University of Toronto, LLC
SuccessFactors LMS
Zoom Attendance, Security & Notifications

4.3 - Job Aid

This job aid allows learning administrators to amend notifications with information for their courses and capture zoom attendance for marking completions

When staff register for your courses, the LMS notification that goes out contains information about date, time and includes a calendar reminder.

When using ZOOM, since it's not integrated with the LMS like Adobe Connect, zoom login details can only be sent in custom email notifications, not the calendar invite. You can type a tailored notification 2 days before and/or the morning of the session with the zoom details. Please see **job aid 4.0** on ad-hoc email notifications.

1.1 Amend the notification

Please note: You can change the notification at either the ITEM LEVEL or CLASS LEVEL

1.1.1 At the **Item Level,** any changes you make will sync down to all classes. E.g. if you have a team's invite that will be the same for all classes, you can add it at the item notification.

Please note the calendar invite will not show the invite. Only Adobe connect has a built-in link due to its integration with the LMS as per above note.

1.1.2 At the **class level**, you can make individual changes for each class. E.g. Virtual meeting invites from Teams can be embedded for each class if the meeting link is different for each class.

Steps

1. Log into the Admin UI and search for your item or class using the menu on the left side.
2. Look for Email notifications below that you want to edit.

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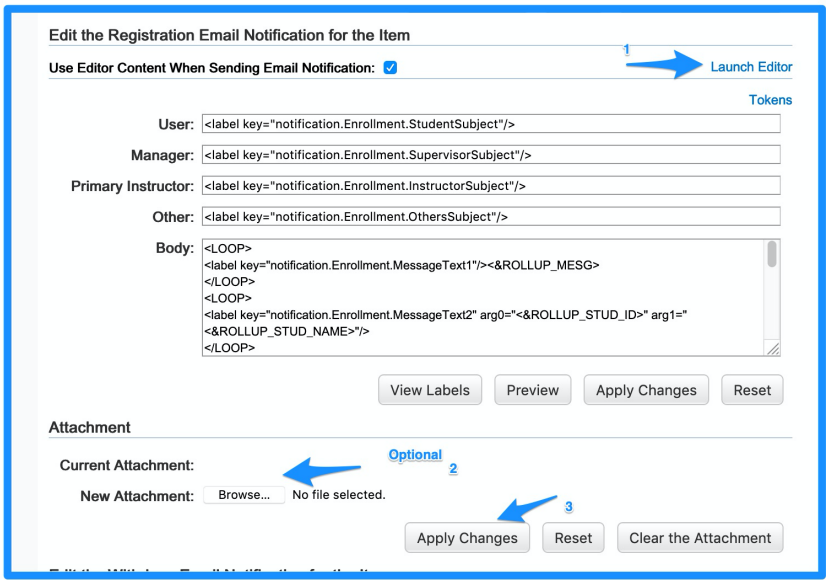
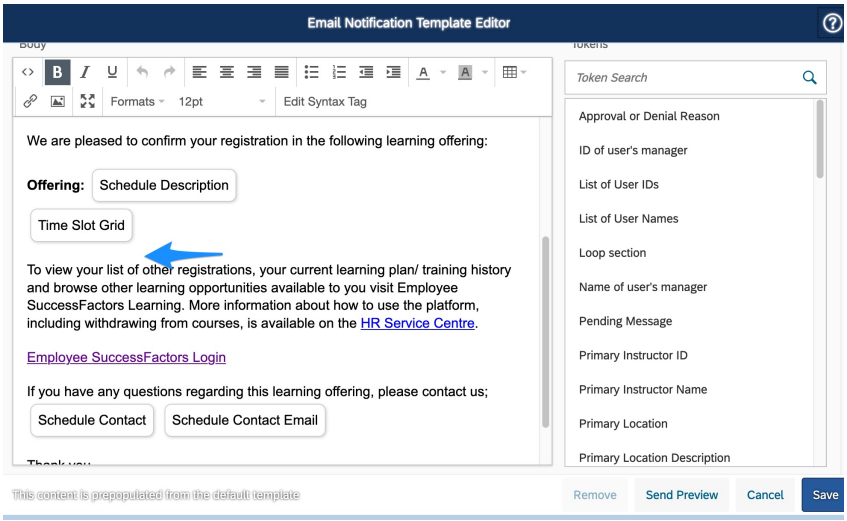
3. In this case, we will only look at one notification that you will use most frequently either in item or class mode.

   It is called "Edit the Registration Email Notification for the Item". This is what staff receive when they register.

4. Click on Launch Editor which will open a popup window with an editor. You can copy and paste text the zoom invite links below the **time slot grid.** If the font looks out of place, use the Formats and sizing on the menu bar.



5. Click **Save** when done.
6. On the main screen, you can **attach** one zipped file only with material like ppt, pdfs etc.
7. When done, click **apply changes.**



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SECURITY AND PRIVACY TIPS FOR ZOOM

Zoom is a software platform widely used for remote meetings and online instruction. The following tips are intended to help provide appropriate security and privacy controls when using Zoom for communications that involve sensitive data such has HIPAA-protected data, attorney-client communications, etc.

Before the Meeting

1. Share the meeting link privately (e.g., email or chat), not via social media.
2. Create a unique ID for each meeting. Use the option marked "generate automatically" rather than "Personal Meeting ID."
3. Require a password for the meeting. This prevents people from simply guessing the ID of your meeting. Do not re-use passwords for multiple meetings. By default, Zoom will create a new password for each meeting.
4. Disable the "join before host" option for the meeting. Otherwise, the first person to join the meeting will become the host and will be able to control the meeting.

Recording the Meeting

1. Do not record the meeting unless necessary. Do not record the meeting to the Zoom cloud location, which uses Panopto. If necessary, work with your local IT staff to understand what locations are approved for the type of information contained within your meeting (e.g., HIPAA). Notify participants in advance if the meeting will be recorded.
2. Do not keep recordings longer than necessary. Notify other participants that they are not permitted to record the meeting by any means.

During the Meeting

1. As of December 2020, Zoom has an integrated capability for automatic speech recognition (ASR). This option can be enabled by the meeting host using the "Live Transcript" button in the zoom client. This function is not approved for use with HIPAA protected data, and it is not advised to use this function for other confidential data. The ASR function in Teams is appropriate for most types of confidential data (including data protected by HIPAA).
2. If you see someone in the meeting who should not be there, remove them from the meeting. Once all participants have joined the meeting, lock the meeting so that others cannot join.
3. When ending a meeting that you are hosting, be sure to select "End Meeting for All" rather than "Leave Meeting."

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4. If you are sharing your screen during a meeting, be sure you understand how screen sharing works so that you don't share confidential information unintentionally. Close any programs, websites, etc. that you will not need during the meeting. If other participants will be sharing a screen during the meeting, remind them not to share private information unintentionally.
5. If you have video enabled for your meeting, make sure that confidential information in your workspace is not visible to remote participants. Remind other participants that they should have similar protection for information in their workspaces.
6. Make sure others in your location cannot overhear your conversations. Remind other participants of this requirement for their locations. This applies also to "smart devices" such as Alexa, Siri, etc.

Security tips taken from https://itsecurity.uiowa.edu/resources/everyone/zoom-security-and-privacy

For downloading Zoom attendance, please see below.

Please note: the attendance list that will be downloaded is based off of the profile names the attendees use. **Best practice is to remind attendees at the beginning of the session to please change their display name to reflect their full name for tracking purposes.**

7. Log in to your Zoom account.

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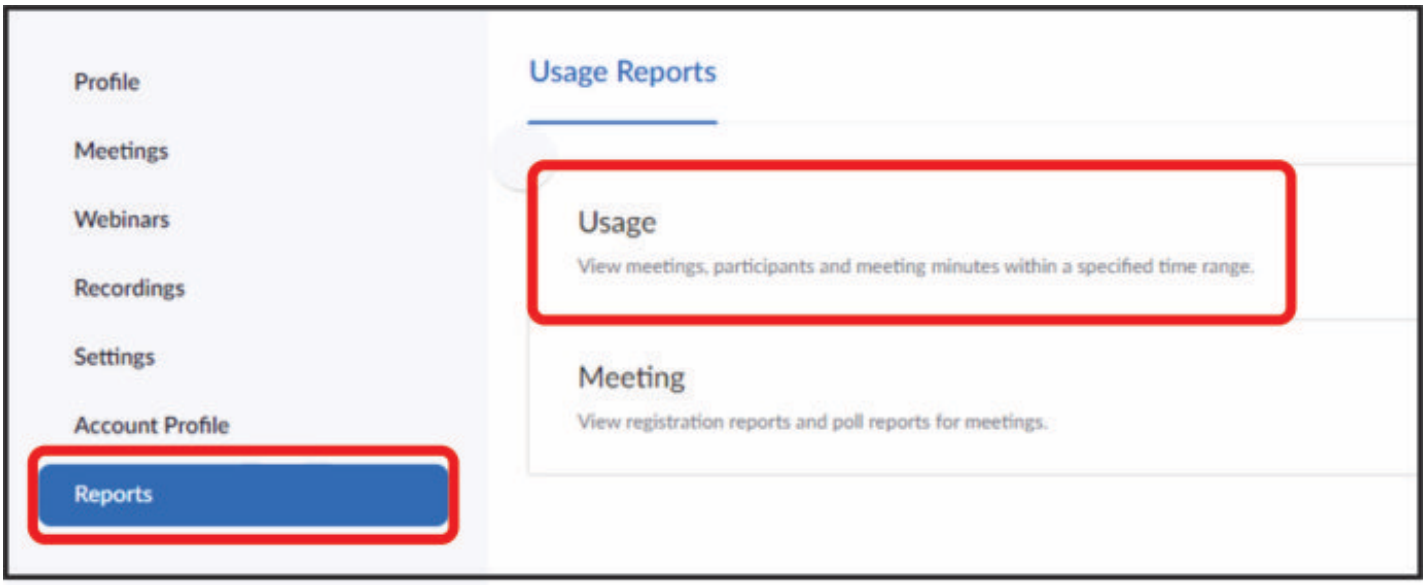
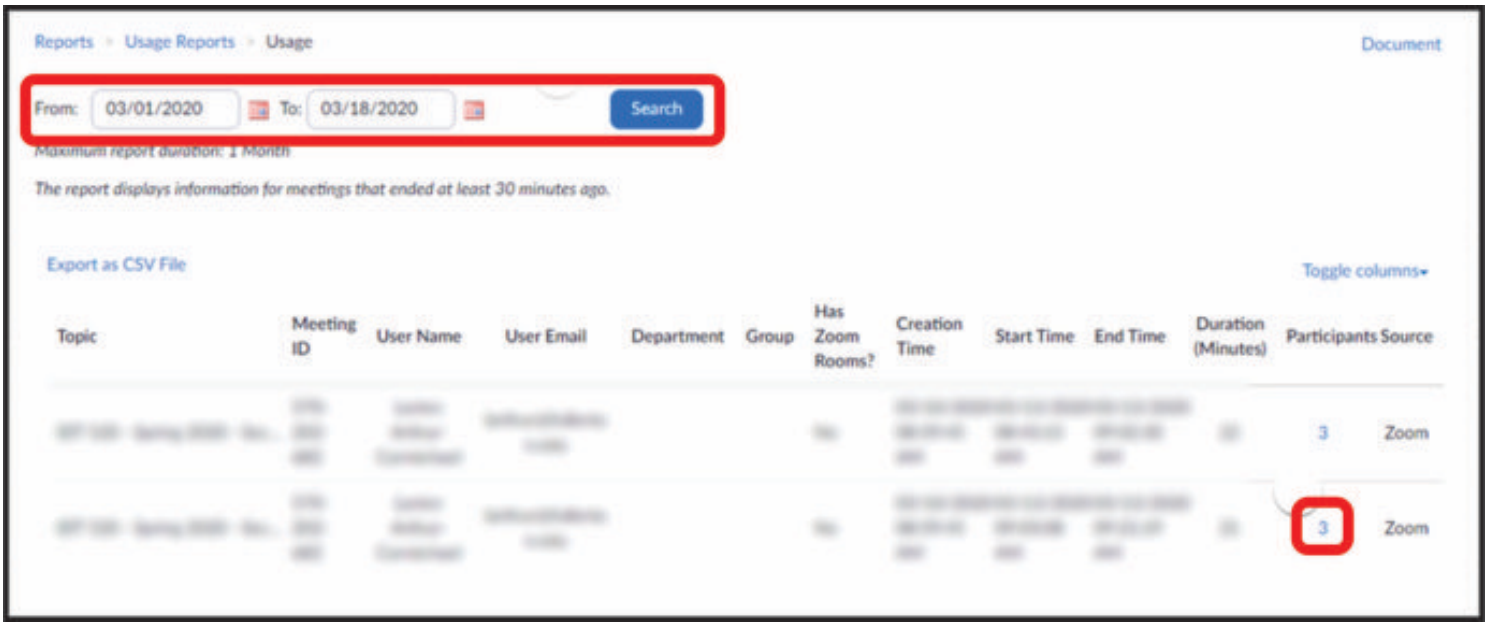
8. Select “Reports” and then click on “Usage.”



9. If the meeting was held recently, you’ll see the report immediately – you can recognize it by topic, meeting ID, or start time. If you want to take attendance for a past meeting, you may need to adjust the Date Range to show meetings from the period you want to search.



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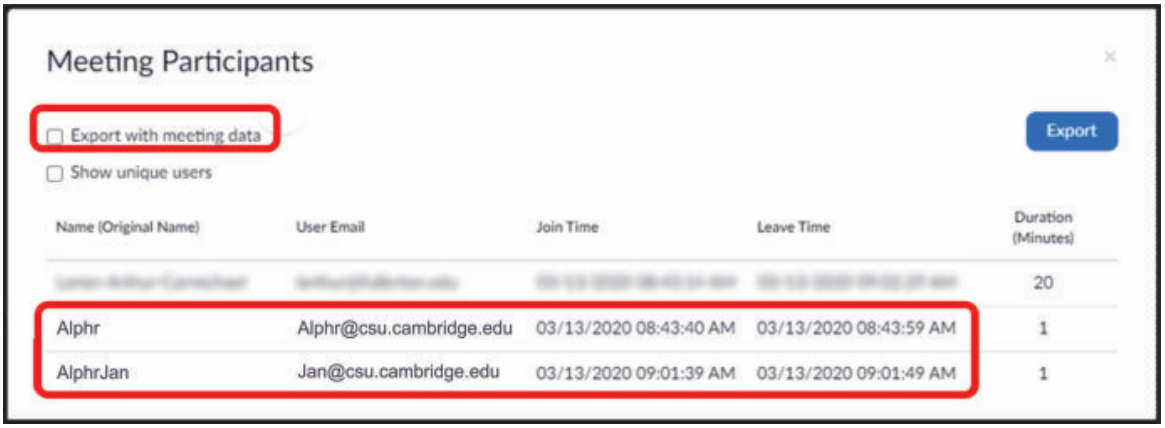
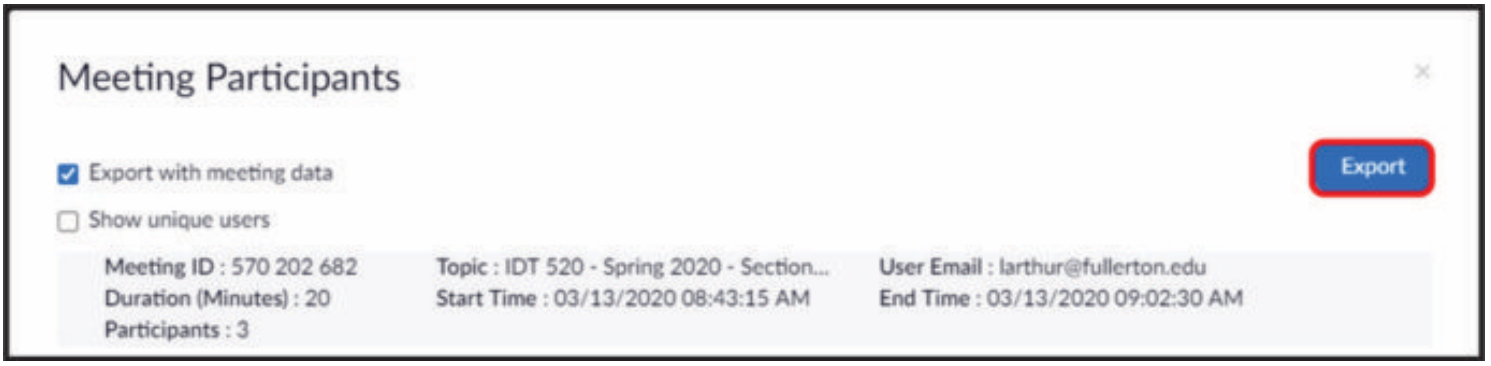
10. Once you've found the meeting, click on the "Participants" section. You'll now see the Meeting Report and Review the Report. Click on "Export with meeting data."



11. Click on "Export as Excel" to confirm. Data will be exported in the form of an Excel file.



12. Download and save the file to your computer.

Once you pull the attendance report from Zoom, you need to cross reference with your registration list and manually remove anyone who did not attend - before Adding to their learning profile

Follow job aid 3.3 to record completions