Developer Documentation for OpenBlend Zoom Integration

Nov 2023

Assumptions:

1. Your company already has an active OpenBlend account
2. You have a user account with Admin role in OpenBlend
3. You have a company Zoom account, and you have a Zoom Admin user with the same email address as the OpenBlend user account mentioned above

1. Adding the OpenBlend chatbot

1.1 First of all, contact the OpenBlend support team to request that Zoom messaging be enabled for the company. This step can't be performed by an end-user.

1.2 The OpenBlend Support Team will notify you once they have enabled Zoom messaging for your company. At this point, you can install the OpenBlend Chatbot app from the Zoom marketplace page. You will need to be logged in to Zoom with Admin permission to perform this step. Note that Zoom Chatbot apps are account-level apps and only require this setup once.
During this installation, you will sign in to OpenBlend using the same email address used to sign in to Zoom.

Go to the OpenBlend application page at Zoom App MarketPlace

Clock on the Add button at the top right of the page

An Authorization message dialog will be displayed. Click on "Allow" to authorize.

You are about to add OpenBlend BETA

| AB | alice.burnett@myemail.com | Switch Account |

> ℹ App can access and manage this information even when not using the app.

App can view information

Associated with your account, others you're allowed to access, and others included in that information.

🎥 Content   ›

By clicking Allow, you give permission to this app to use your information in accordance with their Terms & Privacy Policy. You can remove this app at any time in My Apps.

[**Allow**]   [Decline]

1.4 Individual user activation.

Once these steps are completed, OpenBlend will automatically activate Zoom integration for all OpenBlend user accounts where there is a matching Zoom user account (same email address). Additionally, if any users are added to OpenBlend later, and they have a Zoom user account, these will be automatically linked.

1.   Using the OpenBlend Chatbot

There are two ways that OpenBlend uses Zoom

- OpenBlend delivers notifications to you via Zoom when certain events happen, or when events are upcoming and you need a reminder
- You can type a command into the chatbot, and OpenBlend will perform an action for you as a result (currently this is limited to one command to create custom Talking Points for your agenda)

Notifications

Various events can lead to Zoom notifications such as:

High Fives

High Five received (Manager): Sent to manager when one of their employees has received a High Five

High Five received (Employee): Sent to an employee when they have received a High Five

High Five response: Sent to the High Five sender when the recipient has responded to it

Objectives

Objective Edit: Sent to a manager when one of their employees has edited one of their Objectives

Objective State Change: Sent to a manager when one of their employees has closed or deleted one of their Objectives

Sessions

Manager Join Session: Sent to a manager to remind them to join a session which has started

Evaluate

Evaluate Due: Sent to a user when their self evaluation is due

Evaluate Start: Sent to a user when they are requested to start a self evaluation

Self Evaluate Complete: Sent to a manager when one of their employees has completed their self evaluation

Some types of notification are user-configurable, so you can decide whether you want them delivered by Zoom, by email or not at all.
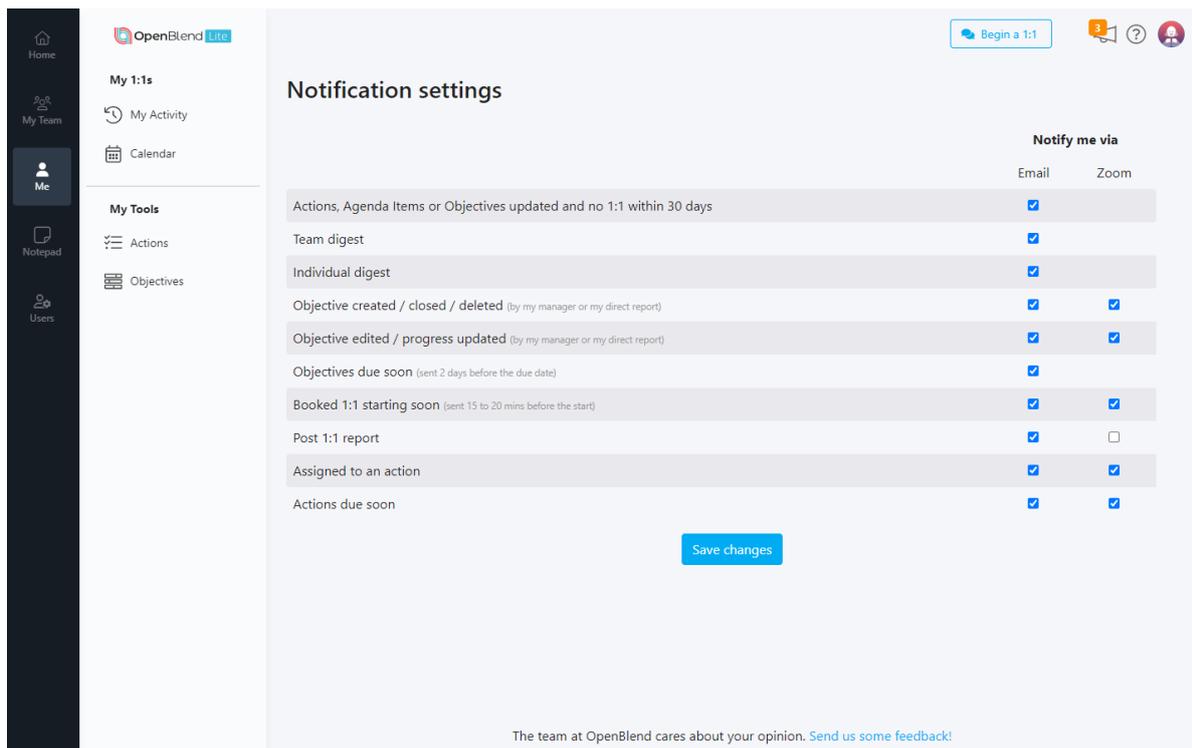
Commands

The Zoom Chatbot currently only supports one command, which is:

"add talking point"

If you type "add talking point " followed by the title of the agenda item you want, this agenda item will be added to your agenda.

For example, type

"add talking point About my training needs"

and this will create an agenda item named "About my training needs" in OpenBlend.

2. Removing the OpenBlend Chatbot

3.1 Log in to your Zoom account (you must use an account with Admin permission) and navigate to the Zoom App Marketplace.

3.2 Click Manage -> Added Apps or search for the "OpenBlend" app

3.3 Click "Remove" next to the app

3.4 Confirm the uninstallation and click "Remove"