

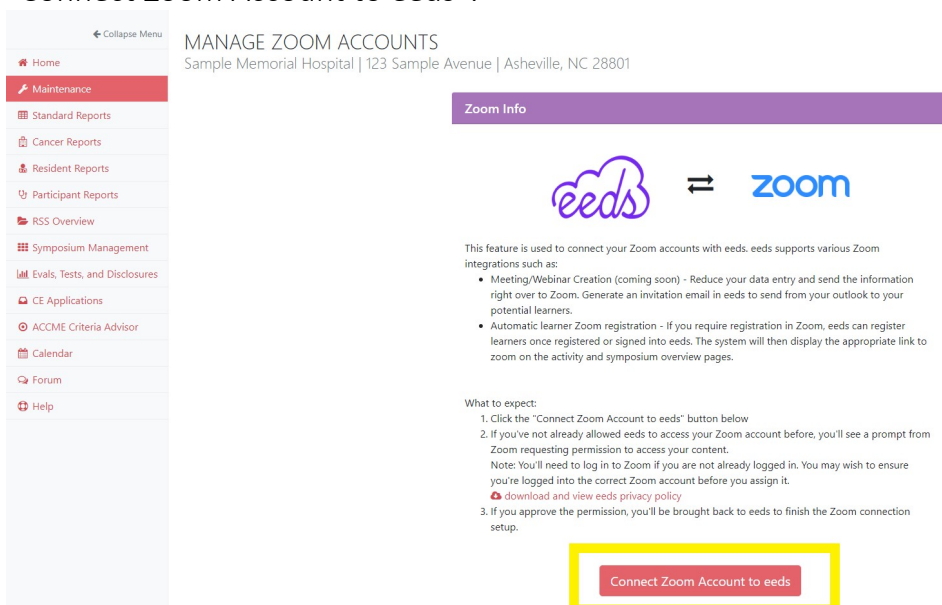
Zoom Integration Documentation

Overview

eeds has integrated with Zoom to provide a more streamlined online learning process to your learners. One of the key benefits of connecting your Zoom information with eeds is to provide your learners the Zoom links within the same process they are accustomed to. Links will be available via the Activity Overview Page and Symposium Overview Page.



Installation: Integrating Zoom with eeds

1. In order to enable Zoom in eeds, you will first need to reach out to an eeds representative to turn the Zoom functionality on. You can contact support@eeds.com or call 828-252-0233 for assistance.
2. After eeds has enabled the Zoom functionality, you will need to log into your eeds Education Provider account by visiting <https://eeds.com/cloud-based-tracker-for-cme/education-providers>.
3. Click on the “Maintenance Tab” to the “Manage Zoom Accounts” feature.
4. The first time you visit this feature, you will view an informational screen. Click “Connect Zoom Account to eeds”.



MANAGE ZOOM ACCOUNTS
Sample Memorial Hospital | 123 Sample Avenue | Asheville, NC 28801


Zoom Info

This feature is used to connect your Zoom accounts with eeds. eeds supports various Zoom integrations such as:

- Meeting/Webinar Creation (coming soon) - Reduce your data entry and send the information right over to Zoom. Generate an invitation email in eeds to send from your outlook to your potential learners.
- Automatic learner Zoom registration - If you require registration in Zoom, eeds can register learners once registered or signed into eeds. The system will then display the appropriate link to zoom on the activity and symposium overview pages.

What to expect:

1. Click the “Connect Zoom Account to eeds” button below
2. If you’ve not already allowed eeds to access your Zoom account before, you’ll see a prompt from Zoom requesting permission to access your content.
Note: You’ll need to log in to Zoom if you are not already logged in. You may wish to ensure you’re logged into the correct Zoom account before you assign it.
 download and view eeds privacy policy
3. If you approve the permission, you’ll be brought back to eeds to finish the Zoom connection setup.

[Connect Zoom Account to eeds](#)

5. If you are not logged into your Zoom account, you will be first presented with Zoom’s login page. If you are logged in, you will be presented with a list of permissions eeds is requesting.

6. If you authorize eeds to access your account information, you will be brought back into eeds to enter some account information. You will give your Zoom account a description and select whether you have subscribed to webinar functionality with Zoom.

Zoom Account Info

Zoom Account Description

Electronic Education Documentation System Zoom Account

Are you paying for webinar functionality?

Yes ▾

i Webinar is an add-on with Zoom, which appears to be an extra charge. If you're unsure, select "No", and you can change this later. [view zoom plans](#)

Is this account enabled in eeds?

Yes ▾

Next

7. Select one or more Conferences to enable Zoom for the Conference.

Select Conferences to Give Zoom Access

☐ **Select All Conferences**

☒ 2016 Best Practices Conference

☒ 2016 Best Practices Conference

☒ 2018 Best Practices Conference

☒ 2019 SEACOEM Annual Meeting

☒ ACEHP Training 2020 3

☒ Cancer Conference

☒ eeds Covid-19 Conference

☒ eeds Technology Conference

☒ Enduring Materials Testing Platform

☒ Family Medicine Grand Rounds

☒ Geriatric Grand Rounds

☒ Grand Rounds

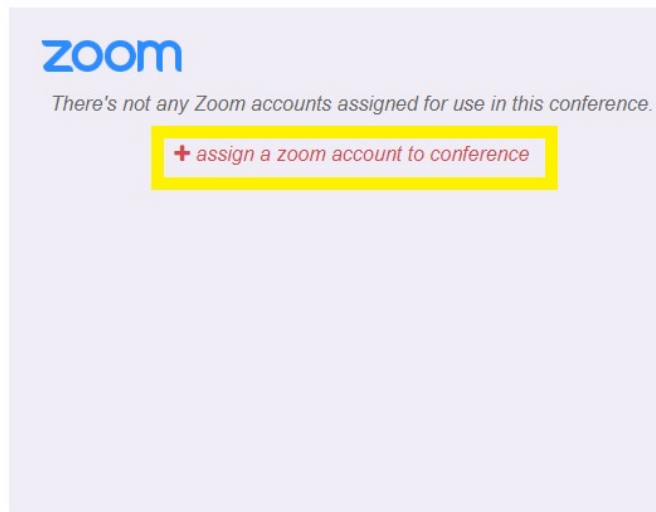
☒ Infection Control RSS

After making your selections, click Next to continue. **Next** ➔

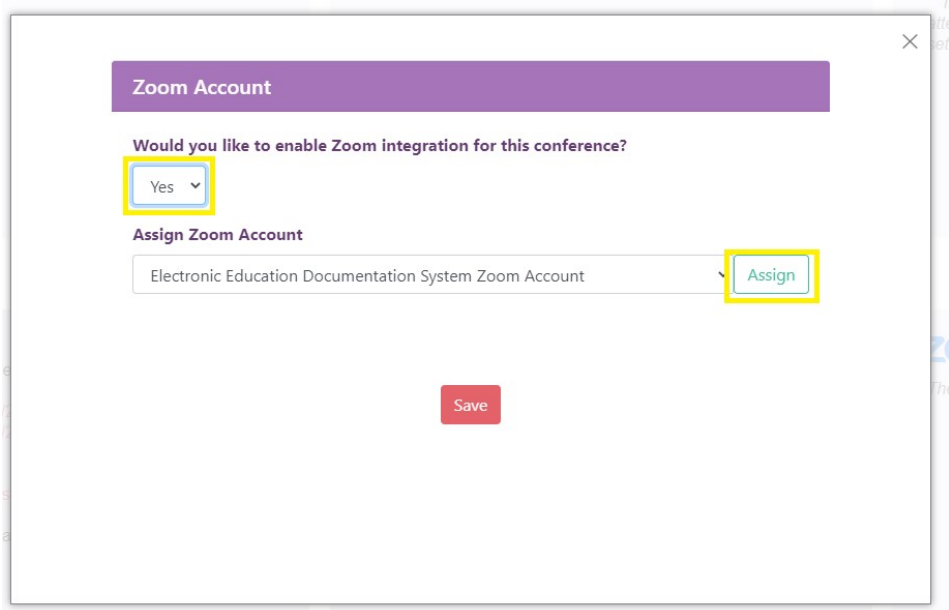
Usage: Education Providers

A. Enabling Zoom for a Conference

- You will need to enable the conference series to allow the activities created within the series to connect with Zoom. You can manage connected Zoom accounts for a conference via the conference builder.
 1. Click on the “Maintenance” tab.
 2. Click on the “Edit a Conference Series” feature
 3. Select your conference
 4. Scroll down to the bottom to the Zoom square and click the link to “assign a zoom account to the conference”.



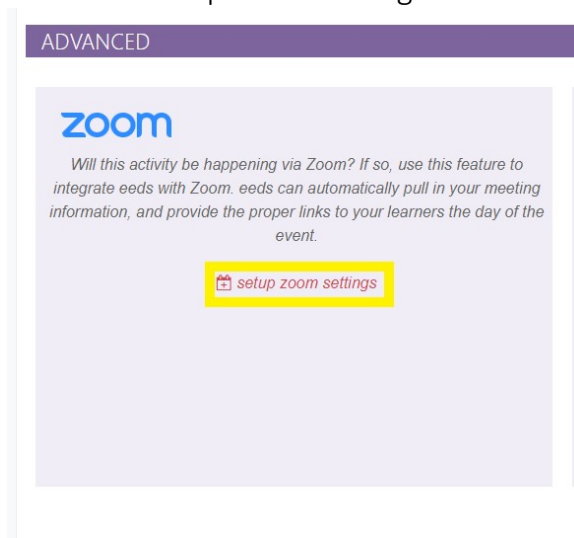
5. Enable the Zoom integration for the conference. Choose the Zoom account to use and click “Assign”. Click “Save” to finish.



- Prerequisites
 - An eeds representative has enabled Zoom integration for your organization.
 - You have setup your Zoom account, which can be viewed in the first section of this document: “Installation: Integrating Zoom with eeds”.

B. Setting up/Connecting a Zoom Meeting to an Activity

- After you have created your activity through the “Create an Activity” feature, there will be a Zoom Square on the “Activity Builder” in the “Advanced Section”. This is where you will setup or connect your meeting with eeds.
 1. Click the “setup zoom settings”.



2. Indicate whether the Zoom meeting or Webinar is already setup in Zoom.
 - Select “Yes” and you can enter the meeting identifier and specify whether you want the Join Link to display on promotional materials and the public calendar.

Setup Zoom Meeting

Is the meeting or webinar already setup in Zoom?

Yes

Enter Meeting/Webinar ID

Save Join Link as Remote Viewing URL?

No

Next

- Select “No” and you will be brought to a step to enter the meeting information.

Setup Zoom Meeting

Is the meeting or webinar already setup in Zoom?

No ▾

Next

3. Enter the meeting information and click “Next” when you are done.

Schedule Zoom Meeting

General

Zoom Meeting Type

Meeting ▾

Topic

Learning About Zoom

Description

Presentation #1
Zoom Setup

Characters: 43/700

Date

6/8/2020

Auto-generate meeting password

Yes ▾

Start Time

8 : 00 AM ▾

End Time

12 : 00 PM ▾

Audio

Telephone and Computer ▾

Require Registration in Zoom

No ▾

4. Webinars ONLY: You will enter your Panelists. The Panelists are prefilled based upon the speakers you have setup for your event.

Panelists

Name	Email Address	
Kelly White, MS	[REDACTED].com	remove
+ Add New Panelist		

[Skip for Now](#)[Next](#)

Your panelists will automatically be sent an email with the panelist Zoom link if the email setting is enabled in your Zoom account.

5. You are done, you can review the information and verify it appears correct.

Zoom Account Settings[get updates from zoom](#)[delete zoom association](#)

Webinar Identifier
[REDACTED]

Join URL
[https://zoom.us/j/\[REDACTED\]](https://zoom.us/j/[REDACTED])

Webinar Password
[REDACTED]

Learner URL
All learners will be provided the Join URL after registration or sign-in.

Panelists

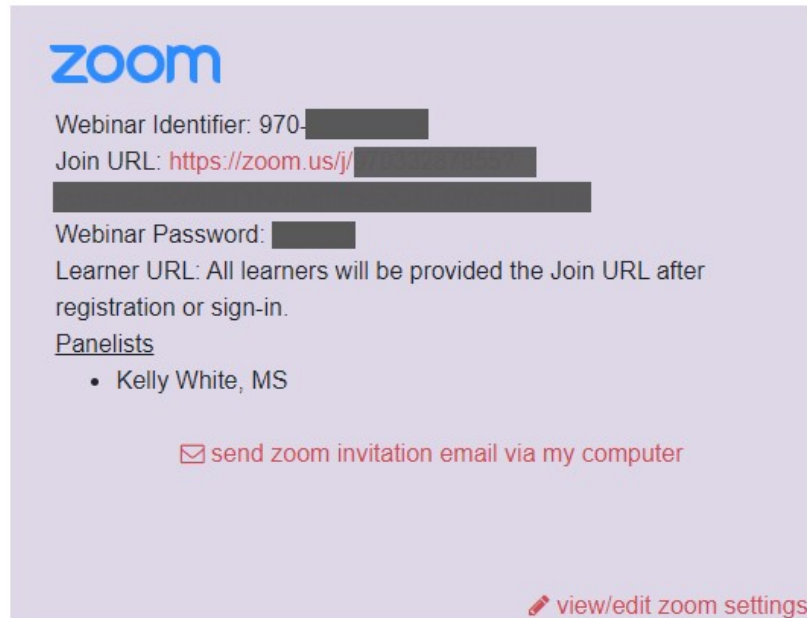
Kelly White, MS	[REDACTED].com	View Join URL
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[manage panelists](#)

[Done](#)

6. This information can be reviewed or modified via the “Activity Builder” after the initial connection:

ADVANCED



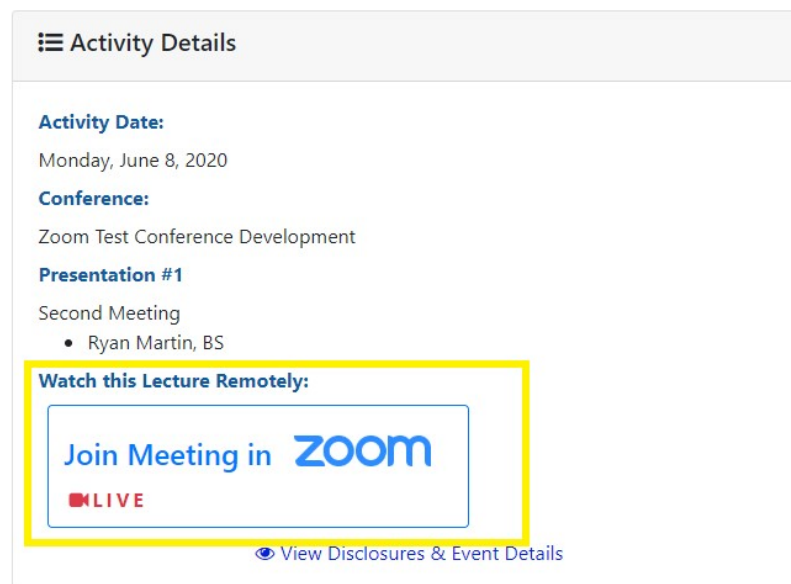
More information related to the now-connected meeting:

- Learner Registration Settings:
 - If you are not requiring learner registration via Zoom, learners will be able to view the standard Join Link after registering for an event or signing into an event.
 - If you are requiring learner registration with Zoom, the learners will be presented a unique Zoom link after registering or signing in. A report view of the learner links for that activity is available in the Zoom square on the activity builder.
 - If you are requiring registration approval, you will have to approve the registrants before they can view the unique Zoom link. A report view of the learner links for that activity is available in the Zoom square on the activity builder. The learners will be separated by approved and unapproved Zoom registrants, with a link to approve next to those you have not approved yet.
- See the “Usage: Healthcare Professionals” section for screenshots of the learner view.
- The “get updates from zoom” link will allow you to resync eeds with Zoom if you should make changes via Zoom, and they are not reflecting in eeds.

- The “delete zoom association” button is available to either un-associate the meeting from the activity or also completely delete the meeting from Zoom.
- The “send zoom invitation email via my computer” link will open a prepopulated email in your own email client, and you can send out invites to your proposed learners.
- Prerequisites
 - An eeds representative has enabled Zoom integration for your organization.
 - You have setup your Zoom account, which can be viewed in the first section of this document: “Installation: Integrating Zoom with eeds”.
 - The conference series has a Zoom Account enabled and assigned.

Usage: Healthcare Professionals

- If your organization has connected Zoom accounts with the events in eeds, you may see links to take you to the Zoom meeting once you have signed-in to an event or registered.
 - From the activity overview, you can see a button to the Zoom meeting if the meeting is in-progress. If the meeting is not in progress, there will be a link available, but it will not have the live indicator:




- From the “Symposium Overview” page, you will see a list of available Zoom links on the top right-hand side of the page:


ZOOM TEST CONFERENCE DEVELOPMENT
Virtual Conference Room on Monday, June 8, 2020

[change conference](#)

Conference

 View Activities Attended

Connect

 Attendees

zoom Meetings

- Today @ 12:00 pm: Second Meeting

[Join Meeting Now](#)
LIVE

[view previous zoom links](#)

If you are having difficulty accessing the links, click the view more link at the bottom, and you will see a link to view the full links:

zoom Meetings

- Today @ 12:00 pm: Second Meeting

[Join Meeting Now](#)
LIVE

Previous Zoom Meetings

- Today @ 8:00 am: KW Test Zoom Conference

[Join Meeting Now](#)

[view full zoom links](#)

Uninstallation

- Login to your Zoom account and navigate to the Zoom App Marketplace.
- Click Manage > Installed Apps or search for the eeds app.
- Click the eeds app.
- Click Uninstall.

Troubleshooting for Education Providers

Q: Why is there not a Zoom square in my conference builder?

A: If you have a coordinator- access account, you will likely need to contact an administrator in your CE department. If you are an administrator, check the “Manage Zoom Accounts” feature on the “Maintenance” tab, mentioned in the first section of this document. If you see an enabled Zoom account, contact eeds support to ensure the integration is enabled.

Q: Why is there not a Zoom square in my activity builder?

A: Check the conference builder to ensure the Zoom account is associated with the conference properly.

Q: Where can I make edits to my Zoom meeting in eeds?

A: Currently, eeds does not support editing. You will need to login to your Zoom account, perform updates and correction, and click the “get updates from zoom” link in eeds in the activity builder to retrieve the latest information. Alternatively, you can completely delete the meeting in eeds and recreate.

eeds Support Information

- Support is available Monday-Friday from 8am – 6pm eastern. Any issues that require immediate attention afterhours can be sent by email and will be addressed at the company’s discretion.
- eeds support email address: support@eeds.com
- eeds phone number: 828-252-0233