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#### What is Webcast Integration?

Webcast Integration is an add-on feature that allows organizations with a third-party webcast tool to communicate with LCVista to process user attendance and CPE calculations. If this is a feature that interests your firm, please contact a LCVista Representative for more details.

# Compatible Webcast Tools

LCVista is compatible with the following webcast tool providers:

- Adobe Connect 9.8
- Webex Events
- On24
- GoTo (pending development)\*
- Zoom (pending development)\*

\*LCVista is continuing to expand on this feature which is still pending integrations with GoTo and Zoom.

### Integration Provider Configurations



If this feature has been enabled for your firm, start this process by selecting the **Integration Providers** link at the bottom of the navigation menu. Clicking the Integration Providers option will take you into the Integration Provider Configurations page.

Integration Provider Configurations												
Providers Rules	sets											
Provider	Name	Site ID										
Adobe Connect 9.8	Adobe Connect 9.8	Edit										



It is important that a few things are setup to start integrating your third-party webcast tool with LCVista:

#### 1. Providers

LCVista is working to become compatible with a variety of different Webcast tool providers. Please reference the Compatible Webcast Tools section for more information on what webcast tool providers that are integrated with LCVista.

Providers	Rulesets		
Provide	Name	Site ID	
			Edit
			Edit
			Edit
-			Edit
_	And a second sec		Edit

From the Add Provider button, enter your Webcast admin credentials. These credentials will be that of the credentials you use when logging in to your Webcast provider.

On24 Client ID	×
Token Key credential	
Token Secret	
Validated: False Delete	Cancel Validate

Select Validate to confirm credentials. Once they are approved, you can save. You will only need to do this once per provider.

If your firm uses more than one webcast tool provider, you may add multiple providers upon setup.

#### 2. Rulesets

Rulesets are a set of rules or guidelines that define the parameters for the way in which CPE credits are calculated for participants. By default, all organizations will have the NASBA GIB ruleset. This ruleset mirrors NASBA standards for calculating CPE credit.

Integration Provider Configurations									
Providers Rulesets									
Ruleset Name	Associated Sessions								
NASBA GIB	15	Duplicate Edit							

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Rulesets

Providers

Ruleset Name

Add Ruleset

CIO Live Integration \varTheta

**Integration Provider Configurations** 

To add your own custom Ruleset, you will select the Add Ruleset button.

Create Ruleset	Return to	o Rulesets								
Name Test Ruleset Make default Save Pules										
1	•	Attendance (mins)		4	• 0	2.4	•	Credits Earned	0	0
2 + Add Rule Save Test Ruleset Please save your Ruleset before	e testing	Attendance (mins) Attendance (mins) Attendance (%) Polls asked Polls answered Polls answered (%)	<b>b</b>	•	• 0	: •	•	Credits Earned	0	

Edit

Edit

Duplicate

When creating a ruleset, there are many aspects to consider:

Associated Sessions

15

5

- Name—This is the name of the ruleset that will display on the Rulesets page, as well as when setting up sessions and selecting your ruleset type. We recommend making this name as specific as possible.
- Make default—Do you want to make this ruleset the default when setting up all Webcast launchable content? Please note that upon using this feature the NASBA GIB ruleset will be the default.
- Rules—These are the rules that dictate the credit calculations. When creating these rules, the factors you may select are: greater than, greater than or equal to, less than, less than or equal to, or equal to the allotted number. The factor(s) may apply to:
  - Attendance (mins)
  - Attendance (%)
  - o Polls asked
  - Polls answered
  - Polls answered (%)
- Credits Earned—Once the rules have been defined, you must make sure to enter in a credit amount that fulfills each rule. For example, if the rule is set for <u>Attendance (min)</u> is <u>greater than</u> <u>or equal</u> to <u>50</u>, the credit amount will be 1.
- Save—Once all rules have been defined you can save the ruleset by clicking the "Save" button.





• Test Ruleset—Once the ruleset has been saved you may now test the rules by clicking the "Test Ruleset" button. This will allow you to add Test Clause examples and show you what the credit calculation will be based on your current ruleset.

When a Ruleset has been assigned to a session (we will review this in the How do I setup a Session with a Webcast Link? section), you may also view which sessions have that following ruleset.

Edit Ruleset	Return to Rulesets						
Name							
NASBA GIB							
Make default							
Save Rules Sessions	$\mathbf{k}$						
Search							
Sessions ID	Program -	Credits	Sponsor	Start Date	End Date		_
100557-1	Aug 1 Take Three (Event via meeting)	0				Edit	Reports •
100580-1	Aug 20 Adobe	1				Edit	Reports +
100563-1	Aug 3 Seminar (Adobe)	3	Maike New Sponsor 1-29	8/3/2018	8/3/2018	Edit	Reports •

## How do I setup a Session with a Webcast link?

As soon as your setup of Provider and Rulesets are complete, you will now be able to start setting up sessions with content type of **WEBCAST**!

When creating your session, the Webcast content type will be available for all launchable Delivery Methods. These Delivery Methods include:

Webcast Integration	Guide New session		
Delivery Method	Certificate Template optional		<b>C</b> I'
Group internet based	\$	Field of Study     Add	Credits
		Des la distina en dite di la	
Certificate location optional		Per-jurisdiction credits will b	e generated automatically
		Overnae per-jurisdiction credits	1
valuation Template optional			
	•		
Content Type optional			
content type optional			
	₽●		
SCORM/AICC			
URL			
MEDIA			
WEBCAST	Enrollment End optional		
MM/DD/YYYY HH:MM AM	MM/DD/YYYY HH:MM AM	4	

- 1. Group internet based
- 2. QAS self study
- 3. Interactive self study
- 4. Nano



Once the content type **WEBCAST** is selected, you will find two additional dropdowns: Webcast Provider and Webcast Ruleset.

Content Type optional WEBCAST	\$	
Webcast Provider Choose a provider		÷
Webcast Ruleset NASBA GIB		
Alternate ID	Program credits:	

Delivery Method		Certificate Template optional	Field of Study		Credits	_	
Group internet based	۰		Accounting	٥	4	0	
Certificate location optional			Add Apply Jurisdiction & Field of S	tudy		Credits	
Evaluation Template optional			General			4 3	
	•		AICPA ABV				
Content Type optional			ABV Body of Knowledg	e		0 \$	
WEBCAST	٥		AICPA CITP				
Webcast Provider			Information Technology			0 0	
On24			AICPA EBPAQC				
Event ID			Employee Benefit Plans			• •	
1700342							

Once you have chosen the Webcast Provider On24 from the dropdown, a new field will appear titled **Event ID.** This is where you will input the webcast information that is given to you from your webcast tool provider.

Once you have chosen the Webcast Provider and input the event information you will then need to choose the Webcast Ruleset by which the CPE credits should be calculated. Please note that you will still need to input the session Field of Study and Credit value on the session level. These CPE credits that are calculated by the chosen Ruleset will apply to the suggested credits on the Completion Data Report for the session.

Once this webcast session has been created and released to end users for enrollment on LCVista, the user experience will remain the same with one exception; the end user may now use the Launch button to link directly to the webcast event hosted on the webcast provider tool.

When users launch a session that is linked to On24, and the event *has* started, users will be taken directly into the On24 and bypass the On24 login screen.



ID: 100926		Sponsor Nono		Provider: None		_
Level:		Length:		Revision:		
Pre-requisites						
None provided						
Description						
None provided						
NASBA Statement						
None						
Learning Objectives						
None provided						
Advanced Properation						
None provided						
Program Documents						
None						
Vour Envollmente						
Your Enrollments						
Delivery Method	Start	End	Started	Completion	Status	
Group internet based	4/16/2019 12:00 P	M 4/16/2019 5:00 PM	4/16/2019		Ongoing Launch	
Sessions New Session						
		Clider			<b>2</b> - D	
		Slides			::	
		Slides			::- □	
		Slides			::	
		Slides			::	
		Slides			::	
ORA		Slides			<b>::</b> – 🗆	
Q&A		Slides			<b>::</b> – D	
Q&A		Slides			::	
Q&A		Slides	L CV/icto T	oct	::- []	
Q&A		Slides	LCVista Te	est	::	
Q&A		Slides	LCVista Te	est	::	
Q&A		Slides	LCVista Te	est	::	
Q&A		Slides	LCVista Te	est		
Q&A Enter your question		Slides	LCVista Te	est	::	
Q&A Enter your question		Slides	LCVista Te	est		
Q&A Enter your question		Slides	LCVista Te	est		
Q&A Enter your question		Slides	LCVista Te	est		
Q&A Enter your question Media Player		Slides	LCVista Te	est		
Q&A Enter your question Media Player Public ADOBE PLASH PLAYER		Slides	LCVista Te	est		
Q&A Enter your question Media Player PLASH PLAYER		Slides	LCVista Te	est		
Q&A Enter your question Media Player TLASH PLAYER		Slides	LCVista Te	est		
Q&A Enter your question Media Player TLASH PLAYER		Slides	LCVista Te	est		

Users will be directed to the On24 login page *if* the event has *not* started.



## Webcast Report Types

Once a webcast has taken place that has used the **WEBCAST** content type, there are two different reports you may pull:

#### 1. Raw Data Report

The Raw Data Report is the exact report/information the webcast provider displays in their system. This information is *untouched* by LCVista. Please note that depending upon your webcast provider, the results may not appear on this report right away. Some providers take time before computing user data. To make sure you're viewing the most current data, we recommend clicking the "Refresh Data" if viewing the report directly, or shortly thereafter the event has concluded.

Raw Data R	Report	Export •	Refresh Data	Recompute	e Results									0	ompletion Da	ta Report
Session ID					100580-1											
Session Name					Aug 20 Adobe											
Meeting Name					Aug20Test											
URL					meet610873406.	adobeconnect.com/	aug20/event/login.h	itml								
Timezone					America/Los_Ang	eles										
Session Start D	ate/Time															
Session End Da	ate/Time															
Webcast Start	- End				8/20/2018 7:00 P	PM - 8/20/2018 8:0	0 PM									
Duration					60 minutes Edit											
Total Number of	of Users				4											
Last Updated (	local time)				9/14/2018 9:58 /	M										
Ruleset					NASBA GIB											
Poll Question Id Question 1 Q1: Favorite 2 Q2: Favorite 3 Q3: Color of 4 Q4: What is 5 What is todi 6 Q6: last nam Search	e Color e Instructor f the sky : the FOS of ay ne	dis this event														
User ID	Name	Email	1	Registration	Attendance Status	First Login Time	Last Logout Time	Duration	QnA	Files Downloaded	Poll 1	Poll 2	Poll 3	Poll 4	Poll 5	Poll 6
1653599639	LCV Support	support@lcv Edit	ista.com		Attended	8/20/2018 7:20 PM	8/20/2018 7:42 PM	00:22:04			red	Tim Geraghty	blue			

There are 3 different editable fields on the Raw Data Report. LCVista has made these fields editable because we understand there may be exceptions that will alter the CPE calculations for an event. For example, if your webcast was 60 minutes long, but you had a 10-minute break. This is a good example of where you may change the duration to 50 minutes so that this data is calculated more accurately by your predetermined ruleset. These editable fields are:

- Duration
- Poll Questions
- Email Address

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Raw Data Report	Export - Refresh Data Recompute Results
Session ID	100580-1
Session Name	Aug 20 Adobe
Meeting Name	Aug20Test
URL	meet610873406.ndobeconnect.com/aug20/event/login.html
Timezone	America/Los_Angeles
Session Start Date/Time	
Session End Date/Time	
Webcast Start - End	8/20/2018 7:00 PM - 8/20/2018 8:00 PM
Duration	60 50 minutes Edit
Total Number of Users	4
Last Updated (local time)	9/14/2018 9:58 AM
Ruleset	NASBA GIB

**LCVista** 

If you have edited one of these fields, it is imperative that you click the **Recompute Results** button to recalculate your data. Once you click on Recompute Results, it will take you to the updated Completion Data Report. Please refer to **Completion Data Report** section for more information on this report type. Please note that once any of these data points have

been edited, the refresh data button should not be used unless you truly wish to override the changes you have made. A warning message will appear if you attempt to refresh the data after edits have been made to the raw report (and the results recomputed).

Raw Data	Report	Export -	Refresh Data	Recompute Results
Session ID	CSV	G	10058	30-1
Session Nam	e Excel		Aug 2	0 Adobe
Meeting Nan	ne		Aug20	DTest

To export the Raw Data Report, you will select the **Export** option. You will be provided the option to export in CSV or Excel.

#### 2. Completion Data Report

The Completion Data Report is a report that consolidates the webcast's Raw Data into usable metrics and applies the Ruleset associated to the session to suggest CPE credit. The top of the Completion Data Report will list all the pertinent session/webcast details.

Completion Data Report Export •		Raw Data Report
Session ID	100580-1	
Session Name	Aug 20 Adobe	
Meeting Name	Aug20Test	
URL	meet610873406.adobeconnect.com/aug20/event/login.html	
Timezone	America/Los_Angeles	
Session Start Date/Time		
Session End Date/Time		
Webcast Start - End	8/20/2018 7:00 PM - 8/20/2018 8:00 PM	
Duration	60 minutes	
Total Number of Users	4	
Last Updated (local time)	9/14/2018 9:58 AM	
Ruleset	NASBA GIB	
Search     Copy selected emails to clipboard       Match Status <ul> <li>Attendance Status</li> <li>All Statuses</li> </ul> Min Attendance (minutes) <ul> <li>Max Attendance (minutes)</li> </ul>	Min Response %	
Username Name Email	Attendance Status Attendance (min) Attendance % Response % Course Status Course Credits S	uggested Credit



Beneath the session data you will see all user completion information. This includes:

- Username
- Name
- Email
- Attendance Status (Attended and Not Attended)
- Attendance (mins)
- Attendance (%)
- Response (%)
- Course Status—Passed with full credit, Passed with custom credit, Failed, Enrolled Unenrolled, No show, Incomplete Invited, ad Waitlisted
- Course Credits—this is the CPE credit amount awarded on the session level
- Suggested Credit—this is the CPE credit calculation based on the applied ruleset

These results can be filtered in various ways:

- Match Status—this is whether we were able to *match* the username entered through the webcast provider interface to a username in LCVista
- Attendance Status
- Course Status
- Minimum Attendance (mins)
- Maximum Attendance (mins)
- Minimum Response (%)
- Maximum Response (%)

Search	n	opy selected emai	Is to clipboard		
Match	Status 🗢 Atten	ance Status 🗢	All Statuses	٥	
Min A	ttendance (minutes)	Max Atte	ndance (minutes)	Min Response %	Max I
	Username	Name	Email	Attendance Status	Attendance (min)
8	testuser123 Jan30 uattestuser PCAOJUUSER NEWJan2018 NewMexicoUser AprilTest MI2584User June20 LouisianaUser JuneEleven	LCV Support	support@lcvista.com	Attended	22
	user1@lcvista.com	User One	user1@lcvista.com	Attended	1
	user2@lcvista.com	User Two	user2@lcvista.com	Attended	4
	user3@lcvista.com	User Three	user3@lcvista.com	Not Attended	0

Once you are ready to manually pass all applicable users in Manage Attendees, we have made it extremely easy to obtain emails in bulk from the Completion Data Report. Once the group of users is selected you can click the **Copy selected emails to clipboard** and this will copy all email addresses selected.



The email addresses copied from the Completion Data Report can be pasted in the **Bulk Select** box within Manage Attendees.

	nage Al	uenuees						View/Export We	ebcast Reports •
10	0580 - Aug 20	) Adobe							
Se	ssion 100580-	1    Delivery method: G	roup internet based						
							Enrolle	nent: 3 enrolled	
Ass	ociated Users	Find Users							
Filte	rs	All Statuses	All Jurisdict	tions   All User	r Groups Ø	Active users		Search	
		Select all 6 users mat	ching filters	support	t@lcvista.com.user1@lcvist	comuser2@ky	Bulk select	on 4 email addresse	5
				ista.com	nuser3@kvista.com				-
					1				
					/	-			
					/				
0.9	how only selec	ted users (15) Unsel	ect all users	Select Action	Apply Action				
09	how only selec	ted users (15) Unsele First Name	ect all users Email	Select Action Status	Apply Action     Status Changed	Completion	Date	Certificate	Credits earned
0 9	how only selec Last Name – Five	ted users (15) Unsele First Name User	ect all users Email user5@icvista.com	Select Action Status Expland Action action	Apply Action     Status Changed     8/20/2018 7:19 PM	Completion	Date	Certificate Add certificate	Credits earned
0	how only selec Last Name - Five Four	ted users (15) Unseli First Name User User	ect all users Email user5@kvista.com user4@kvista.com	Select Artish Status Expliced Distance Enrolled Admote	Apply Action     Status Changed     B/20/2018 7:19 PM     B/20/2018 7:19 PM	Completion	Date	Certificate Add certificate Add certificate	Credits earned
	how only selec Last Name - Five Four Johnson	ted users (15) Unsel First Name User User Admin	ect all users Email user5@kvista.com user4@kvista.com admin@kvista.com	Select Art Status Exolect Ervolled Adl rete Ervolled Adl rete	Apply Action     Status Changed     B/20/2018 7:19 PM     B/20/2018 7:19 PM     9/6/2018 6:46 AM	Completion	Date	Certificate Add certificate Add certificate Add certificate	Credits earned
	how only select Last Name - Five Four Johnson One	ted users (15) Unsel First Name User User Admin User	et all users Enuil userS@lovista.com user4@tovista.com admin@co.ta.com yuTi@tovista.com	Select Ast Status Eggland Enrolled Antirote Pased with full credit Antirote	Apply Action     Apply Action     Status Changed     B/20/2018 7:19 PM     B/20/2018 6:46 AM     B/21/2018 6:46 AM	Completion 1 1 8/21/2018	Date	Certificate Add certificate Add certificate Add certificate Add certificate	Credits earned

Completion Data	Report	Export -
Session ID	CSV	
Session Name	Excel	Ŀ
Meeting Name		

To export the Completion Data Report, you will select the Export option. You will be provided the option to export in CSV or Excel.

## Where to Access Webcast Reports

Once a webcast has taken place that has used the **WEBCAST** content type, there are two different ways you may access these reports.

1. You may access the reports from Manage Attendees.

Manage A	ttendees				View/Export Webcast Reports	Print/Export Sign-In Sheet •
100580 - Aug 20	) Adobe				Raw Data Report Completion Data Report	•
Session 100580	1    Delivery method: Gr	oup internet based				•
					Enrollment: 3 enrolled	
Associated Users	Find Users					
Filters	All Statuses	All Jurisdicti	ons e	All User Groups   Active users	Search	
	Select all 6 users mate	ching filters		Paste or enter emails Bulk select of	on 0 email addresses	
Select users belo	w to apply actions					
Last Name +	First Name	Email	Status	Status Changed Completion Date	Certificate Credits earne	d Evaluation Sent
E Five	User	user5@lcvista.com	Enrolled	8/20/2018 7:19 PM	Add certificate	



2. You may access the reports from Rulesets edit page.



Edit Rule	Return to Rulesets					
Name						
NASBA GIB						
Make defau	ilt					
Save						
Rules Se	ssions					
Search						
Sessions ID	Program 🔺	Credits	Sponsor	Start Date	End Date	
100557-1	Aug 1 Take Three (Event via meeting)	0				Edit Reports
100580-1	Aug 20 Adobe	1				Raw Data Report
100563-1	Aug 3 Seminar (Adobe)	3	Maike New Sponsor 1-29	8/3/2018	8/3/2018	Completion Data Report