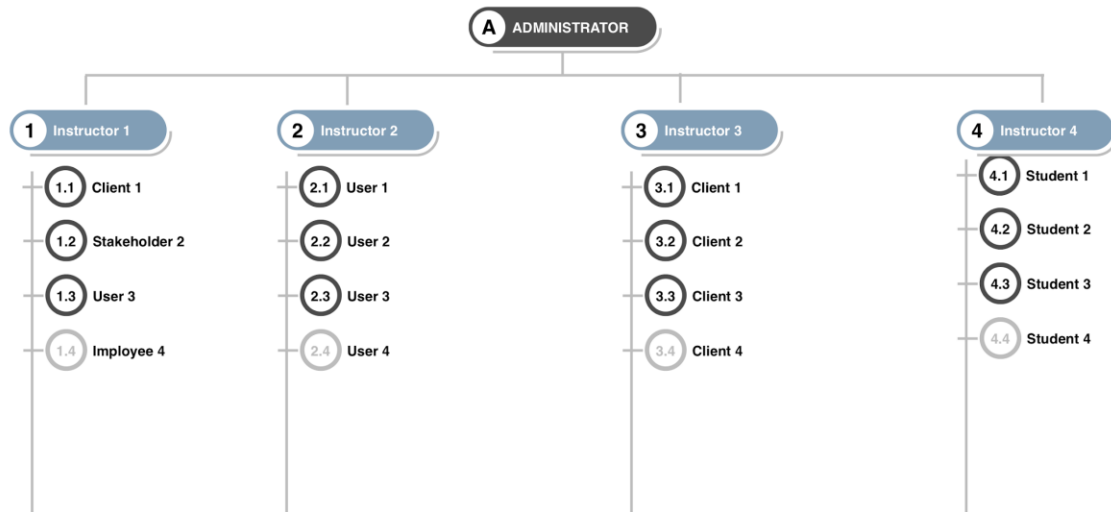
Zoom Connector in SuccessFactors is one main feature of LTI Architecture platform that makes it possible for users to join Zoom meetings and process data and information and based on that define and create attendance report data in a SF unit level.

The main process of creating, collecting, processing, managing and analysis of the results is presented in the diagram below (see Pic. 1).



3. Target Audience, Users and Roles

It is expected that there will be 3 main user roles defined within the system:



- **Administrators** (staff members who manage the SF tool, add roles, modify information, give rights to Instructors to assign Scheduled Offerings etc.)
- **Instructors** (teachers, instructors, designers, lead instructors) who are able to manage courses, users, scheduled offerings, and reports.
- **Users** (employees, students etc.) who are able to give input into Zoom Meeting, someone to whom Instructors assign scheduled offerings).

4. Requirements

To ensure the correct operation of the Zoom connector, you should adhere to the following requirements:

1. The account ID for the Instructors needs to be the email address for the instructor's host account in Zoom. When a learner joins Zoom sessions through the LMS, the account is created for the learner on the Zoom site. Since accounts are created for hosts and learners on Zoom through the VLS integration, LMS users cannot have the same email address as the LMS instructors.
2. The **Account Id** must be unique to all instructors.
3. If you create a new VLS Account, you should select the **Create New Account** option.
4. Account Id must be the email address associated with the Zoom's account.

5. If you update an existing VLS Account, you should check **Use existing account**.

5. Design and Implementation Constraints

- Hardware limitations (timing requirements, memory requirements): RAM 6GB, Total disc space - 5GB.
- Communications protocols: HTTPS.

5.1 Solution Constraints

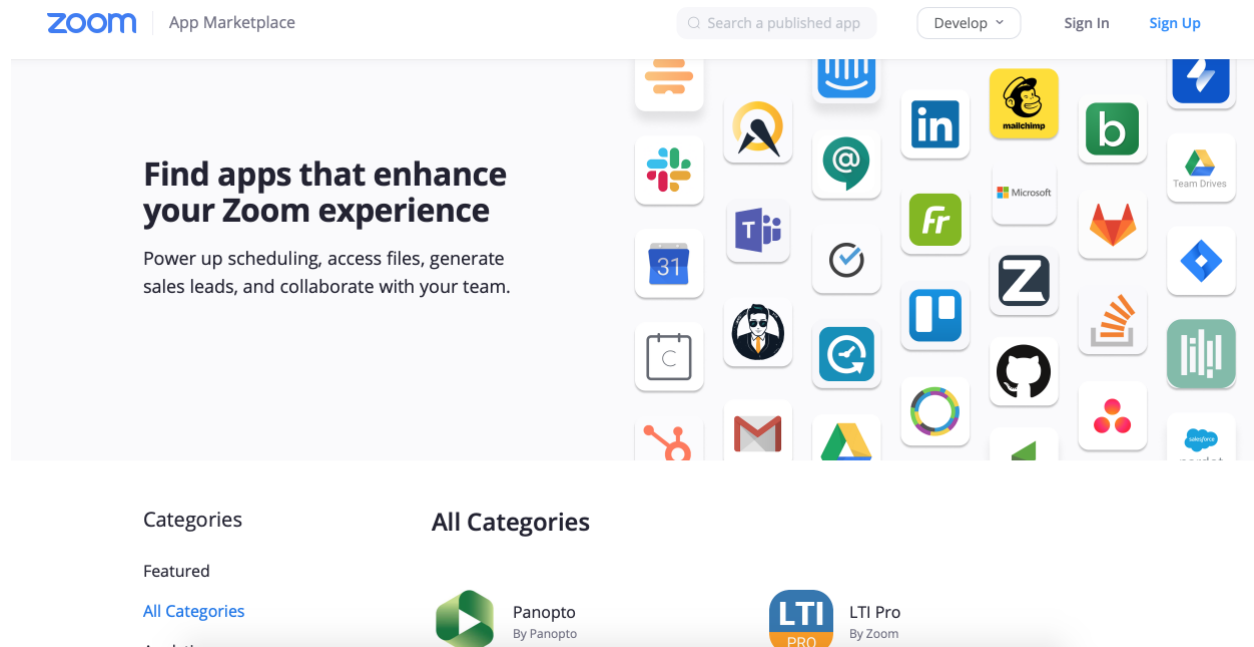
This section specifies constraints on the way that a problem must be solved.

The application will be optimized to perform with the following browsers and operating systems:

OS/Browser	Windows 8		Windows 10	MAC
Chrome	✓		✓	✓
Mozilla FF	✓		✓	✓
Safari	-		-	✓

6. Installing application in Zoom Marketplace

1. Open <https://marketplace.zoom.us>



2. Sign in with the zoom admin credentials. Restrictions:
 - Your Zoom account should be the following: type=Licensed; role=Admin
 - Your Zoom account should not be registered in the Coso Zoom Admin previously.

☐ mike@ [redacted] ☐ [redacted] Admin Licensed

3. Install the application **SuccessFactors LTI**.
4. Authorize the Application.



SuccessFactors LTI is requesting access to your Zoom account

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

Authorize

Decline

5. Provide Organization name and Accept Terms of Service and Privacy Policy:



Administration

Organization

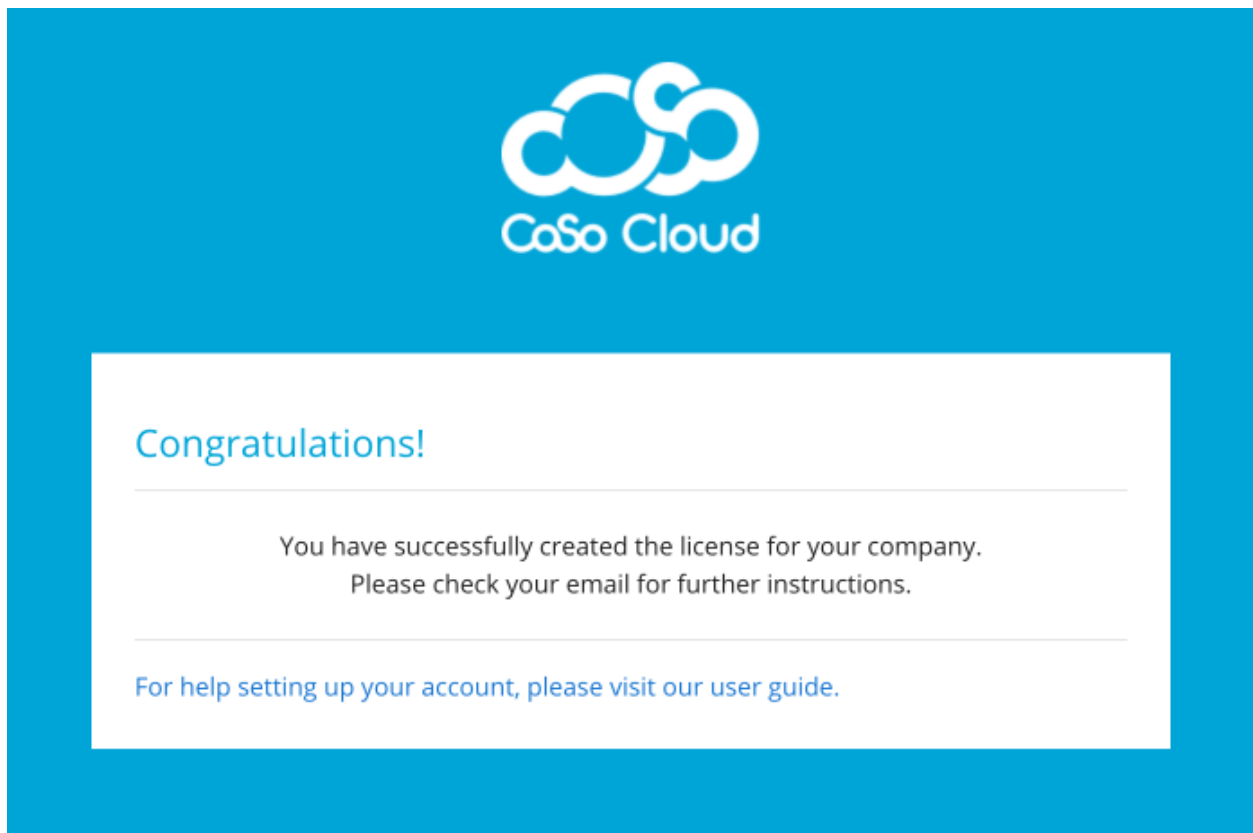
ABC Inc.



I Agree. Our [Terms of Service](#) and [Privacy Notice](#) are linked here for your review.

CREATE

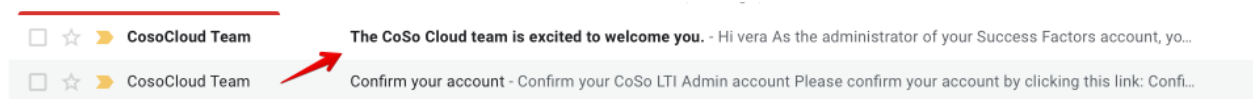
6. When the license is created user will get the following message:



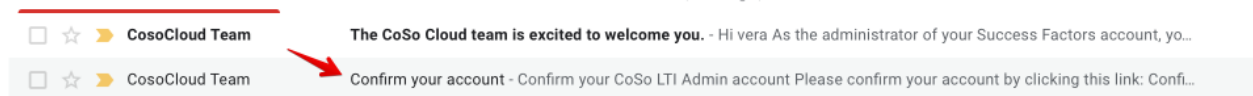
Here you can open UserGuide.

7. There are 2 emails will be sent to user

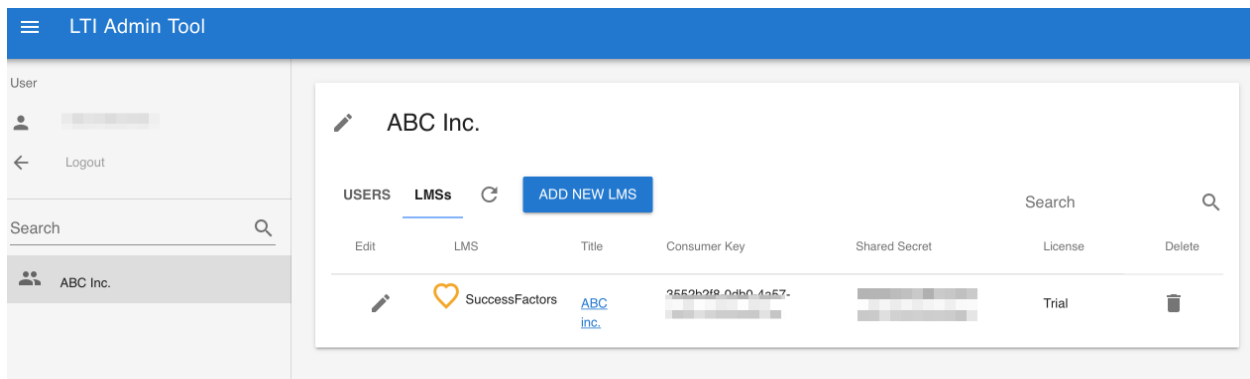
7.1 Welcome email:



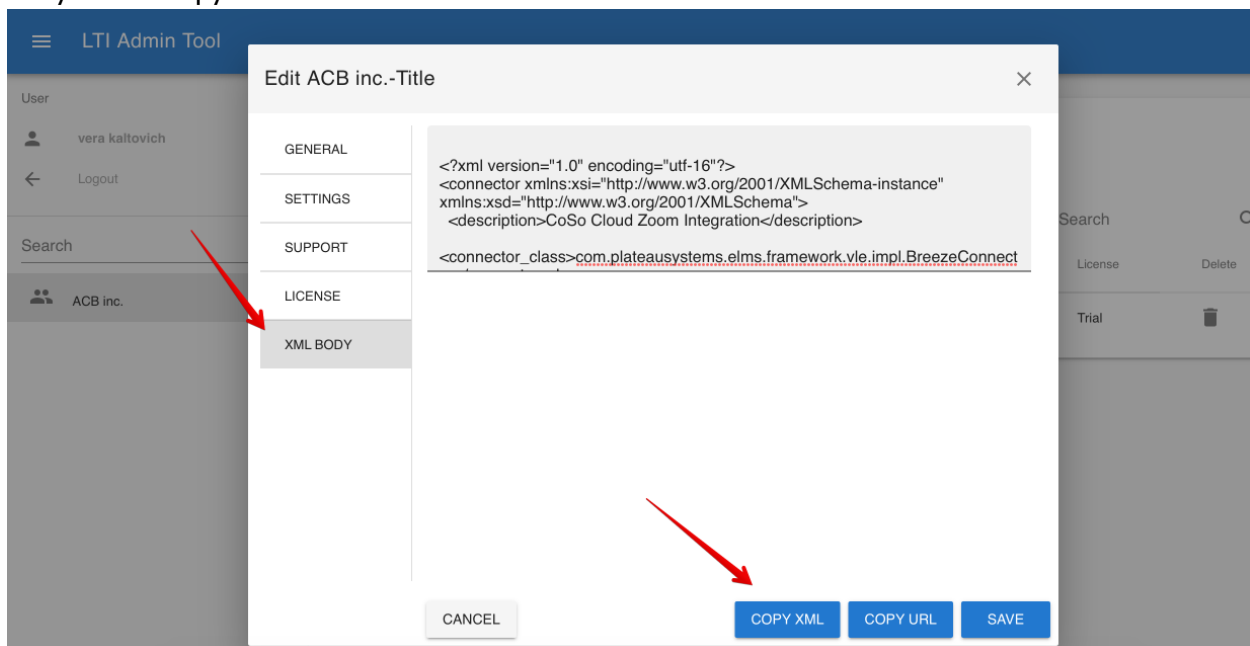
7.2 Activation email: user should activate his account in CoSo Zoom Admin application:



8. Once a user has confirmed his account, the license will be activated (Trial period=month).



9. VLS configuration in SF will require an XML body. User can find it in his license: Edit->XML body tab-> Copy XML:

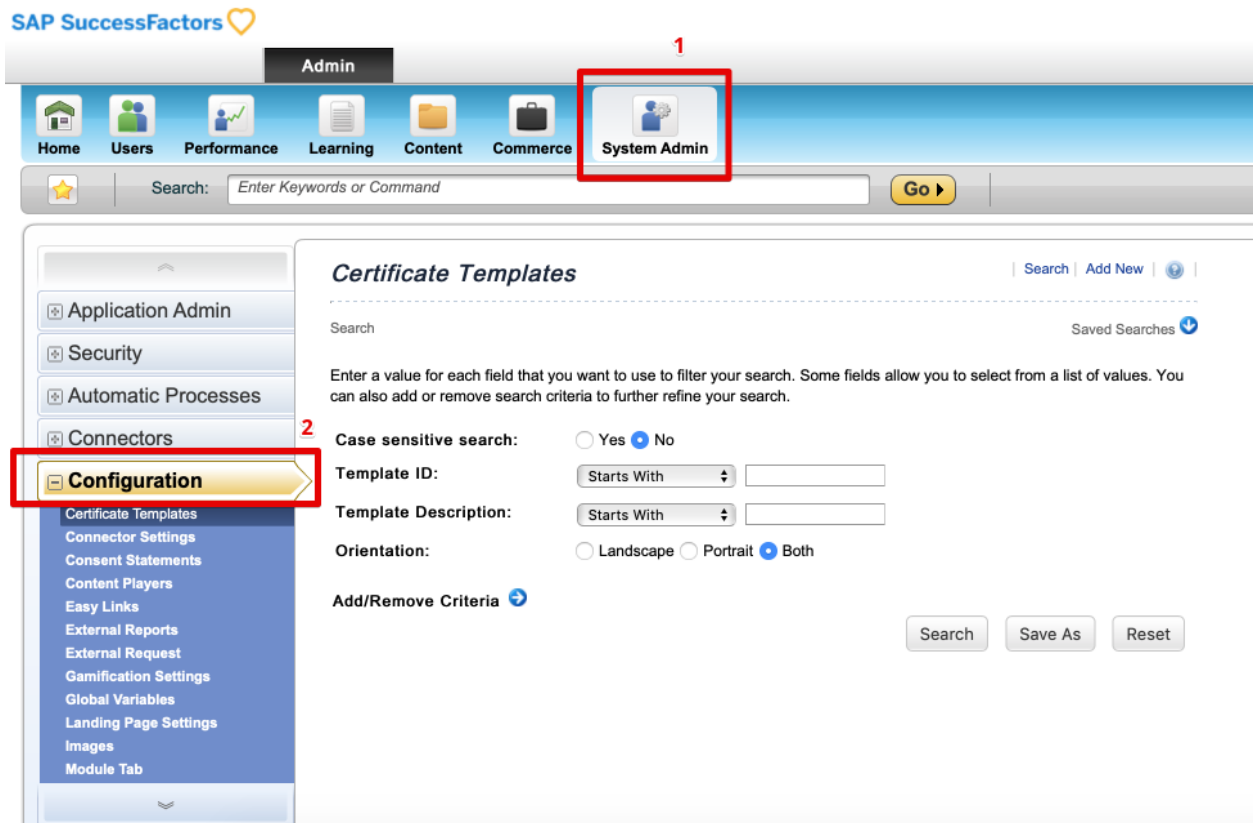


7. SuccessFactors Integration With Zoom via VLS configuration

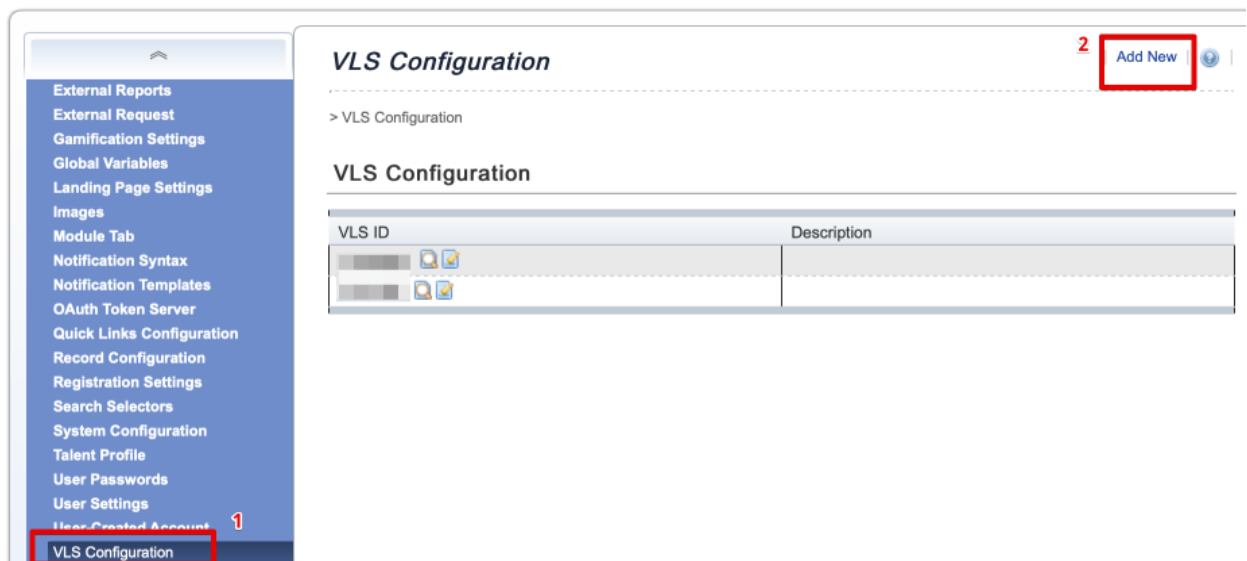
The execution procedure is the following:

1. Login to SuccessFactors

2. Navigate to **System Admin->Configuration:**



3. Navigate to **System Admin->Configuration→VLS Configuration**. Click **Add New**.



4. Enter **VLS ID** and **XML Configuration** (see 8).

Note: The password is displayed only when a new value is entered. Upon save, it will show as encrypted.

* = Required Fields

* VLS ID: VLS NAME

Description:

* Configuration:

```
<?xml version="1.0"?>
<connector xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <description>Macromedia Breeze</description>
  <connector_class>com.plateausystems.elms.framework.vle.impl.BreezeConnector</connector_class>
  <xml_api_address>http://localhost:8080/soap/soap12-secure-test-001-1222-0000
  </xml_api_address>
  <server_address>localhost</server_address>
  <username>admin</username>
  <password>admin</password>
  <lms_user_name_custom_field_id>x-username</lms_user_name_custom_field_id>
  <lms_user_type_custom_field_id>x-role</lms_user_type_custom_field_id>
  <folder_id>1000000</folder_id>
  <learner_group_id>1100000</learner_group_id>
  <instructor_group_id>1200000</instructor_group_id>
  <learner_default_password>admin</learner_default_password>
  <elms_url_prefix>/vle</elms_url_prefix>
  <sync>true</sync>
</connector>
```

5. Save.

8. Instructors Leading Virtual Training

If you configure your instructors for virtual learning, they can launch their classes directly from their instructor page. If your instructors lead training in Zoom meeting rooms, consider managing their accounts through SAP SuccessFactors Learning. When you manage their accounts through SAP SuccessFactors Learning:

- Instructors can see their upcoming training events and launch their virtual training events from the instructor view.
- Instructors should use their personal Zoom accounts for their instruction.
- The system can track attendance in the virtual training event.
- Users can launch virtual training from their My Assignments tile.

8.1 Configuring Instructors for VLS

Configure instructors for the Virtual Learning Service (VLS) so that they can start virtual training sessions in virtual Zoom meeting rooms.

Prerequisites

Before you can work with Virtual Learning Service (VLS), you must configure it. Configuring the VLS is a one-time implementation task. Please read our implementation guide for your meeting room vendor. Each server that you configure is available when you configure other parts of the application for VLS, like segments and instructors. Add your instructors to SAP SuccessFactors Learning. Your instructors must be tracked in the system for VLS to work properly.

Context

Virtual Learning Service (VLS) integrates SAP SuccessFactors Learning and a virtual Zoom meeting room vendor so that the training and employees can meet online in a virtual meeting room. It reduces costs for live training events when the instructor and learners are dispersed. They can meet virtually instead of travelling.

Procedure

1. Go to Learning Instructors and search for the instructor who should have access to VLS.

Home Users Performance **Learning** Content Commerce System Admin

Search: Enter Keywords or Command **Go**

Instructors | Search | Add New | ?

Search Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: ☐ Yes ☒ No

Instructor ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Items: Exact Type: ID:

Status: ☒ Active ☐ Not Active ☐ Both

Related User: Starts With

Add/Remove Criteria

Search Save As Reset

2. Go the Summary to verify that the instructor record has a first name, last name, and email address.
These fields are required to maintain VLS accounts in SAP SuccessFactors Learning.
3. Go to VLS Settings.
VLS Settings contains the VLS servers that you created when you configured your instance of VLS.

Add New

Email Address:

Comments:

Biography:

Active: ☒

Related User:

Authorized to Teach

Item ID:

Type:

VLS Settings

VLS Server:

Account ID:

Account Password:

Action: ☐ Create New Account ☒ Use Existing Account

1. The account id for the Instructors needs to be the email address for the instructor's host account in Zoom. When a learner joins a Zoom session through the LMS, an account is created for the learner on the Zoom site. Since accounts are created for hosts and learners on Zoom through the VLS integration, LMS users cannot have the same email address as the LMS instructors.
2. The Account Id must be unique to all instructors.
3. The Zoom user must exist in a Zoom account.
4. Instructor should be a Zoom Licensed user.
5. VLS setting for all other instructors (which are not listed in the VLS config): Option is 'Create Existing Account'.

Troubleshoots

1. VLS Error: Instructor was not found in Adobe Server. Please remove the instructor and re-create it with the Updated VLS option selected.

Add New

Validation Error

You must correct the following error(s) before proceeding:

The user account could not be created on Sirva VLS Config VLS Server. Please try again later or note the error and contact your VLS administrator.
VLS Error: Instructor was not found in Adobe Server. Please remove the instructor and re-create it with Update VLS option selected.

Instructors

> Add New

Add New Instructor

* = Required Fields
First Name, Last Name and Instructor Email are required for VLS support.

Add

Reset

* Instructor ID:

14may

Last Name:

Instructor

First Name:

Roman

MI:

Company:

* Domain:

PUBLIC

* Role:

Default Instructor Role (DEFAULT INSTRUCTOR)

Organization:

Time Zone:

Email Address:

romanp+14may@esynctraining.com

Comments:

Biography:

Active:

☒

Related User:

Authorized to Teach

Item ID:

Type:

VLS Settings

VLS Server:

Sirva VLS Config

Account ID:

romanp+14may@esynctrain

Account Password:

Action:

☐ Create New Account

☒ Use Existing Account

You need check Create New Account

Solution: You must select Create New Account option

2. VLS Error: No status in response from Breeze:

Add New

You must correct the following error(s) before proceeding:

- The user account could not be created on Sirva VLS Config VLS Server. Please try again later or note the error and contact your VLS administrator.
VLS Error: No status in response from Breeze:

Instructors

> Add New

Add New Instructor

* = Required Fields
First Name, Last Name and Instructor Email are required for VLS support.

Add **Reset**

* **Instructor ID:** 14may

Last Name: Instructor **First Name:** Roman **MI:**

Company:

* **Domain:** PUBLIC

* **Role:** Default Instructor Role (DEFAULT INSTRUCTOR)

Organization:

Time Zone:

Email Address: romanp+14may@esynctraining.com

Comments:

Biography:

Active: ☒

Related User:

Authorized to Teach

Item ID:

Type:

VLS Settings

VLS Server: Sirva VLS Config

Account ID: romanp+13may@esynctrain

Account Password:

Action: ☒ Create New Account ☐ Use Existing Account

Add **Reset**

Solution: Check Account Id. It is possible that that Account Id has already existed in SF.

3. VLS Error: A user with the same Account ID (email/login) currently exists in Adobe:

Add New

Validation Error

You must correct the following error(s) before proceeding:

- The user account could not be created on Sirva VLS Config VLS Server. Please try again later or note the error and contact your VLS administrator.
VLS Error: A user with the same Account ID (e-mail/login) currently exists in Adobe.

Instructors

> Add New

Add New Instructor

* = Required Fields

First Name, Last Name and Instructor Email are required for VLS support.

Add

Reset

* Instructor ID:

14may

Last Name:

Instructor

First Name:

Roman

MI:

Company:

* Domain:

PUBLIC

* Role:

Default Instructor Role (DEFAULT INSTRUCTOR)

Organization:

Time Zone:

Email Address:

romanp+14may@esynctraining.com

Comments:

Biography:

Active:

☒

Related User:

Authorized to Teach

Item ID:

Type:

VLS Settings

VLS Server:

Sirva VLS Config

Account ID:

13may

Account Password:

Action:

☒ Create New Account

☐ Use Existing Account

Solution: Check Account Id. It is possible that that Account Id already exists in SF.

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8.2 How to Update an Existing Instructor in Success Factors

Rules

1. The account id for the Instructors needs to be the email address for the instructor's host account in Zoom. When a learner joins a Zoom session through the LMS, an account is created for the learner on the Zoom site. Since accounts are created for hosts and learners on Zoom through the VLS integration, LMS users cannot have the same email address as the LMS instructors.
2. The Account Id must be unique to all instructors.
3. The Zoom user must exist in a Zoom account.
4. The Zoom user must be Pro type.

Steps

1. You must check **Use Existing Account** option

Instructors | Search | Add New | ?

> Search > Search Results > Edit VLS Settings

Instructor ID: [Text Box]
Name: [Text Box]

Edit the VLS Settings for the Instructor

Use this page to create or maintain a mapping between this instructor and account(s) on the specified VLS server(s). For each VLS server listed you can enter the instructor's VLS Server account ID and password. If you wish to create a new account for this Instructor on a VLS server, enter the credential information (user ID and password) you would like for the Instructor to have, then choose the "Create a New Account" option. The system will attempt to create an account on the VLS server for this instructor using the ID and password you provide. To have the system use the instructor's existing VLS server account, enter the instructor's account information here and choose the "Use Existing Account" option.

Apply Changes Reset

VLS Server	Account ID	Account Password	Action
[Text Box]	[Text Box]	[Text Box]	☐ Create New Account ☒ Use Existing Account
[Text Box]	[Text Box]	[Text Box]	☐ Create New Account ☒ Use Existing Account
[Text Box]	[Text Box]	[Text Box]	☐ Create New Account ☒ Use Existing Account
Zoom	[Text Box]	[Text Box]	☐ Create New Account ☒ Use Existing Account
Zoom	[Text Box]	[Text Box]	☐ Create New Account ☒ Use Existing Account

Apply Changes Reset

2. After you populate the VLS host account credentials and click 'Apply Change' you

need to wait for synchronization to complete. There are no messages displayed stating that the account synchronized successfully if the action was successful. If the synchronization is not successful, an error message will be presented. To verify that the synchronization completed successfully, you should click on a different tab on the LMS instructor record and then click back on the VLS Settings tab. If the account credentials are populated when the VLS Settings tab is reloaded, then the synchronization was successful

Troubleshoots:

1. VLS Error: duplicate

Validation Error

You must correct the following error(s) before proceeding:

- The user account could not be updated on Sirva VLS Config VLS Server. Please try again later or note the error and contact your VLS administrator.
VLS Error: duplicate

Instructors | Search | Add New |

> Search > Search Results > Edit VLS Settings

Instructor ID: 14may

Name: Instructor, Roman

Edit the VLS Settings for the Instructor

Use this page to create or maintain a mapping between this instructor and account(s) on the specified VLS server(s). For each VLS server listed you can enter the instructor's VLS Server account ID and password. If you wish to create a new account for this instructor on a VLS server, enter the credential information (user ID and password) you would like for the instructor to have, then choose the "Create a New Account" option. The system will attempt to create an account on the VLS server for this instructor using the ID and password you provide. To have the system use the instructor's existing VLS server account, enter the instructor's account information here and choose the "Use Existing Account" option.

Apply Changes | Reset

VLS Server	Account ID	Account Password	Action
Sirva VLS Config	13may	*****	☐ Create New Account ☒ Use Existing Account
AC STAGE			☐ Create New Account ☒ Use Existing Account
SF_eSync_Zoom_test			☐ Create New Account ☒ Use Existing Account
SF_eSync_AC			☐ Create New Account ☒ Use Existing Account

Apply Changes | Reset

Solution: Check Account Id. It is possible that the Account Id already exists in SF.

9. How to Create a new Student/User

Configure users(students) for the Virtual Learning Service (VLS) so that they can start virtual training sessions in virtual Zoom meeting rooms. To create a new user please use the following procedure:

1. Go to Learning->Users→ **Add new User:**

Note: email address should be associated with the zoom account, otherwise user can not open the meeting:

Add New

Users

> Add New

Add New User Information

* = Required Fields

Security

* User ID:

Active: ☒

* Domain:

* Role:

Personal

Last Name:

First Name:

MI:

Organization

Organization:

Supervisor:

Employment

Job Code:

Job Location:

Employee Type:

Employee Status:

Region:

Prior Years of Service:

Years

Add Reset

2. Rules

- User Id must be unique for all users
- User Id cannot match VLS AccountId for Instructors

- User ID - required field
- Last Name - required field
- First Name - required field
- Email Address - required field

Add New

* = Required Fields

AddReset

Security

* User ID: Userid

Active: ☒

* Domain: PUBLIC

* Role: System Default User Role (DEFAULT USER)

Personal

Last Name: John

First Name: Smith

MI:

Organization

Organization:

Supervisor:

Employment

Job Code:

Job Location:

Employee Type:

Employee Status:

Region:

Prior Years of Service:

Years

Month(s)

Hired: (Test)

Related Instructor:

Address

Address:

City:

State / Province:

Postal Code:

Country:

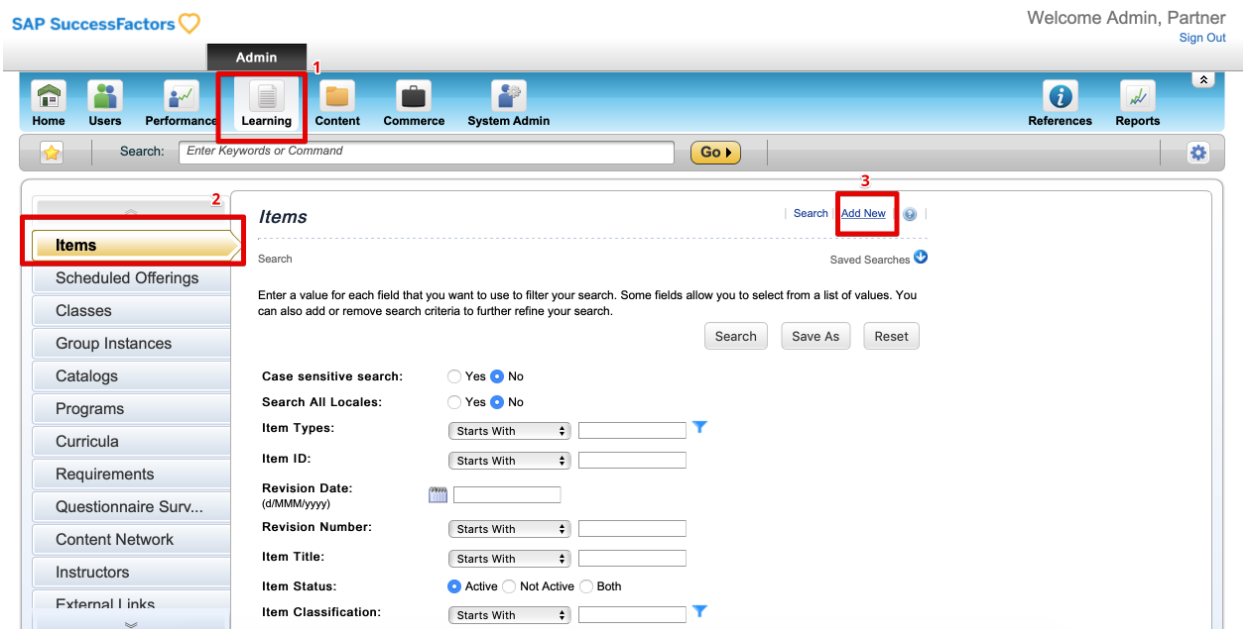
Email Address: email@example.com

AddReset

4. If everything is OK. The form will be closed.

10. The Online Course for Zoom Integration

1. Login to your SuccessFactors environment
2. Create a new Course. Open **Learning-> Items-> Add new.**



3. Select *Class and Online* type:

Add New Item

Please select the type of item you would like to add:



Class
This item will be scheduled at specific dates and times, with the option to assign instructors and locations.
Example: Classroom course



Online Only
This item will have associated online content that can be launched and completed at any time.
Example: Web-based tutorial



Class and Online
This item will contain both **class** and **online** components.



Other
This item will be neither **class** nor **online**, and actions must be taken outside of the system to complete it.
Example: Read a book

Please select a locale associated with the new item:

Item attributes entered as text will be saved in this locale. After the item has been created, you can view values in all locales by clicking the globe icon.

English (English) ▼

- *Item Type:* Virtual
- *Id:* provide id
- *Title:* Provide Title

Add New Item

Summary Add Content Change type of item or primary locale

Enter Basic Information

*Required Fields

*Item Type: Virtual (VIRT) ▼

*ID: CoSo test

*Title: Coso test

Description: Enter text in English (English)

*Domain: Default Public Access Domain (PUBLIC) 🔍

Approval Required: No ▼

Contact Hours: 0.00

Approval Process: 1 Step Supervisor (1 Step Supervisc) ▼

Credit Hours: 0.00

CPE Hours: 0.00

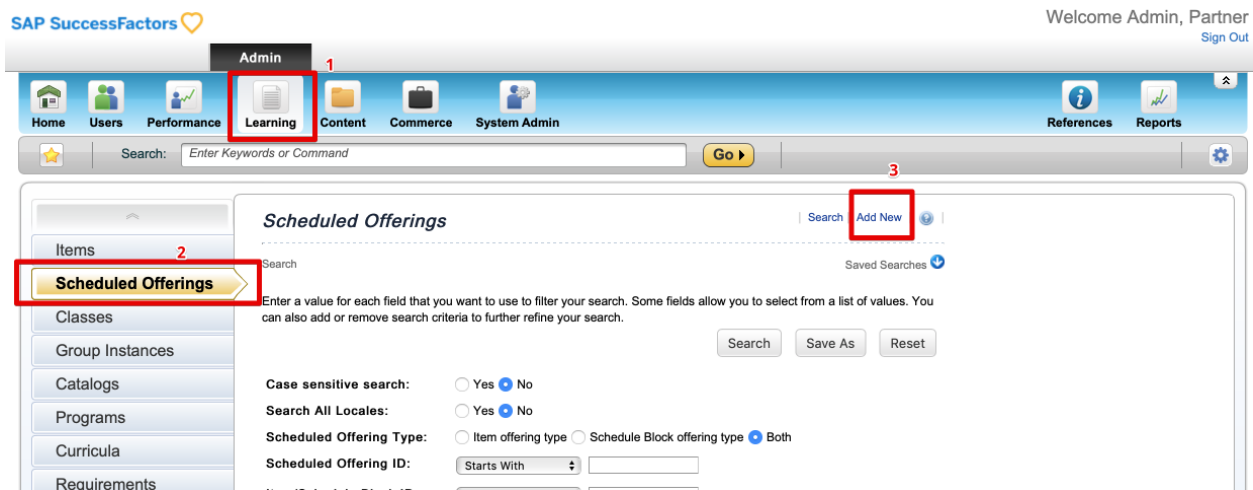
Schedule Template

Continue

Save & Exit Cancel

11. The new Scheduled Offering with VLS settings

1. Open Learning-> Scheduled Offerings> Add new:



- Type: Item
- Item Type: Virtual
- Item ID: Course (search for created course)
- Enter Start Date/Time (make sure the datetime is not in the past)
- Select Primary Instructor (search for instructor associated with the VLS Server)
- Select VLS Server

Add New

Add New Scheduled Offering
Help

* = Required Fields

1. Summary Information

* Type:
☒ Item
☐ Schedule Block

* Item Type:
Virtual (VIRT)

* Item ID:
COSO RP

* Domain:
PUBLIC

COSO RP

Description:

Catalogs:
☒ Publish in all associated catalogs (0)
Catalogs may be individually removed from the Scheduled Offering.

2. Schedule Information

* Start Date:
08/MAY/2020
(d/MMM/yyyy)

* Start Time:
10:10 PM
(hh:mm AM/PM)

* Time Zone:
Eastern Standard Time (America/New York)

Preview

Schedule Date/Time

Schedule

8/May/2020 10:10 PM - 11:10 PM

3. Resources

Facility:

Primary Location:

Primary Instructor:
vkaltovich1

☒ Notify Instructor

Equipment:

VLS Server:
VLS Test

Warning: Specify a valid primary Instructor

Password:

2. Open the Segment and click Start Session(VLS Event):

SAP SuccessFactors  Welcome Admin, Partner [Sign Out](#)

Admin ¹

Home Users Performance **Learning** Content Commerce System Admin

Search:

Recommended Next: [Add Catalogs](#) [Register Users](#) 

Test Course 20001  

Description:

²

Item: **ONLINE Test Course (Rev 1 - 4/May/2020)** **Approval Process:** 1 Step Supervisor (1 Step Supr

Approval Required: No ***Domain:** Default Public Access Domain (PUBI)

End Time: 04:30 PM **End Date:** 4/May/2020

[View All](#) 

Actions [View All](#)

Bookmark

Copy

Cancel the Sched...

Delete

Record Learning

Send Notification

Initiate Evaluations

View Roster

Related [More](#) 

Registration

Catalogs ³

Segments

Description

Primary Location

Primary Instructor

Virtual

Actions

Remove

☐ **Select All**

☐ **Mon 4/May/2020** 

08:30 AM - 04:30 PM No Description

Vera Vera

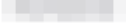
Start Sess... ⁵ **Attendance** ☐

[Resend Registration Notifications](#)  

3. VLS Event will be opened in the Zoom Meeting:

Zoom

Meeting Topic: **SC20001-SG1-Test Course**

Host Name: 

Invitation URL: 

[Copy URL](#)

Participant ID: 131977



Join Audio

Computer Audio Connected



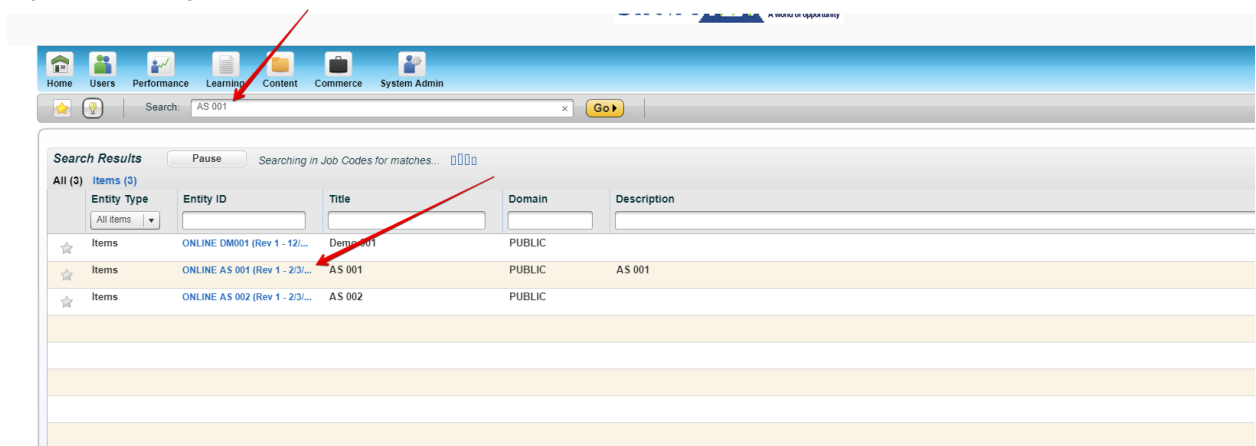
Share Screen



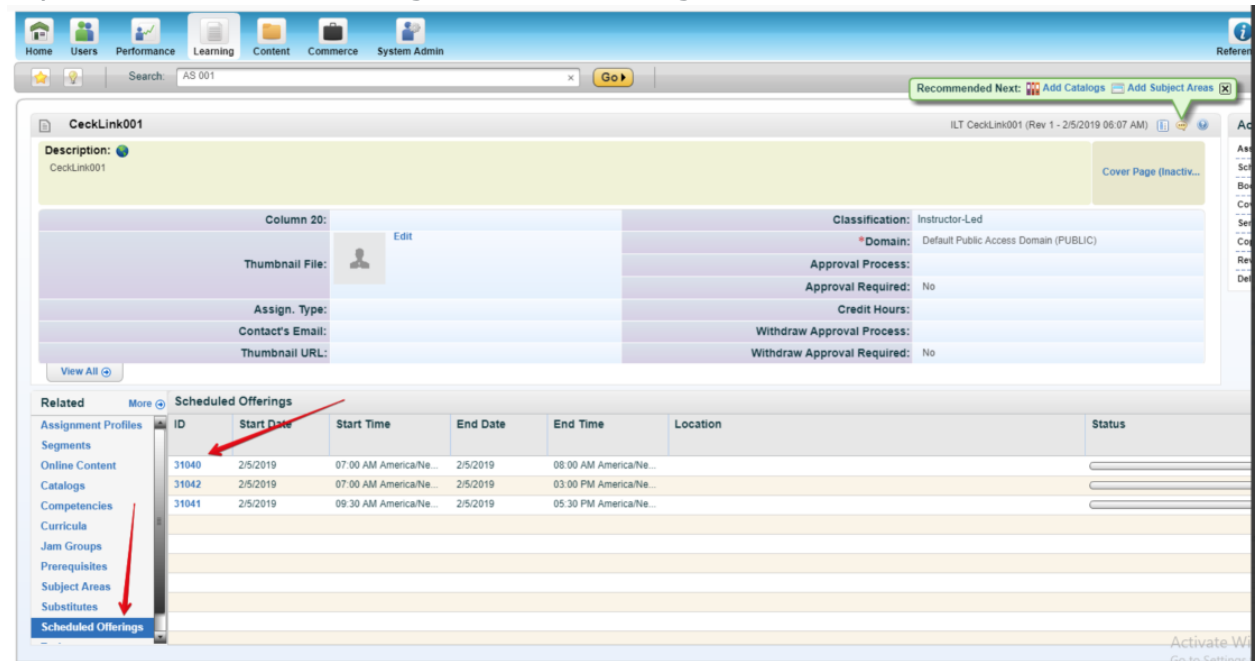
Invite Others

12. Adding Participants to the SO (Students/Users)

1. Open the required Course.



2. Open the Scheduled Offering, click The Offering ID



3. Navigate to the registration. Click 'Add Users'

The screenshot shows the 'CeckLink001' registration page. At the top, there is a navigation bar with icons for Home, Users, Performance, Learning, Content, Commerce, and System Admin. Below this is a search bar containing 'AS 001' and a 'Go' button. A 'Recommended Next' button is also visible. The main content area displays details for 'CeckLink001' (ID 31040), including a description field and a table of registration details. Two red arrows point to the 'Registration' tab in the left sidebar and the 'Add Users' button in the top navigation bar. The 'Registration' tab is currently selected, showing a list of non-enrolled users and an enrolled user named Vera Koltovich.

Item:	Approval Process:
ILT CeckLink001 (Rev 1 - 2/5/2019 06:07 AM)	No
Approval Required:	Domain: Default Public Access Domain (PUBLIC)
End Time: 08:00 AM	End Date: 2/5/2019
Withdraw Approval Process:	Withdraw Approval Required: No
Facility:	Instructor: Ivan Silva
Start Date: 2/5/2019	Start Time: 07:00 AM
*Time Zone: Eastern Standard Time (America/New York)	Registration Status: 1 enrolled, 0 waitlisted

View All

Related More Registration Add Users: [Add Users]

Registration Catalogs Segments

Non-enrolled Waitlisted (0)

Filter Sort By: Registration I

Enrolled (1) Total (No Limit) Slots (0) Open Slots (0)

Filter for Enrolled User

Vera Koltovich

4. Enter Search Criteria

Assign

Users

Search

Search Users

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Keyword:

Last Name:

First Name:

Middle Initial:

Role ID:

User Status:

Profile Status:

Domains:

Position ID:

Native Deeplink User:

Gamification User ID:

Add/Remove Criteria

Starts With

Starts With

Starts With

Starts With

☒ Active ☐ Not Active ☐ Both

☐ Active ☐ Expired ☒ Both

Starts With

Starts With

☐ Yes ☐ No ☒ Both

Starts With

Search

Reset

Search

Reset

5. Add

NOTE: The User(Student) should have an email in the Account ID field which is associated with the Zoom Account (by email)

Add One or More From List

Search Reset

Keyword:

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Role ID: Starts With

User Status: ☒ Active ☐ Not Active ☐ Both

Profile Status: ☐ Active ☐ Expired ☒ Both

Domains: Starts With

Position ID: Starts With

Native Deeplink User: ☐ Yes ☐ No ☒ Both

Gamification User ID: Starts With

Add/Remove Criteria [+](#) Search Reset

Add Users to Scheduled Offering

Add

User	Registration Status	Chargeback Account	Price (1000)	Order Ticket	Add
	Active Enrollment(Enrolled)		0.00	US Dollar(USD)	☒

Select All / Deselect All

Email confirmations to: ☒ User ☐ Instructor ☐ Supervisor ☐ Contacts Add

6. Check that the user is added:

Description:

Item: ILT CeckLink001 (Rev 1 - 2/5/2019 06:07 AM)	Approval Process:
Approval Required: No	*Domain: Default Public Access Domain (PUBLIC)
End Time: 08:00 AM	End Date: 2/5/2019
Withdraw Approval Process:	Withdraw Approval Required: No
Facility:	Instructor: Ivan Silva
Start Date: 2/5/2019	Start Time: 07:00 AM
*Time Zone: Eastern Standard Time (America/New York)	Registration Status: 1 enrolled, 0 waitlisted

View All [+](#)

Related More [+](#) Registration Add Users: [+](#)

Non-enrolled Waitlisted (0)

Enrolled (1) Total (No Limit) Slots (0) Open Slots (0)

Filter for Enrolled User

7.

13. Generate the VLS Attendance Report

The procedure for obtaining the VLS attendance report is the following:

1. In the Admin Center click the Learning tab. Select Scheduled Offering on the left menu and click Add New to create a new Scheduled Offering.
2. Fill in the Summary and Schedule information forms and click Save.

The screenshot shows the 'Add New Scheduled Offering' form. It is divided into three main sections: 1. Summary Information, 2. Schedule Information, and 3. Resources. Red boxes and numbers 1 through 6 highlight specific fields and sections.

1. Summary Information

- 1. **Type:** ☒ Item ☐ Schedule Block
- 2. **Item Type:** Online Course (ONLINE)
- 3. **Item ID:** Test Course
- 4. **Domain:** PUBLIC
- Description:** (empty text area)
- Catalogs:** ☒ Publish in all associated catalogs (0)
Catalogs may be individually removed from the Scheduled Offering.

2. Schedule Information

- Start Date:** 04/MAY/2020 (d/MMM/yyyy)
- Start Time:** 1:30 PM (hh:mm AM/PM)
- Time Zone:** Greenwich Mean Time (Europe/London)
- Preview** button
- Schedule Date/Time**
Schedule
4/May/2020 01:30 PM - 09:30 PM

3. Resources

- Facility:** (dropdown menu)
- Primary Location:** (dropdown menu)
- 5. **Primary Instructor:** vkaltovich1 ☒ Notify Instructor
- Equipment:** (dropdown menu)
- 6. **VLS Server:** VLS Test
"Warning: Specify a valid primary Instructor"
- Password:** (text field)

3. After successfully saving of the Scheduled Offering, click the View All button to open the Additional Settings:

Home Users Performance Learning Content Commerce System Admin

Search: Enter Keywords or Command **Go**

Search Results

Zoom test 27001

Description:

View All

Related More

Registration Add Users: **Enrolled (0)** Total (No Limit) Slots (0)

Registration Waitlisted (0)

Filter Sort By: Registration I Filter for Enrolled User

3.1 Set Report rules:

Home Users Performance Learning Content Commerce System Admin References Reports

Additional Settings

* Required Fields

Email confirmation to the Instructor:	No	Email confirmation to the Supervisor:	No
Email confirmation to the User:	No	Email confirmation to the Contacts:	No
Enable Users to Waitlist:	Yes	Maximum Registration:	
Minimum Registration:		Registration Cut-off Date:	MM/DD/YYYY
Registration Cut-off Time:		Registration Cut-off Time Zone:	
Published Price:	0.00 US Dollar (USD) (Default)	Self Registration:	Yes
Supervisor Registration:	Yes	Withdraw Cut-off Date:	MM/DD/YYYY
Withdraw Cut-off Time:		Withdraw Cut-off Time Zone:	

VLS Settings

Automatically record learning events after sch...	Yes
Minimum Attendance Percentage for Credit	10

For Credit Completion Status: ILT_ATTENDED (Attended) - For Credit

Non-Credit Completion Status: ILT_NOSHOW (No Show) - Not For Credit

Save **Cancel**

3.2 For configuration a VLS Scheduled Offering to automatically record attendance:

Set the required parameter to the form according to the information below:

VLS Settings

Automatically record learning events after sch...	No	Must be YES	Not For Credit Status	Non-Credit Completion Status
For Credit Completion Status:		For Credit Completion Status		Contact:
Auto Fill Registration:	No			Enable Users to Waitlist:
Withdraw Approval Process:				
Minimum Attendance Percentage for Credit:		Minimum percentage of time of meeting users need to attend for Credit		

Under the VLS Settings heading, set the following

Automatically record learning events after the scheduled offering has completed to "Yes"

Minimum Attendance Percentage for Credit should be populated with the percent of time users need to attend the session in order to receive credit.

For Credit Completion Status should be set to a for-credit completion status. This is the completion status used for the learning events recorded for users that attended the session for the required % of time

Non-credit Completion Status should be set to a non-credit completion status. This is the completion status used for the learning events recorded for users that did not attend the session for the required % of the time.

Note: Both For Credit and Non-credit Completion statuses are mandatory for Scheduled offerings (unlike for other types of items) using VLS integration. Otherwise, an error may be displayed such as "Non-credit Completion status ID is required".

4. Click Save

5. Select the Registration tab on the left panel and click the Add User button to add students to the Scheduled Offering. Enrolled users are displayed on the table on the right side.

The screenshot displays the 'Zoom test' interface with the ID '27001'. A large yellow box labeled 'Description:' is at the top. Below it is a 'View All' button. The interface is divided into a left sidebar and a main content area. The sidebar has a 'Related' section with a 'More' button and three links: 'Registration' (highlighted), 'Catalogs', and 'Segments'. The main content area has a 'Registration' tab. Under this tab, there is an 'Add Users:' button with a dropdown arrow. A dropdown menu is open, showing four options: 'Add Users...', 'Add Users From Request List...', 'Add Users Using Import Data Tool...', and 'Add Slots...'. Below the dropdown, there are two sections: 'Non-enrolled' with a 'Waitlisted (0)' count and a 'Filter' input field, and 'Enrolled (0)' with a 'Total (No Limit)' count and a 'Filter for Enrolled User' input field.

6. To set a Report scheduler, go to the System Admin and expand Automatic Processes button on the left panel.

Home Users Performance Learning Content Commerce System Admin

Search: Enter Keywords or Command Go

Native User Data Retention
Open Content Network Content...
Power Search Synchronization
Power Search Optimization
Purchase Order Low Balance N...
Purge Deleted User Audit History
Purge Expired Catalog Contents
Refresh Org Dashboard Data
Reset Online Item
VLS Attendance Processing
Waitlist to Request List
Scheduled Offering Delivery
Subscription Expiration Notific...
User Requested Scheduled Off...

Current Status: Scheduled
Next Execution: 13/Sep/2019 04:10 AM America/New York

- Schedule -

☒ Schedule This Process

☐ Hourly Every: (1000) Hour(s)
☒ Daily
☐ Weekly Day:
☐ Monthly Date:

Time of Day: 04:10 AM (hh:mm AM/PM)
Time Zone: Eastern Standard Time (America/New York)
Email Address: admin@gmail.com

6. Click the VLS Attendance Processing to Set time schedule.
Click Apply Changes.

Home Users Performance Learning Content Commerce System Admin

Search: Enter Keywords or Command Go

Coupon Expiration Notification
Curriculum/Program Clean-up
Deny Expired Approval Proces...
Evaluation Synchronization
External Verification Reminder
Jam Groups Notification
Item Request Clean-up
Item Scheduling Demand
Learning Expiration
Learning Plan Notification
Native User Deletion
Native User Data Retention
Open Content Network Content...
Power Search Synchronization
Power Search Optimization
Purchase Order Low Balance N...
Purge Deleted User Audit History
Purge Expired Catalog Contents
Refresh Org Dashboard Data
Reset Online Item
VLS Attendance Processing
Waitlist to Request List
Scheduled Offering Delivery
Subscription Expiration Notific...
User Requested Scheduled Off...
Recommendations Newsletter
Program Enrollment/Withdrawal
Set Instructor Base Cost

Automatic Processes [Help](#)

> Edit VLS Attendance Processing

VLS Attendance Processing

- Status -

Last Execution Result: Succeeded
Last Execution: 12/Sep/2019 04:10 AM America/New York View Errors

Current Status: Scheduled
Next Execution: 13/Sep/2019 04:10 AM America/New York

- Schedule -

☒ Schedule This Process

☐ Hourly Every: (1000) Hour(s)
☒ Daily
☐ Weekly Day:
☐ Monthly Date:

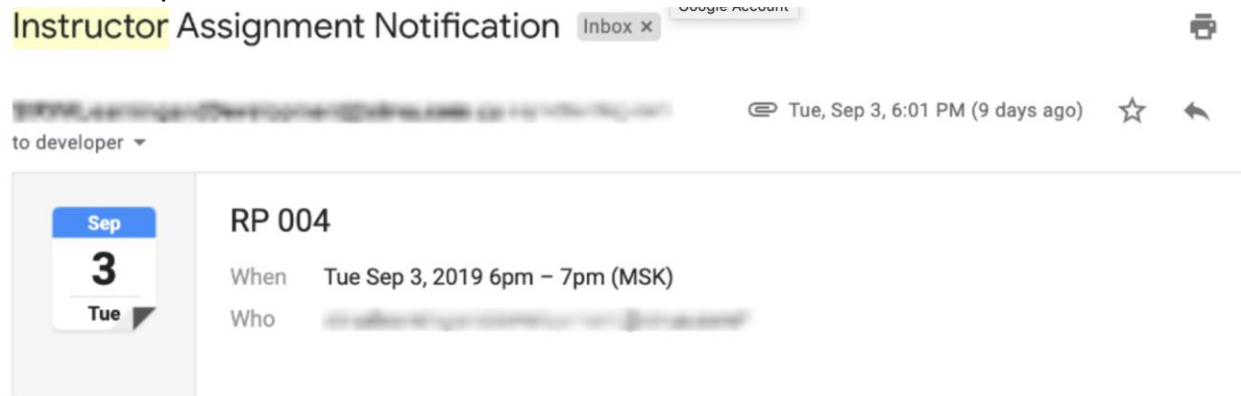
Time of Day: 04:10 AM (hh:mm AM/PM)
Time Zone: Eastern Standard Time (America/New York)
Email Address:

- Automatic Process Job Settings -

Schedule End Date Threshold: 10 day(s)

7. When a Scheduled Offering is created, a teacher gets the Confirmation email.

Email example:



Instructor Assignment For: *[blurred name]*

This e-mail confirms that you have been assigned as an **instructor** for the following learning session:

Subject:

Schedule:

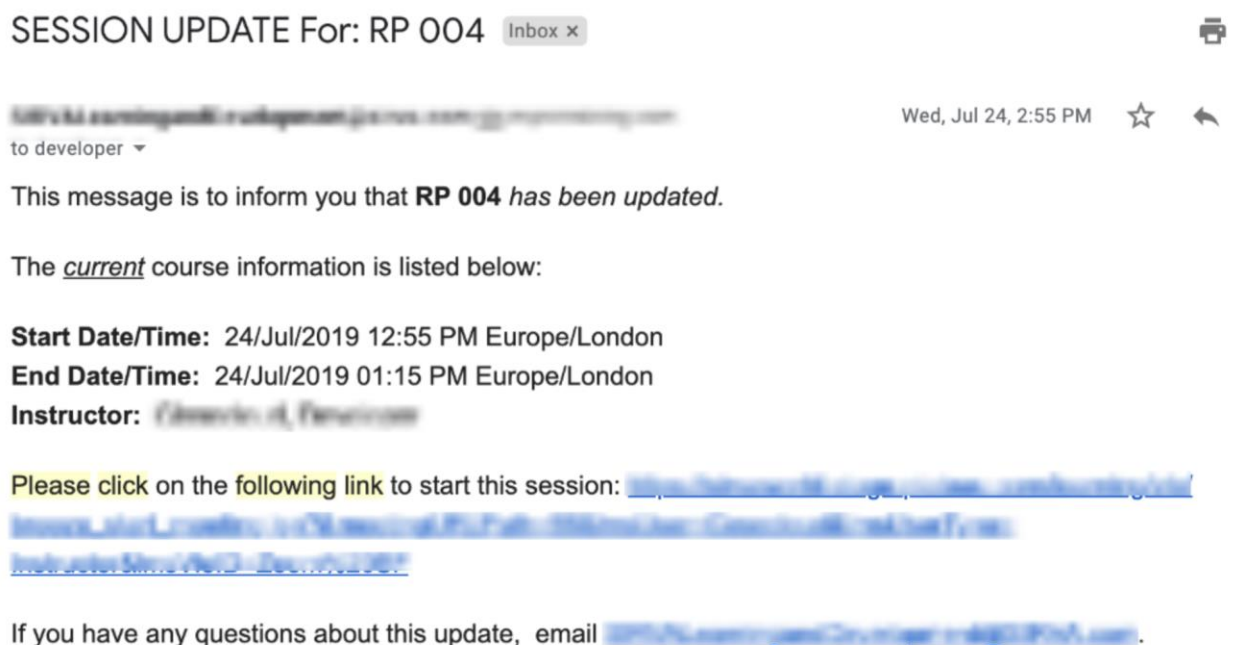
Course Duration : 3/Sep/2019 - 3/Sep/2019

Course Schedule : 04:00 PM - 05:00 PM Europe/London

To join the training session, click on the link below:

7. Students receive the Confirmation email after adding to the Scheduled Offering.

Email example:



8. A user receives a report email after Scheduled Offering is completed and automatically recorded.

to me ▾

The VLS Attendance Processing APM produced the following results:

User attendance data was retrieved for 1 Virtual Learning Event(s).

Learning events were automatically recorded for 1 Scheduled Offering(s).

Scheduled Offering ID 33209 - RP 004 (ILT, RP 004, 4/8/2019 02:53 AM America/New York, RP 004) had 1 User learning event(s) recorded.



9. Users can check a Report in their account in the Admin Center.

To check the report open Users, search for user name, click on the search results and open Item Completed tab on the left panel.

If Scheduled Offering has Attended status, Report is available in View details.

A screenshot of the 'Users' page in an Admin Center. The top navigation bar includes 'Home', 'Users' (highlighted with a red box), 'Performance', 'Learning', 'Content', 'Commerce', and 'System Admin'. A search bar is present with the text 'Enter Keywords or Command' and a 'Go' button. Below the search bar, a 'Search Results' section shows a user profile for 'vera+8@esynctraining.com'. The profile includes fields for Last Name, MI, Job Code, Email Address, Organization, Related Admin, First Name, External ID, Position, Domain, and Primary Supervisor. To the right of the profile is an 'Actions' panel with links like 'Bookmark', 'Registration Assi...', 'Assign Learning ...', 'Send Notification', 'Launch Proxy', 'View User's Talent...', 'Manage Alternate ...', and 'Copy User'. Below the profile is a 'Related' section with a 'More' link and a table titled 'Items Completed'. The table has columns for 'Item Title', 'Status', 'Completion Date', and 'Details'. The 'Items Completed' tab is highlighted with a red box. The table lists several items with status 'No Show' or 'Attended' and completion dates in April 2019. A 'View Details' link is highlighted with a red box in the 'Details' column for the first row.

Item Title	Status	Completion Date	Details
RP 004	No Show	11/Apr/2019	View Details
RP 004	Attended	25/Apr/2019	View Details
RP 004	Attended	25/Apr/2019	View Details
RP 004	Attended	25/Apr/2019	View Details
RP 004	No Show	19/Apr/2019	View Details
RP 004	Attended	19/Apr/2019	View Details
RP 004	Attended	15/Apr/2019	View Details
RP 004	Attended	15/Apr/2019	View Details

10. To check the report click on the More Details button.

Learning History Details

Item: ILT RP 004 (Rev 1 - 4/8/2019 02:53 AM America/New York)

Title: RP 004

Scheduled: 33207

Offering ID:

Instructor: fwa2187 - Geist, Sarah

Completion Date: 4/15/2019 11:45 AM America/New York

Completion Status: ILT_ATTENDED (Attended)

Total Hours: 0.17 Contact Hours:

CPE Hours: Credit Hours:

Grade:

Comments: Completion Status assigned by Virtual Learning System

File Attachments (0)

Close

11. Students can see the report Certificate in their User's interface.
 Open My Learning, select Completed Work and in the list click on attended Scheduled Offering.

← Back Completed Work ?

Show Completions: All

Completion Date *	Title	Status	Action
4/12/2019 09:00 AM	Zoom 8	Attended	
4/11/2019 03:10 AM	RP 004	Attended	
4/8/2019 06:20 AM	RP 004	Attended	
4/8/2019 05:30 AM	RP 004	Attended	

Items: 4 * All dates are for America/New York time zone.

Back
Completed Work

Show Completions: All

Completion Date *	Title	Status	Action
4/12/2019 09:00 AM	Zoom 8		
4/11/2019 03:10 AM	RP 004		
4/8/2019 06:20 AM	RP 004		
4/8/2019 05:30 AM	RP 004	Attended	

RP 004

Instructor: vera+7@esynctraining.com - Tester, Vera

Completion Date: 4/11/2019 03:10 AM

View Details

Print Certificate

Items: 4
All dates are for America/New York time zone.

12. In the opened popup click on the View Details button to check Report Certificate.

Back
Completed Work Details

Zoom 8

Instructor-Led Training zoom8

Revision: 1 - 4/12/2019 05:36 AM America/New York

Scheduled Offering ID: 33175

Completion Date: 4/12/2019

Status: Attended

Completed Work Details

Grade:

Total Hours: 0.17

Credit Hours:

Contact Hours:

CPE Hours:

Instructor: ivanr+sirva@esynctraining.com - sirva, ivan

Comments: Completion Status assigned by Virtual Learning System

File Attachments (0)