Administrator's Guide

AudioCodes Continuous Enterprise Productivity Powered by Voice.AI

Meeting Insights

meetinginsights

audiocodes

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Related Documentation

Document Name
Meeting Insights User's Manual
Meeting Insights Release Notes

Document Revision Record

LTRT	Description
12716	Initial document release.

LTRT	Description
12718	Teams Tenant ID. Notification Policy. New deployment illustrations. Replaced diagram for Hosted by AC to show shared Bot (removed also from POC annex hosted by AC).
12722	(Version 2.0) Place.Read.All. Consenting on behalf of org. Global Administrator. Onboarding users. Automatically adding Mia to Teams meetings. Default settings for new users. D4as_v4. D2as_v4 for POC. Pre-Deployment Check List - Requested Info.
12723	(Version 2.2) Planner (Integrations). Microsoft Power Business Intelligence (BI). Audit Trail: Activity; Items. Permissions: Consent on behalf of your organization. Application Access Policy. Management actions per Meeting Insights user. Notifications. AI Features (speech-to-text and transcription).
12724	(Version 2.3) Private Organizational Glossary. Add User. Retention Policy. Users page: Search. User Representative. Export Users to Excel. Notifications page.
12725	(Version 3.0) AI-generated summary, outline and action items; snippets
12726	(Version 3.8)
12727	Teams test user
12728	(Fix) Automatic Invitation of Mia to Teams Meetings

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1 Introduction

Meeting Insights offers you the optimal enterprise solution for recording your meetings, presented media such as PowerPoint slide presentations and participants' speech, in a Teams environment. Meeting Insights provides a central repository for all your company meeting recordings, offering an effective solution for capturing, managing, and sharing information and ideas across your company.

During the meeting, Meeting Insights allows you to perform various voice-driven actions such as adding notes, assigning action items (tasks) to yourself or to participants, and highlighting specific stages in the meeting with tags so that you can easily locate specific content after the meeting.

When the meeting recording ends, you can use Meeting Insights' feature-rich and flexible web-based management tool to manage and edit it. This includes publishing and sharing it so that all participants and optionally, all or specific contacts in your organization, can also view it even if they weren't present (or invited); editing the slide presentation (adding, replacing, or deleting slides); trimming the presentation (including voice) to exclude unwanted content, and converting speech spoken by the participants into text. Meeting Insights also lets you record yourself independently of a meeting; you can later edit and share the recording with others.

You can import recorded meetings created by third-party applications or record any meeting locally using the portal's integral "record meeting" button and manage them through Meeting Insights like any other meeting recording.

For more information on AudioCodes Meeting Insights solution, see AudioCodes website.

2 Deployment Overview

Meeting Insights can be hosted entirely on AudioCodes' or the customer's Azure subscription.

Meeting Insights comprises these components:

- Virtual Assistant/Recording Bot
- Meeting Insights Application
- Voice.AI Engines (voice-commands and speaker-identification engines)
- Storage space for recorded media
- Video processing containers

Components Overview

Read here brief descriptions of Meeting Insights components:

- Virtual Assistant/Teams Bot below
- Meeting Insights Application below
- Voice AI Engines Servers below
- Media Storage Space below
- Video Processing Containers on the next page

Virtual Assistant/Teams Bot

This component consists of one or several virtual machines (VMs) that operate in a cluster configuration and are closely managed and balanced by the surrounding infrastructure. The Virtual Assistant joins the meetings, records the content, takes notes, action items, and more. For a Trial/Proof of Concept (POC) by AudioCodes, it is multi-tenant, and shared between POC customers.

Meeting Insights Application

The Meeting Insights application consists of one or more VMs that host the portal and database, and which process the recordings.

Voice AI Engines Servers

Meeting Insights AI Engine consists of one or more VMs that host Voice AI engines for Voice Commands detection and Speaker- Identification. For a Trial/Proof of Concept (POC) by AudioCodes, the servers are shared between POC customers.

Media Storage Space

Azure Blob Storage space is used for recordings media (audio, desktop sharing, images, etc.)

Video Processing Containers

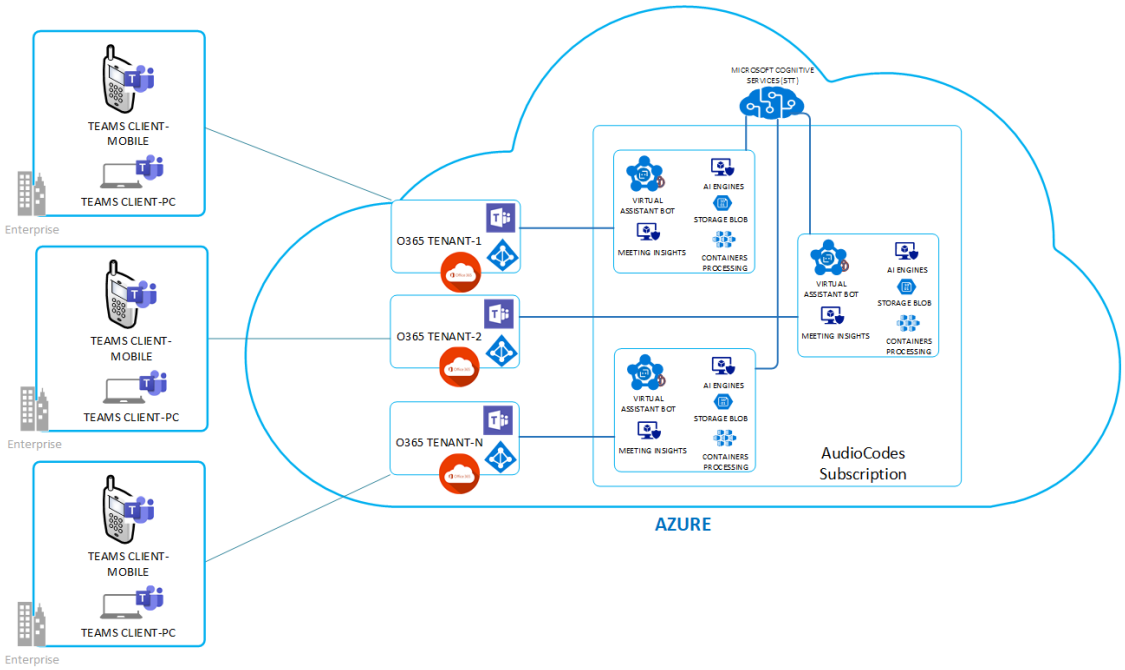
The video processing containers are used for generation of key images/slides from a recorded screen capture.

Hosted by AudioCodes

Meeting Insights may be hosted by AudioCodes or alternatively, Hosted in Customer Azure on page 9. If hosted by AudioCodes, see:

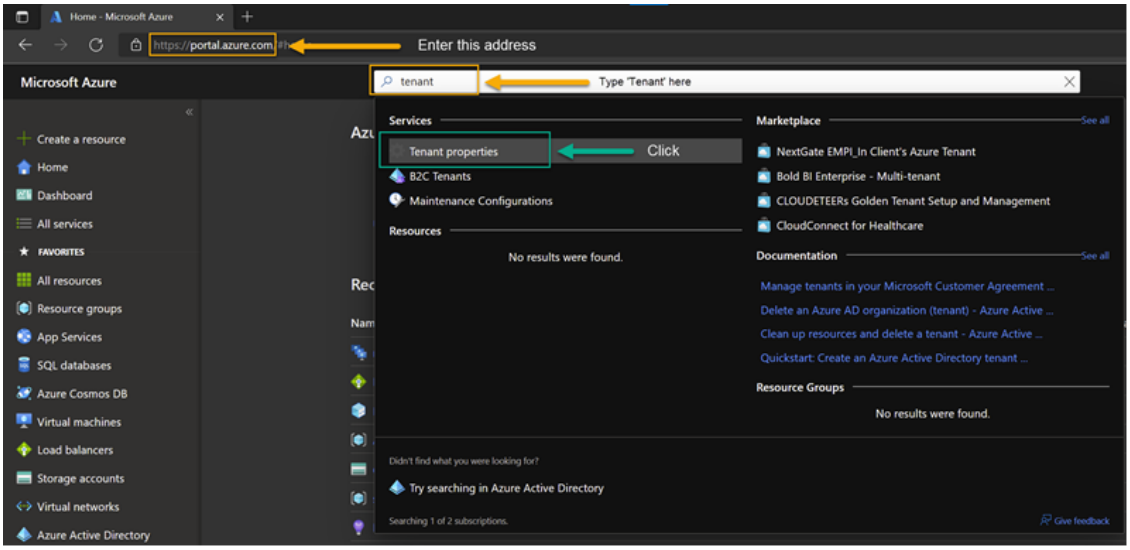
- Deployment Diagram below
- Prerequisites below
- Pre-Deployment Check List on page 7
- Security on page 8

Deployment Diagram



Prerequisites

- To install Meeting Insights, the customer's Teams Tenant ID must be provided to AudioCodes beforehand. You can find the Teams Tenant ID here:



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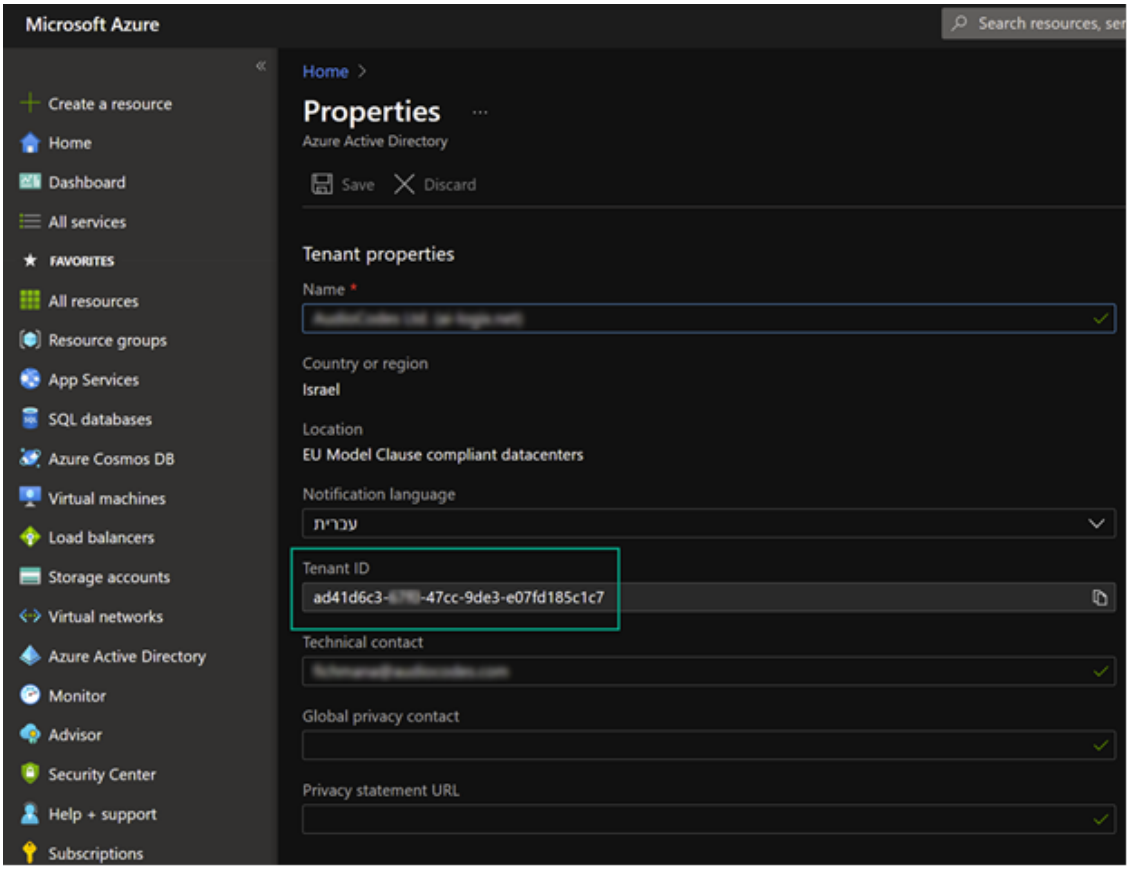
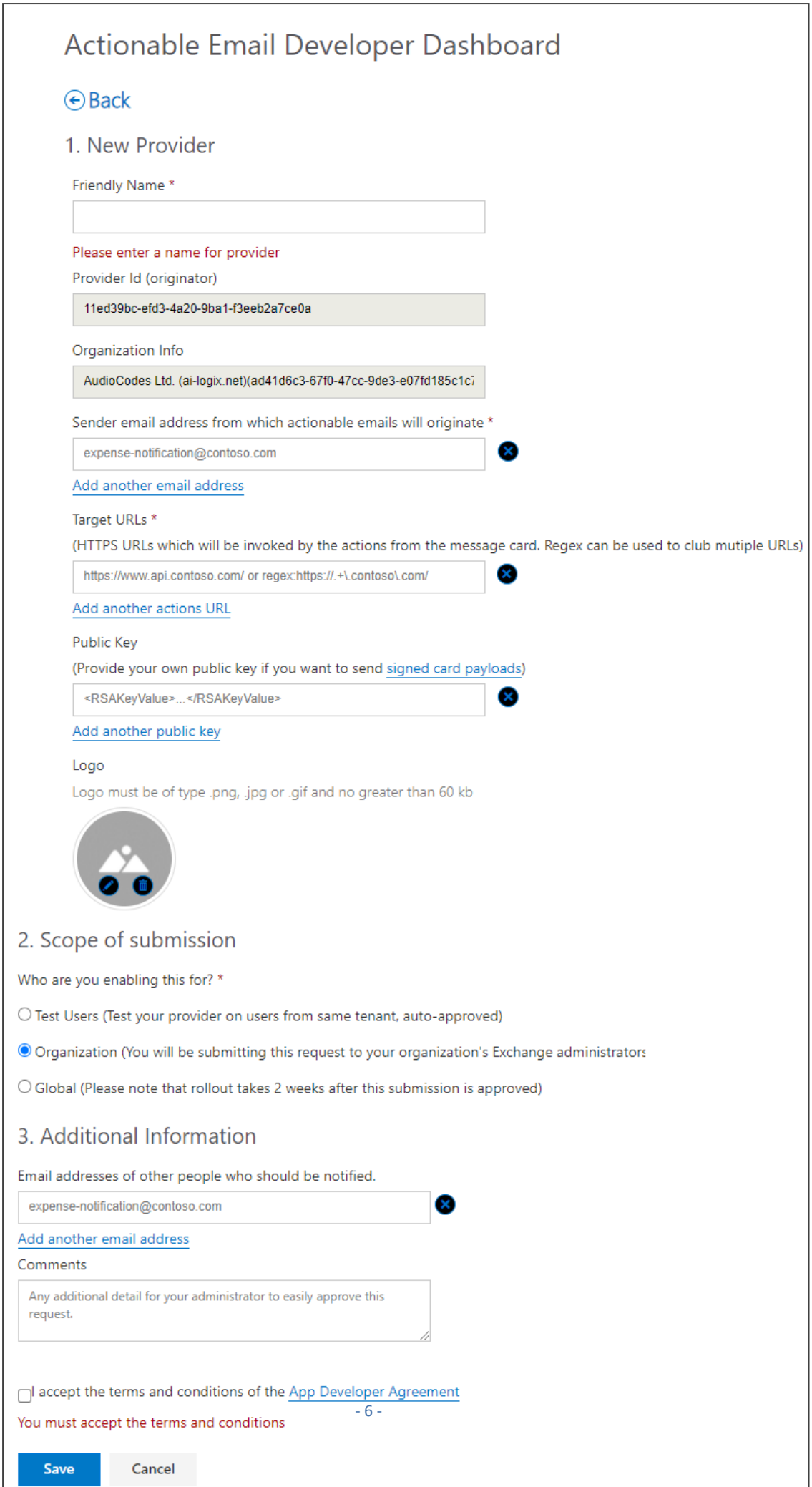


- To test the Meeting Insights setup, the customer must provide a test Teams Client from the customer Teams Tenant.
- To enable recipients of Action Items emails to set the status to "Done" in the email (by clicking the **DONE** button), create a new Outlook Office provider:
  a. Go to https://aka.ms/publishoam.
  b. Log in with the Teams Tenant admin that belongs to the same Tenant as the users to whom the meeting recordings will be sent; the following appears:

c. Click **New Provider**; the following appears:


Actionable Email Developer Dashboard
Back
1. New Provider
Friendly Name *
Please enter a name for provider
Provider Id (originator)
11ed39bc-efd3-4a20-9ba1-f3eeb2a7ce0a
Organization Info
AudioCodes Ltd. (ai-logix.net)(ad41d6c3-67f0-47cc-9de3-e07fd185c1c7
Sender email address from which actionable emails will originate *
expense-notification@contoso.com
Add another email address
Target URLs *
(HTTPS URLs which will be invoked by the actions from the message card. Regex can be used to club mutiple URLs)
https://www.api.contoso.com/ or regex:https://.+\.contoso\.com/
Add another actions URL
Public Key
(Provide your own public key if you want to send signed card payloads)
<RSAKeyValue>...</RSAKeyValue>
Add another public key
Logo
Logo must be of type .png, .jpg or .gif and no greater than 60 kb
2. Scope of submission
Who are you enabling this for? *
Test Users (Test your provider on users from same tenant, auto-approved)
Organization (You will be submitting this request to your organization's Exchange administrators
Global (Please note that rollout takes 2 weeks after this submission is approved)
3. Additional Information
Email addresses of other people who should be notified.
expense-notification@contoso.com
Add another email address
Comments
Any additional detail for your administrator to easily approve this request.
I accept the terms and conditions of the App Developer Agreement
You must accept the terms and conditions
Save
Cancel

d. Under the **New Provider** group, fill in the following fields:
   - 'Friendly Name': Enter any name for the provider (e.g., "be304qf4BE").
   - 'Provider Id': (Read-only) This value is automatically generated. Please provide it to AudioCodes.
   - 'Sender email address from which actionable emails will originate': Enter Mia's email address (provided by AudioCodes) from where Action Items emails will originate.
   - 'Target URLs': Enter the URL (provided by AudioCodes) that is invoked when users click DONE in Action Items emails.

e. Under the **Scope of submission** group, select the **Organization** option.

f. Under the **Additional information** group, enter the email addresses of other people who should be notified, and then type a message for this email notification.

g. Accept the terms of use, and then click **Save**.

Pre-Deployment Check List

Use the check list shown in the table below before deploying Meeting Insights.

AudioCodes Hosting Deployment Prerequisites	Requested info	Status
To install Meeting Insights, the customer's Teams Tenant ID must be provided to AudioCodes beforehand.		Pending
It is highly recommended to temporarily provide a Teams test user with a basic mailbox (Outlook) to expedite the onboarding process for testing the Meeting Insights setup. If Multi-Factor Authentication (MFA) is enabled, it's crucial to either exclude the test user from the conditional access rules or create the Teams test user without associating a phone number.		Pending
Handover Prerequisites	**Requested info**	**Status**
Provide Meeting Insights with permissions to join calls	Confirm you have Office 365 'Administrator' rights to run Meeting Insights consent links	Pending
Provide Meeting Insights with permissions to read Azure Active Directory	Confirm you have Office 365	Pending

AudioCodes Hosting Deployment Prerequisites	Requested info	Status
	'Administrator' rights to run Meeting Insights consent links	
Provide Meeting Insights with permissions to authenticate the users utilizing Microsoft Open ID Connect (OAuth 2) authentication	Confirm you have Office 365 'Administrator' rights to run Meeting Insights consent links	Pending
Provide Meeting Insights with permissions to enable Microsoft recording notifications.	Confirm you have Office 365 'Administrator' rights to run Meeting Insights consent links	Pending
After the preceding consents are given and you receive the Meeting Insights URL, run the following test: ■ Make sure you can log in to the URL using your Office 365 credentials. ■ Invite mia@meetinginsights.net to a test meeting and make sure the Mia Bot has joined the call.	Confirm you have Office 365 'Administrator' rights to run Meeting Insights consent links	Pending
Add the provided Meeting Insights Teams app to the organization Teams store and provide the Catalog ID.	Confirm you have Office 365 'Administrator' rights to run Meeting Insights consent links	Pending

Security

Make sure security products in your network (like Firewall) don't interfere with Meeting Insights' correct operation; add the service FQDN and IP address to the appropriate whitelists, to be exempt from scanning and manipulation.

- Data security
  - Encrypted at rest (disk and storage encryption)
  - Encrypted in transit, HTTPs connections
- Platform/Hosting security

- Azure subscription following MSFT Security and Compliance recommendation

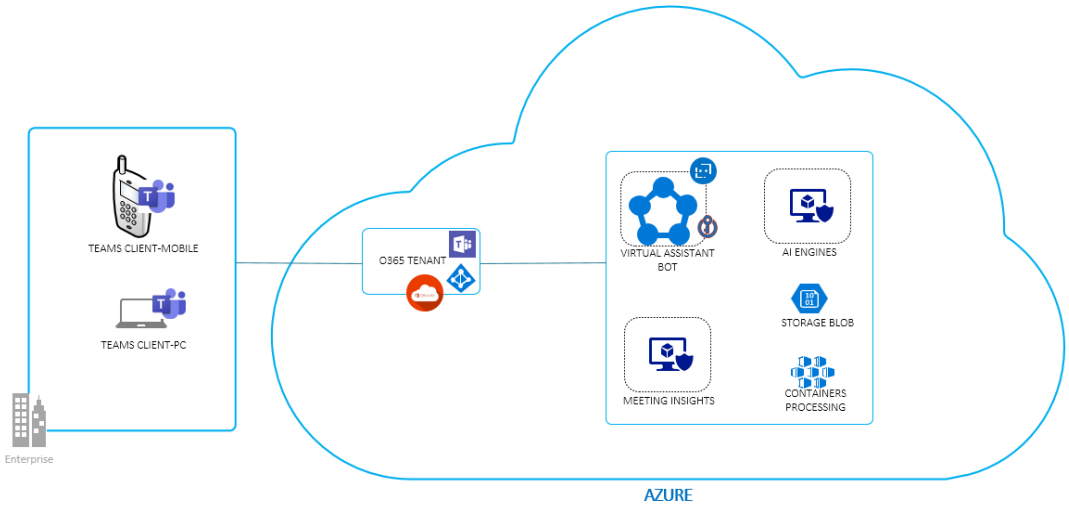
- Application security
  - Limited to specific domain(s)
  - Imperva Incapsula – web application security, DDoS mitigation, and more
- Authentication
  - Azure Active Directory, Teams SSO

Hosted in Customer Azure

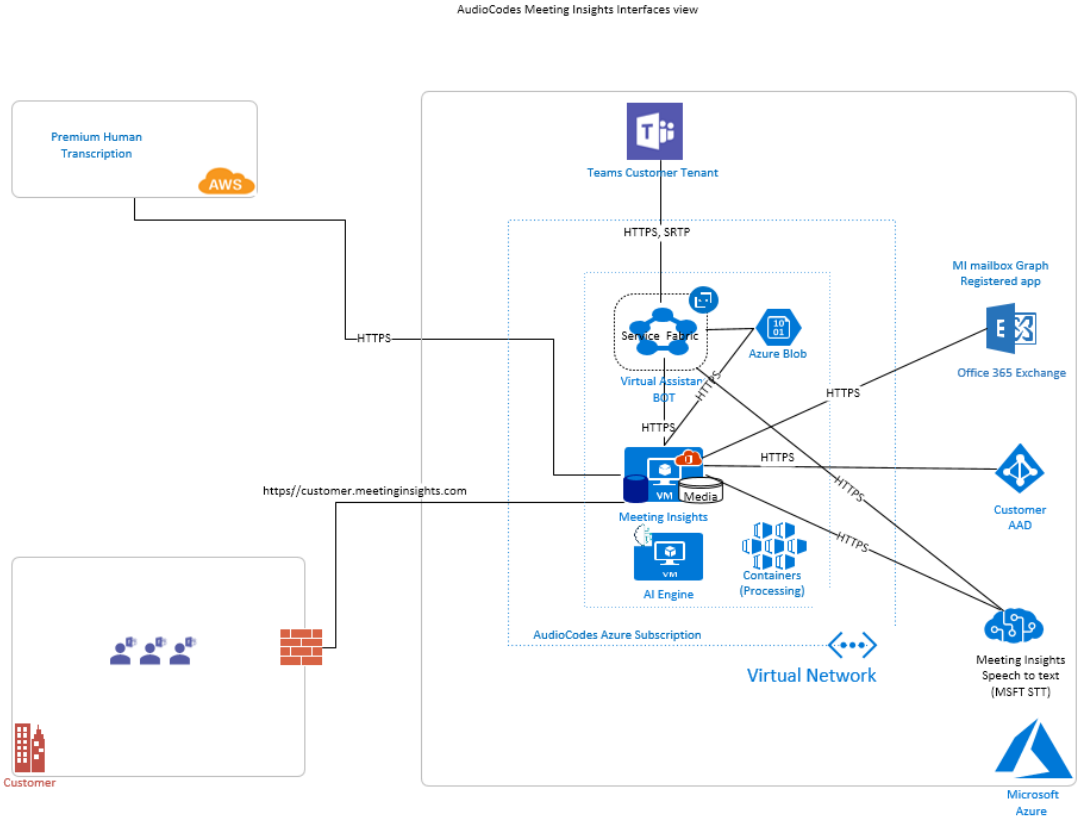
Meeting Insights may be hosted by in the customer's Azure or alternatively, Hosted by AudioCodes on page 3. If hosted in the customer's Azure, see:

- Deployment Diagram below
- Detailed Deployment Diagram on the next page
- Minimum Server Requirements on the next page
- Prerequisites on page 12
- Pre-Deployment Check List on page 13
- Security on page 14

Deployment Diagram



Detailed Deployment Diagram



Minimum Server Requirements

The following table shows the Meeting Insights machine specifications.

Feature	Details
Operating Systems	■ Microsoft Windows Server 2016 ■ Microsoft Windows Server 2019
Meeting Insights Live Server Specifications	■ Must be of the Dasv4 series described here. ✓ One vCPU can handle up to 50 simultaneously recorded meetings -or- up to 40 users simultaneously accessing the MI Portal/GUI (for example, to record up to 20 simultaneous meetings while up to 120 users access the GUI simultaneously, a D4as_v4 machine will be needed). ✓ An additional managed disk of size +-650 kB per an hour recorded meeting is required for database storage (not required for POC if the Meeting Insights Server's OS disk has sufficient space to hold the database). The disk should be a premium SSD-managed disk.

Feature	Details
Virtual Assistant/Teams Bot Specifications	■ Deployed using one of the following options: ✓ The VM must be of the Dsv2 series described here. ✓ One vCPU can handle up to 26 audio-only meeting recordings -or- eight audio and desktop sharing meeting recordings. ✓ Deployed either as an Azure Standalone VM or Azure Service Cluster. ◆ Azure Standalone VM ◆ Virtual Machine: Tier=Standard, Instance=DS2 V2 (2 vCPUs, 7 GB RAM) ◆ Virtual Machine: Tier=Standard, Instance=DS3 v2 (4 vCPUs, 14 GB RAM) ◆ Virtual Machine: Tier=Standard, Instance=DS4 v2 (8 vCPUs, 28 GB RAM) ◆ Azure Service Fabric Cluster: Silver Durability with a minimum of five nodes. ◆ Virtual Machine: Tier=Standard, Instance=DS2 V2 or D2 V2 (2 vCPUs, 7 GB RAM) ◆ Windows Server 2019 Data Center - with Containers ■ For more information, refer to Microsoft Service Fabric Cluster.
Voice.AI Engines (voice-commands and speaker-identification engines)	■ Two VM machines of the Dasv4 series are required, one to detect voice commands and the other to identify the speakers. Both can handle two simultaneous meetings per vCPU.
Microsoft Azure Blob Storage	■ A one-hour audio-only meeting consumes approximately 125 MB of the storage. A one-hour meeting with desktop sharing and audio consumes approximately 400 MB.
Video processing containers	■ A one-hour meeting with desktop sharing post-meeting video processing consumes about 45 minutes of the Linux container with two vCPUs and 2GB of RAM for 45 minutes of processing. Such a machine can cost about 10 cents for 45 minutes. The cost may vary according to Azure region.
Additional mandatory Azure	■ Deployed in Service Fabric Cluster:

Feature	Details
resources	✓ Standard Load Balancer for Bot Service Fabric Cluster ✓ Virtual Machine Scale Set - VMs for Bot Service Fabric Cluster ■ The public IP address ■ Standard Load Balancer in case of SFC Teams Bot deployment ■ Key Vault to store MI certificates and keys ■ App Configuration to store Bot configuration
Optional Azure resources	■ Application Insights to store Bot logs (not mandatory but useful for troubleshooting)
Antivirus Software	■ Teams Bot machines ✓ C:\Program Files\Microsoft Service Fabric ✓ D:\SvcFab\Log ✓ C:\ProgramData\SF ✓ C:\MiMedia ✓ C:\Program Files (86)\AudioCodes ■ Meeting Insights Server ✓ C:\inetpub\MeetingRecorderBackEnd ■ Voice.AI engines ✓ C:\ac\audiocodes speech service

Prerequisites

1. Certificate(s):
   - Before the installation, select and provide the FQDN for Meeting Insights.
   - Before the installation, select and provide the FQDN for Teams Bots.
   - Create a certificate(s) for the preceding services and have it signed (wildcards are supported).
2. Key Vault is created as a part of the deployment. The certificate should be prepared in pfx format. Use the script to check if the certificate corresponds the valid provider (Microsoft Enhanced RSA and AES Cryptographic Provider). See here for more information.
3. Download packages:
   - Provide your subscription ID. AudioCodes will enable a download of the following packages for your subscription from the Azure marketplace.
     - Software/Tools packages. Links will be provided.

- Download Teams Bot package.
- AudioCodes will deploy AI Engines VM.
- AudioCodes will deploy MI Application VM.

4. Create an online email account for Mia (Meeting Insights Virtual Assistant/Teams Bot). This account will be used for inviting Mia to the meetings. Consider mia@domain.com. Needed app permissions for reading the meeting invitations sent to Mia:
   - Calendars.Read
   - Mail.ReadWrite

     Application Access Policy can be used by an exchange admin to restrict an application for a specific email or a security group, as described here.
5. Prepare SMTP for sending email notifications from Meeting Insights
   - SMTP server properties (Azure email services can be utilized)
   - Sender's email (mia@domain.com)
6. Provide the following information:
   - Your Azure Subscription ID
   - Your Teams Tenant ID
   - Supported domains - @domain.com
   - Meeting Insights email account – meetinginsights@domain.com
   - Meeting Insights FQDN - meetinginsights.domain.com
7. The deployment of Meeting Insights requires creation of a VM, deployment of an Azure Service Fabric Cluster (SFC), creating applications, users, secret keys, configuring virtual networks and giving permissions. During the installation, the customer's IT engineer with the following appropriate permissions is required:
   - 'Domain Admin' with Azure administration privileges of the customer's subscription
   - 'Teams Admin' privileges
   - Global DNS/Firewall/Networking permissions

Pre-Deployment Check List

Customer Hosting Deployment Prerequisites	Requested info	Status
Provide Azure subscription ID where the installation would take place – to make Meeting Insights images available	-	Pending
Provide Organizational Office 365 Tenant ID	-	Pending

Customer Hosting Deployment Prerequisites	Requested info	Status
Provide a list of supported domains	-	Pending
Provide Meeting Insights with permissions to enable Microsoft recording notifications.	-	Pending
Define and provide 2x FQDN in external DNS: ■ UI - mia.domain.com ■ Bot -miabot<customerName>.domain.com	-	Pending
Prepare a global, valid certificate with both of the preceding domains in SAN (Subject Alternative Names). No information is needed. Set the status to 'Done' when you have the certificates.	-	Pending
An online email account (mailbox) for Mia (Meeting Insights Virtual Assistant/Teams Bot) in the organization's Office 365. This account will be used for inviting Mia to meetings. For example: mia@domain.com. Provide the name of the account selected.	-	Pending
Have an E3 or higher licensed account in the organization's Office 365 for testing.	-	Pending
Rights and Permissions: ■ Ability to Add external DNS records ■ Subscription owner rights ■ Office 365 Tenant Global Admin (Azure AD) rights. No information is needed. Set the status to 'Done' when you have the certificates.	-	Pending

Security

Make sure security products in your network (like Firewall) don't interfere with Meeting Insights' correct operation; add the service FQDN and IP address to the appropriate whitelists, to be exempt from scanning and manipulation.

- Data security
  - Encrypted at rest (disk and storage encryption)
  - Encrypted in transit, HTTPs connections
- Application security

- Limited to specific domain(s)
- Recommended to protect access through tools like VPN, NSG, restricted source IPs or WAF.

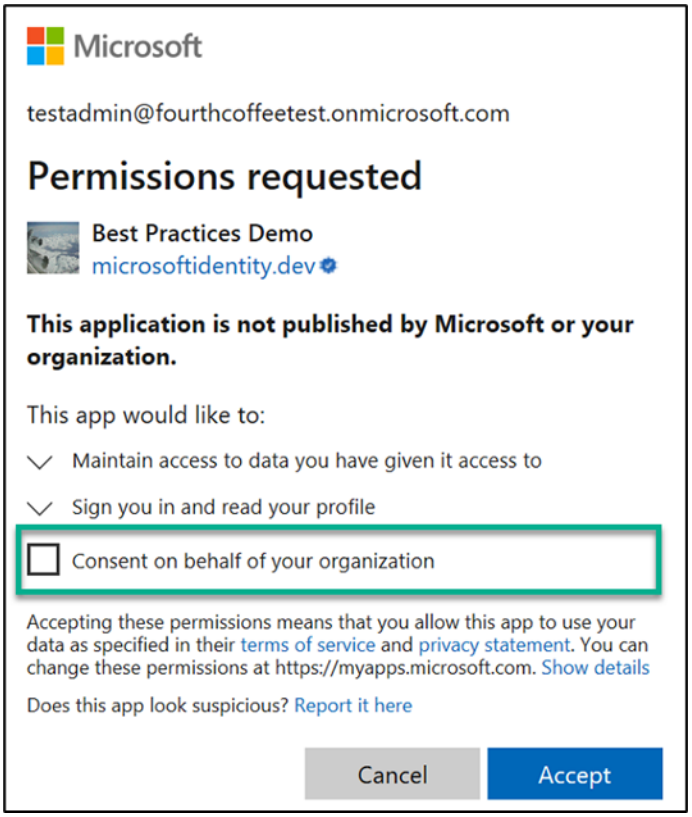
- Authentication
  - AAD, Teams SSO
- Platform/Hosting security
  - Microsoft Azure provides a wide array of security tools and capabilities

There are a few outside interactions when hosting Meeting Insights in the customer's Azure:

- Speech-to-text using Microsoft cognitive services over a secure channel.
- High-level statistics of Meeting Insights application usage without any personal information (e.g., number of meetings using Meeting Insights, number of action items); this will be presented using Microsoft Power BI and will be shared with the customer's admin/productivity officer.

Consenting on Behalf of your Organization

After clicking the last link, log in as a Global Admin user and if you are presented with another consent dialog (shown in the following figure), check the **Consent on behalf of your organization** checkbox before approving.



- If this step is skipped, every user will see this consent request when logging in for the first time.
- If the prompt is displayed without the checkbox, the authenticating user does not have 'Global Admin' or 'Application Administrator' permission.

Installation Additions

The following supplementary applications are provided by AudioCodes:

- Meeting Insights Outlook add-on provided by AudioCodes to make the scheduling of recorded meetings easier.
- Meeting Insights Teams add-on provided by AudioCodes for accessing the portal from within the Teams client.

3 Required Permissions

The permissions described next are required for successful operations with the Meeting Insights application. The application must have permissions to join users' meetings, enable Microsoft recording notifications, access users information in Azure Active Directory, and to authenticate users through Single Sign On when accessing the app from Microsoft Teams application or reroute users to Microsoft Azure Active Directory authentication when accessed from the Chrome browser.

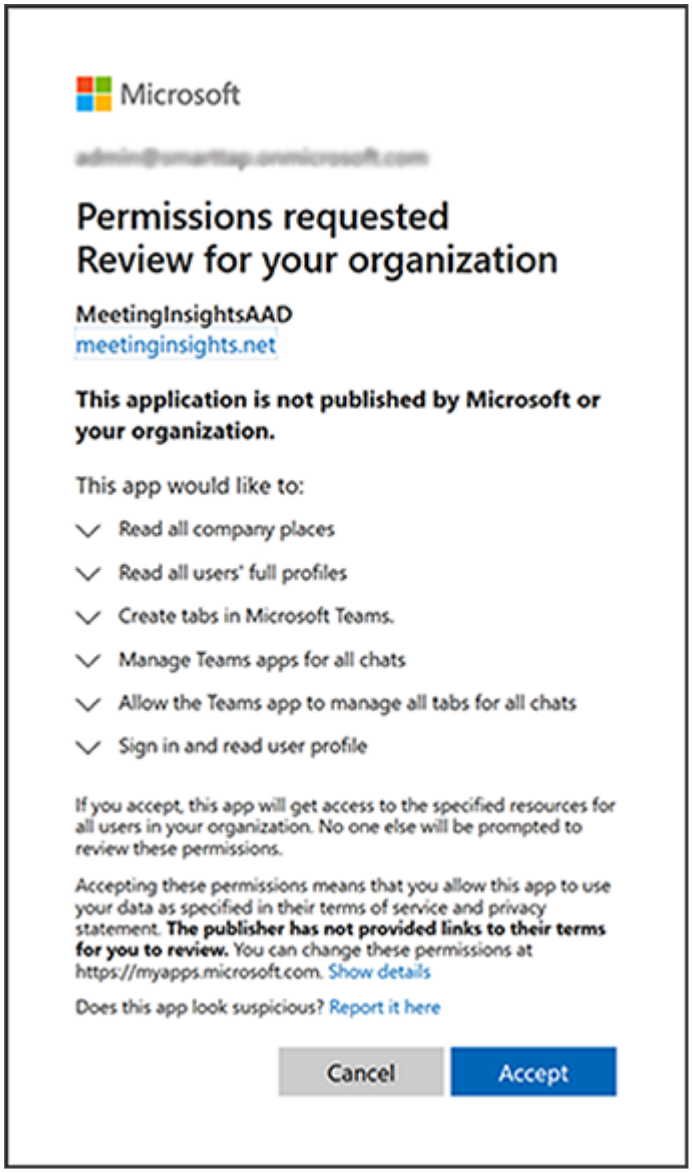
Consent links to activate the permissions will be provided.

Permissions to Read Azure Active Directory

Provide Meeting Insights with permissions to read Azure Active Directory to match the users with meeting participant IDs.

1. Required app permissions:
   - Place.Read.All - Read company places (conference rooms and rooms lists)
   - User.Read.All - Read all users' full profiles (name, email)
   - TeamsAppInstallation.ReadWriteForChat.All - Manage Teams apps for all chats
   - TeamsTab.Create - Allow the app to create tabs in Microsoft Teams
   - TeamsTab.ReadWriteForChat.All - Allow the app to manage all tabs for all chats
   - MeetingInsights.ReadWrite - Read/Write access to Meeting Insights (utilizes Azure authentication for Meeting Insights' internal APIs)
2. Required Role to run the consent link: Your Office 365 Global Administrator
3. Consent link example:

   https://login.microsoftonline.com/common/adminconsent?
   client_id=YYYY
   &state=12345
   &redirect_uri=https://login.microsoftonline.com/common/oauth2/nativeclient
   &scope=https://graph.microsoft.com/.default
   where YYYY is Meeting Insights' unique ID.



4. Click **Accept** to accept the permissions request.

Permissions to Join Meetings

Provide Meeting Insights with permissions to join meetings in your Teams' tenant.

1. Required app permissions:
   - Calls.AccessMedia.All - Access media streams in a call as an app
   - Calls.JoinGroupCall.All - Join group calls and meetings as an app
   - OnlineMeetings.Read.All - Read online meeting details
   - Chat.ReadBasic.All - Read all meeting chats in order to join meetings add-hoc and read the meeting details
2. Required Role to run the consent link: Your Office 365 Global Administrator
3. Consent link example:

4. https://login.microsoftonline.com/common/adminconsent?

   client_id=XXXX
   &state=12345
   &redirect_uri=https://login.microsoftonline.com/common/oauth2/nativeclient
   &scope=https://graph.microsoft.com/.default
   where XXXX is Meeting Insights' unique ID.

5. Click **Accept** to accept the permissions request (if prompted, check the check box to apply permissions to the entire organization).

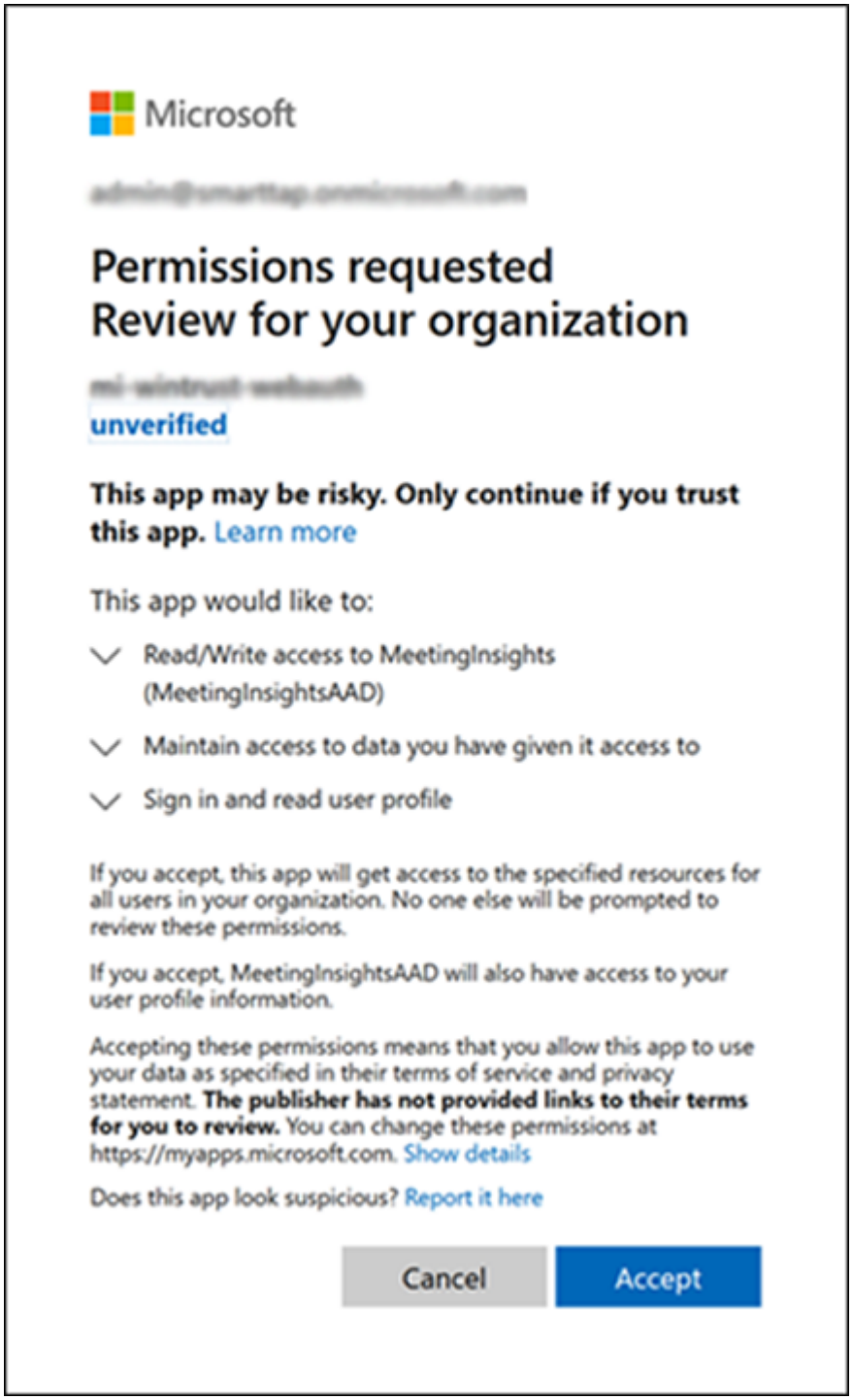
Permissions to Authenticate Users

Provide Meeting Insights with permissions to authenticate users utilizing Microsoft Open ID Connect (Oauth 2) authentication.

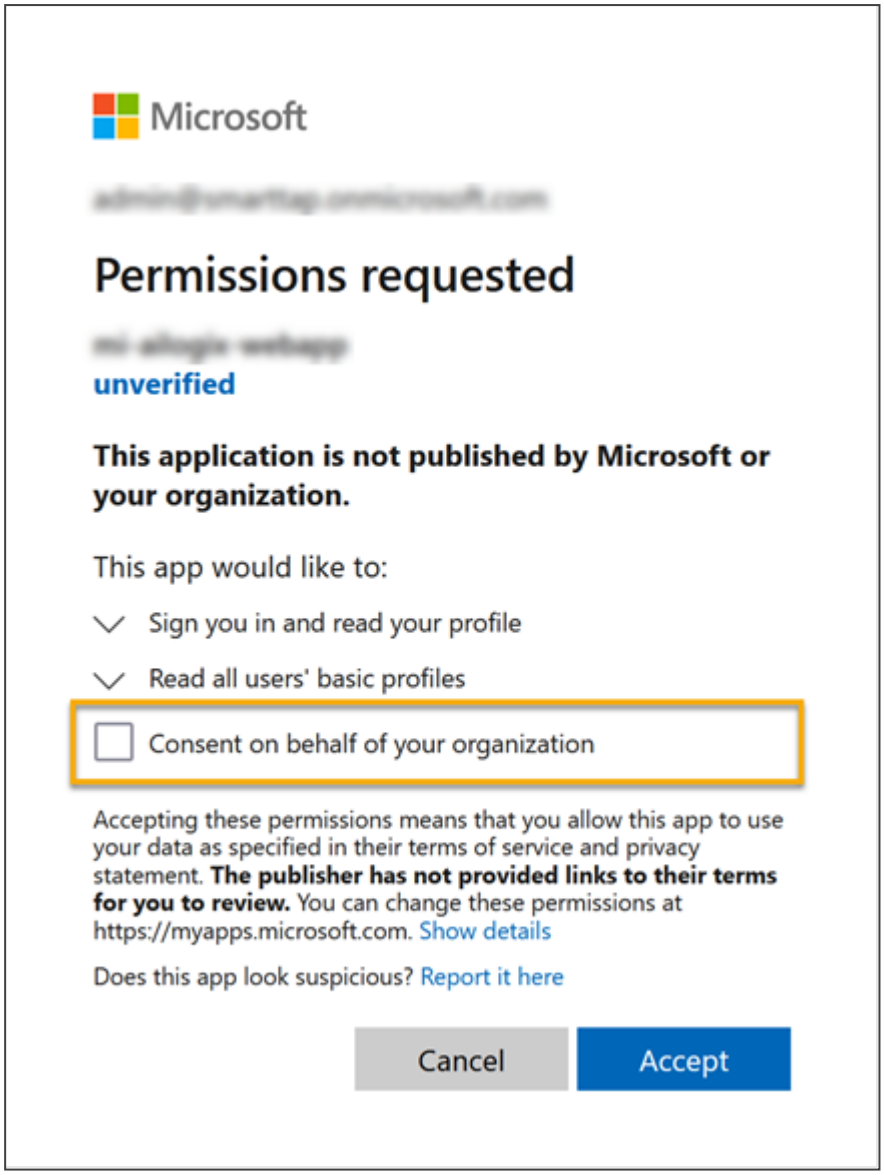
1. Required app permissions:
   - User.Read - Sign in and read user profile (delegation)
   - MS.Graph.email - View users' email address (delegation)
   - MS.Graph.offline_access - Maintain access to data you have given it access to (delegation)
   - MS.Graph.openid - Sign users in (delegation)
   - MS.Graph.profile - View users' basic profile (delegation)
   - MeetingInsights.ReadWrite - Read/Write access to Meeting Insights (delegation)
2. Required Role to run the consent link: Your Office 365 Global Administrator
3. Consent link example:

   https://login.microsoftonline.com/common/adminconsent?client_id=ZZZZ&state=12345&scope=https://graph.microsoft.com/.default

   where ZZZZ and XXXX are Meeting Insights' unique IDs.



4. Click **Accept** to accept the permissions request.
5. Log in as global Admin user; you'll be prompted again with this prompt:



6. Select the **Consent on behalf of your organization** option, and then click **Accept**.

Permissions to Enable Microsoft Recording Notifications

Provide Meeting Insights with permissions to enable Microsoft recording notifications during meetings in your Teams' tenant.

1. Required app permissions:
   - Calls.AccessMedia.All - Access media streams in a call as an app
   - Calls.JoinGroupCall.All - Join group calls and meetings as an app
2. Required Role to run the consent link: Your Office 365 Global Administrator
3. Consent link example:
4. https://login.microsoftonline.com/common/adminconsent?

   client_id=XXXX

&state=12345
&redirect_uri=https://login.microsoftonline.com/common/oauth2/nativeclient
&scope=https://graph.microsoft.com/.default
where XXXX is Meeting Insights' unique ID.

5. Click **Accept** to accept the permissions request (if prompted, check the check-box to apply permissions to the entire organization).

4 Onboarding Users

Users are automatically created in Meeting Insights when

- they access Meeting Insights or when
- they're invited to a meeting

When a user is automatically created in Meeting Insights, they're created with a basic profile allowing them access to the application interface. Customers can have an unlimited number of basic user profiles depending on their Purchase Order.

Users are managed in Microsoft's Azure Active Directory; access to Meeting Insights is controlled from Microsoft Azure Active Directory.

The network administrator can then assign profiles to users who will then be able to record their meetings with their Meeting Insights profile.

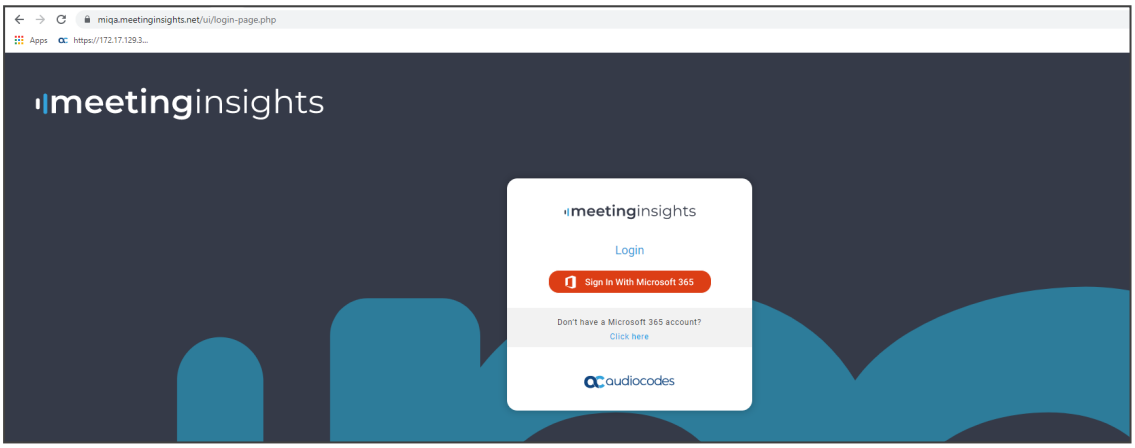
The number of profiles a customer will have will match the number of user licenses they purchased, for example, 120 purchased user licenses = 120 Meeting Insights profiles.

5 Signing in

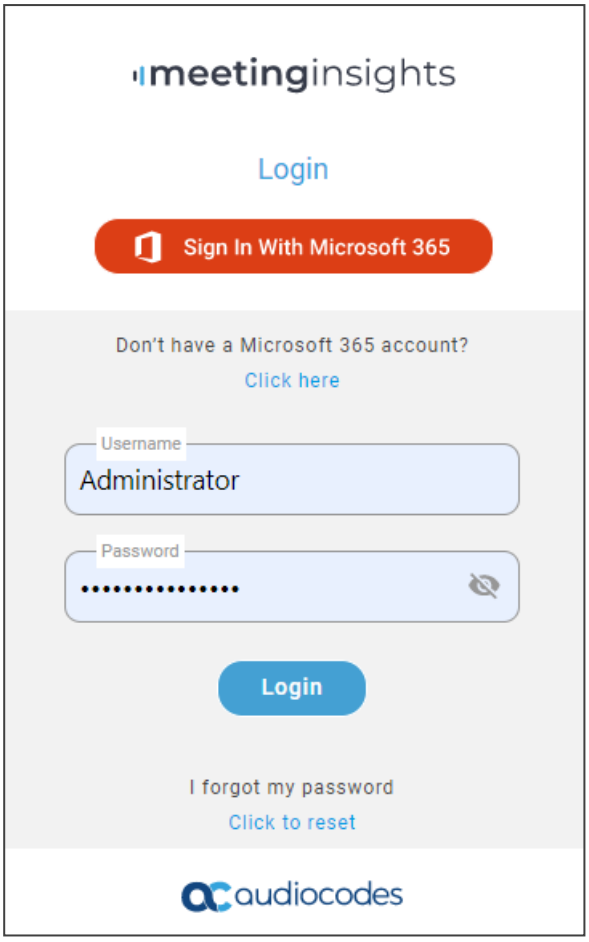
Meeting Insights allows you to sign in as Administrator. After signing in as Administrator, you can perform management tasks such as assigning (or removing) user permissions, which regular users cannot perform.

➢ To sign in as Administrator:

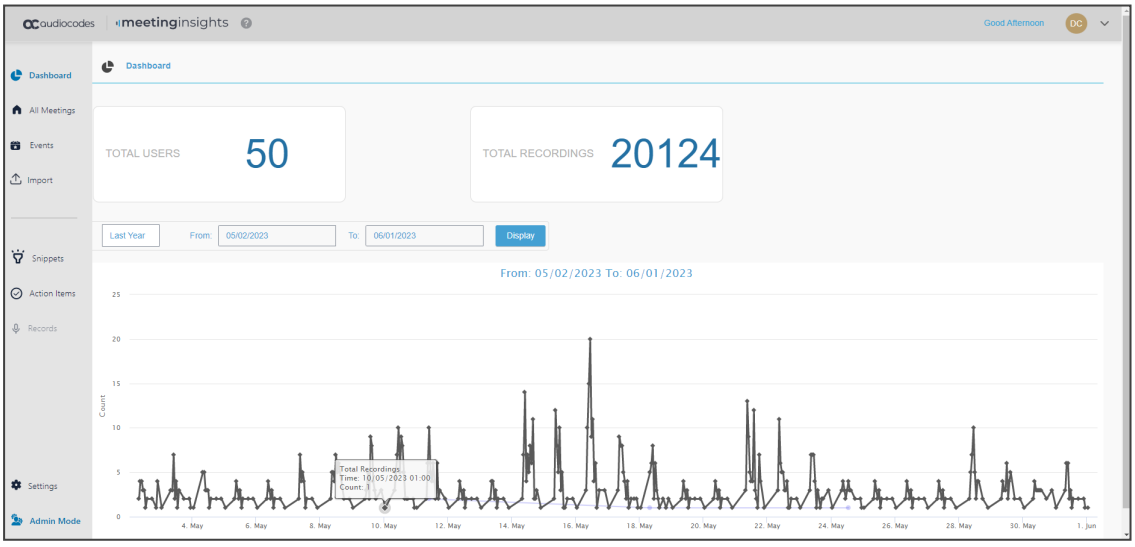
1. Copy the URL provided by AudioCodes and paste it into your browser's address field.



2. In the Login screen displayed, click the option **Click here** (since you're signing in as an Administrator).

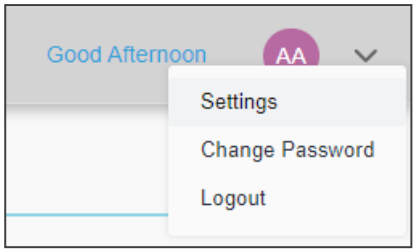


3. In the expanded Login screen, enter the Username and Password (the defaults are **Administrator** and **Administrator1!** respectively) and then click **Login**.

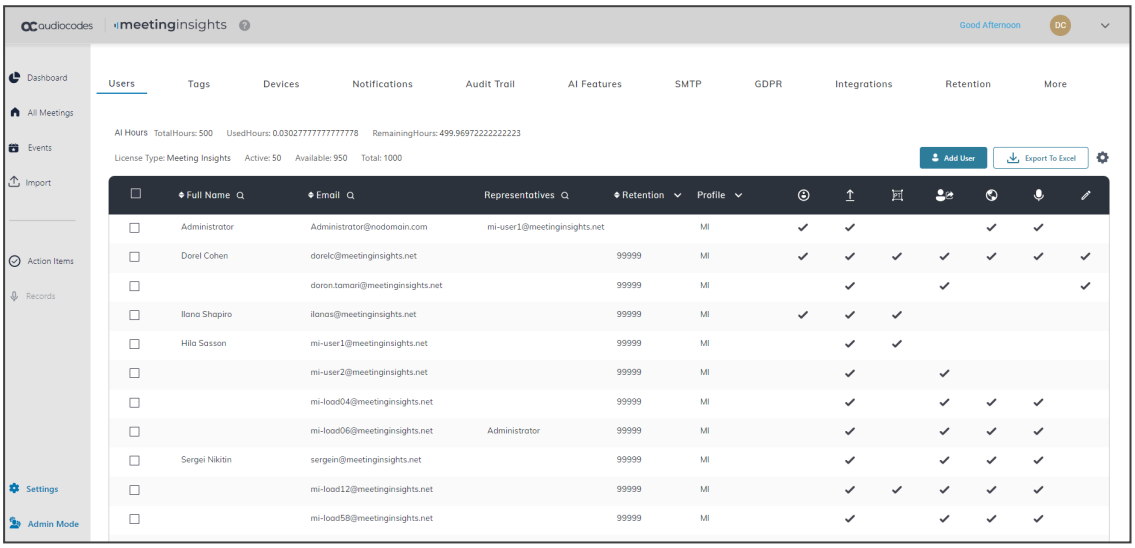


4. Click the **Admin mode** link in the lowermost left corner of the page to switch to administrative view (if you're a user with administrative permissions - not the default administrator - who logged into the system using Microsoft 365 credentials).

5. In the uppermost right corner of the page, click the drop-down arrow and select the **Settings** option.

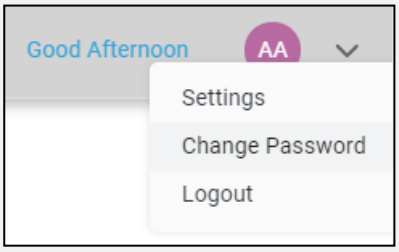


↓↓↓



6. You've successfully signed in as Administrator. You can now perform management actions. To switch back to a user view, click the **Admin mode** icon again.

After signing in for the first time, it's typically recommended to change your password but currently the **Change Password** option (accessed from the drop-down arrow located in the uppermost right corner of the page) only applies to the local user | admin who is an Azure user.



6 Configuring Settings

After signing in to Meeting Insights as Administrator, the application allows you to perform management actions such as configuring settings which regular users cannot do.

Here are the settings you can configure:

- Users
- Tags
- Devices
- Notifications
- Audit Trail
- AI Features
- SMTP
- GDPR
- Integrations
- Retention
- More

In addition to configuring the preceding settings, the application allows Administrators to also perform the following management actions:

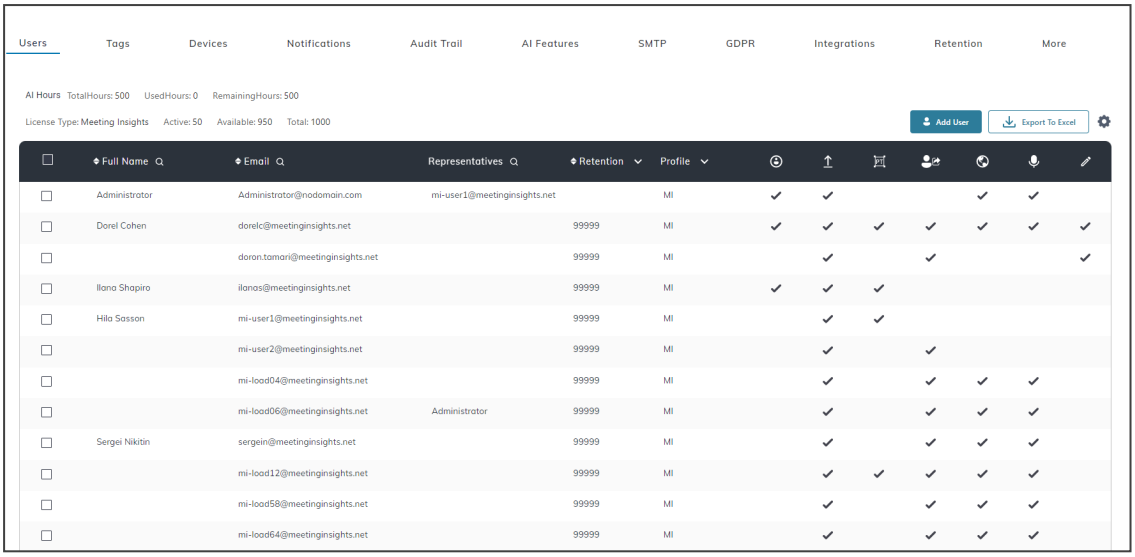
- Integrate data with Power BI service
- Install Meeting Insights Teams add-in
- Give Meeting Insights permissions
- View user statistics

Users

The administrator can perform management actions per Meeting Insights user, in the Settings page under the **Users** tab.

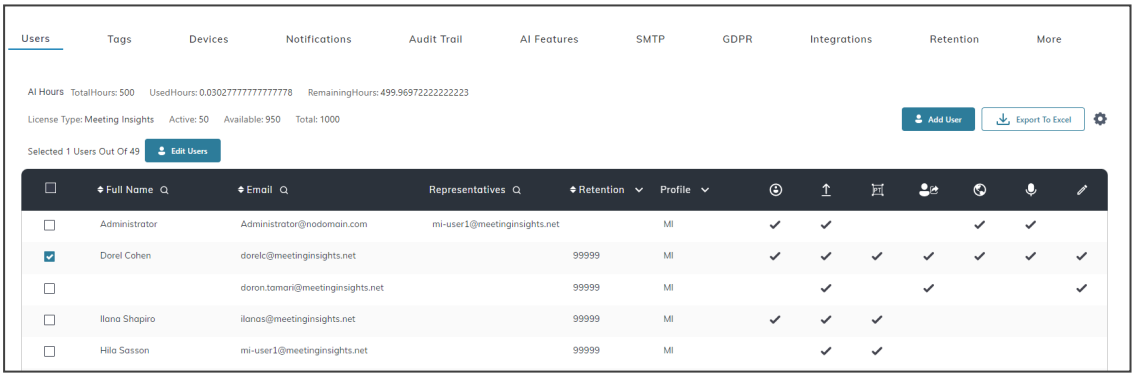
➢ **To edit a user:**

1. Click the **Users** tab.

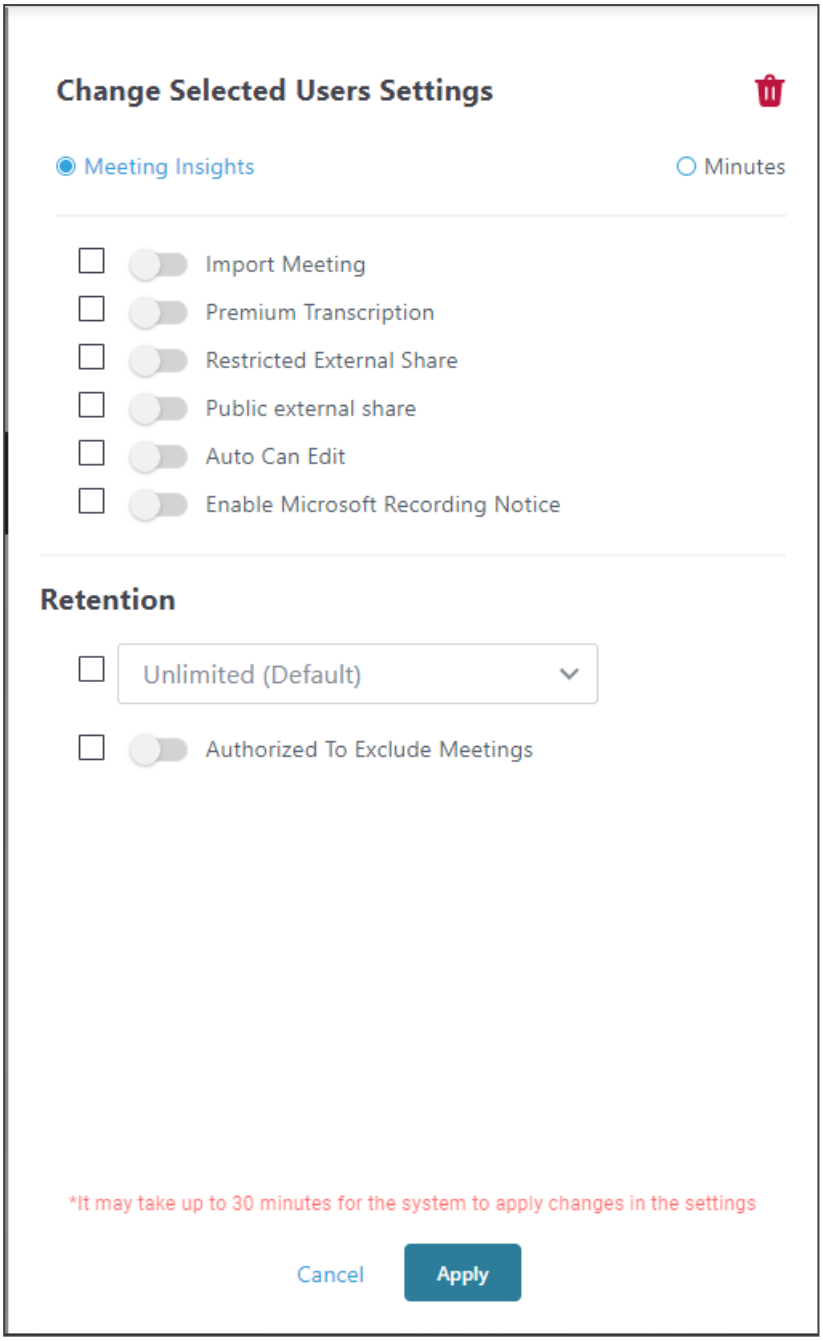


2. Select the user/s whose settings you want to edit.

To edit the settings of a *single specific* user, click that user in the list; that user's settings will be displayed, *including Representatives* settings (see also here for more info). The instructions below describe editing the settings of selected user/s. *Representatives* settings are not displayed.



3. Click the **Edit Users** button.



The Retention values configured here will override the *global* defaults. See here for more information.

4. Use the table below as reference.

Setting	Description
Meeting Insights | Minutes	'Meeting Insights' option, in contrast to the 'Minutes' option described next. To switch to the 'Minutes' option, select **Minutes**.

Setting	Description
	■ Select the **Meeting Insights** option to give full privileges to all functionalities offered by Meeting Insights to this user. ■ Select the **Minutes** option to give limited privileges to limited functionalities to this user. See the *User's Manual* for more information.
Minutes	
Audio	(Applies only to the **Minutes** option) Enable this setting to give the user permission to record audio in meeting recordings that they initiate.
Auto Can Edit	People whose 'Auto Can Edit' setting is activated get the 'Can Edit' permission automatically prior to the meeting, i.e., any meeting to which they are invited. They can view, edit, etc. (just like delegate). It's the same role that's available in the live panel (Can View / Can Edit).
Retention	See here for more information.
Meeting Insights	
Import Meeting	Enable or disable this setting to give or deny the user permission ('On' or 'Off') to import meeting recordings.
Premium Transcription	Enable this setting to give the user permission to transcribe meeting recordings. The setting is applicable only if the user's User Profile Type is 'Meeting Insights'.
Restricted External Share	Switch this setting on to allow the user to share meeting recordings with external parties who participated in the meetings.
Public External Share	Switch this setting on to allow the user to share meeting recordings with users from outside the organization regardless of whether the external parties participated in

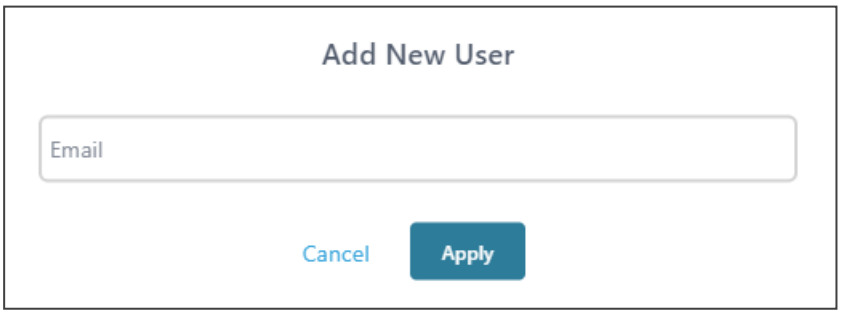
Setting	Description
	the meetings or not.
Auto Can Edit	People whose 'Auto Can Edit' setting is activated get the 'Can Edit' permission automatically prior to the meeting, i.e., any meeting to which they are invited. They can view, edit, etc. (just like delegate). It's the same role that's available in the live panel (Can View / Can Edit).
Enable Microsoft Recording Notice	If this option is selected, the user's meeting recordings are recorded only when the user (the Owner) is present at the meeting. When the user leaves the meeting, an audio message is played to all participants to notify that recording has stopped. When the user join (or rejoins) the meeting, an audio message is played to all participants to notify that recording has started.
Retention	See here for more information.

Adding a User Manually

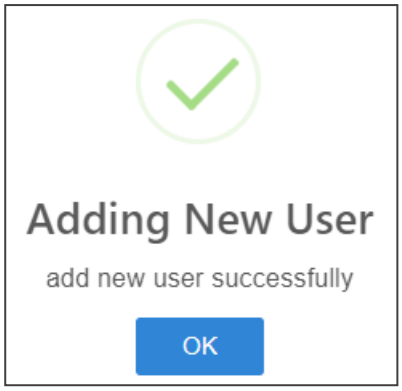
The network administrator can optionally manually add users to Meeting Insights.

➢ **To add a user manually:**

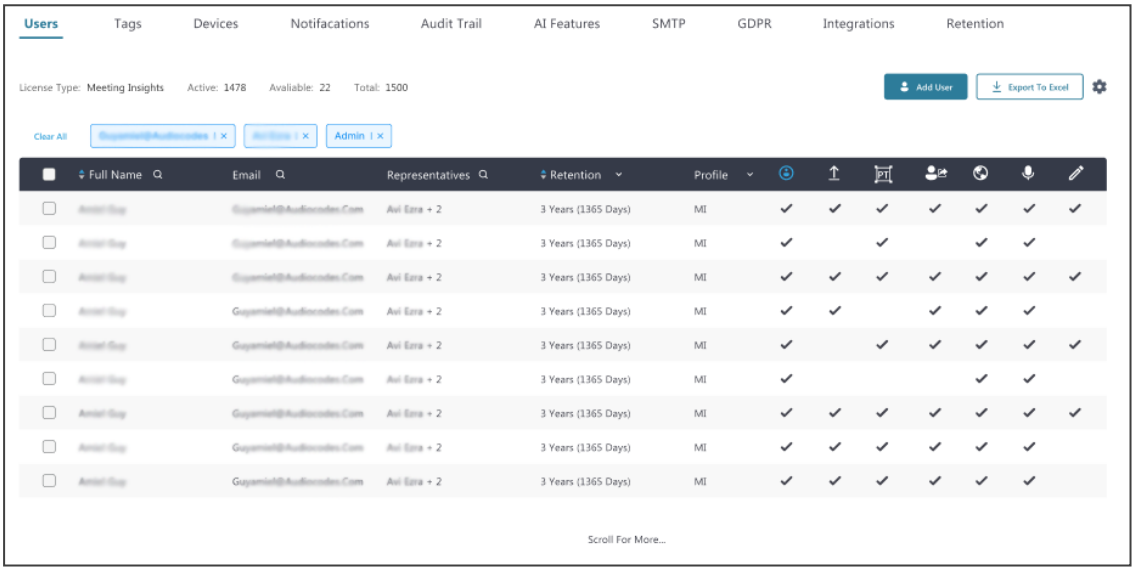
1. In the Users page, click the **Add User** button.



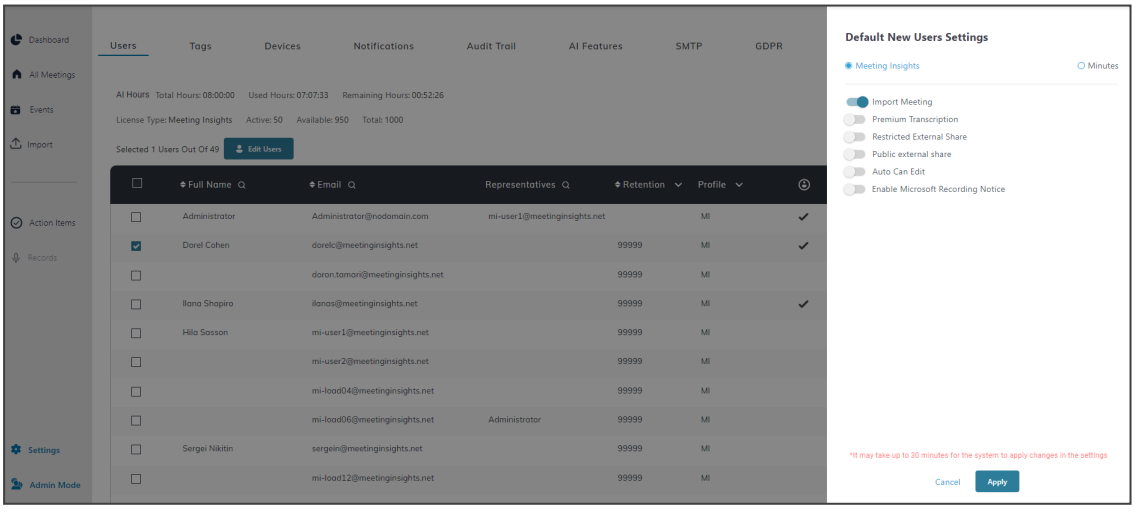
2. Enter a valid email address and click **Apply**.



3. View the newly added user listed in the Users page.

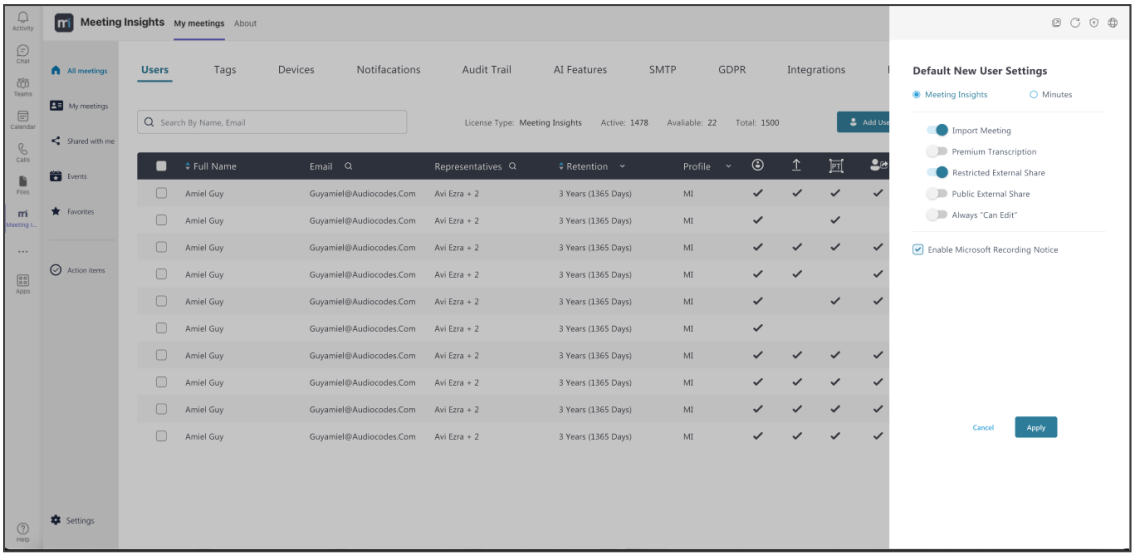


4. Select the user and then click the cog icon ⚙

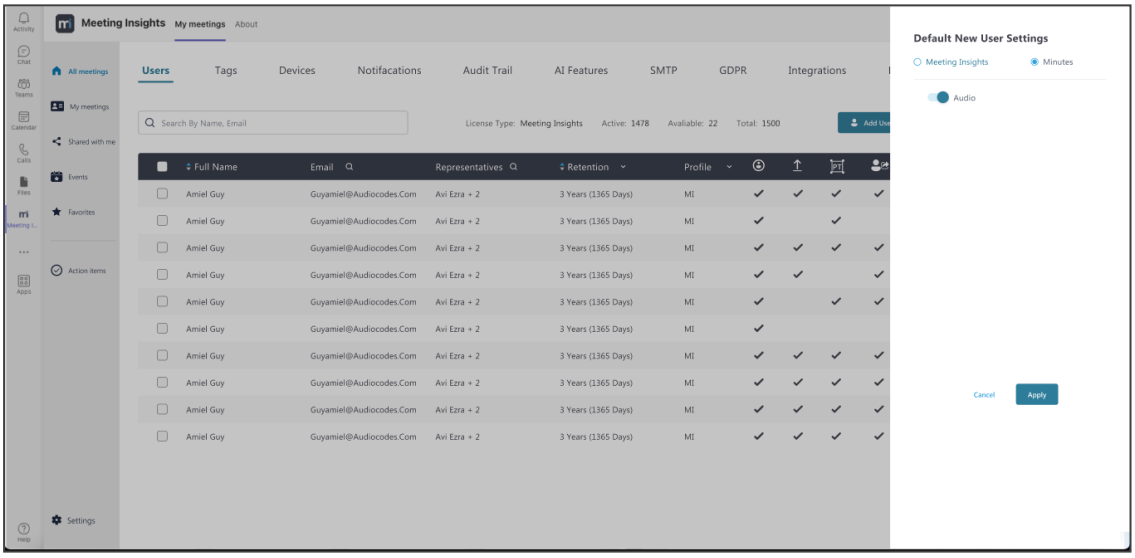


5. In the 'Default New User Settings' pane shown in the preceding figure:

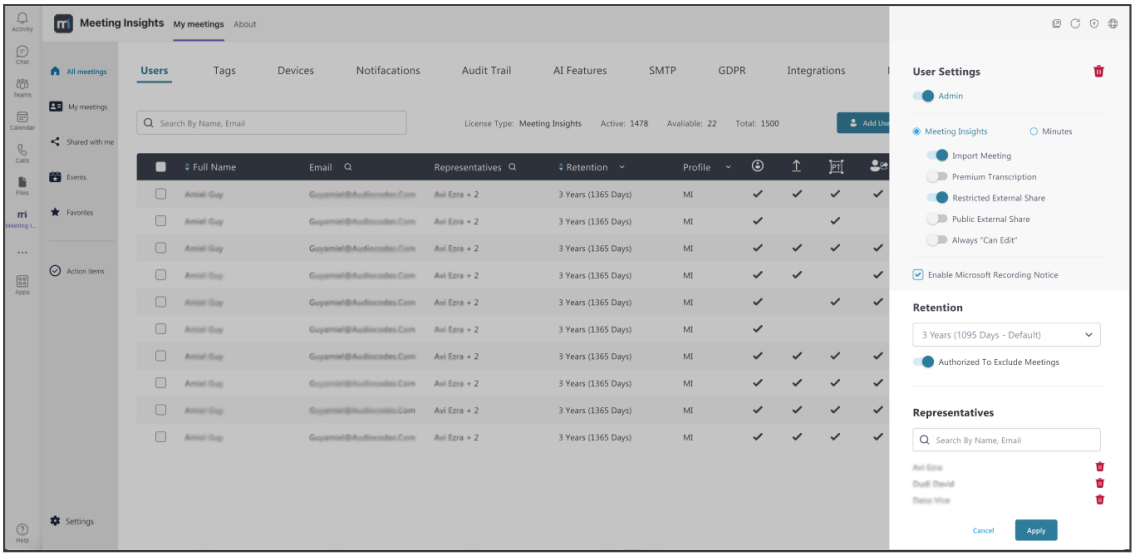
   - Leave the **Meeting Insights** option selected (default); when someone is invited to a meeting, they'll automatically become a Meeting Insights user even if they don't have a license; they'll be able to do everything that a licensed Meeting Insights user can do.



- Optionally, select **Minutes** as shown in the next figure; when someone is invited to a meeting, they'll be limited to meeting minutes.



6. Optionally, configure **Admin** User Settings.



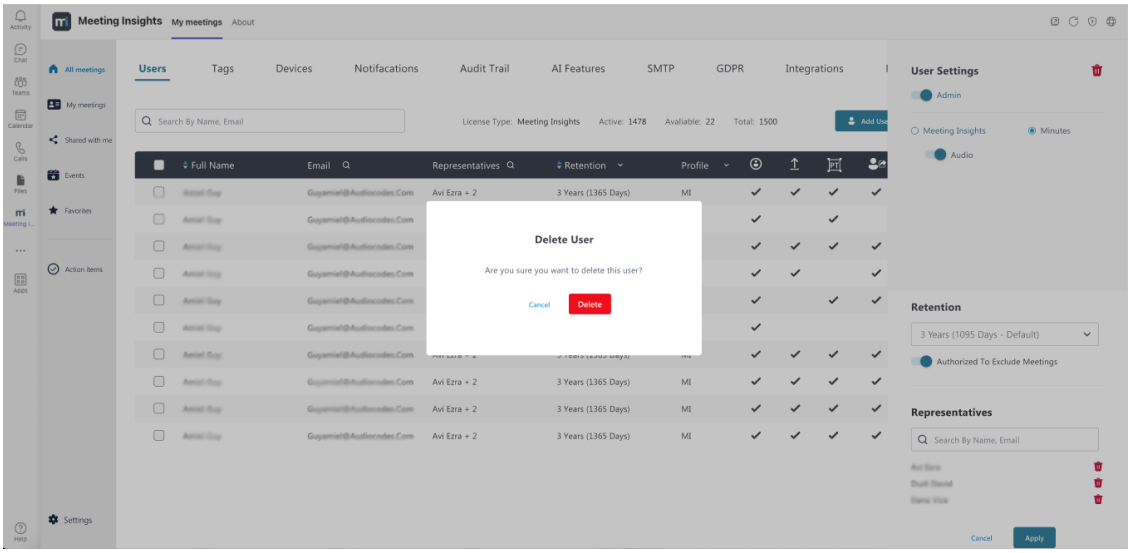
Deleting a User Manually

The network administrator can optionally manually delete a user from the Users page.

> The page features a Search field enabling the admin to quickly locate the user to delete.

➢ To delete a user:

1. Select the user to delete (click the check box next to the user's name) and then click the 🗑 icon.



2. Click **Delete**.

> A deleted user will be added to Meeting Insights automatically upon access.

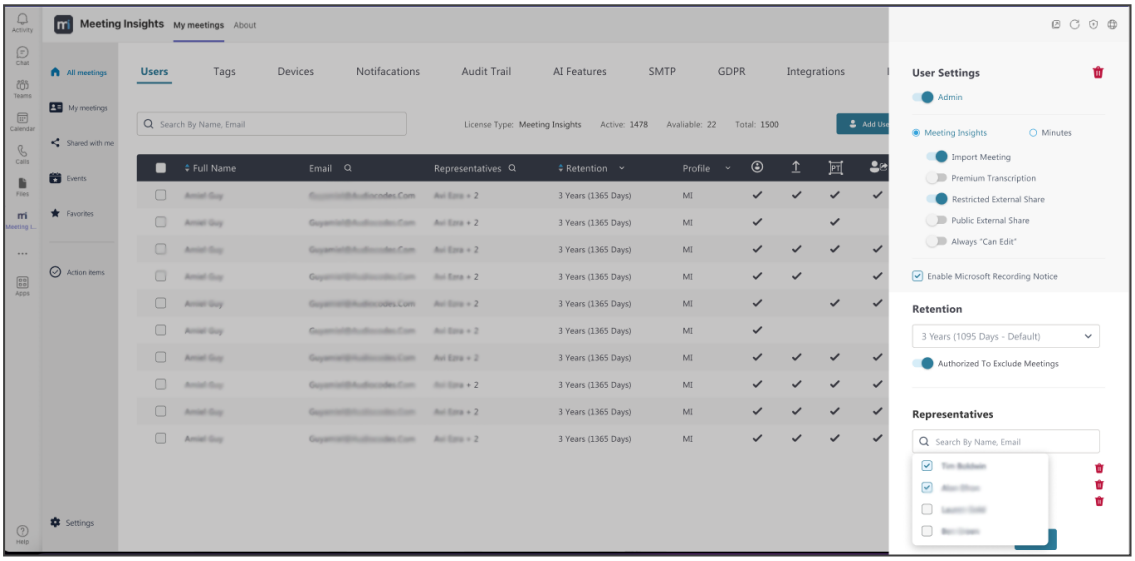
Allocating a Representative

The network administrator can allocate a user representative or remove a representative.

> The feature facilitates effective management. If (for example) an employee gets married and changes their surname, they'll be able to access meetings in which they participated *under their premarital name* via their representative.

➢ To allocate a representative:

1. In the Users page, select the user to whom to allocate a representative.



2. Under 'Representatives' as shown in the preceding figure lowermost right, select the representative to allocate.
3. View in the Users page the representative allocated to the user, under the Representatives column.

> More than one representative can be allocated.

Assigning a Default Profile to New Users

View in the preceding figure under the **Users** tab an option to select a default profile to assign to new users that are automatically added to Meeting Insights.

New users are automatically added when they interact with Meeting Insights (through the user interface) or participate in a meeting with Mia. The basic profile is **Minutes** (with no audio), shown in the preceding figure under section 'Default settings for new users'.

> In corporate Meeting Insights, the default profile is **MI**.

Administrator Role

➢ **To assign administrator role:**

- Select the user (click the check box next to the user's name) and then slide the on/off switch to on in the 'Admin' column.

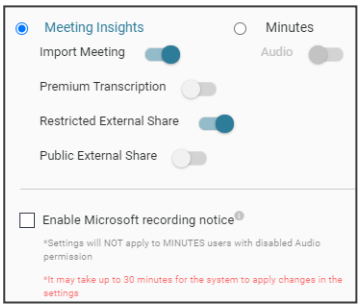
➢ **To disable administrator role:**

- Select the user (click the check box next to the user's name) and then slide the on/off switch to off in the 'Admin' column.

Defining Features per User

➢ **To define features per user:**

1. In the same row as the listed user on whom you want to define features, click the Actions button.



2. Configure features per user using the following as reference:

   - Meeting Insights = Unlimited profile (Advanced User), can record audio and desktop sharing of the user's meetings, create and edit recaps including voice commands, upload recordings, edit and share recordings, etc...

     Profile options:

     - Import Meeting = Allows the user to upload to Meeting Insights a meeting recording that was created using a third-party recording program.
     - Premium Transcription = Allows the user to enable Meeting Insights to transcribe a meeting recording using a professional translator (human). (Otherwise, basic transcription can be done using a third-party speech-to-text service provider.)
     - Restricted External Share = Allows the user to share meeting recordings with users from outside of the organization who joined the meeting.
     - Public External Share = Allows the user to share meeting recordings with users from outside of the organization (regardless of whether they joined the meeting).

- Enable Microsoft recording notice: The user's meeting recordings are recorded only when the user is present at the meeting -- when the user leaves the meeting, recording is stopped; when the user re-joins the meeting, recording resumes.

- Minutes = Limited account profile (Basic User). Can record audio of the user's meetings, create and edit recaps, edit and share the recaps and recordings.

  Profile options:

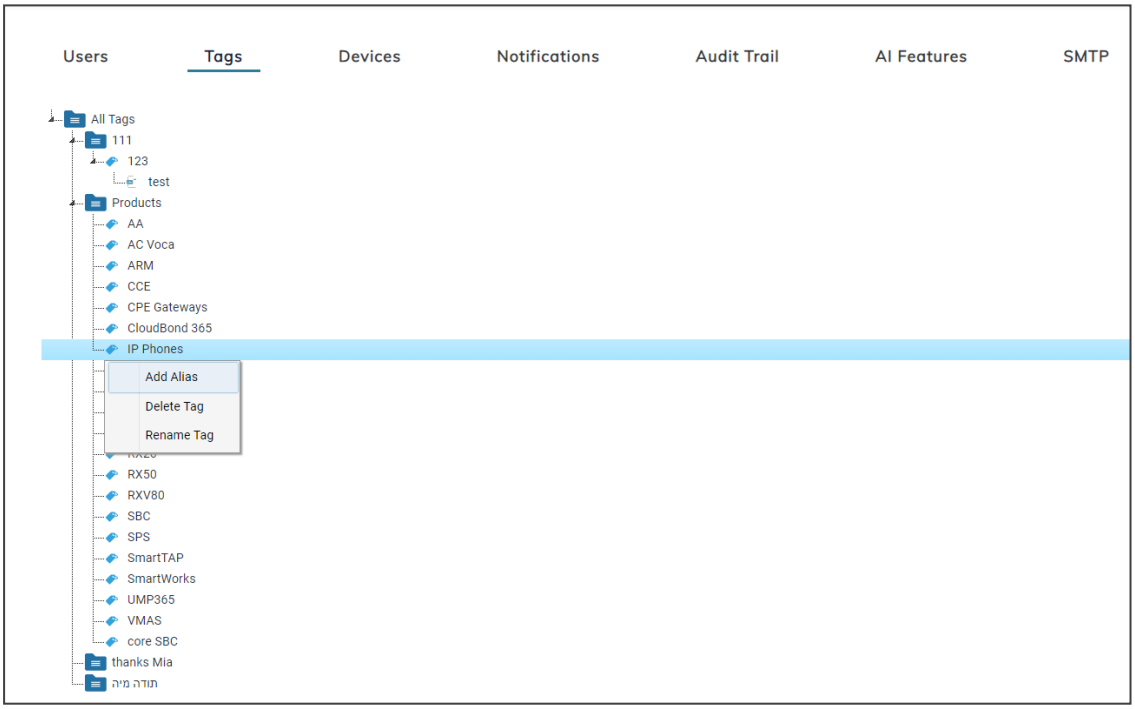
  - Audio = Allows the user under Minutes profile to record the audio of meeting recordings. This is applicable only to users with a 'Minutes' account profile.

Tags

Administrators can define default tags that users can use in their meeting recording as 'bookmarks' to easily and quickly locate a 'place' in the recording later.

➢ To define tags:

1. Open the Tags screen.



2. Right-click **All Tags** and from the popup menu, select **Add Tag** (the only option available). This tag is the highest categorical level.

3. Right-click the tag and from the popup menu, select **Add Alias**. Two categorical levels of 'alias' can be added under the tag. These categorical levels facilitate organizing your corporate meetings around subject matter (for example, around products).

4. Optionally select the **Delete Tag** or **Rename Tag** options to facilitate building meeting junctures.

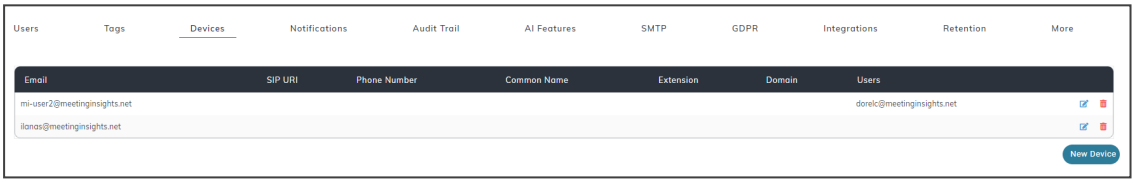
Devices

Network administrators must define a conference room device for Meeting Insights to identify speakers participating physically in the room with the device, else their voice will be attributed to the room.

Administrators must define a device if for example the phone in a meeting room is a Common Area Phone (CAP), unassociated with any specific user, and the attendees in the meeting want to perform recording management. If a call comes in on the phone and the device is unassociated with a user, recording management with Meeting Insights will not be possible. Defining an email address is sufficient to associate the phone with a specific user to make recording management possible.

➢ To define a device:

1. Open the Devices screen.



2. Click the **New Device** button.

3. In the Device Details screen, configure the settings using the table as reference.

Setting	Description
Email	[Mandatory] If a call comes in on a CAP located in a conference room around which a number of attendees are sitting and the device is unassociated with any specific user, recording management with Meeting Insights will not be possible. Defining an email address is sufficient to associate the phone with a specific user to make recording management possible. Note that Meeting Insights applies speaker detection on the device by using the email addresses of all attendees in the meeting, i.e., the invited users voiceprint, if available, is used for device speaker detection.
Phone Number	Not mandatory.
SIP URI	Not mandatory.

Setting	Description
Domain	Not mandatory.
Common Name	Not mandatory.
Extension	Not mandatory.
Users	Not mandatory.

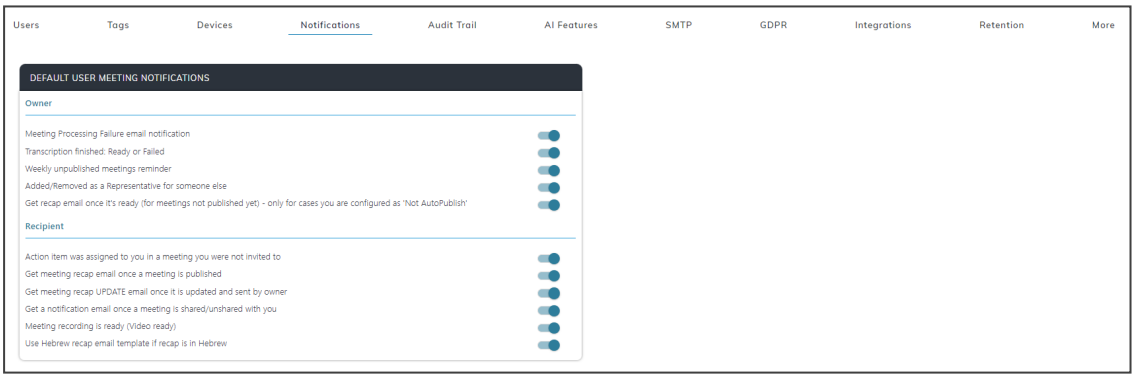
4. Click **Save Device**.

Notifications

The Notifications page allows administrators to configure all settings related to notifications sent from Meeting Insights to users. The user can override the configuration in the user settings.

➢ **To configure notifications settings:**

1. Click the **Notifications** tab.



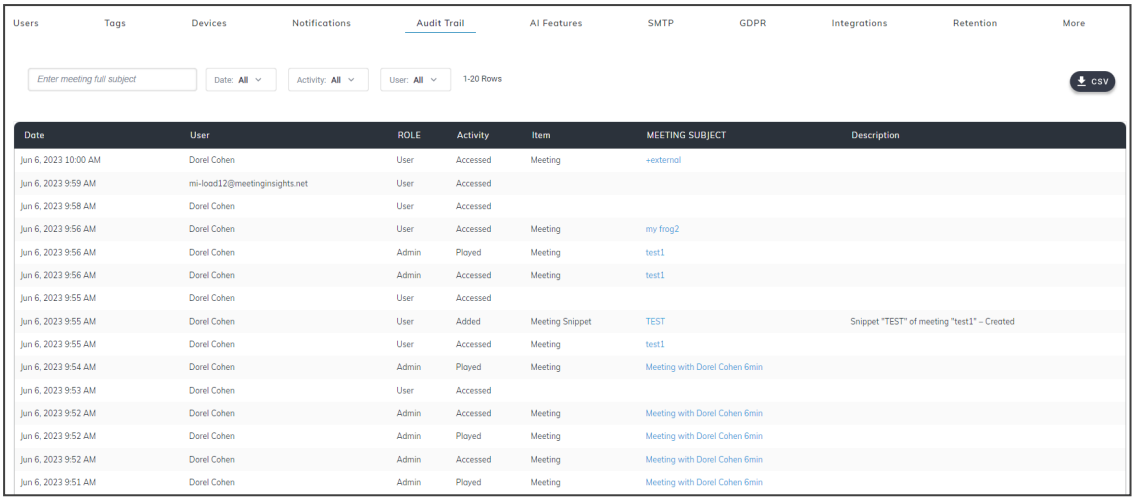
2. Configure the settings using the table below as reference.

Setting	Description
Owner	
Meeting Processing Failure email notification	Switch on | off for an email notification to be sent | not sent to users indicating that meeting processing failed.
Transcription finished: Ready or Failed	Switch on | off for a notification to be sent | not sent to users indicating that the transcription is finished and that its status is Ready | Failed.
Weekly unpublished meetings	Switch on | off for an email notification to be sent |

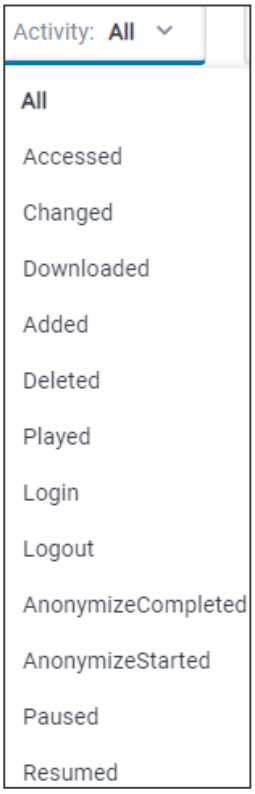
Setting	Description
reminder	not sent to users every week, reminding them about their unpublished meetings.
Added/Removed as a Representative for someone else	Switch on | off for a notification to be sent | not sent to users indicating that they've been added | removed as a representative for someone else.
Get recap email once it's ready (for meetings not published yet) - only for cases you are configured as 'Not AutoPublish'	Switch on | off for an email to be sent | not sent to users indicating that a recap is ready (for unpublished meetings). Applies only if users are configured as 'Not AutoPublish'.
Recipient	
Action item was assigned to you in a meeting you were not invited to	Switch on | off for a notification to be sent | not sent to users after an action item is assigned to them in a meeting to which they were not invited.
Get meeting recap email once a meeting is published	Switch on | off for a notification to be sent | not sent to users indicating the meeting recording has been published.
Get meeting recap UPDATE email once it is updated and sent by owner	Switch on | off for a notification email to be sent | not sent to users indicating that a meeting recap has been updated by the owner.
Get a notification email once a meeting is shared/unshared with you	Switch on | off for a notification email to be sent | not sent to users, indicating a meeting recording has been shared | unshared with them.
Meeting recording is ready (Video ready)	Switch on | off for a notification to be sent | not sent to users indicating that the meeting recording is ready (video ready).
Use Hebrew recap email template if recap is in Hebrew	Switch on | off for a Hebrew recap email template to be used if the recap is in Hebrew.

Audit Trail

Meeting Insights features an audit trail which logs all administrator and user activities performed in the Meeting Insights GUI for future reference.

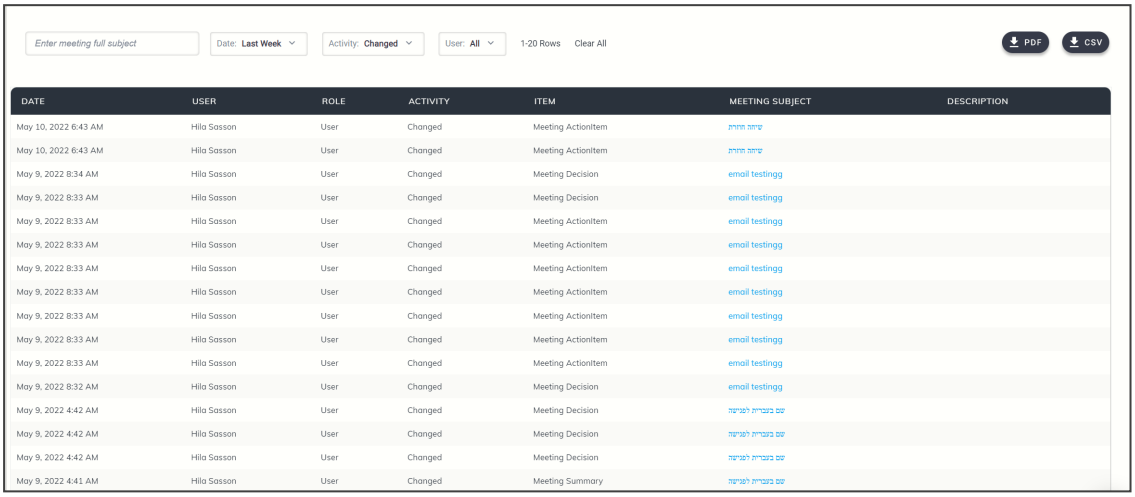


- Use the filters to exclude unwanted information from the audit trail, facilitating more effective management:
  - **Enter meeting full subject**. Only activities associated with meetings whose subject line matches the text entered in the field will be displayed (activities associated with meetings whose subject line does not match the text will be excluded).
  - **Date**. Only activities that took place on this date will be displayed (activities that did not take place on this date will be excluded).
  - **Activity**. From the drop-down, select an activity.



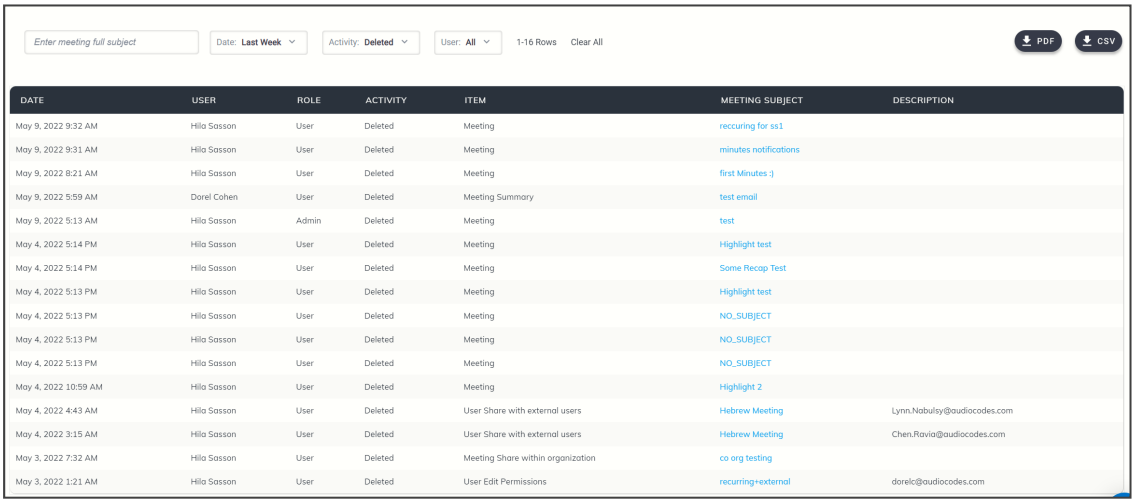
Only items associated with the activity you select will be displayed; items not associated with the activity will not be displayed.

- Items associated with the activity of **Added** | **Deleted** | **Changed** are (for example) **Participant** | **ActionItem** | **Highlight** | **EditPermissions** | **External share**, etc.; these items will be displayed if you select this activity. The following figure exemplifies some items that are displayed after selecting the activity of **Changed** (see column ITEM).



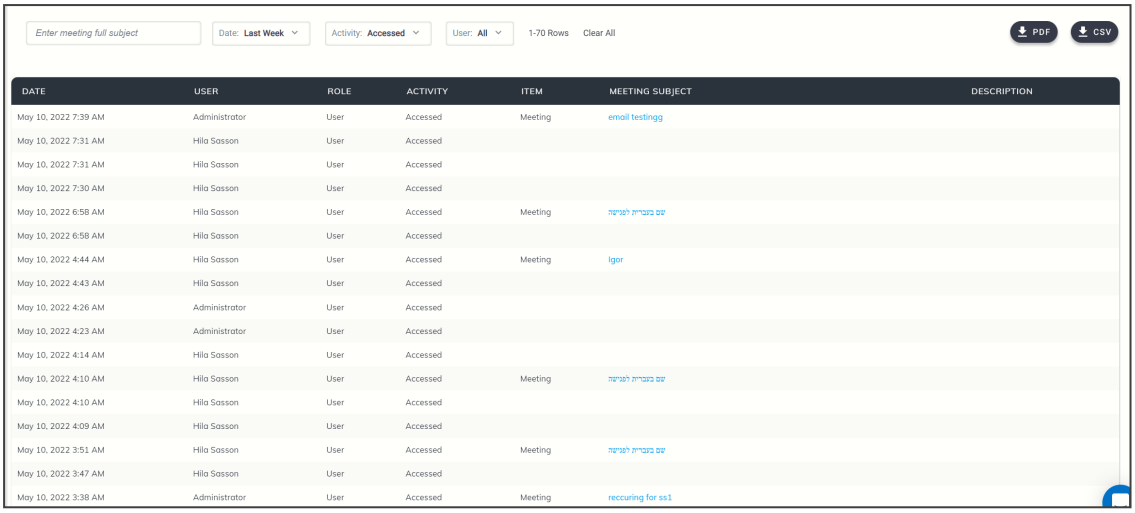
DATE	USER	ROLE	ACTIVITY	ITEM	MEETING SUBJECT	DESCRIPTION
May 10, 2022 6:43 AM	Hila Sasson	User	Changed	Meeting ActionItem	שיחה חדרית	
May 10, 2022 6:43 AM	Hila Sasson	User	Changed	Meeting ActionItem	שיחה חדרית	
May 9, 2022 8:34 AM	Hila Sasson	User	Changed	Meeting Decision	email testingg	
May 9, 2022 8:33 AM	Hila Sasson	User	Changed	Meeting Decision	email testingg	
May 9, 2022 8:33 AM	Hila Sasson	User	Changed	Meeting ActionItem	email testingg	
May 9, 2022 8:33 AM	Hila Sasson	User	Changed	Meeting ActionItem	email testingg	
May 9, 2022 8:33 AM	Hila Sasson	User	Changed	Meeting ActionItem	email testingg	
May 9, 2022 8:33 AM	Hila Sasson	User	Changed	Meeting ActionItem	email testingg	
May 9, 2022 8:33 AM	Hila Sasson	User	Changed	Meeting ActionItem	email testingg	
May 9, 2022 8:33 AM	Hila Sasson	User	Changed	Meeting ActionItem	email testingg	
May 9, 2022 8:33 AM	Hila Sasson	User	Changed	Meeting ActionItem	email testingg	
May 9, 2022 8:32 AM	Hila Sasson	User	Changed	Meeting Decision	email testingg	
May 9, 2022 4:42 AM	Hila Sasson	User	Changed	Meeting Decision	שם בעברית לפגישה	
May 9, 2022 4:42 AM	Hila Sasson	User	Changed	Meeting Decision	שם בעברית לפגישה	
May 9, 2022 4:42 AM	Hila Sasson	User	Changed	Meeting Decision	שם בעברית לפגישה	
May 9, 2022 4:41 AM	Hila Sasson	User	Changed	Meeting Summary	שם בעברית לפגישה	

- The activity of **Deleted** is also associated with the item of **Meeting deletion**, so if you select this activity, this item will also be displayed. The following figure exemplifies some items displayed after selecting the activity of **Deleted** (see column ITEM).



DATE	USER	ROLE	ACTIVITY	ITEM	MEETING SUBJECT	DESCRIPTION
May 9, 2022 9:32 AM	Hila Sasson	User	Deleted	Meeting	reccuring for ss1	
May 9, 2022 9:31 AM	Hila Sasson	User	Deleted	Meeting	minutes notifications	
May 9, 2022 8:21 AM	Hila Sasson	User	Deleted	Meeting	first Minutes :)	
May 9, 2022 5:59 AM	Dorel Cohen	User	Deleted	Meeting Summary	test email	
May 9, 2022 5:13 AM	Hila Sasson	Admin	Deleted	Meeting	test	
May 4, 2022 5:14 PM	Hila Sasson	User	Deleted	Meeting	Highlight test	
May 4, 2022 5:14 PM	Hila Sasson	User	Deleted	Meeting	Some Recap Test	
May 4, 2022 5:13 PM	Hila Sasson	User	Deleted	Meeting	Highlight test	
May 4, 2022 5:13 PM	Hila Sasson	User	Deleted	Meeting	NO_SUBJECT	
May 4, 2022 5:13 PM	Hila Sasson	User	Deleted	Meeting	NO_SUBJECT	
May 4, 2022 5:13 PM	Hila Sasson	User	Deleted	Meeting	NO_SUBJECT	
May 4, 2022 10:59 AM	Hila Sasson	User	Deleted	Meeting	Highlight 2	
May 4, 2022 4:43 AM	Hila Sasson	User	Deleted	User Share with external users	Hebrew Meeting	Lynn.Nabulsy@audiocodes.com
May 4, 2022 3:15 AM	Hila Sasson	User	Deleted	User Share with external users	Hebrew Meeting	Chen.Ravia@audiocodes.com
May 3, 2022 7:32 AM	Hila Sasson	User	Deleted	Meeting Share within organization	co org testing	
May 3, 2022 1:21 AM	Hila Sasson	User	Deleted	User Edit Permissions	recurring+external	dorelc@audiocodes.com

- The activity of **Downloaded** is associated with items such as **Meeting Downloaded** or **Recap downloaded**.
- There are no items associated with the activity of **Accessed**; the activity implies *generic access* to content, or else the item indicates **Meeting** and the subject of the meeting; the following figure exemplifies this (see column ITEM).



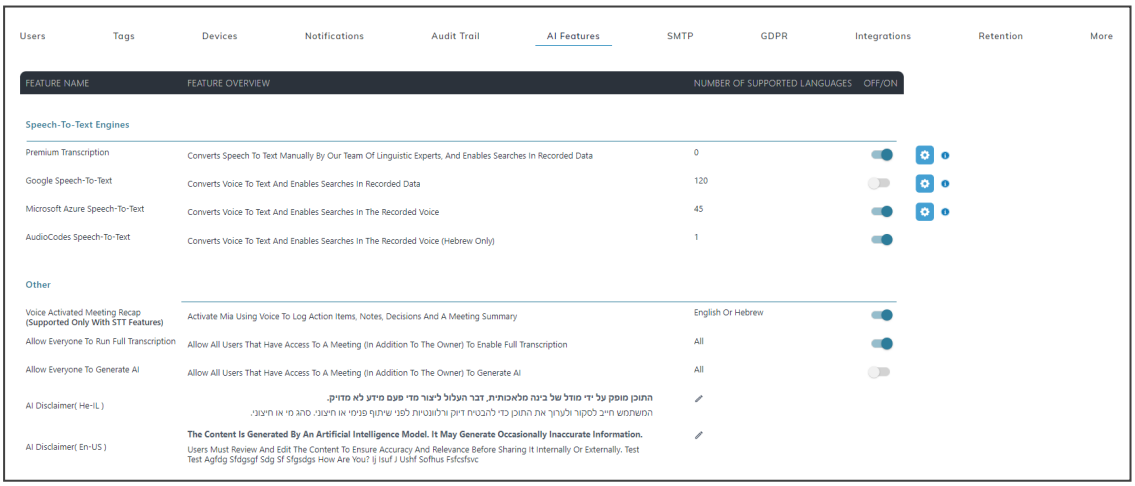
The activities of **Login** and **Log out** apply only to the local Administrator.

- **User**. Click the drop-down arrow and in the 'Search' field displayed, specify a user; only entries related to that user will be displayed.

Use the PDF and / or CSV option to export the audit trail in a format that can easily be shared with others.

AI Features

Meeting Insights supports Artificial Intelligence features such as speech-to-text, allowing users to convert audio recordings of meetings to textual documentation.



Customers should not change the AI Features settings. The settings are used by AudioCodes Professional Services to tune AI Features per STT engine.

SMTP

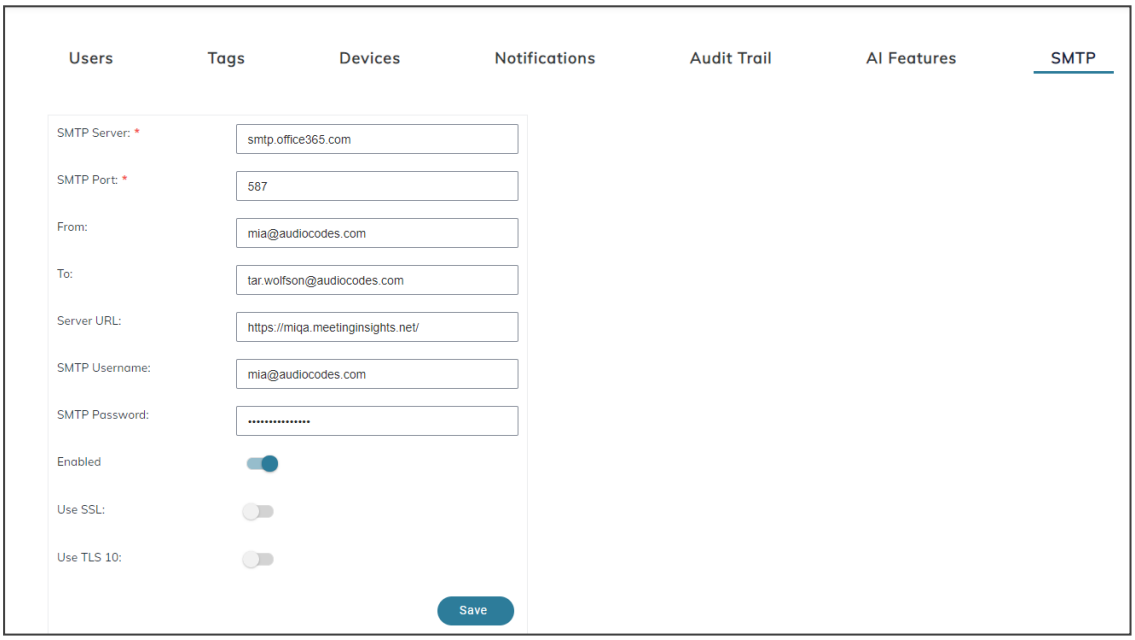
Administrators need to configure Simple Mail Transfer Protocol (SMTP) server properties (Azure email services can be utilized) for sending email notifications from Meeting Insights.

> This feature is only applicable when Meeting Insights is hosted in the customer subscription.

SMTP settings must be configured in order to send email notifications from the system.

➢ To configure SMTP settings:

1. Click the **SMTP** menu.



2. Configure the SMTP settings using the following table as reference.

Table 6-1: SMTP Settings

Setting	Description
SMTP Service	Defines the SMTP server to use
SMTP Port	Defines the port to use for SMTP traffic
From	Defines the sender's email. Each deployment must include a user with a mailbox for the Mia agent, and an email address attached to this user. The email address is used to add Mia to meeting invites.
To	Defines a focal point for failures; i.e. the administrator's email address.

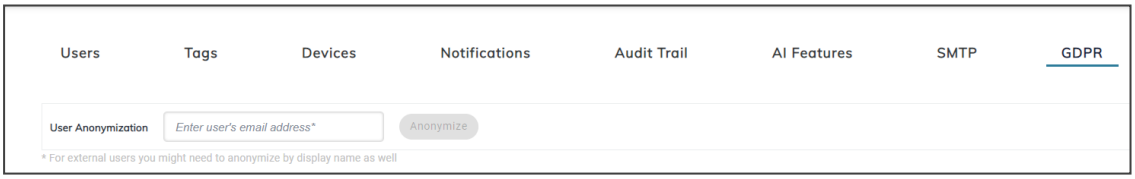
Setting	Description
Server URL	Defines the system's FQDN, used for the links in the emails (link to the meeting, etc.)
SMTP Username	Defines the SMTP server username
SMTP Password	Defines the SMTP server password
Enabled	Enable / Disable email notifications. Default: Enabled
Use SSL	Default: Disabled
Use TLS 10	Default: Disabled

GDPR

Administrators can configure user anonymization via the **GDPR** tab in Meeting Insights. The General Data Protection Regulation regulates data protection and privacy.

➢ To anonymize a user:

1. Click the **GDPR** menu.

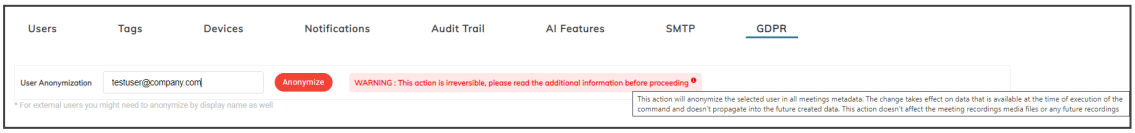


2. In the 'User Anonymization' field, enter the user's email address; if the field is left empty, the **Anonymize** button will remain inactivate; it is only activated after data is inputted.

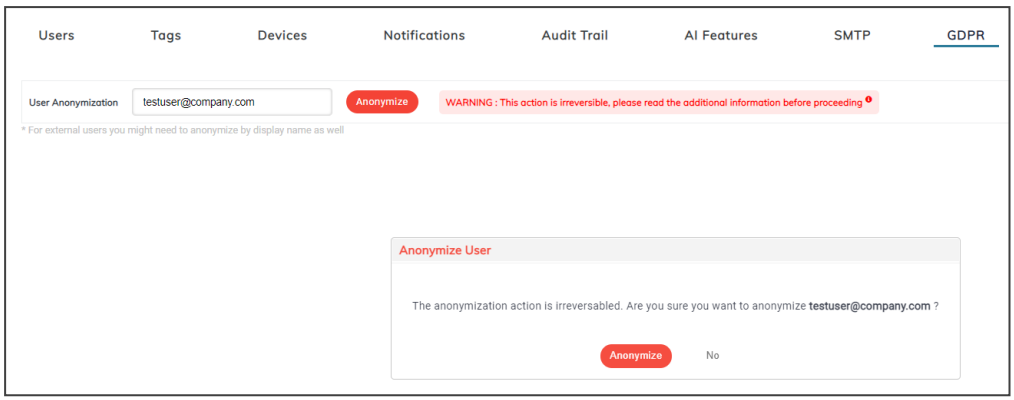
External users can anonymize by display name as well.

3. Observe as you start entering the user's email address that the **Anonymize** button is activated, and view the following notification (shown in the next figure):

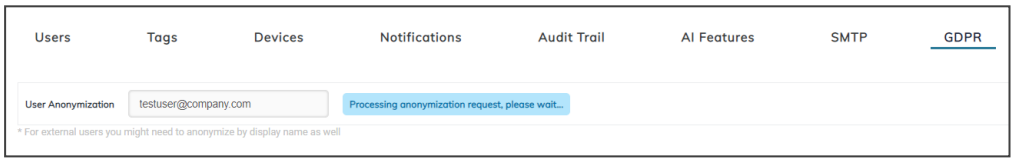
   'This action will anonymize the selected user in all meetings metadata. The change takes effect on data that is available at the time of execution of the command and doesn't propagate into the future created data. This action doesn't affect the meeting recordings' media files or any future recordings.'



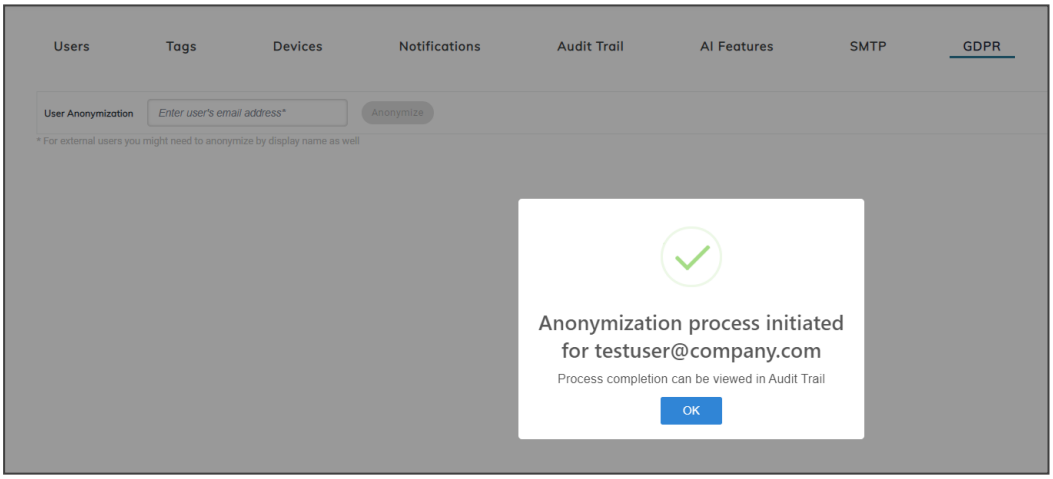
4. Click the **Anonymize** button; you're prompted to confirm the action:



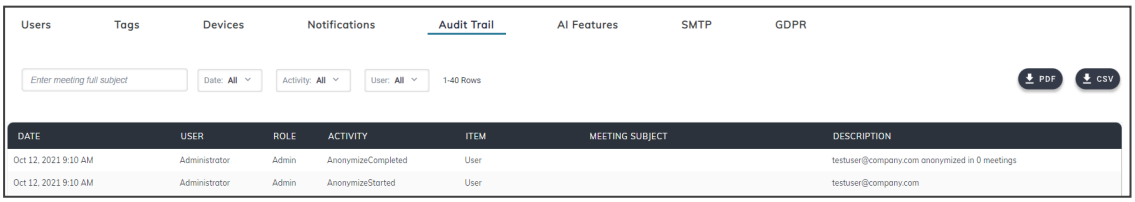
5. Click **Anonymize**; you'll view 'Processing anonymization request, please wait…' shown in the next figure.



6. View after a few seconds the following:



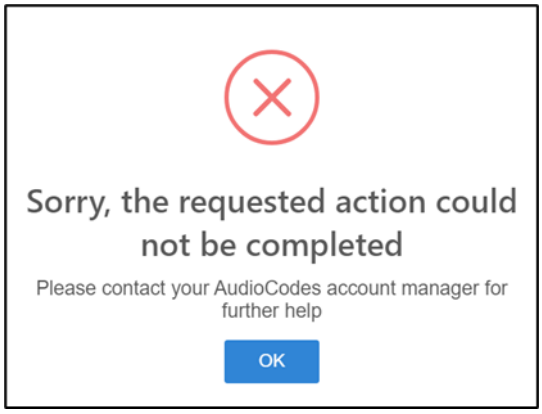
7. Click **OK** and verify in Audit Trail that the anonymization process has been completed.



Audit Trail displays two entries:

- Anonymization started. Includes the entered email.
- Anonymization completed. Includes the scope of the change, i.e., the number of meetings in which the user was anonymized: 'Anonymized in X meetings'.

8. If user anonymization was unsuccessful, you'll view the following:



Integrations

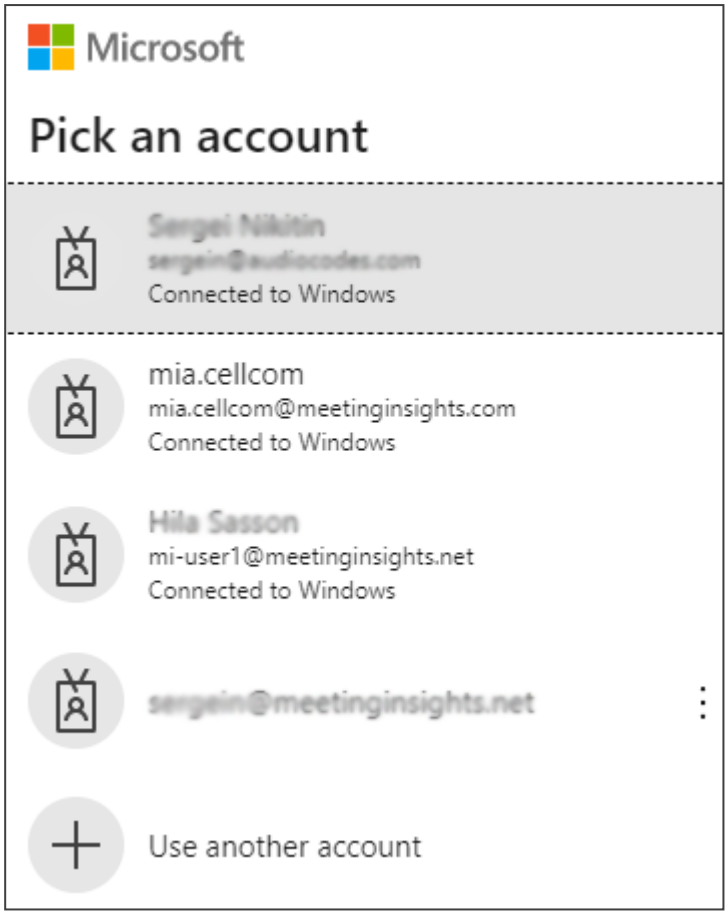
The instructions here show how to integrate Microsoft Planner with Meeting Insights.

> Before integrating Microsoft Planner, the logged-in user must have Meeting Insights 'admin' privileges and Azure 'tenant admin' privileges.

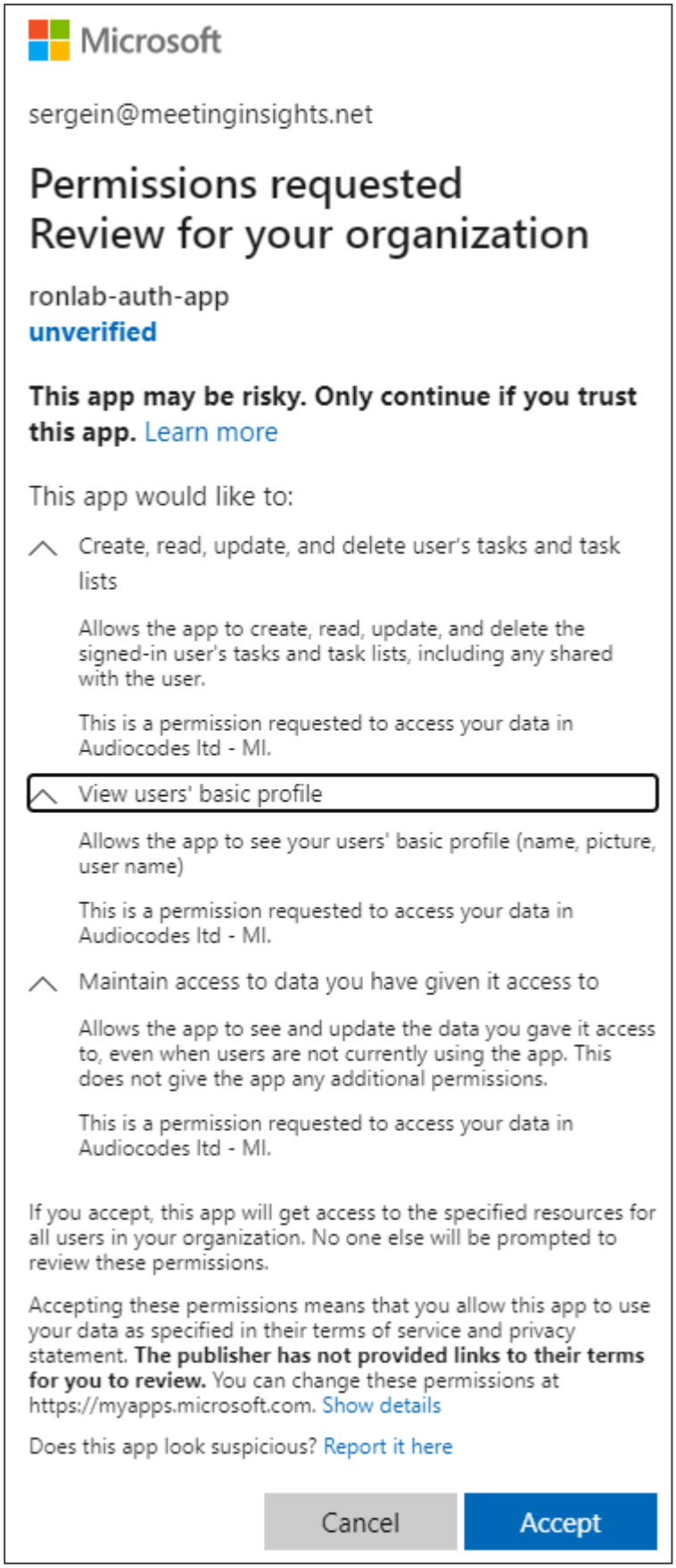
➢ To integrate Microsoft Planner:

1. In Meeting Insights' Settings page, click the **Integrations** tab.

2. Enable the **Send to Planner** setting; you will be redirected to the following Microsoft admin login prompt:



3. Pick an account.

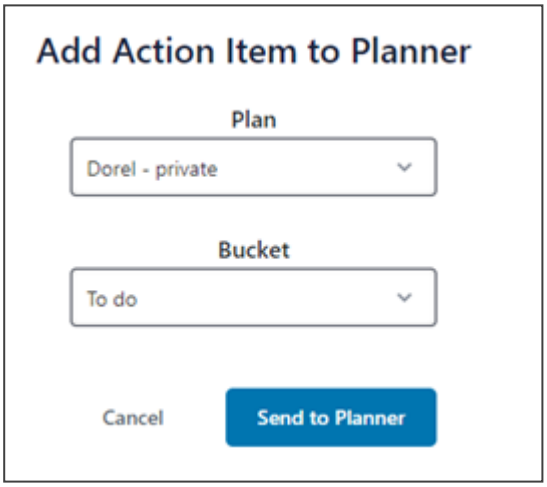

Microsoft
sergein@meetinginsights.net
Permissions requested
Review for your organization
ronlab-auth-app
unverified
This app may be risky. Only continue if you trust this app. Learn more
This app would like to:
Create, read, update, and delete user's tasks and task lists
Allows the app to create, read, update, and delete the signed-in user's tasks and task lists, including any shared with the user.
This is a permission requested to access your data in Audiocodes ltd - MI.
View users' basic profile
Allows the app to see your users' basic profile (name, picture, user name)
This is a permission requested to access your data in Audiocodes ltd - MI.
Maintain access to data you have given it access to
Allows the app to see and update the data you gave it access to, even when users are not currently using the app. This does not give the app any additional permissions.
This is a permission requested to access your data in Audiocodes ltd - MI.
If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.
Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. The publisher has not provided links to their terms for you to review. You can change these permissions at https://myapps.microsoft.com. Show details
Does this app look suspicious? Report it here
Cancel
Accept

4. Click **Accept**; you're giving the app permission to create, read, update, and delete the signed-in user's tasks and task lists, as indicated in the prompt; you'll be redirected back to the Meeting Insights Settings page; click the **Integrations** tab to make sure it's enabled.

Here's an example of the user sends an action item to Microsoft Planner (during a live meeting):

1. Click the **Action Items** menu.

2. Choose a plan and a bucket, and then click **Send to Planner**.



Retention

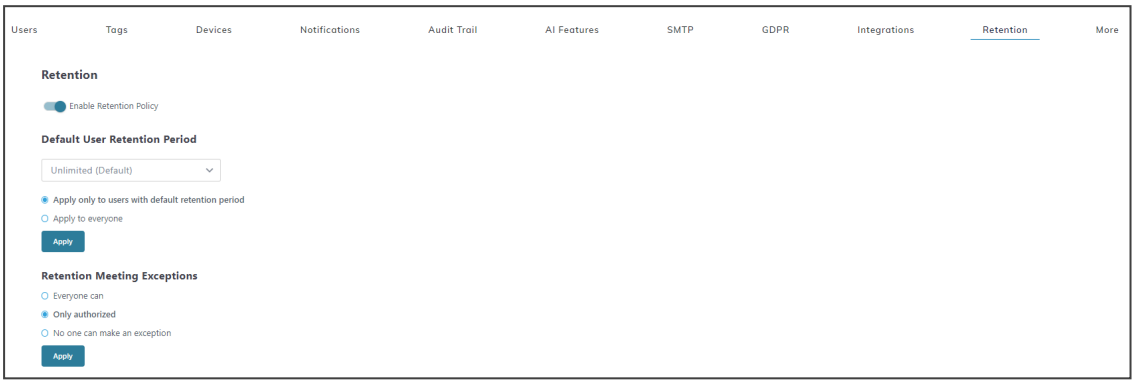
Meeting Insights admins can configure a Retention Policy in the Retention page.

- The Retention page displays the *global* default values, to be applied to all users.
- In the Users page, the admin can select a user, click **Edit Users** and override that user's default values.

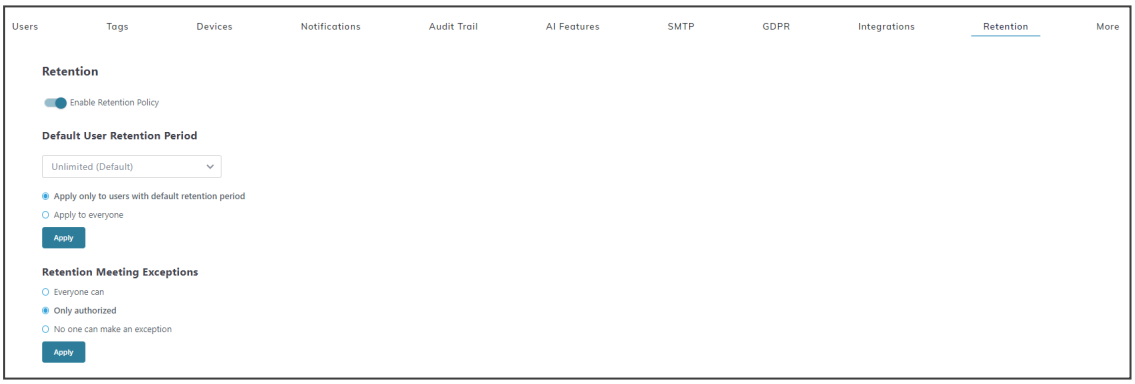
➢ To configure a retention policy:

1. In Meeting Insights' Settings page, click the **Retention** tab.

2. Switch on 'Enable Retention Policy' if it isn't switched on already.



3. From the **Default user retention period** drop-down, select how long video meeting recordings will be retained for (how many days recordings will be kept in storage); if the set limit is exceeded, recordings will be deleted.



4. Select either:

   - **Unlimited** (default): Recordings will never be deleted. Network administrators must practice caution because the storage location will eventually reach full capacity.
   - **180 Days**
   - **1 Year (365 Days)**
   - **2 Years (730 Days)**
   - **3 Years (1095 Days)**
   - **Custom**

   Meeting Insights deletes recordings that exceed the retention period once a day.

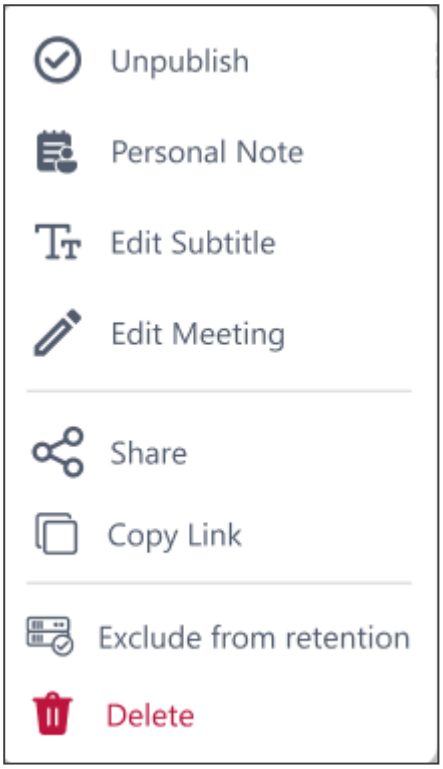
   Admins can apply a filter:

   - Apply only to users with default retention period
   - Apply to everyone

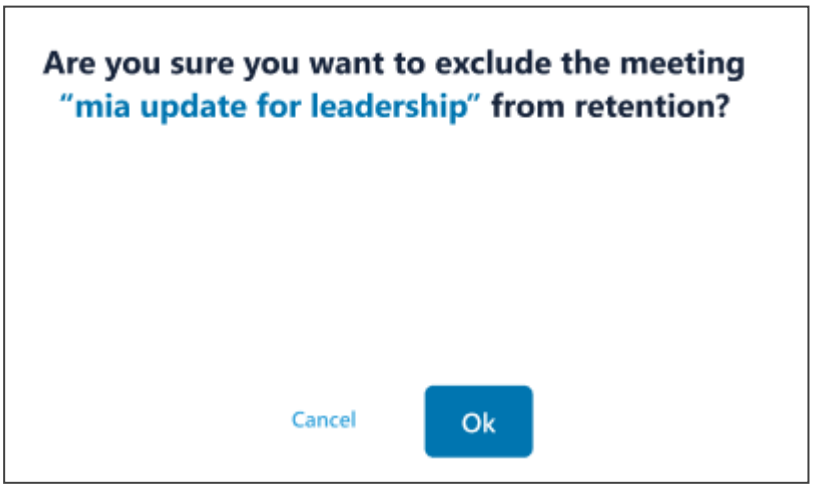
With the option **Retention meeting exceptions**, the admin can configure:

- **Everyone can**
- **Only authorized**
- **No one can make an exception**

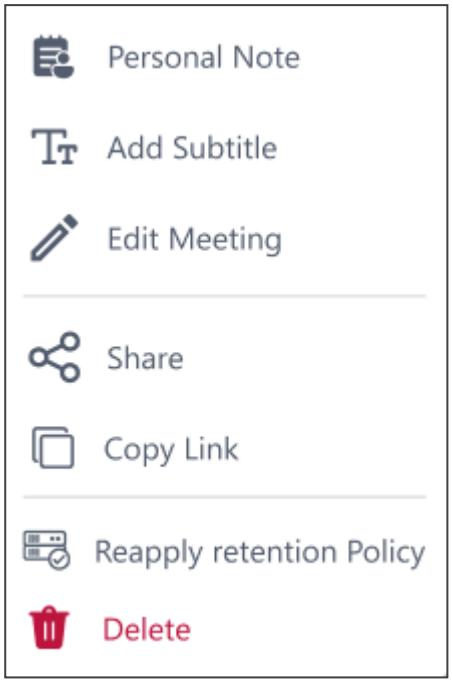
Users and/or admins can *exclude* a meeting recording from a Retention Policy by selecting the new **Exclude from retention** option in the vertical ellipsis menu adjacent to the meeting in the Meetings list page.



They'll be prompted:



After excluding a meeting from retention, they can opt to *reapply* the policy by selecting the new **Reapply Retention Policy** option in the vertical ellipsis menu adjacent to the meeting in the Meetings list page.

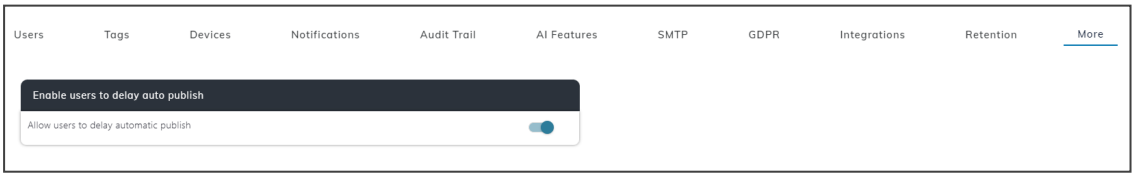


A Retention Policy can be set *per user* rather than *globally* as described above, in the Users page. See here for more info.

More

Admins can activate or deactivate the **Delayed Auto Publish** option for users.

When the user activates the option, Meeting Insights automatically publishes meeting recordings three days after they end if the user did not actively publish them before.



By default, two options are available to the user:

- **Auto Publish** (default). Meeting Insights automatically publishes meeting recordings when they end.
- **Manual Publish**. Enables users to publish meeting recordings by clicking the meeting recording's **Publish** button (as described in the *User's Manual* under 'Publishing Meeting Recordings').

7 Configuring Automatic Invitation of Mia to Teams Meetings

Network administrators can configure automatically inviting Mia to Teams meetings – whether organized by a specific user or by a group of users – utilizing a Microsoft Exchange rule. When a user schedules a regular Teams meeting, a 'Mia' contact will automatically be added to the invitees list and this disclaimer will be added to the body of every invitation to that user's meetings:

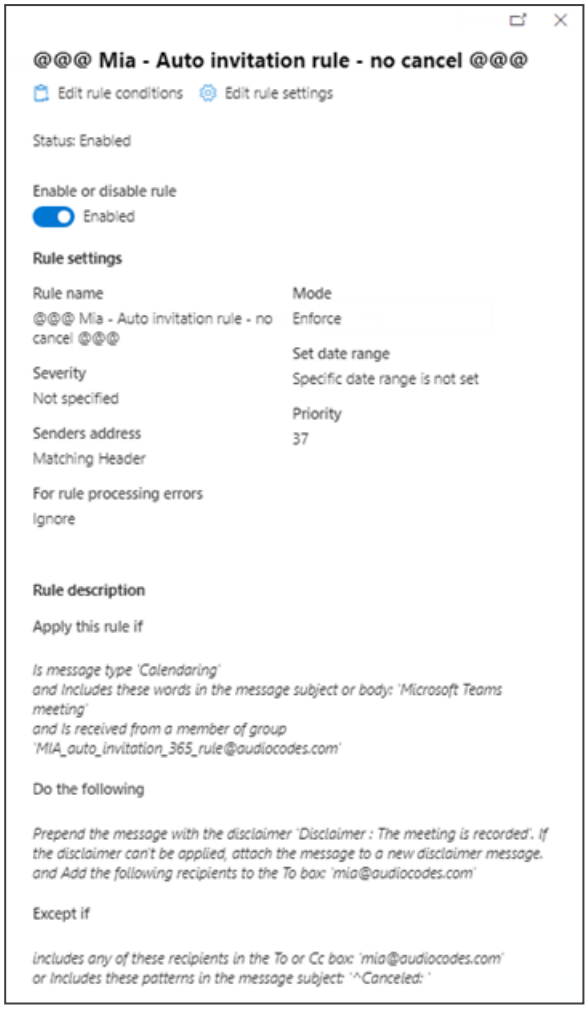
'Disclaimer: The meeting is recorded'

The meeting's organizer cannot see the 'Mia' contact or the disclaimer when they open the meeting invitation on their side. All other recipients of the meeting invitation will view the disclaimer on the top of the body of the invitation.

➢ **To configure Mia auto invite:**

1. Open Microsoft Exchange and configure the rule. The figure below shows the rule in **Conditions format**.

2. Configure these fields with *values specific to your organization*:
   - **The sender is a member of**. Create your distribution group and assign Meeting Insights users to it, then enter it into the rule.
   - **Disclaimer: The meeting is recorded**. Optionally, customize the disclaimer text, or else leave it as shown in the figure.
   - **Add these recipients to the To box**. Enter your Mia email address. It must be <xxx>.mia@meetinginsights.com where xxx is the short name of your organization.
   - **Except if [The To or Cc box contains]** Same as the preceding field.
3. Configure the remaining fields using the figure above as reference.
4. Use the figure below as reference when configuring the rule in **Summary format**.



It's recommended to enable Mia automatic invite for all users by default. Users who want to remove the automatic invitation can do so by kicking Mia out of the meeting.

8 Running the Application Access Policy

Customers must execute an application access policy on their side, along with consents. The application access consent is specifically for adding the Meeting Insights application, which also pulls Mia Bot ad hoc, during a meeting.

The following application access policy and consents must be run:

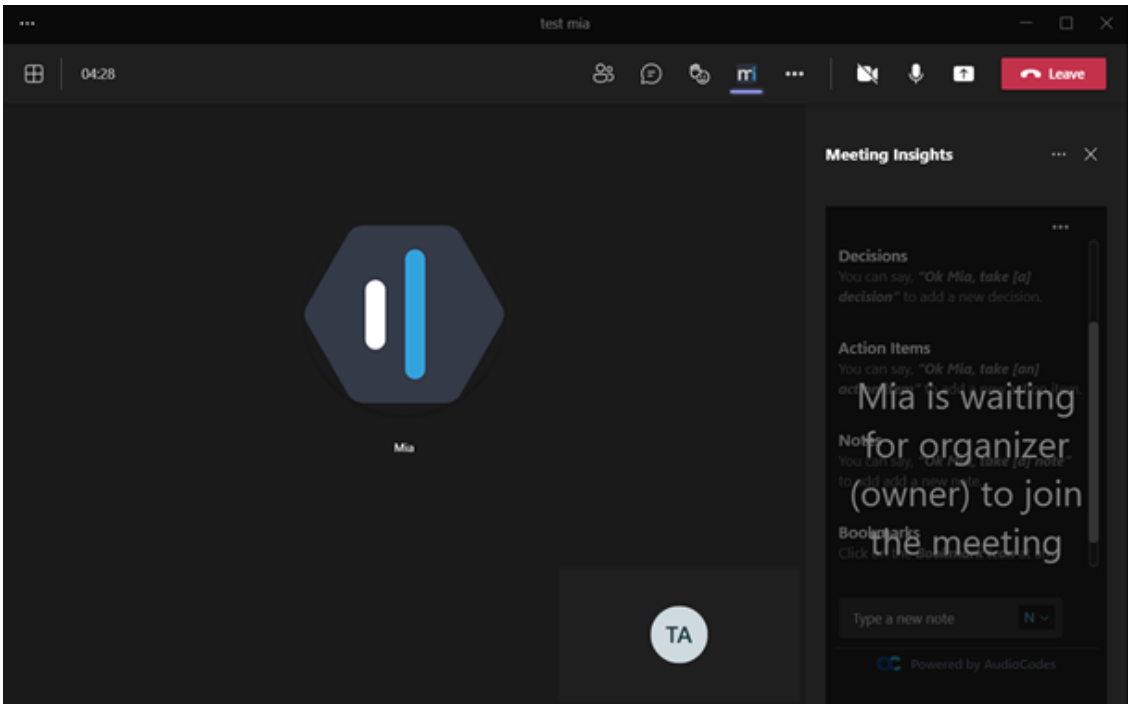
```
New-CsApplicationAccessPolicy -Identity MeetingInsights-policy -AppIds "<Mia bot App Id>", "<Notification bot App Id>" -Description "MeetingInsights Ad-Hoc"
Grant-CsApplicationAccessPolicy -PolicyName MeetingInsights-policy -Global
```

- The Meeting Insights application, which adds the Mia Bot, can be added to a meeting only once.
- If removed from the meeting, the Mia Bot will fail to join again.
- If you need to stop the recording, it's recommended to use the pause / resume functionality, available to the meeting's organizer and co-organizer.

9 Recording Notifications

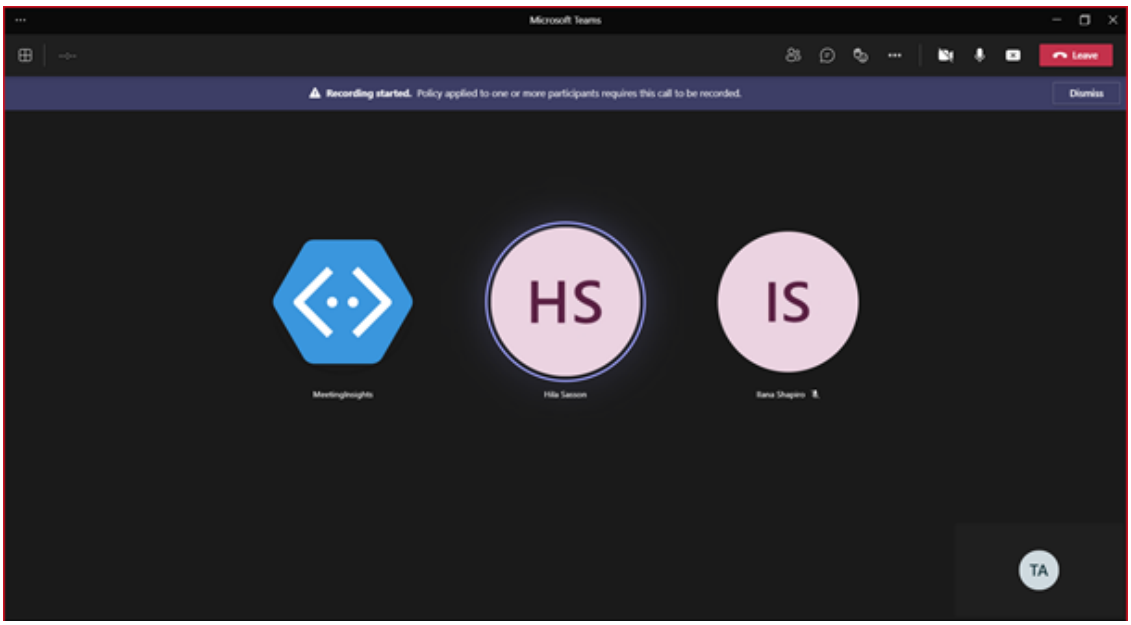
When a meeting is recorded, Meeting Insights can provide audio and visual recording notifications. Meeting recording starts only when the owner-organizer joins the meeting. If they leave the meeting, recording is paused; if they rejoin, recording resumes. If the feature is disabled, recording continues regardless of whether they joined, left, or didn't join or leave. The notifications flow is as follows:

Figure 9-1: Owner-organizer hasn't yet joined or left the meeting



1. When the owner-organizer joins, recording starts and notifications are activated.

Figure 9-2: Owner-organizer joined the meeting - meeting is recorded



a. Mia plays an audio notification "Recording started" to the bridge when the owner-organizer joins the meeting.

b. Microsoft presents a bar with a visual recording notification "Recording started…" to all existing and new participants.

c. Those who join later from a Teams client see the Microsoft visual notification.

d. Those who join later not from a Teams client hear a Microsoft audio notification.

2. When the owner-organizer leaves the meeting, the recording stops, notifications are disabled, and the side panel disables.

Figure 9-3: Owner-organizer left the meeting

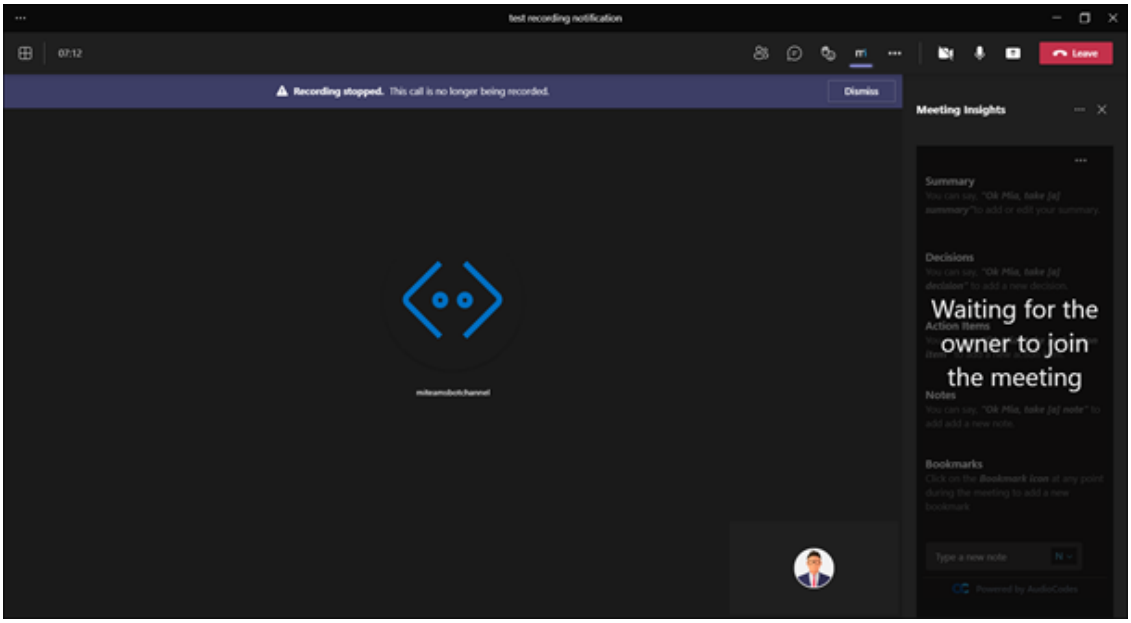


Figure 9-4: Mobile view

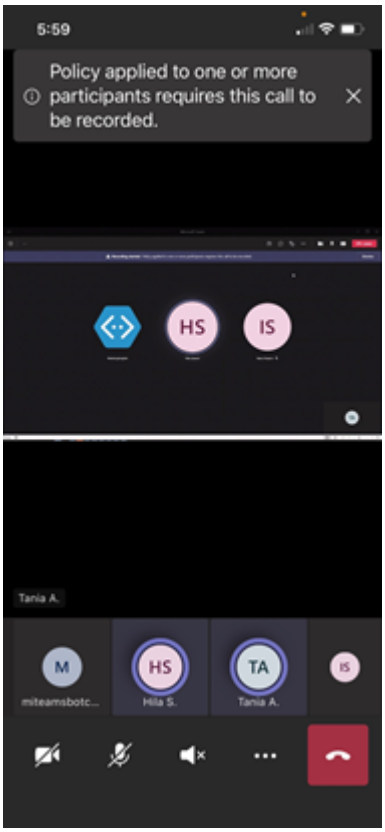


Figure 9-5: Live panel - Owner-organizer is not in meeting

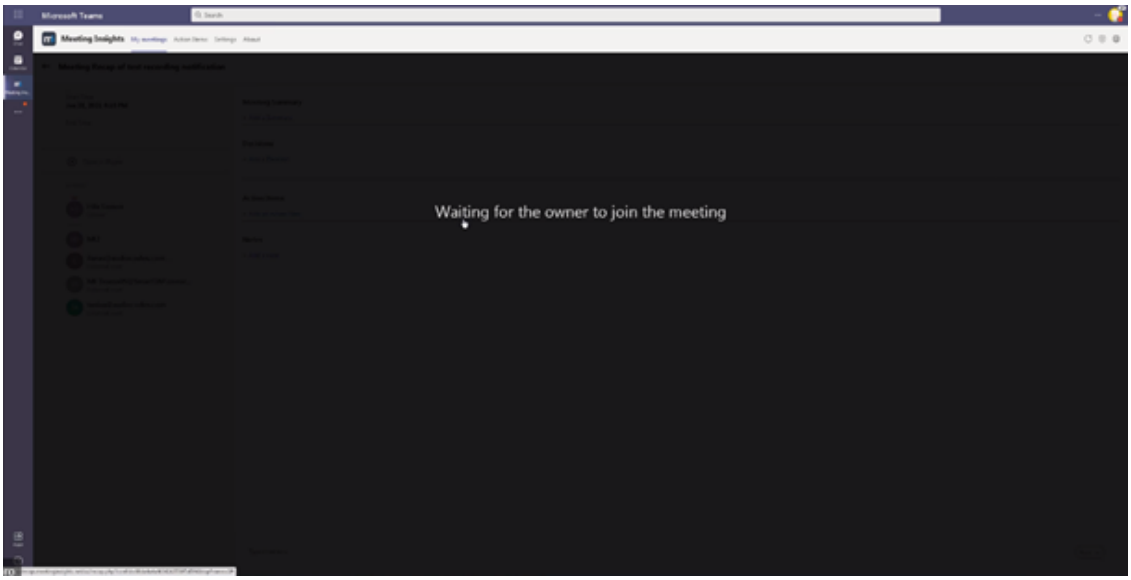
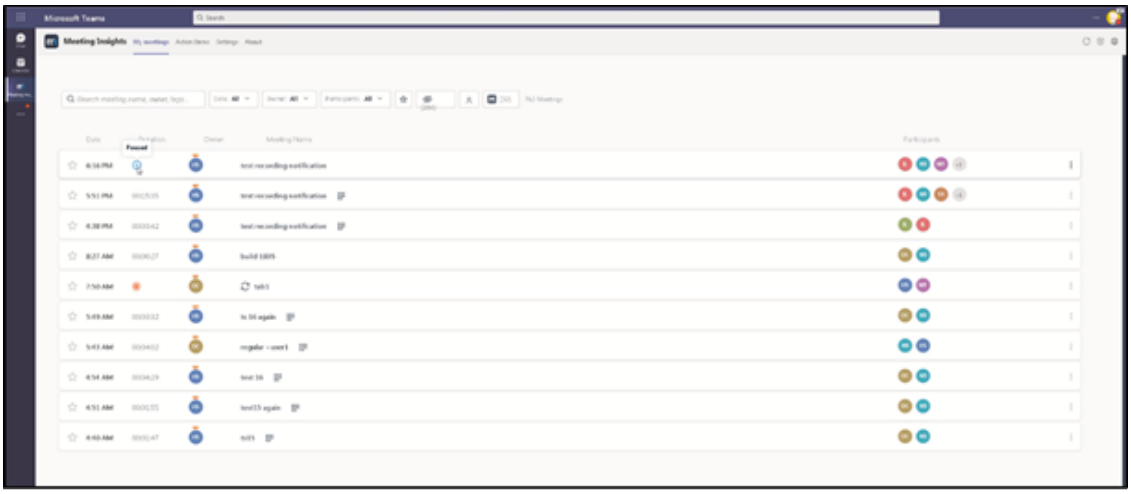


Figure 9-6: List view - Owner-organizer of not in the meeting



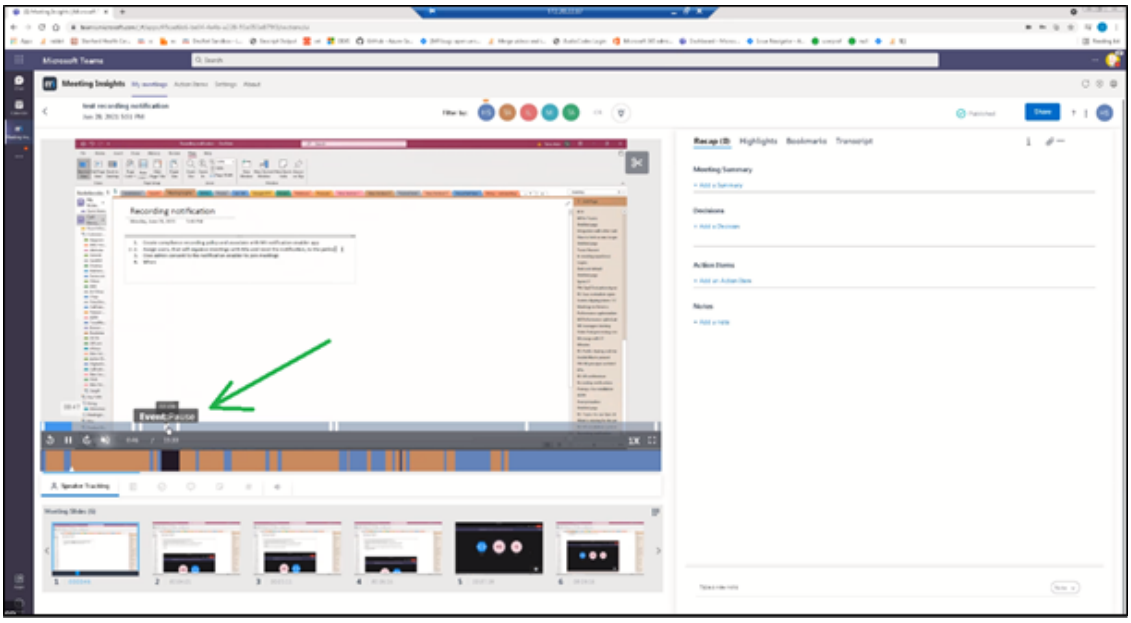
a. Mia plays an audio notification "Recording stopped" to the bridge when the owner-organizer leaves the meeting.

b. Microsoft presents a bar with a visual recording notification "Recording stopped" to all existing and new participants.

c. Participants who join a meeting after the owner-organizer leaves will not hear or see notifications because there is no recording.

3. When the owner-organizer rejoins the meeting, the recording is resumed, and notifications are played / presented according to step 1.

Figure 9-7: After the meeting - Player page



Setting up, Configuring Recording Notifications

The recording notifications feature needs to be set up and configured in the customer's Microsoft Teams, Meeting Insights, and Azure Active Directory.

- The organizer-owner of a meeting must have an E3 licensed account in the organization's Office 365.
- Every Teams call (P2P internal and federation, PSTN) of a user enabled with Microsoft recording notifications will be escalated to a conference but will not be recorded and Bot will not be in the call. Escalation to the conference may cause delays in calls establishment.

- In Microsoft Teams:
  a. Run the script to create a Compliance Recording Policy (see Running the Script to Create a Compliance Recording Policy below)
  b. Assign organizers whose meetings must have recording notifications, to the Compliance Recording Policy
- In Meeting Insights:
  - In Administrator view, go to User settings and enable the recording notification per user or for all users.
- In Azure Active Directory (Admin consent is required):
  - Admin consent links will be generated in a terraform output file named **consents.txt**

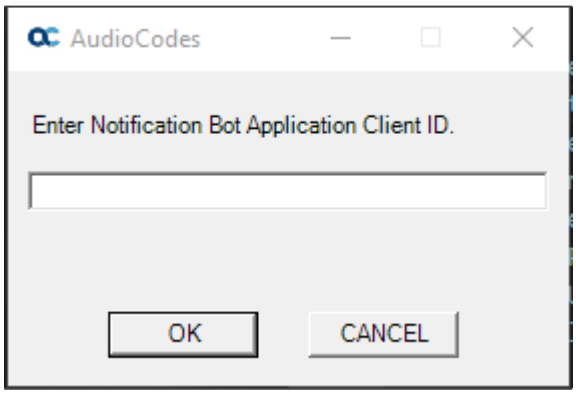
Running the Script to Create a Compliance Recording Policy

After obtaining Admin consent, the customer must run a script in Teams to create a Compliance Recording Policy.

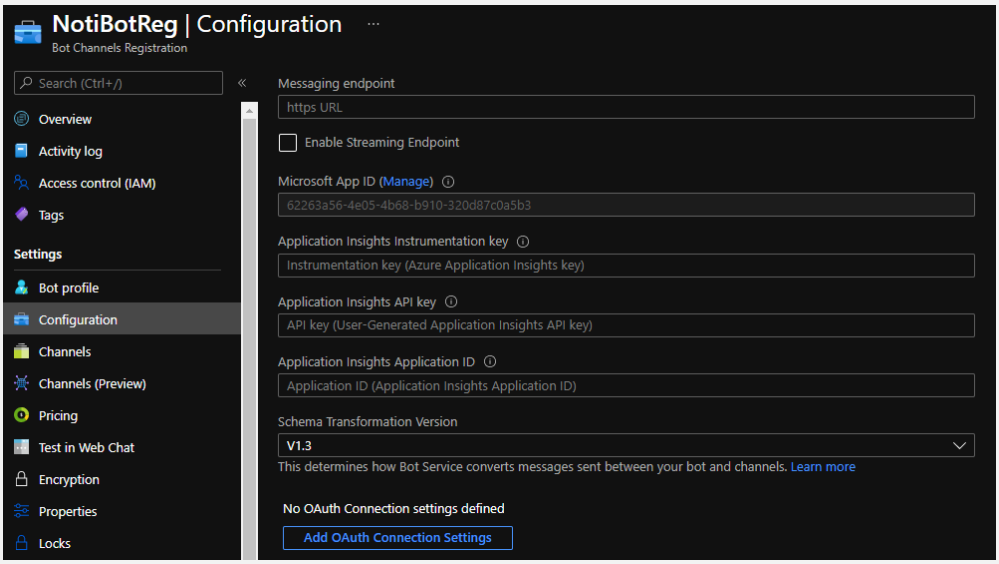
➢ **To run a script in Teams to create a Compliance Recording Policy:**

1. Enter the Mia/Teams **Notification Bot** Application Client ID that can be found in your Azure subscription.

Figure 9-8: Enter Mia/Teams Notification Bot Application Client ID

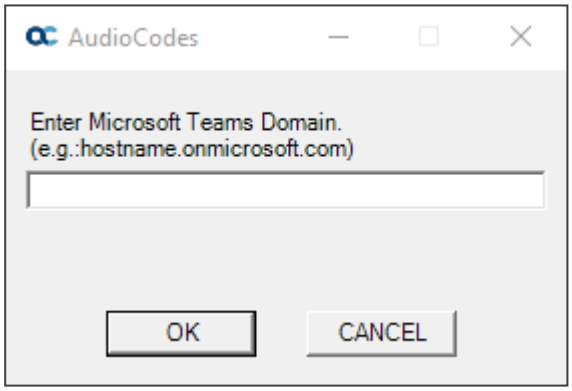


The Notification Bot Application Client ID can be found inside the terraform output file **apps.txt** -OR- it can be found in the Bot App Registration shown in the following example figure, in the field under Microsoft **App ID (Manage)**.



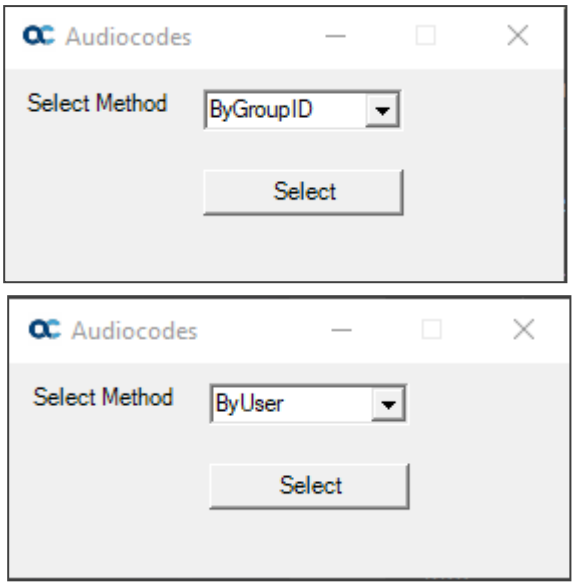
2. Enter the Microsoft Teams Domain.

Figure 9-9: Microsoft Teams Domain



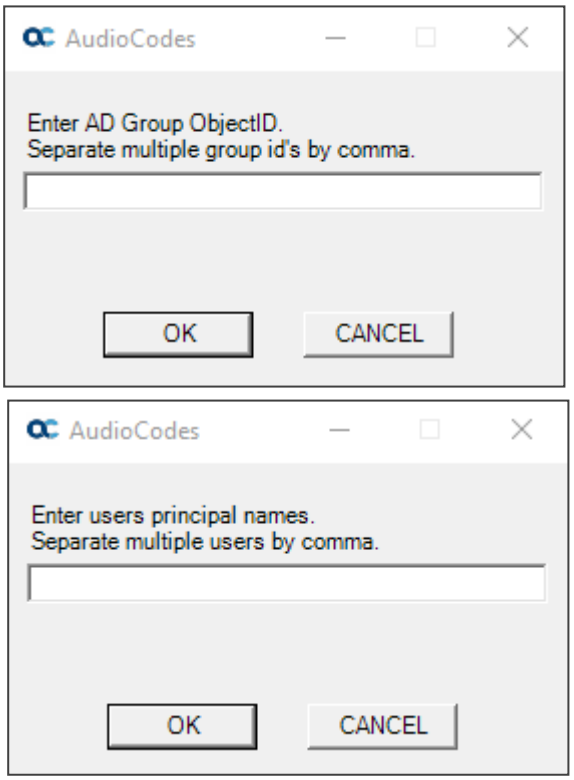
3. From the dropdown, select the method.

Figure 9-10: Select Method: Group | User



4. Enter the AD Group ID or enter the principal names of users to whom to assign the Recording Policy.

Figure 9-11: AD Group ID | Users Principal Names



5. Click **OK**; view a message verifying that users have successfully been added; you've successfully created a Compliance Recording Policy.

10 Integrating Meeting Insights with Microsoft Power BI

Meeting Insights can be integrated with Microsoft's Power Business Intelligence (BI) for visualized business analytics (reports). The procedure described here shows how to integrate Meeting Insights with the Power BI service.

Before integration:

- Purchase a Power BI Pro license if you have *any* Microsoft Office 365 license *other than* Microsoft Office 365 **E5**.

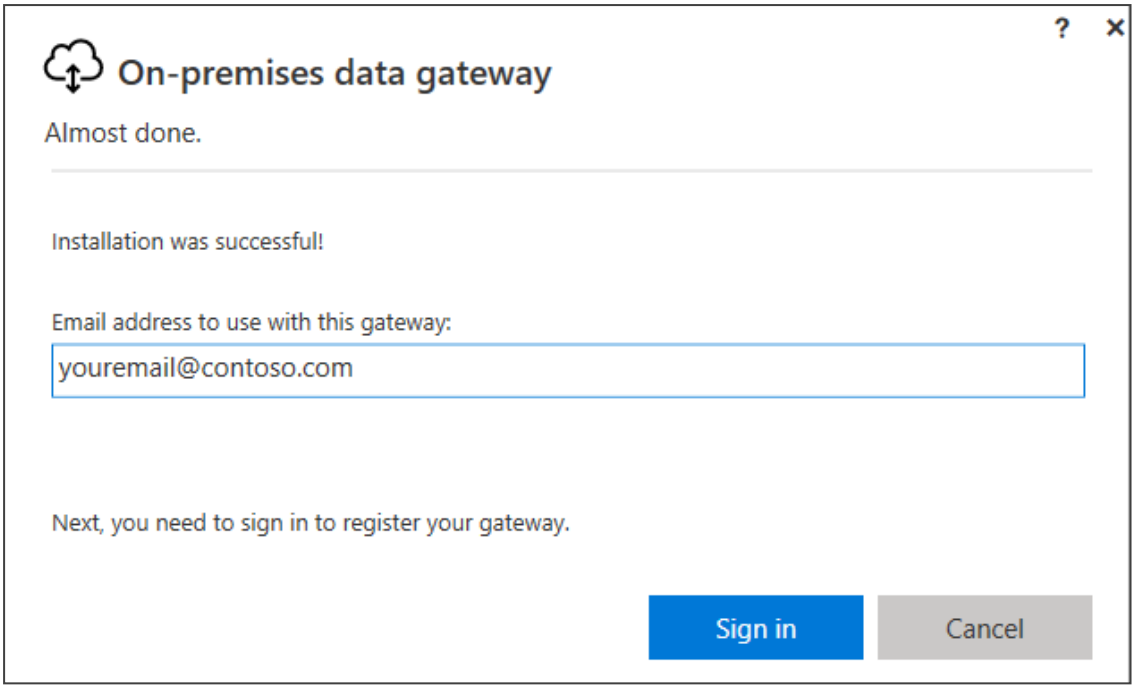
> Microsoft Office 365 **E5** license *includes the Power BI Pro license built-in*.

Note that content created with a Power BI Pro license can only be shared / consumed by users with the same license, i.e., a Power BI Pro license.

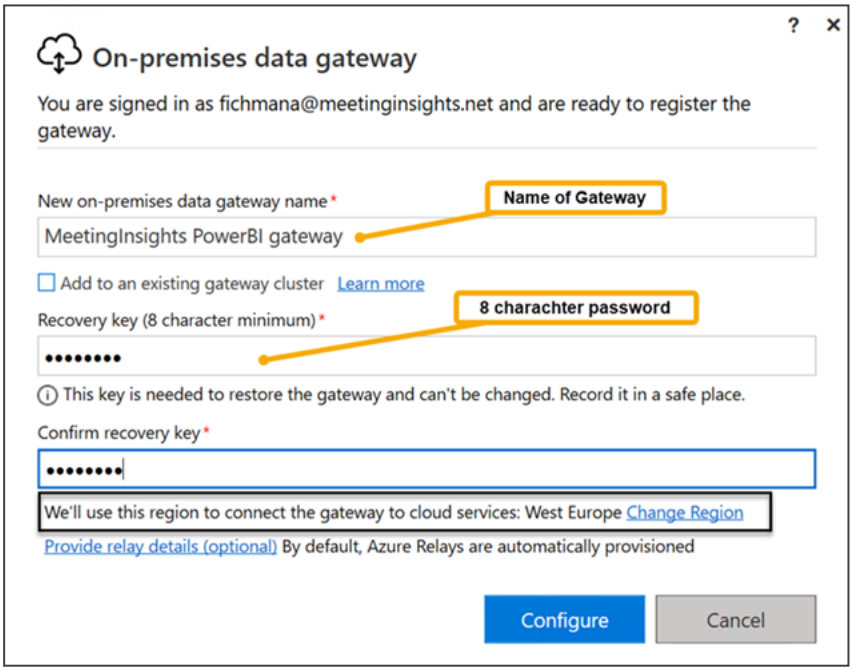
After installing the Power BI gateway, only *the same account holder that signed-in during installation of the data gateway* (the gateway attached to the signing-in account) must log in to the organization's account. The first user to do so is assigned as the Administrator. This user can assign additional users as administrators or users of the gateway's output.

➢ **To integrate Meeting Insights with Power BI:**

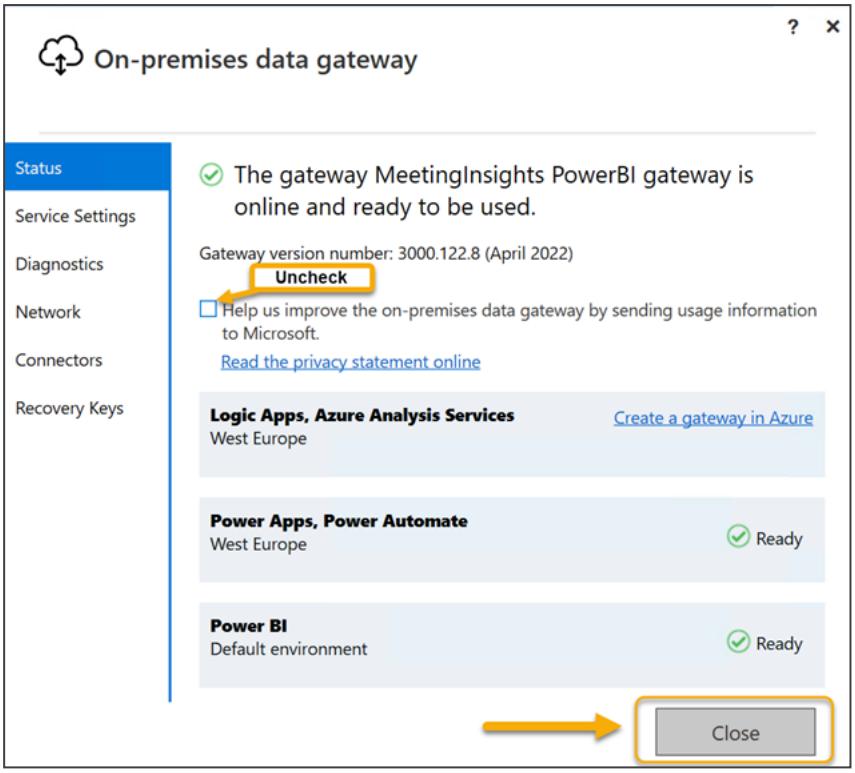
1. AudioCodes will provide the customer with Power BI.
2. Run the file *GatewayInstall.exe* and go through the installation screens.
3. In the 'On-premises data gateway' screen, enter the email address of the customer organization's Office 365 account, and then click **Sign in**. For more information, see here.



4. View an Office 365 login screen displayed. Use the same email address as above and log in. After successfully logging in, the following screen is displayed:



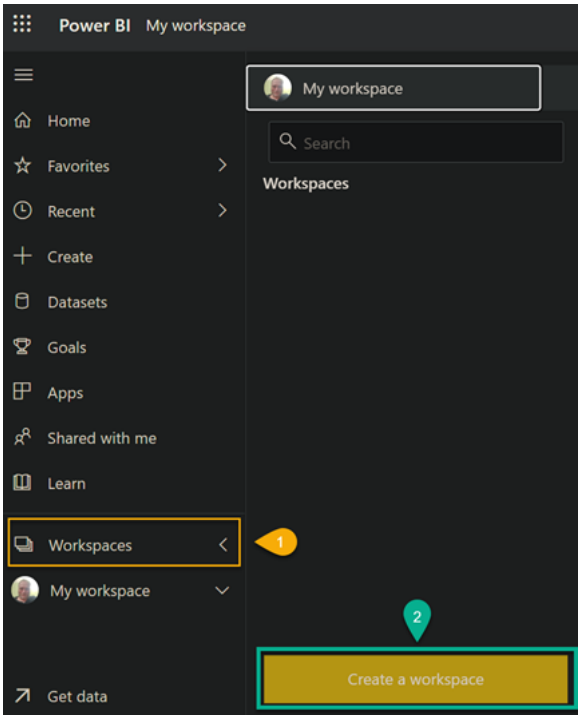
5. Configure the required fields and click **Configure**.



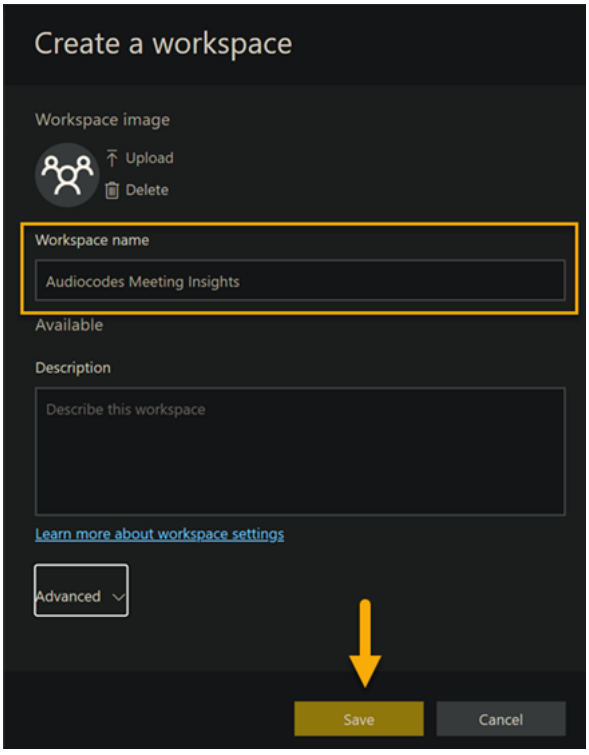
- All steps up to here are performed on a backend server.
- Customers deploying Meeting Insights in their own tenant must contact AudioCodes Professional Services to prepare a backend server for Power BI.
- In a SaaS environment, the customer has no access to a backend server - see step 6.

The preceding procedure attached the installed gateway to the account of the signing-in user. Later, when signing into the Power BI portal with the same account, the above data gateway will be accessible. For more information about installing an on-premises data gateway, see here.

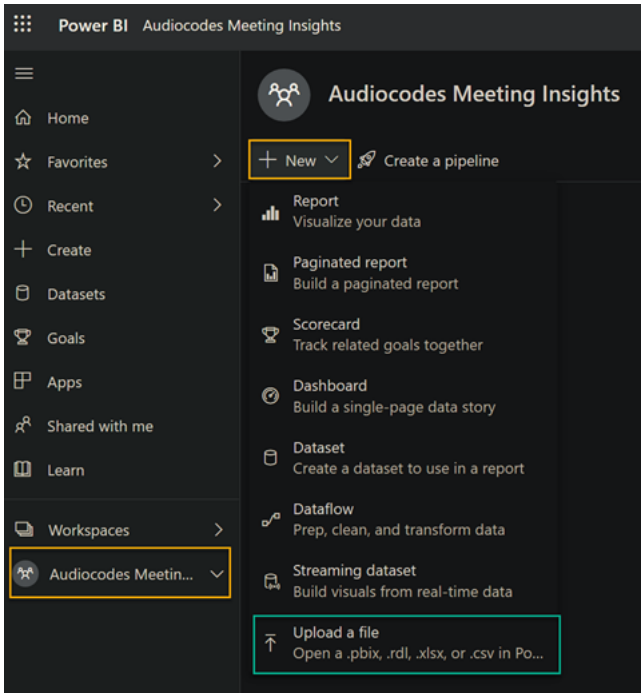
6. [This step onward applies to customers in a SaaS environment]. Sign in to the Microsoft Power BI portal at https://app.powerbi.com/ with the same user as above.
7. Create a new Workspace.

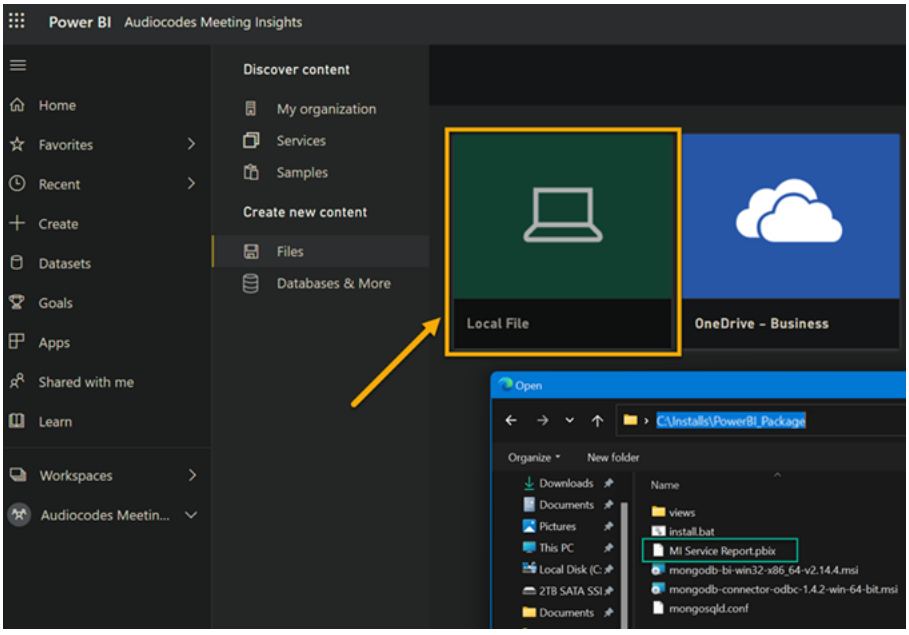


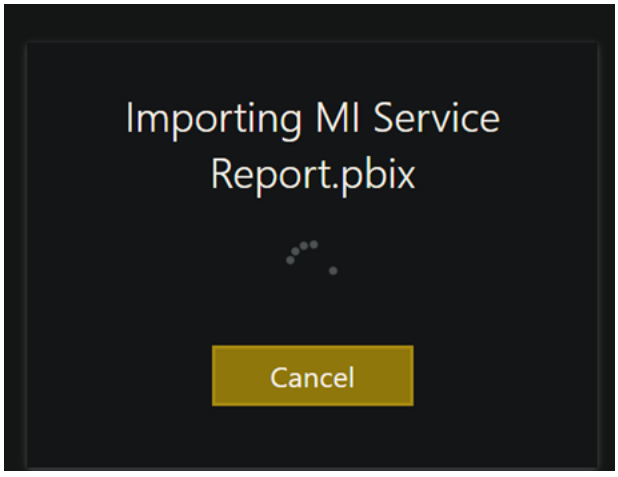
8. Enter a name for the new workspace and press **Save**.



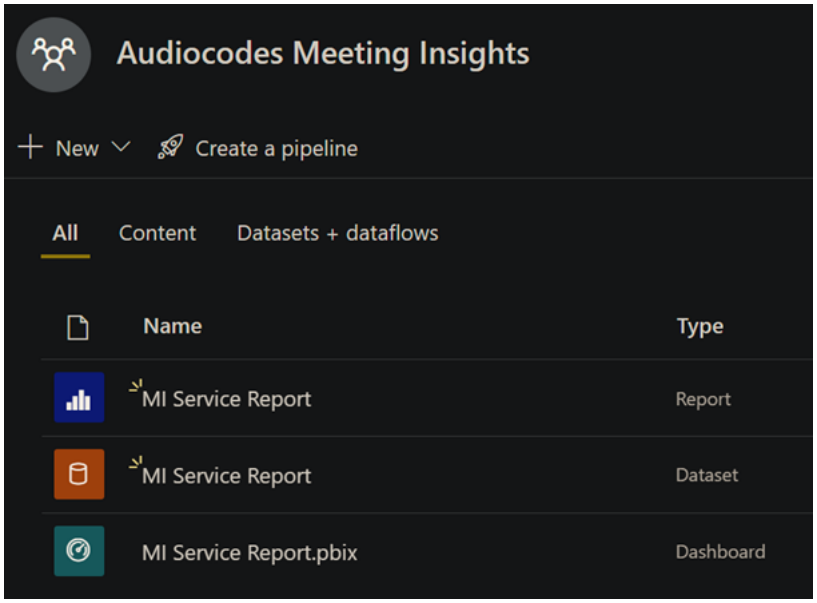
9. Upload the Power BI report template (.pbix) you received from AudioCodes.


Power BI Audiocodes Meeting Insights
Home
Favorites
Recent
Create
Datasets
Goals
Apps
Shared with me
Learn
Workspaces
Audiocodes Meetin...
Audiocodes Meeting Insights
New
Create a pipeline
Report
Visualize your data
Paginated report
Build a paginated report
Scorecard
Track related goals together
Dashboard
Build a single-page data story
Dataset
Create a dataset to use in a report
Dataflow
Prep, clean, and transform data
Streaming dataset
Build visuals from real-time data
Upload a file
Open a .pbix, .rdl, .xlsx, or .csv in Po...

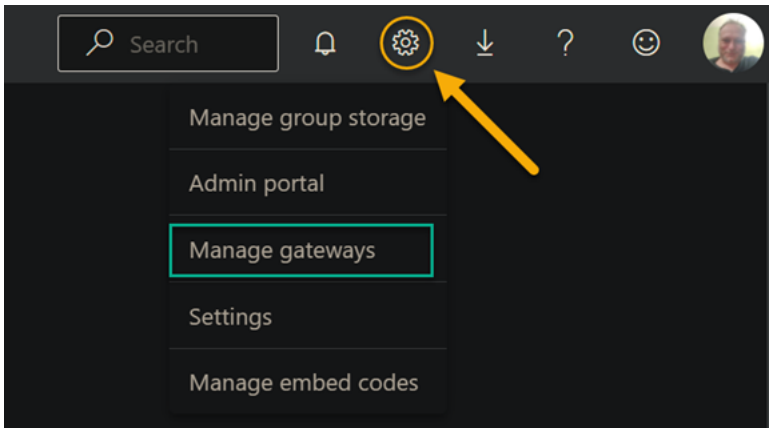

Power BI Audiocodes Meeting Insights
Discover content
My organization
Services
Samples
Create new content
Files
Databases & More
Local File
OneDrive – Business
Open
C:\Installs\PowerBI_Package
Organize
New folder
Downloads
Documents
Pictures
This PC
Local Disk (C:
2TB SATA SSI
Documents
Name
views
install.bat
MI Service Report.pbix
mongodb-bi-win32-x86_64-v2.14.4.msi
mongodb-connector-odbc-1.4.2-win-64-bit.msi
mongosqld.conf


Importing MI Service Report.pbix
Cancel

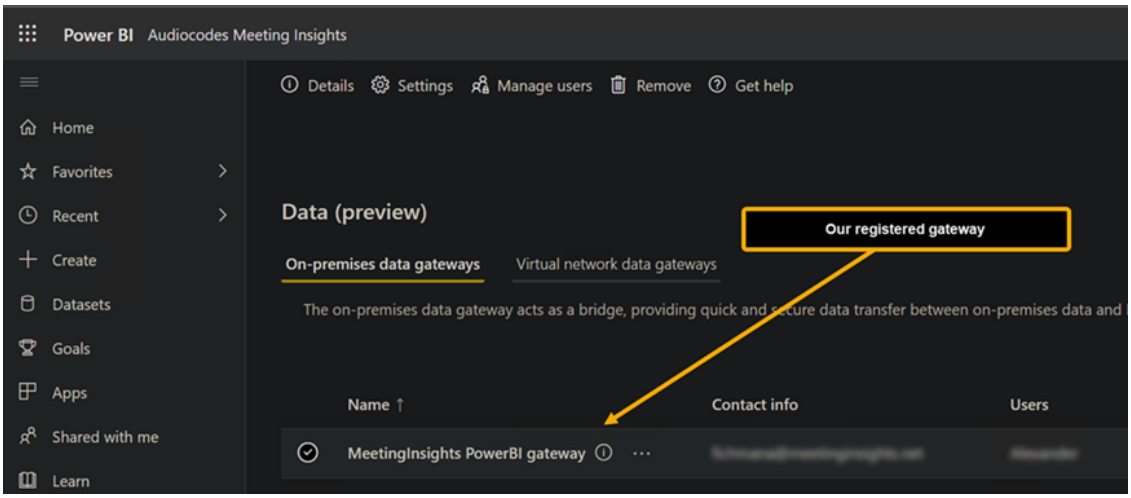
10. After importing the report template, view the following screen:



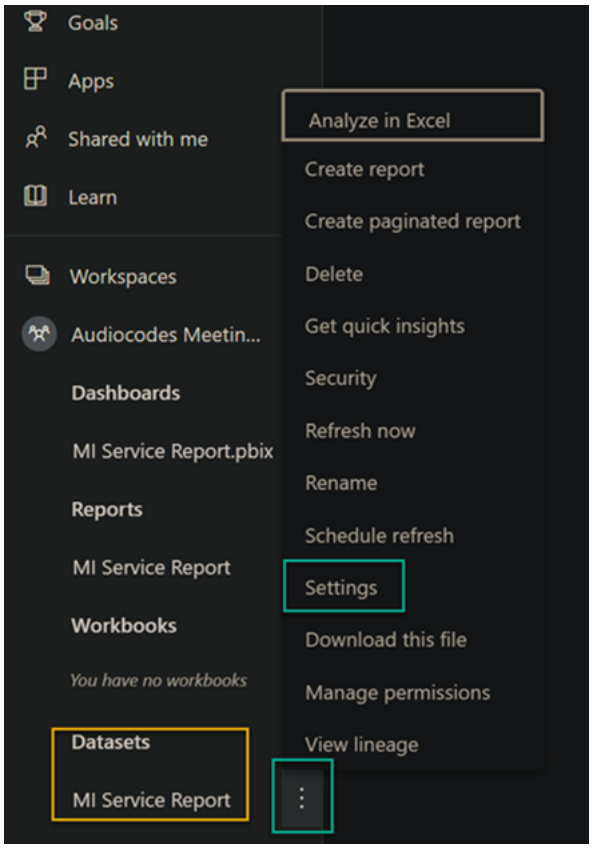
11. Click the cog wheel icon and then choose **Manage gateways**.



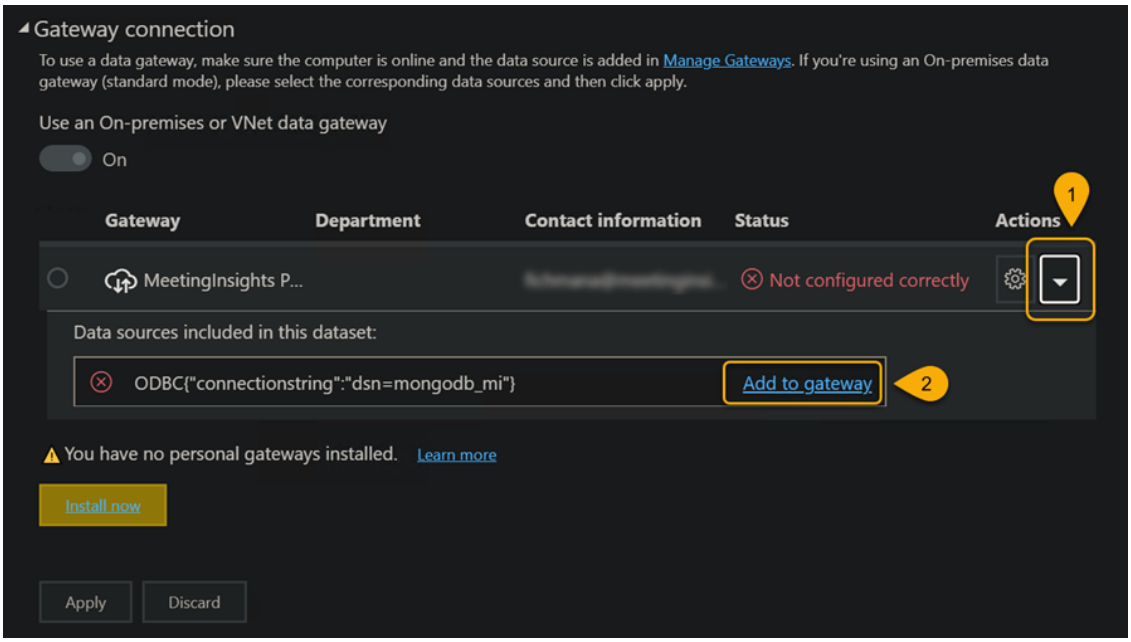
12. View the registered gateway and make sure it's operational.



13. Under **Datasets**, find the imported file dataset, press the vertical ellipsis, then choose **Settings**.

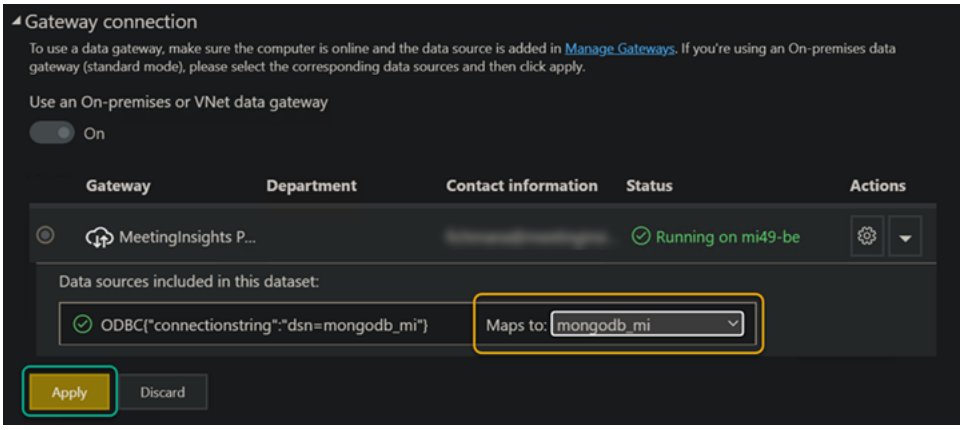


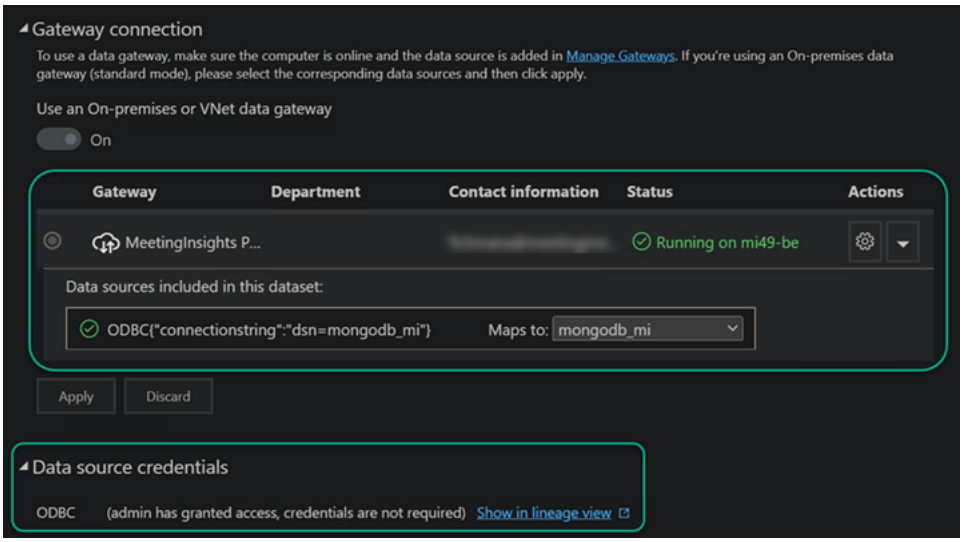
14. Expand the configuration by pressing the down arrow, and then configure using the next figure as reference.



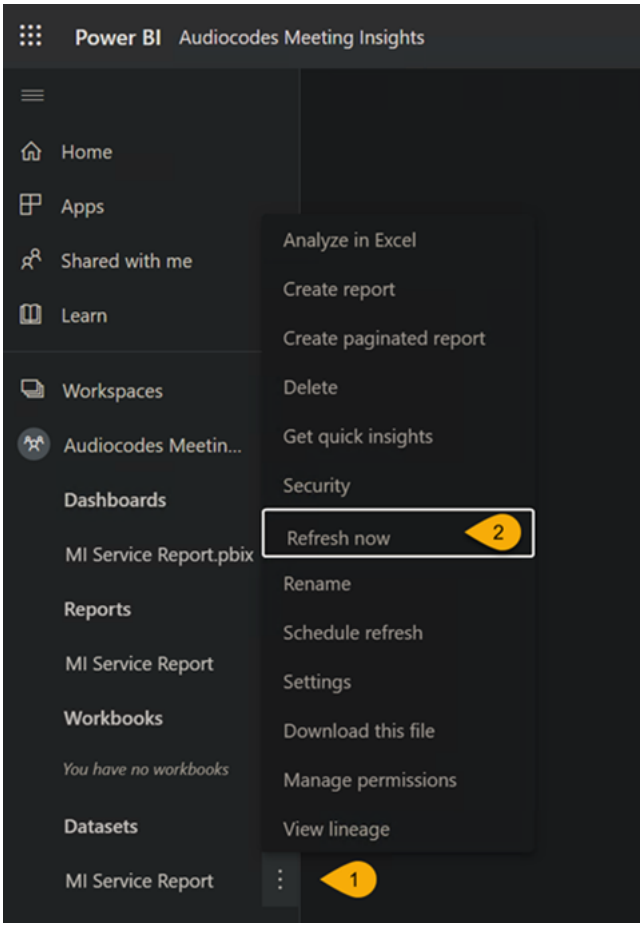
15. After configuring, click the **Install now** button.

16. Configure the ODBC database connection: Enter 'Data source name' and under 'Authentication', choose **Anonymous**. Press **Create**. Use the next figures as reference.

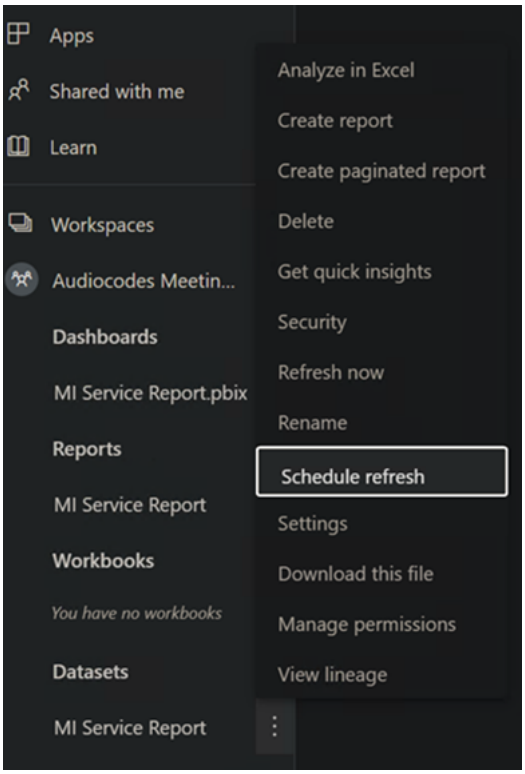


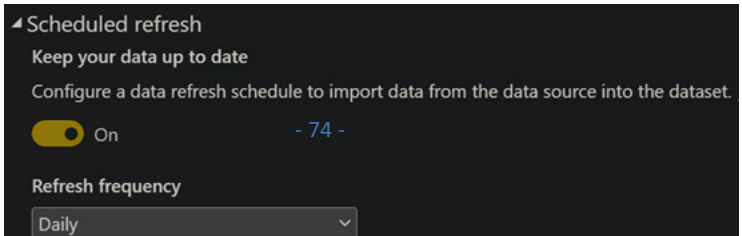


17. Refresh data from the customer's Meeting Insights installation.

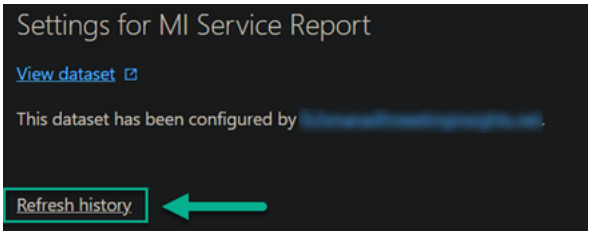


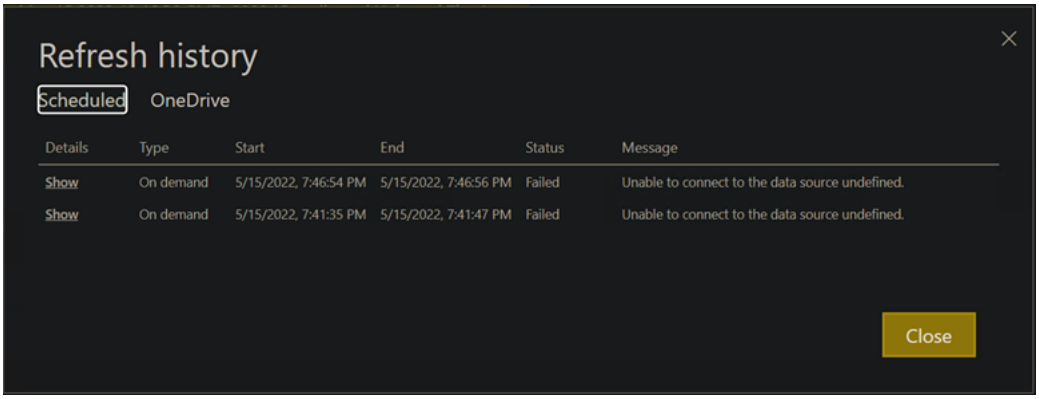
18. Schedule a daily refresh.





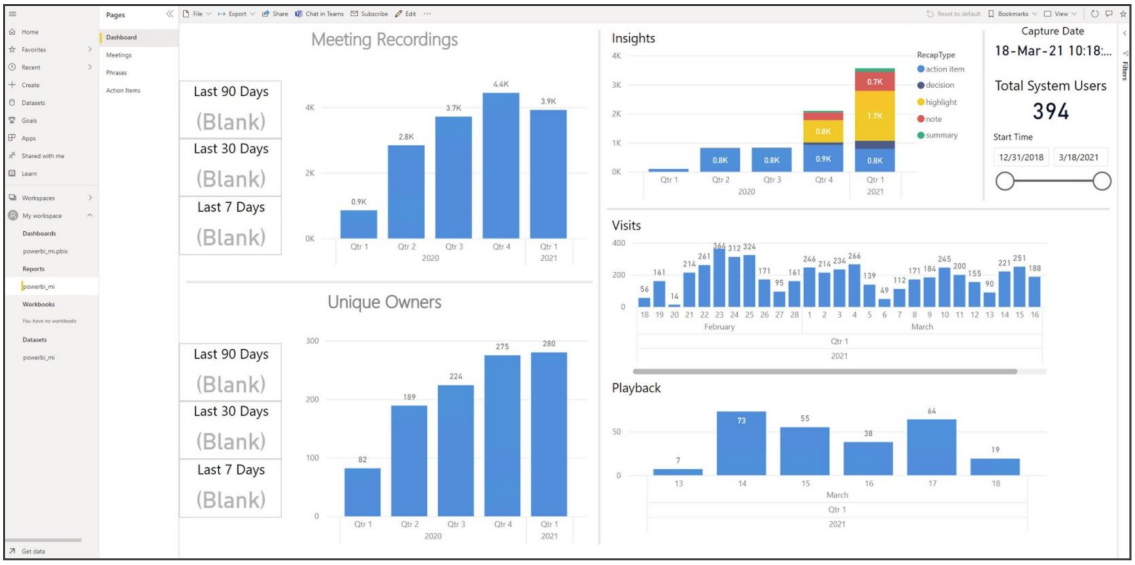
19. Use 'Refresh history' to view past refreshes statuses and details.





Examples of Meeting Insights Dashboards and Reports Produced by Power BI

View Meeting Insights' reports under the **Reports** tab. Following are examples of an Action Items report, two Meetings reports, and a Phrases report.


Meeting Recordings
Last 90 Days
(Blank)
Last 30 Days
(Blank)
Last 7 Days
(Blank)
Unique Owners
Insights
Capture Date
18-Mar-21 10:18:...
Total System Users
394
Start Time
12/31/2018
3/18/2021
Visits
Playback

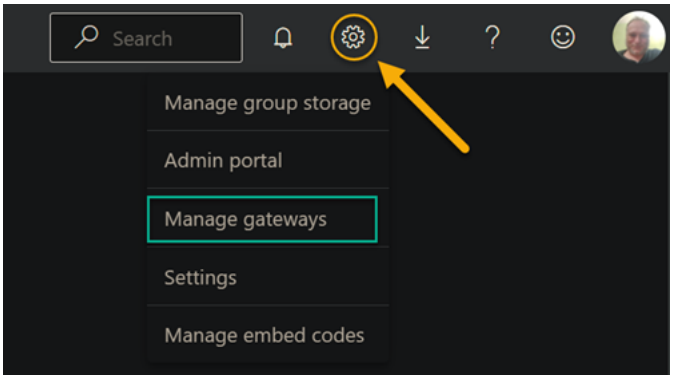
Meetings
Total number of meetings
Total meetings per Week (last 20 weeks)
Total Meetings Hours
Meetings by Number of Participants
Attendance by Meeting size
Average Meeting Duration (hours)

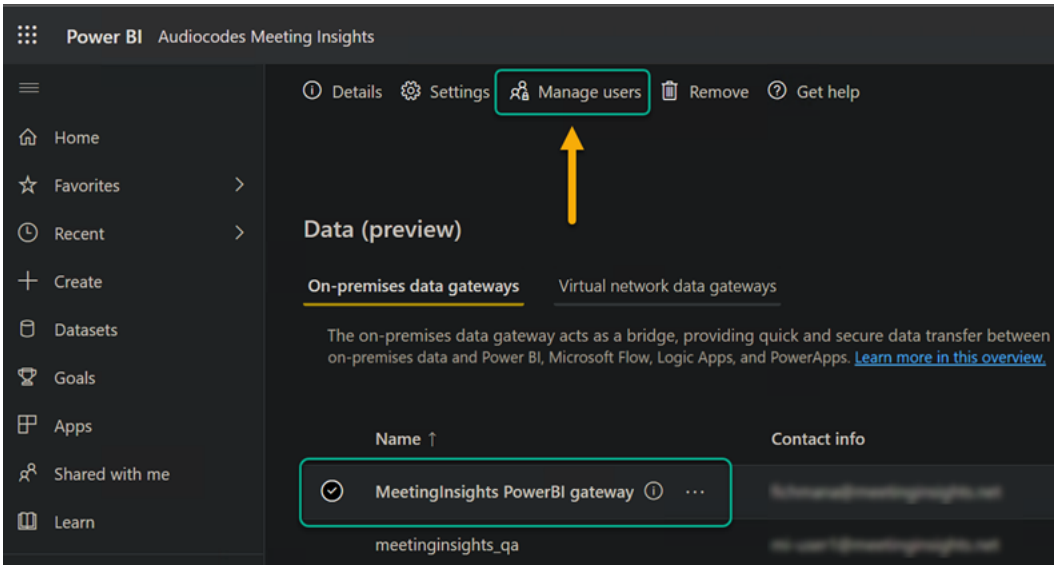
Phrases
Phrases over Time
Phrases by Trigger Type
Filters
Detailed view
Phrases by Meeting size
Trigger Type by Meeting Size

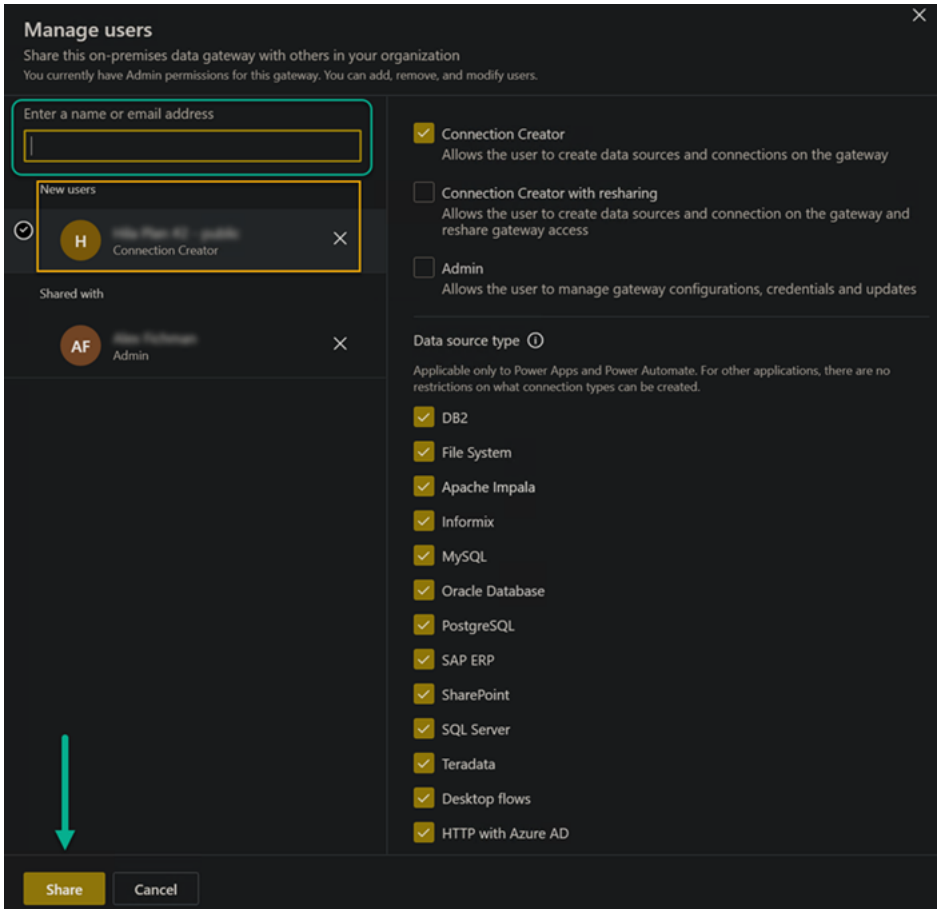
Adding Gateway Connection Permissions to Additional Users

To grant a user access to Power BI reports and dashboards, the user or a security group containing a set of users, must be granted permissions to access the data-source by a Power BI Administrator (usually the first user to register with Power BI).

After logging in with the Administrative user, take the following steps. Use the figures as reference.





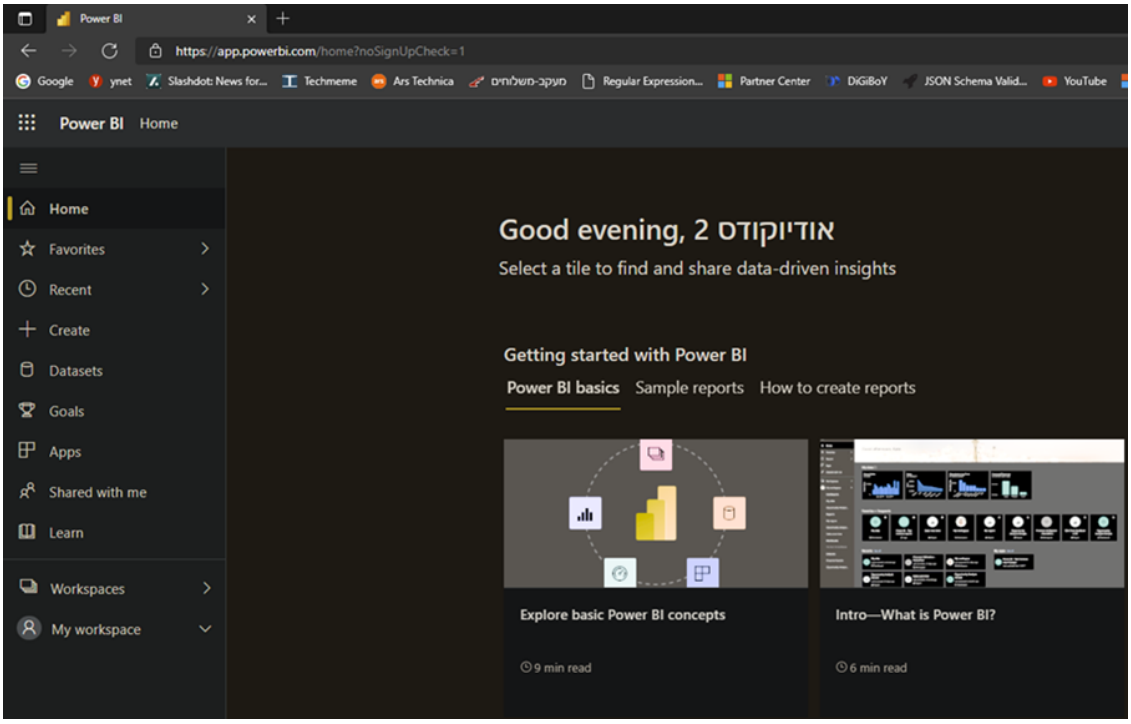


Adding Power BI Reporting to Another User

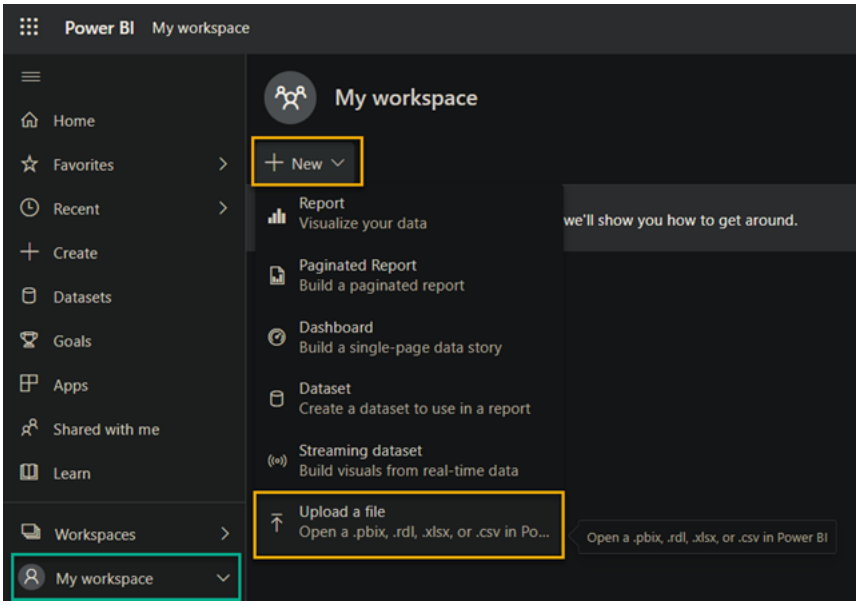
➢ To add

1. Sign in to the Power BI portal from here.

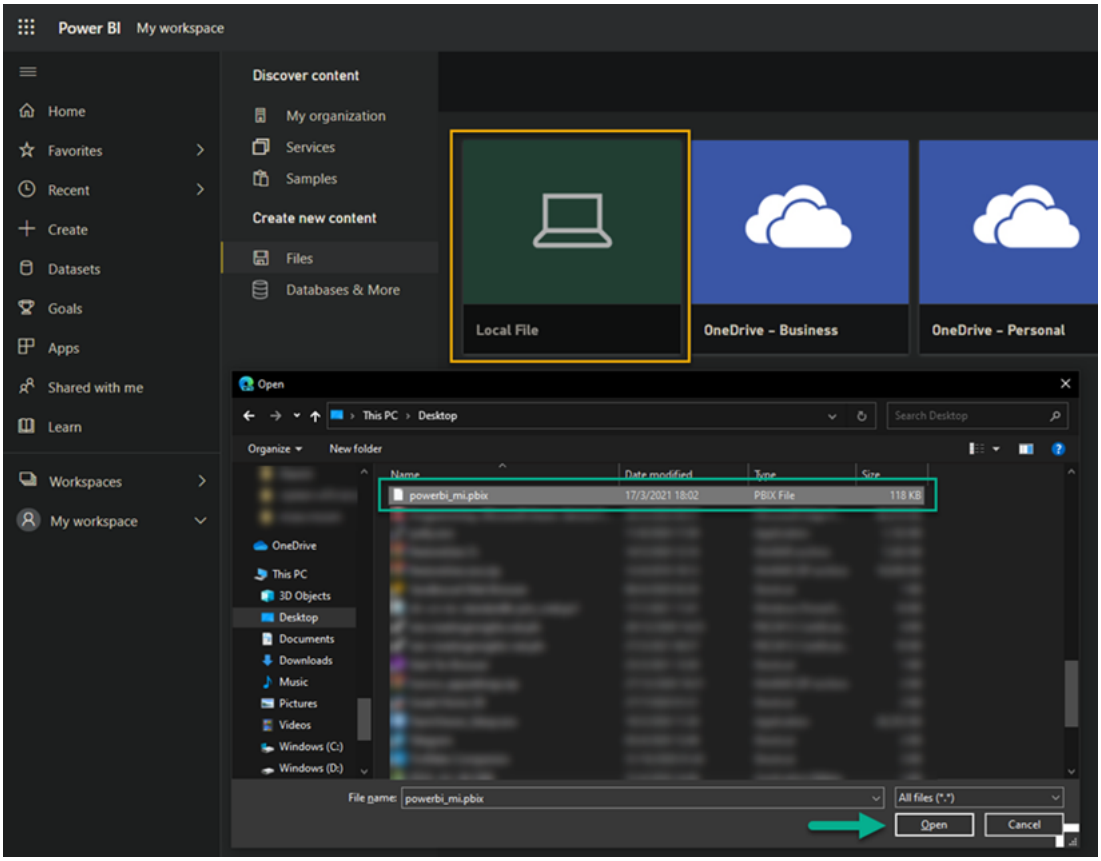
> ⚠ Your user must be licensed with an E5 Office 365 license or higher (Power BI Pro license).



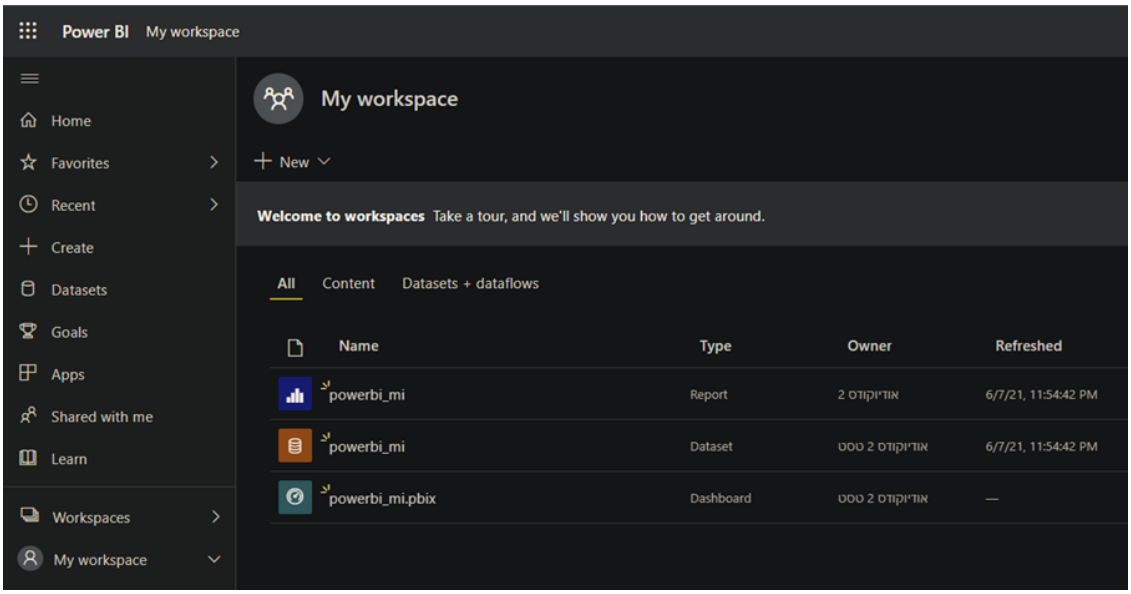
2. Click **My workspace** in the left navigation pane and then click **+ New** and choose **Upload a file**.



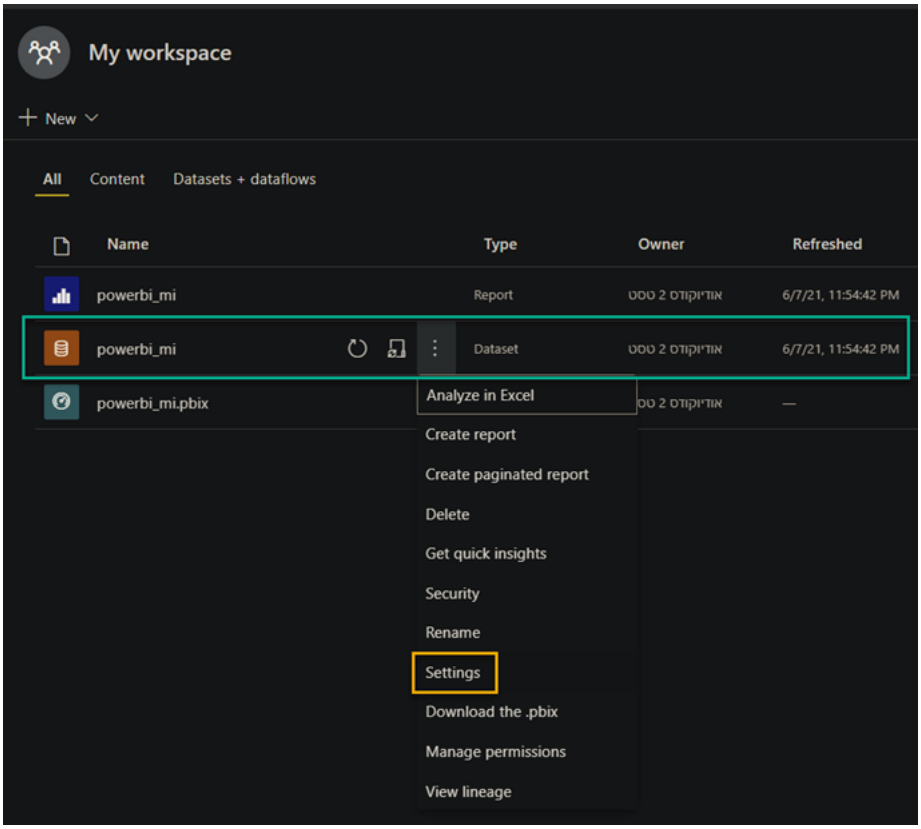
3. In the next screen, choose the **Local File** icon and use the file browsing dialog to select and open the Meeting Insights reports template file (pbix).



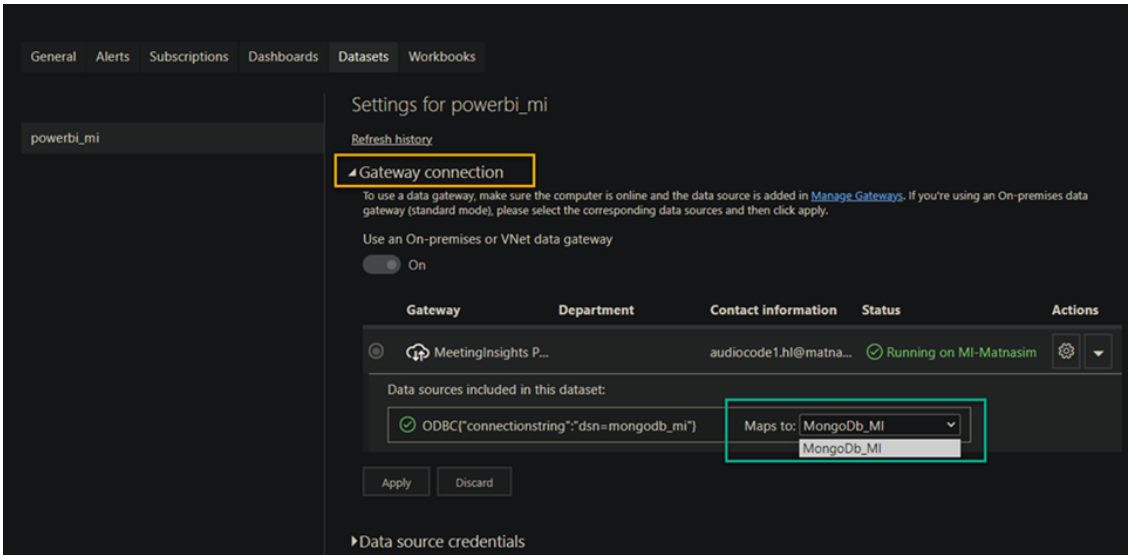
4. View the following screen:



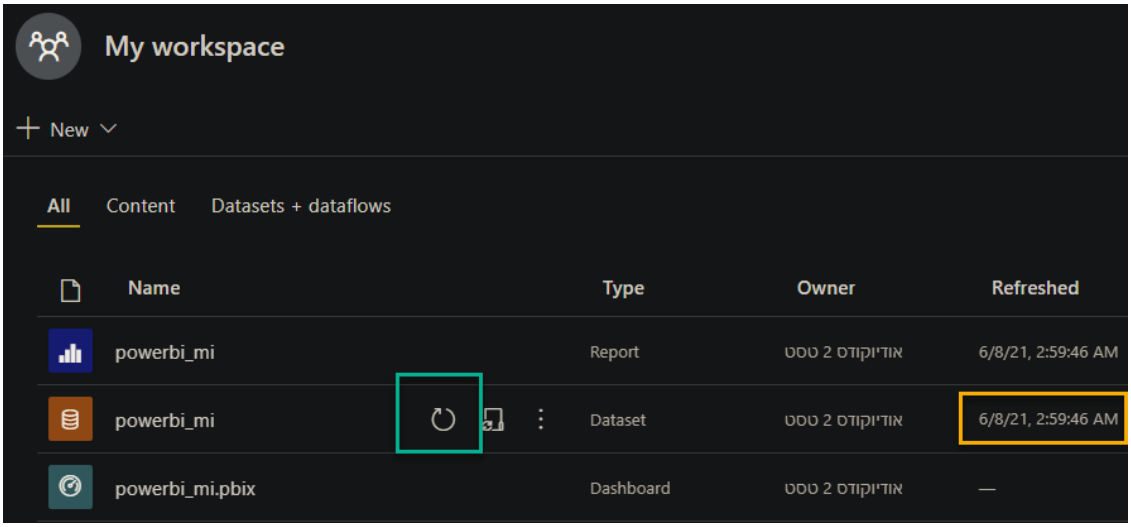
5. Configure data source (make sure you've been granted permissions for accessing the gateway) on the **Dataset** object by clicking the vertical ellipsis and choosing **Settings**.



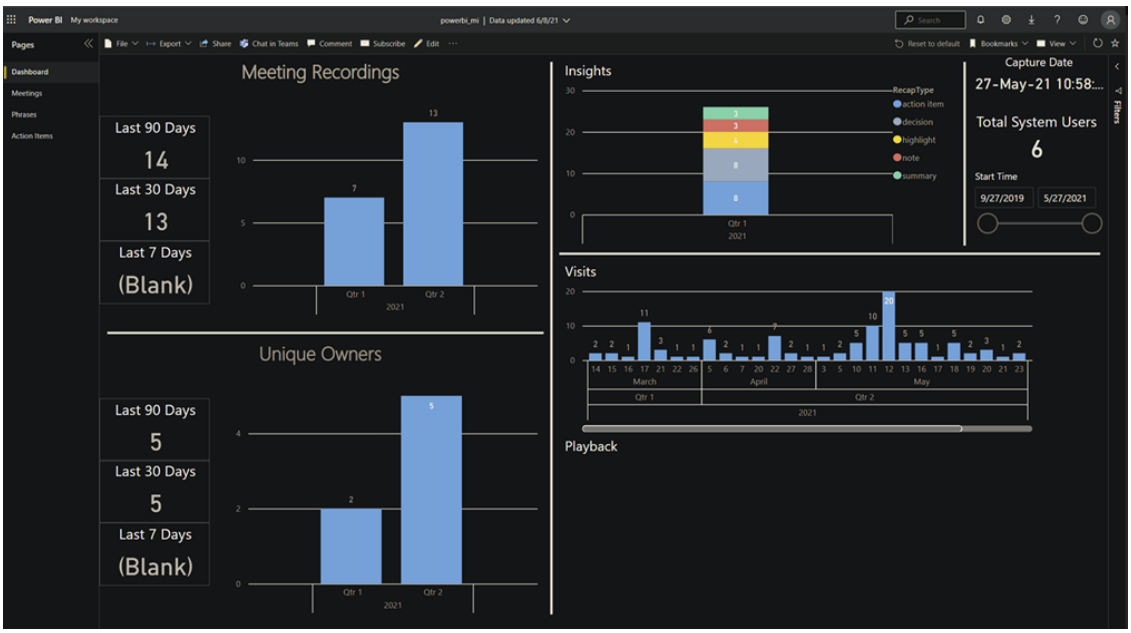
6. Choose the correct data-source under 'Maps to', then click **Apply**.



7. Refresh the source data (fetched from the gateway) to make sure reports are up to date.

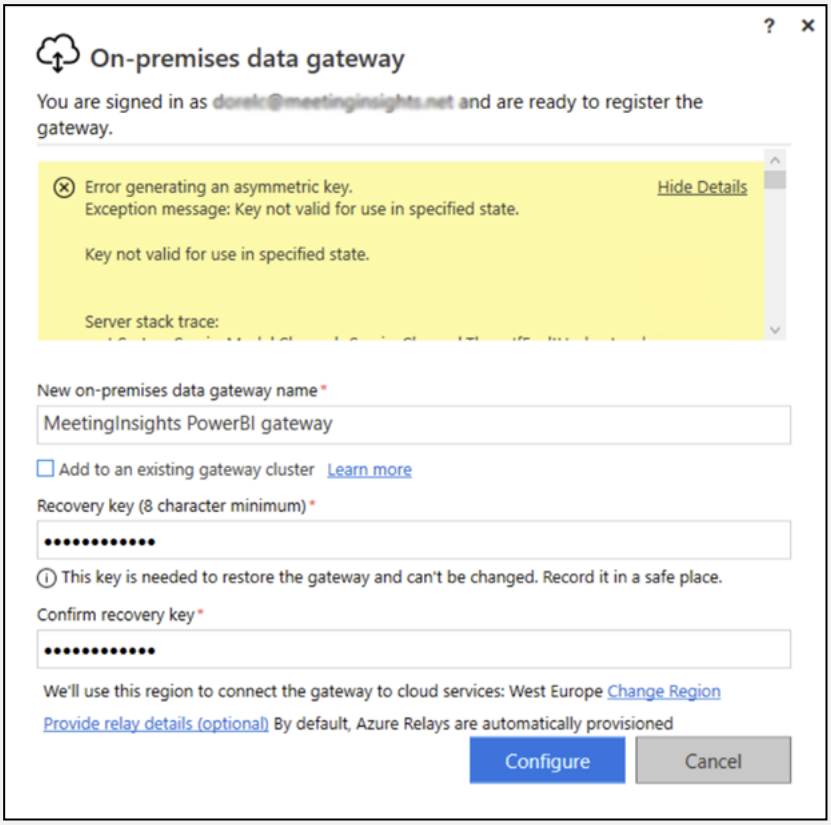


8. Click the report or the dashboard to view the processed data.



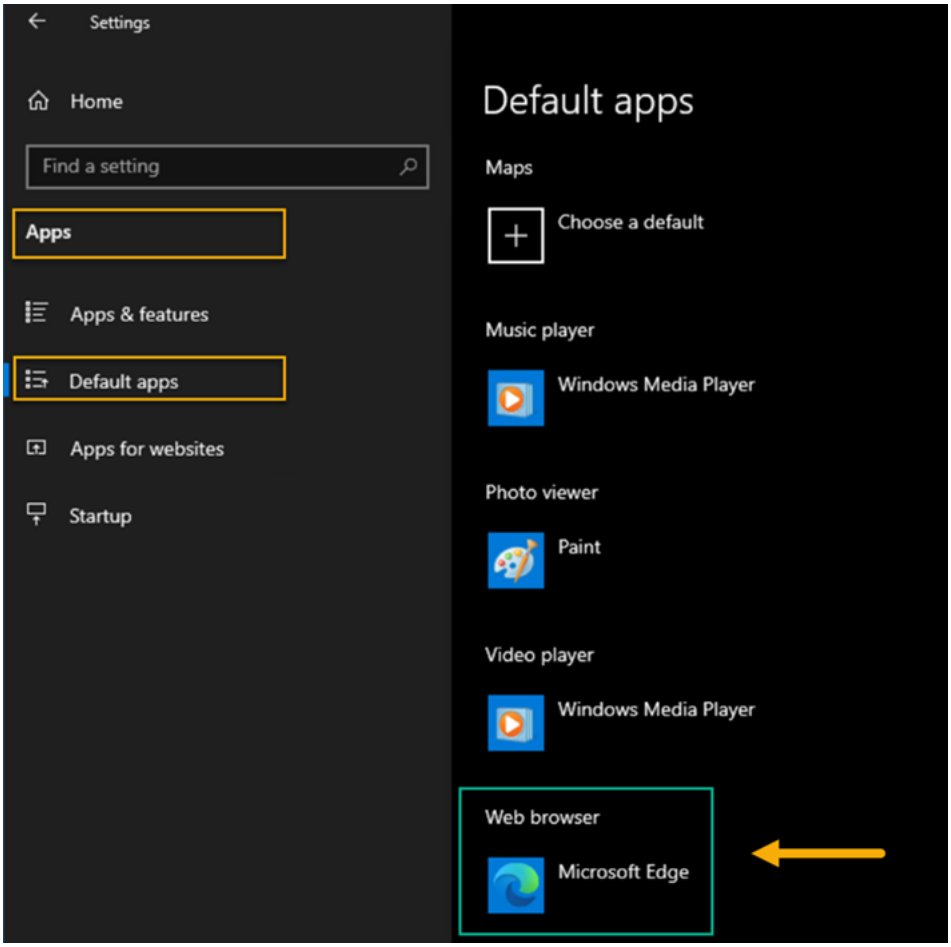
Remedy Installation

If you encounter the following error while installing the Power BI gateway, refer to the instructions below to fix it.

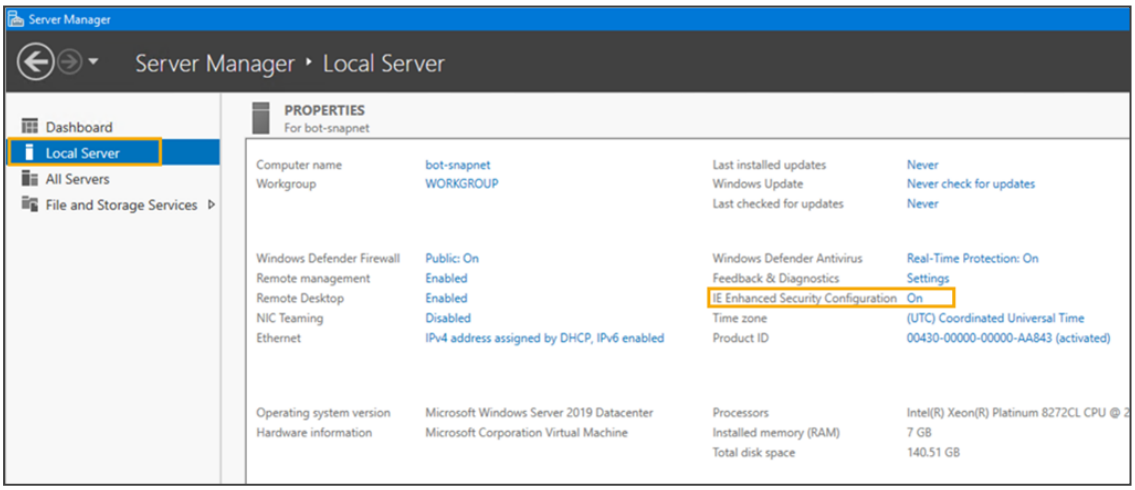


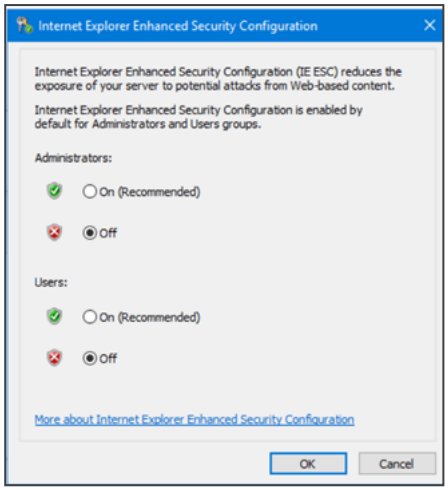
➢ To remedy the error:

1. Open a Remote Desktop connection to the backend Meeting Insights server.
2. Uninstall any on-premises gateway installation on the machine (if there is).
3. Set 'Microsoft Edge' as the default browser in **Settings** > **Apps** > **Default Apps** > **Web browser**.

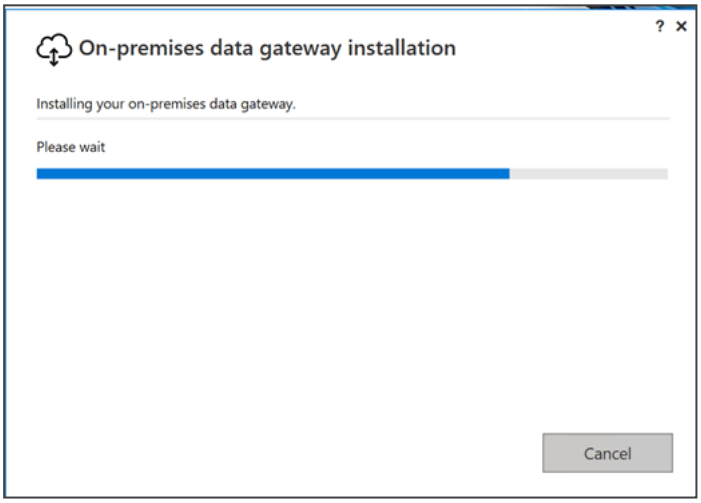


4. Turn off 'IE enhanced security' mode temporarily until the end of the gateway installation: Open **Server Manager** > **Local Server** > click **IE Enhanced Security Configuration** > **Off**.

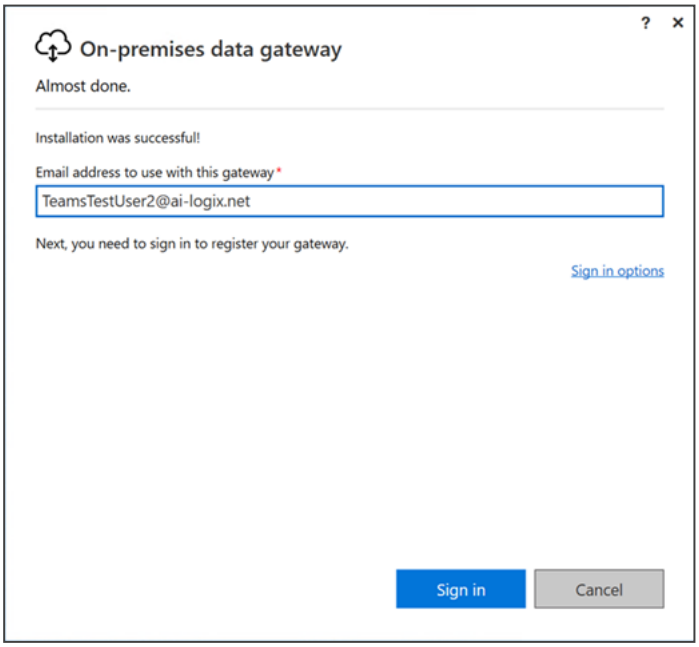




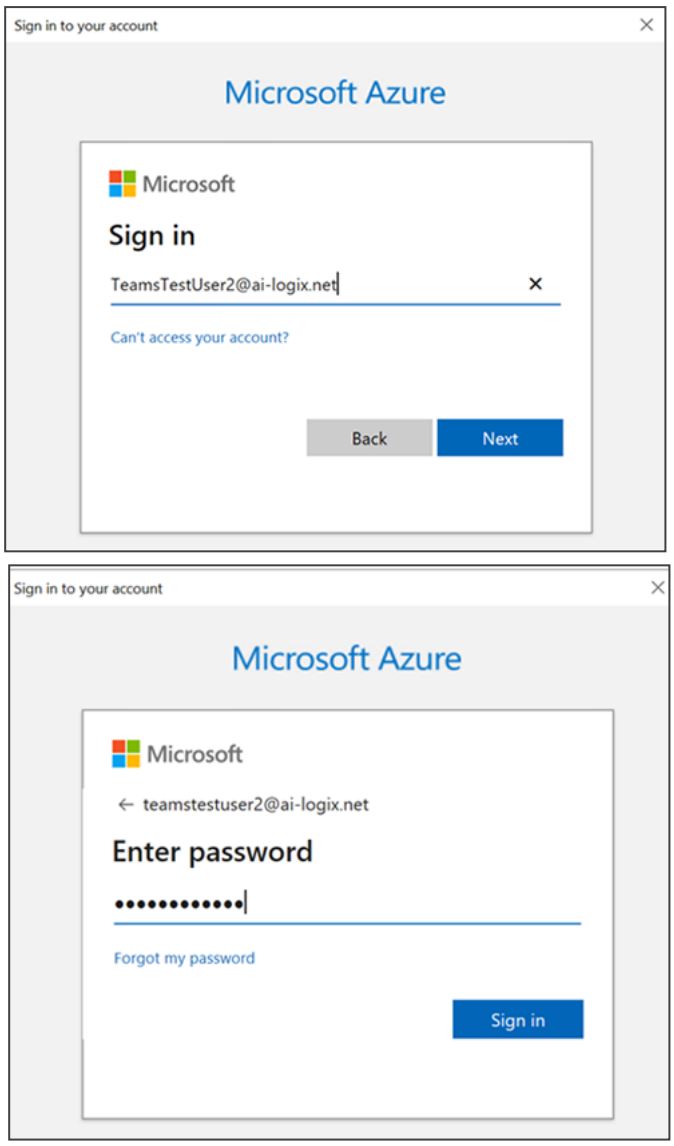
5. Download the latest Power BI gateway installation. Run the downloaded installer exe and go through the initial installation.



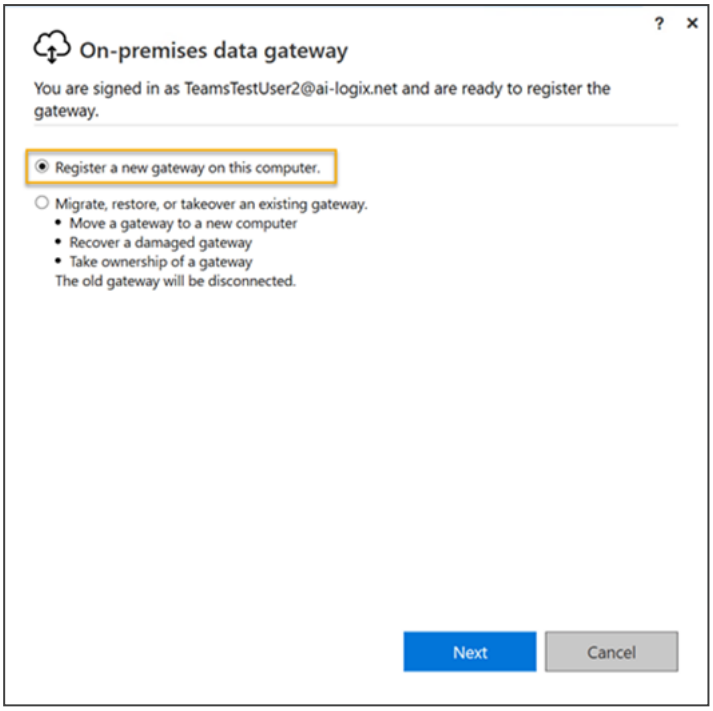
6. Enter the E5 user login name (or one with a Power BI license) and then click **Sign in**.



7. In the login window that pops up, enter the same user login and password.

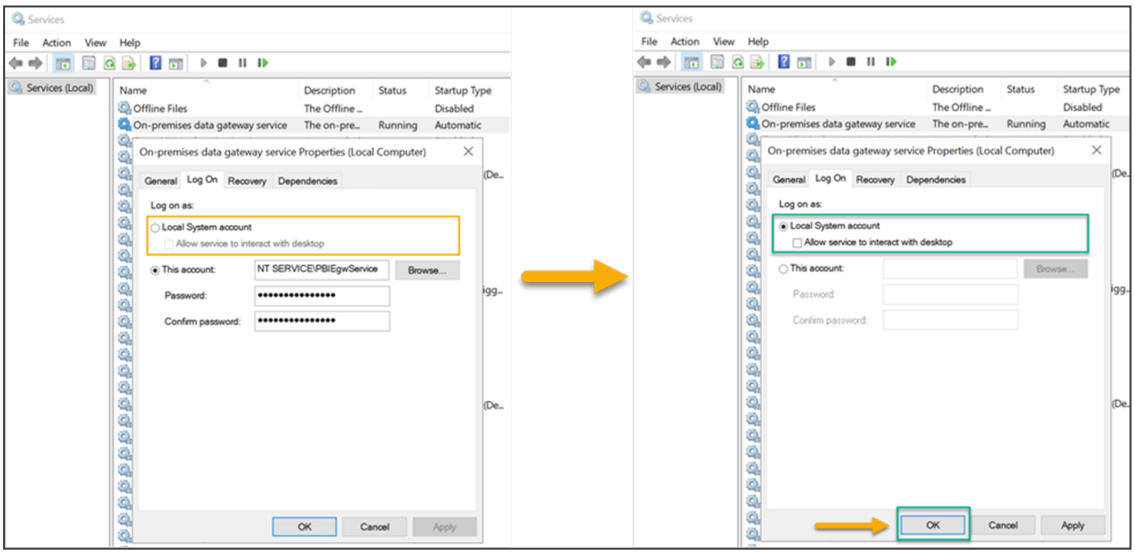


8. When reaching the registration stage, *do not continue* and open the services applet (services.msc).

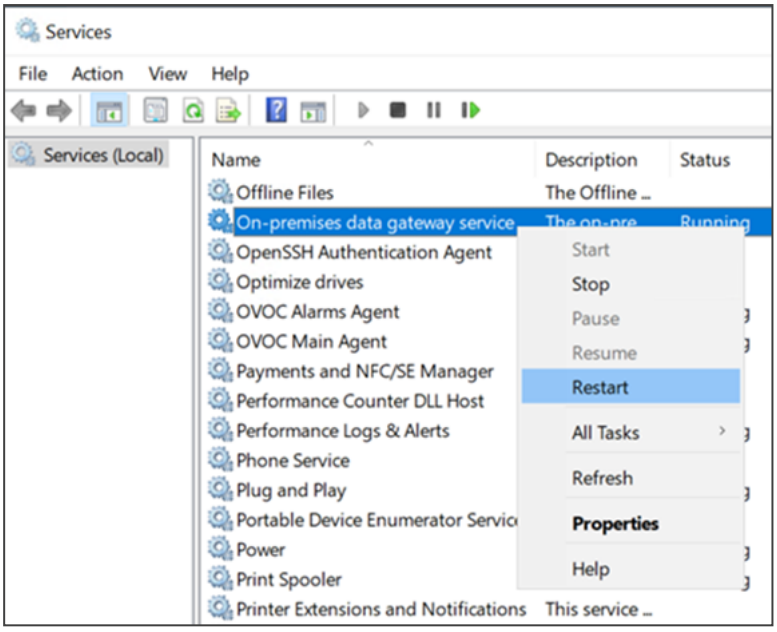


9. Under 'Services', locate **On-premises data gateway service** and open its properties > **Log on** tab.

10. Change to **Local System account** and click **OK** ('ok' any further confirmation prompts).

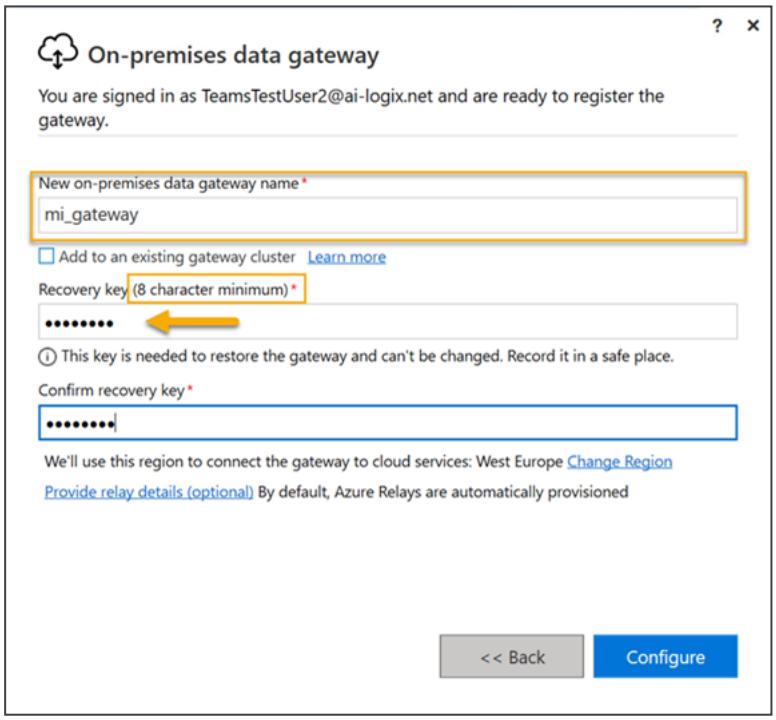


11. Restart the service.

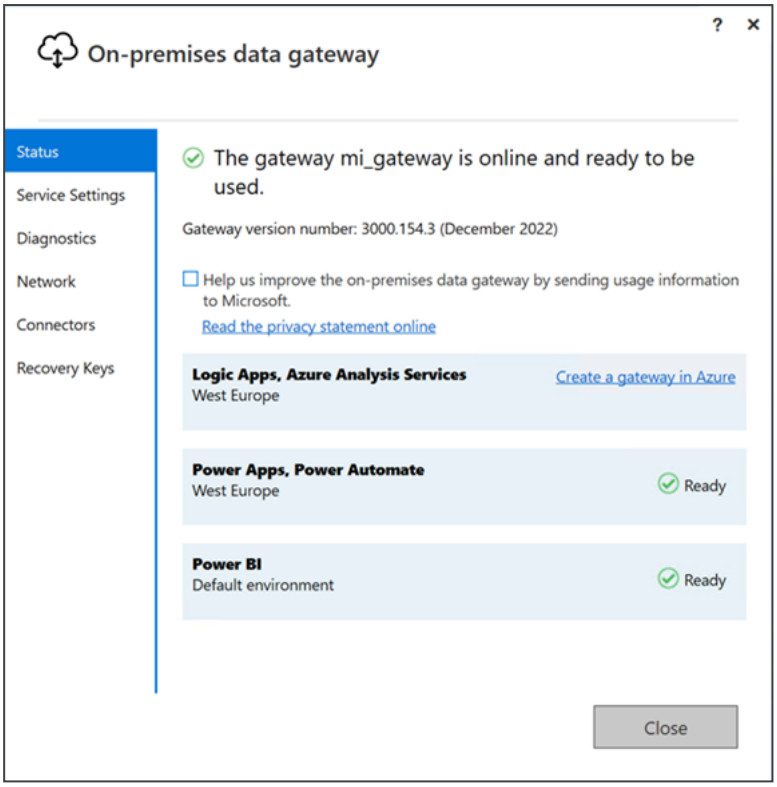


12. Go back to the Power BI gateway registration window and click **Next**.

13. Enter the gateway name and the recovery key (any string 8 chars or longer) and click **Configure**.



14. View a message displayed indicating a successful process and then click **Close**.

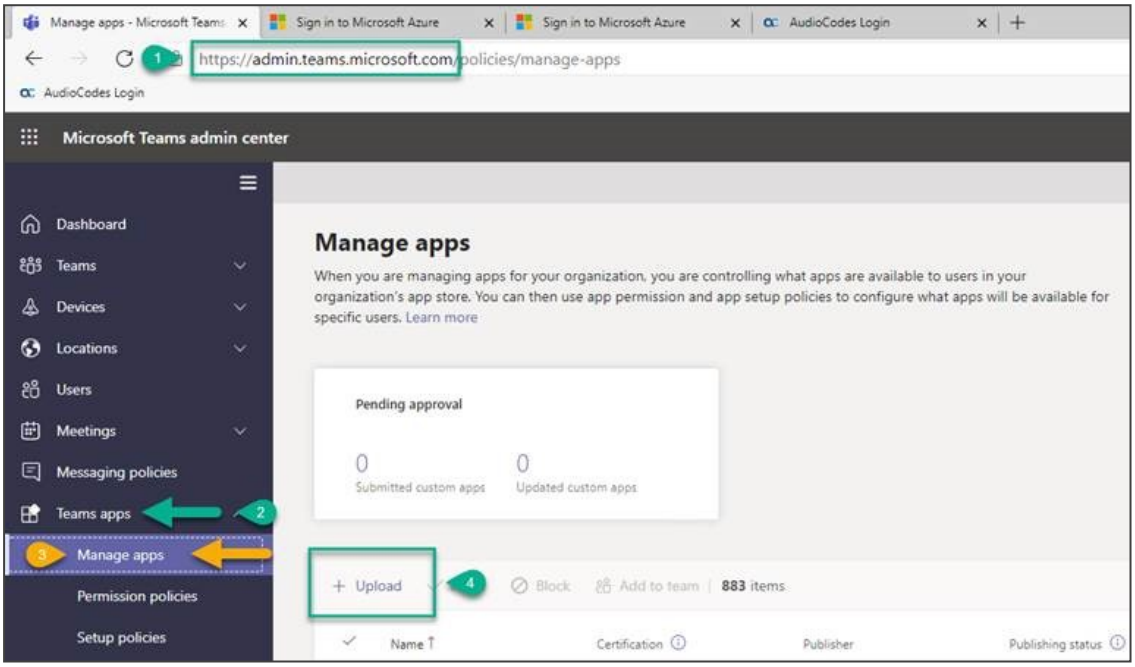

On-premises data gateway
Status
Service Settings
Diagnostics
Network
Connectors
Recovery Keys
The gateway mi_gateway is online and ready to be used.
Gateway version number: 3000.154.3 (December 2022)
Help us improve the on-premises data gateway by sending usage information to Microsoft.
Read the privacy statement online
Logic Apps, Azure Analysis Services
West Europe
Create a gateway in Azure
Power Apps, Power Automate
West Europe
Ready
Power BI
Default environment
Ready
Close

11 Installing Meeting Insights Teams Add-In

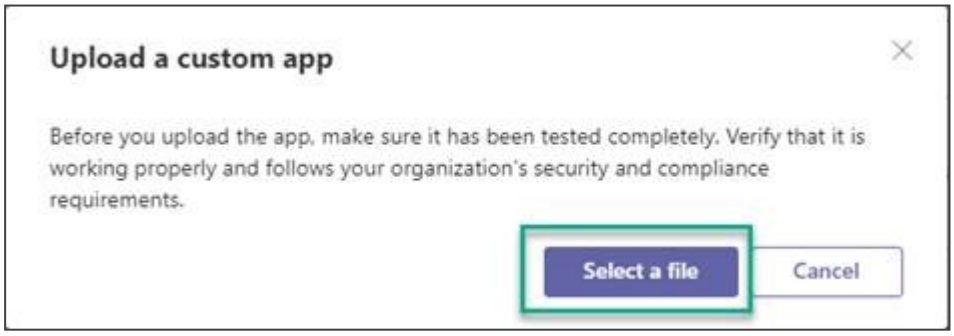
The procedure described here shows how to install Meeting Insights Teams Add-In.

➢ **To install the Meeting Insights Teams Add-In:**

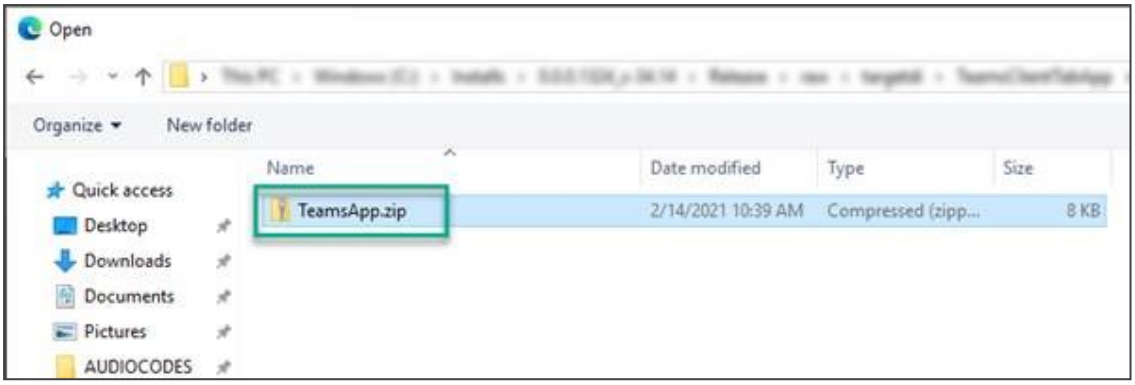
1. Log in to the Teams administration portal as Office 365 administrator.



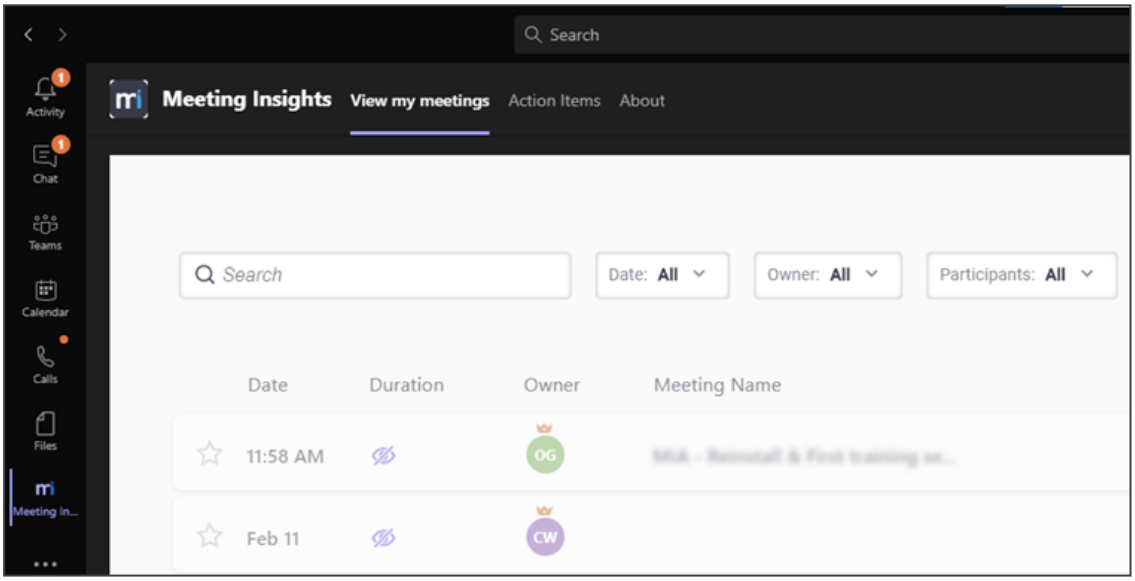
2. Click **Select a file**.



3. Select the manifest file, making sure it is a zip archive.



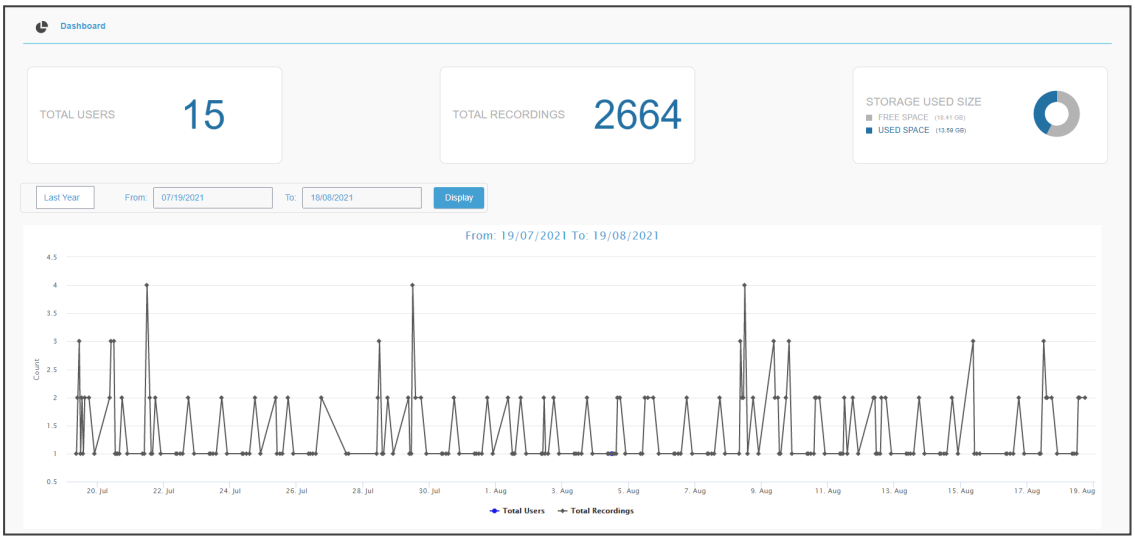
4. After successfully adding the zip file to Teams, on the Teams client, click the '3-dots (…)' button on the lower-left shortcut bar.
5. Select the recently installed Meeting Insights Teams App. A Meeting Insights® icon is added to the navigation bar.



12 Viewing User Statistics

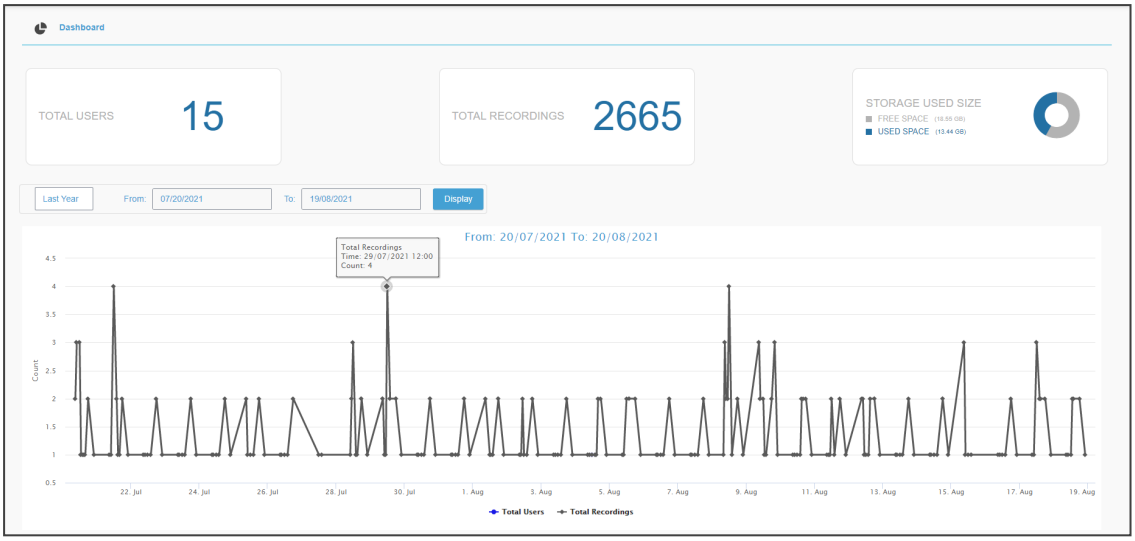
The Dashboard screen provides the administrator with vital statistics about users' 'consumption' of the Meeting Insights application.

- The Dashboard opens by default after signing in to Meeting Insights as Administrator.
- To access the Dashboard from 'Settings', click the icon in the uppermost left corner.



- View global statistics about Meeting Insights users consumption.
  - Total Users (in the preceding figure it is 15)
  - Total Recordings (in the preceding figure it is 2664)
  - Local Application Storage Used Size (in the preceding figure, Free Space is 18.41 GB and Used Space is 13.59 GB)
- Use the time filter to enable viewing statistics about Meeting Insights users consumption over a specific time frame.
  - Click **Last Year** to select either
    - Last Year (default)
    - Last Month
    - Last Week
    - Last Day
    - Customize
    - Select **Customize**; in the activated From/To fields, define specific dates from which and until which to display usage statistics, and then click the **Display** button.

- Point your mouse over a spike in the graph as shown in the next figure.



  - View for that date and time the total number of recordings which users made.

13 Microsoft Graph Permissions' Definitions

The table below shows the Microsoft Graph permissions.

Permission	Type	Display Name	Description
TeamsAppInstallation.ReadWriteForChat.All	App	Manage Teams apps for all chats	Allows the app to read, install, upgrade, and uninstall Teams apps in any chat, without a signed-in user. Does not give the ability to read application-specific settings. Component: MI app
TeamsTab.Create	App	Create tabs in Microsoft Teams	Allows the app to create tabs in any team in Microsoft Teams, without a signed-in user. This does not grant the ability to read, modify or delete tabs after they are created, or give access to the content inside the tabs. Component: MI app

Permission	Type	Display Name	Description
TeamsTab.ReadWriteForChat.All	App	Allow the Teams app to manage all tabs for all chats	Allows a Teams app to read, install, upgrade, and uninstall all tabs for any chat, without a signed-in user. Component: MI app
User.Read.All	App	Read all users' full profiles	Allows the app to read user profiles without a signed-in user. Component: MI app
Calls.AccessMedia.All	App	Access media streams in a call as an app	Allows the app to get direct access to media streams in a call, without a signed-in user. Component: Teams Bot app
Calls.JoinGroupCall.All	App	Join group calls and meetings as an app	Allows the app to join group calls and scheduled meetings in your organization, without a signed-in user. The app will be joined with the privileges

Permission	Type	Display Name	Description
			of a directory user to meetings in your organization. Component: Teams Bot app
OnlineMeetings.Read.All	App	Read online meeting details	Allows the app to read online meeting details in your organization, without a signed-in user. Component: Teams Bot app
Chat.ReadBasic.All	App	Read basic chat	Allows the app to read online meeting details when Mia is added ad-hoc. Component: Teams Bot app
Calendars.ReadWrite *Customer tenant deployment only	App	Read and write calendars in all mailboxes	Allows the app to create, read, update, and delete events of all calendars without a signed-in user. Component: Mia daemon
Mail.Read * Customer tenant deployment only	App	Read mail in all mail-	Allows the app to read mail in

Permission	Type	Display Name	Description
		boxes	all mailboxes without a signed-in user. Component: Mia daemon
Email	Delegated	View users' email address	Allows the app to read your users' primary email address. Component: MI app
offline_access	Delegated	Maintain access to data you have given it access to	Allows the app to see and update the data you gave it access to, even when users are not currently using the app. This does not give the app any additional permissions. Component: MI app
Openid	Delegated	Sign users in	Allows users to sign in to the app with their work or school accounts and allows the app to see basic user profile information. Component: MI app

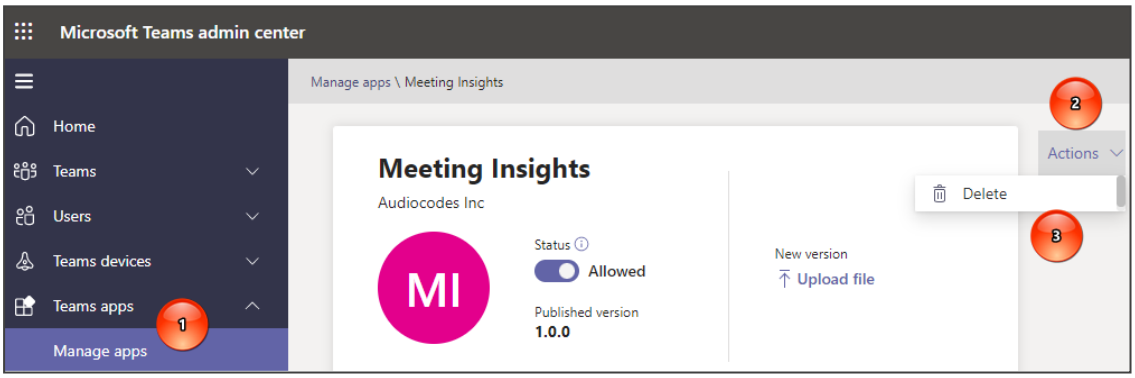
Permission	Type	Display Name	Description
Profile	Delegated	View users' basic profile	Allows the app to see your users' basic profile (name, picture, user name). Component: MI app
User.Read	Delegated	Sign in and read user profile	Allows users to sign-in to the app, and allows the app to read the profile of signed-in users. It also allows the app to read basic company information of signed-in users. Component: MI app

13 Adding Meeting Insights App to Organization's Teams Store

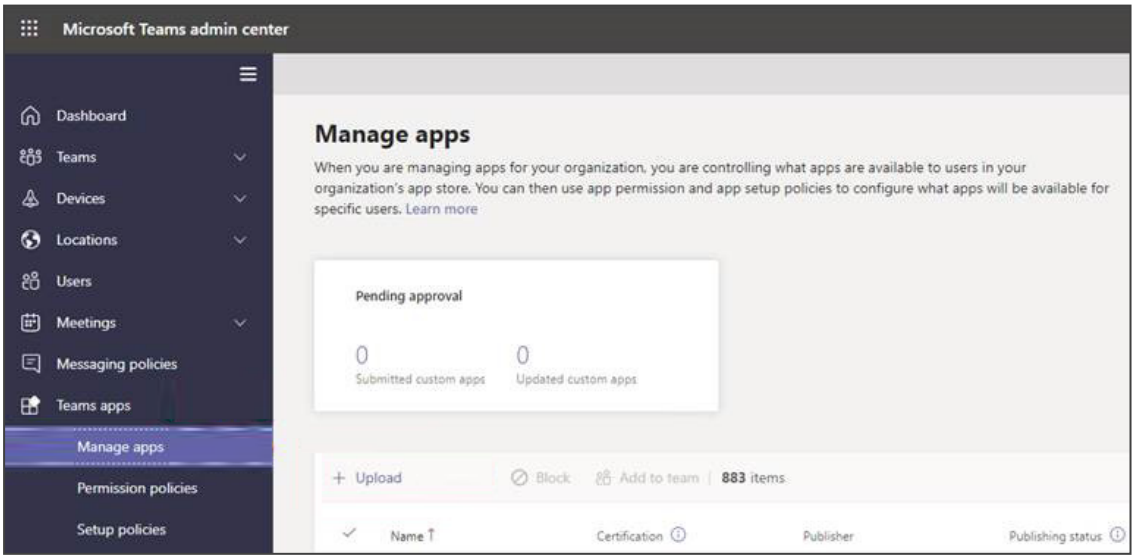
This section describes how to add the Meeting Insights app to your organization's Microsoft Teams Store. This is done through Microsoft's Teams admin center.

➢ **To add Meeting Insights app to Teams store:**

1. Sign in to your organization's Teams admin center with your Office 365 admin account.
2. If the Teams store has the previous version of Meeting Insights Teams app, you need to remove it:
   a. From the left navigation menu, navigate to **Teams apps** > **Manage apps**.
   b. Search for the Meeting Insights app, and then from Actions drop-down menu, choose **Delete**:



3. Upload the installation file for the Meeting Insights Teams app:
   a. From the left navigation menu, navigate to **Teams apps** > **Manage apps**, and then click **Upload**:



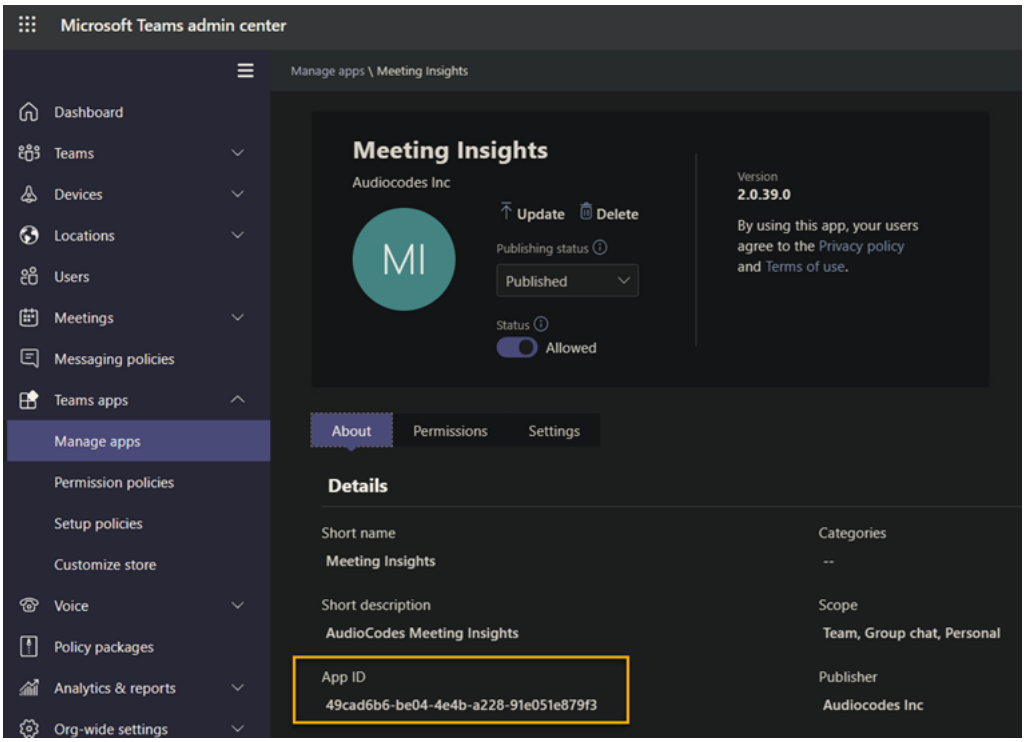
b. In the displayed dialog box, click **Select a file**, and then browse to and select the Meeting Insights Teams app installation file (*TeamsApp.zip*) that you received from AudioCodes.

4. Provide AudioCodes with the App ID:

a. From the left navigation menu, navigate to **Teams apps** > **Manage apps**.

b. Locate the newly installed Meeting Insights Teams app in the list of apps, and then select it.

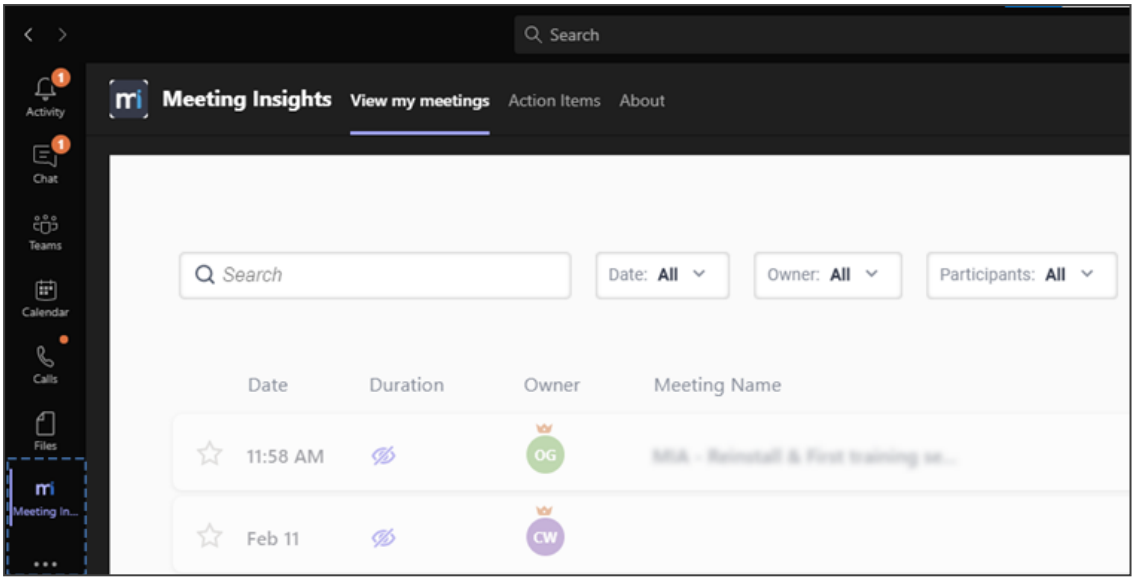
c. Under the **About** tab, copy the 'App ID' field value:



d. Send AudioCodes the App ID.

5. Pin the Meeting Insights app to the Teams client navigation bar:

In the Teams client left navigation bar, click the 3-dot (…) button, and then choose the newly installed Meeting Insights app; a Meeting Insights icon is added to the navigation bar:



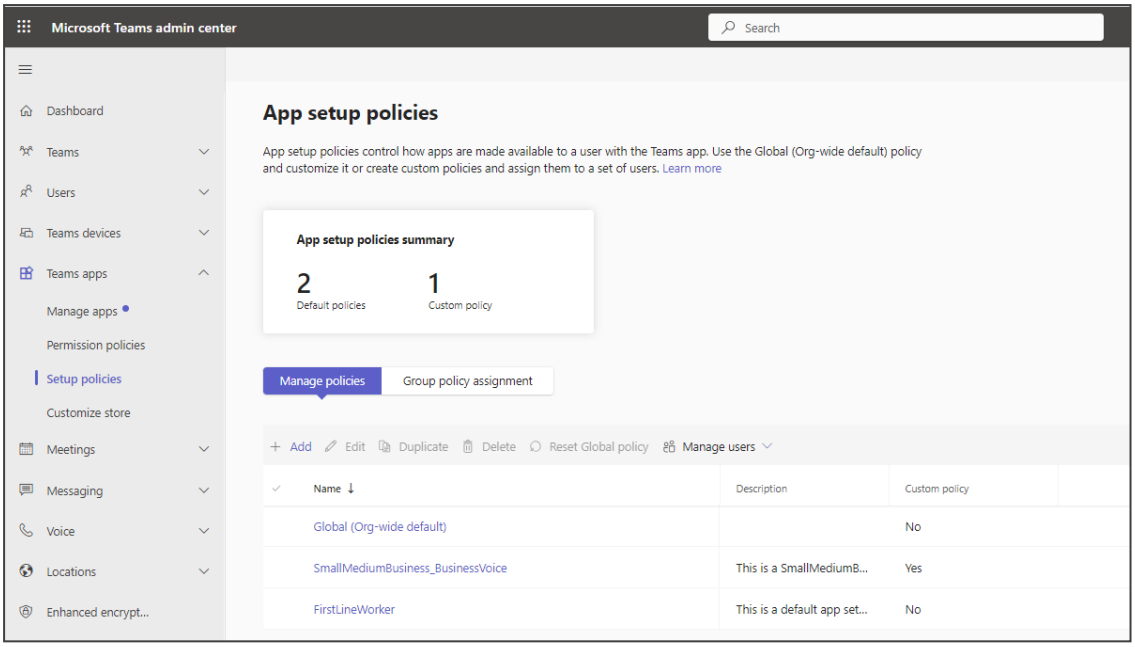
Admins are recommended to add and pin Meeting Insights Teams app to the whole organization or to user group(s) that will be using the application. See here for more information.

Add and Pin Meeting Insights Teams App to the Entire Organization or to User Group(s)

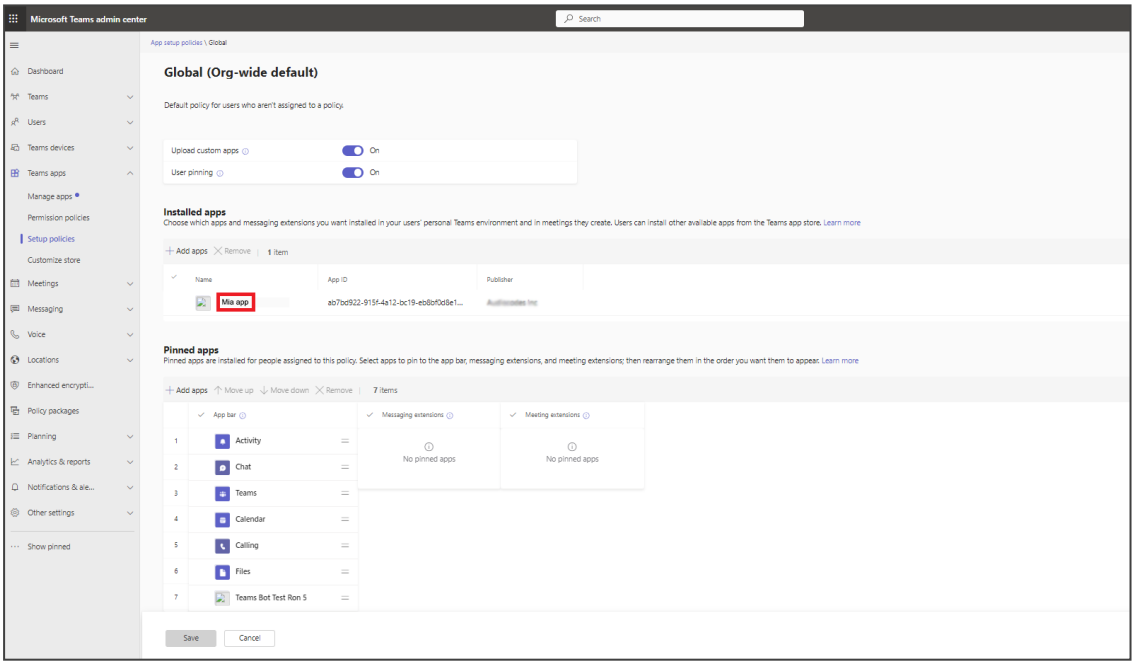
Admins are recommended to add and pin the Meeting Insights Teams app to the whole organization or to user group(s) that will be using the app.

➢ **To add and pin the Meeting Insights Teams app to the whole organization or to user group(s):**

1. Open Microsoft Teams admin center (TAC) and add to the organizational policy or create a new policy and assign it to the users or groups.

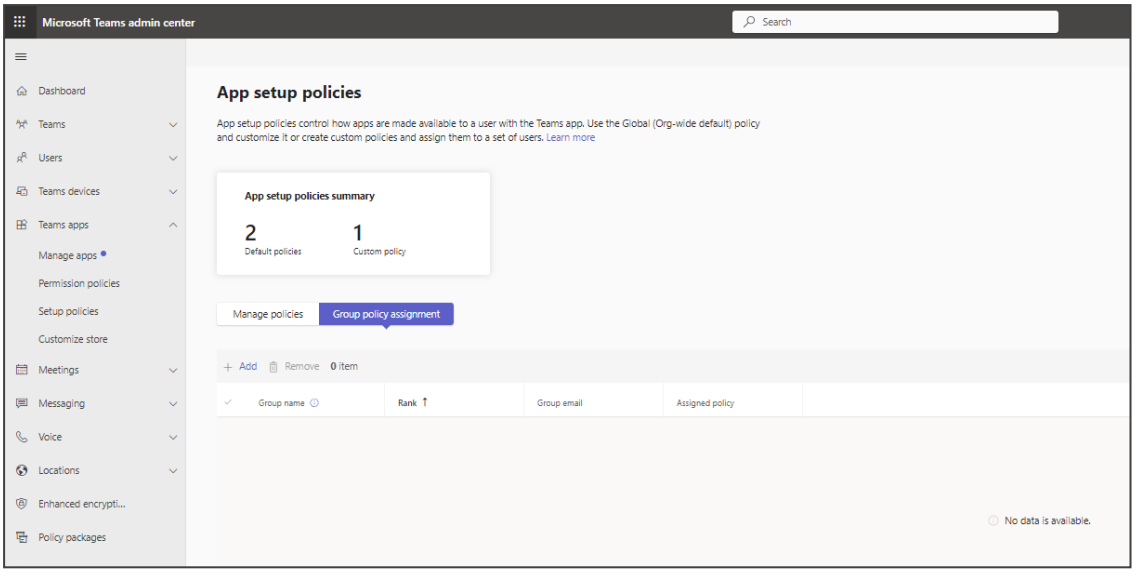


2. Add Meeting Insights Teams app to the installed apps and to the pinned apps (recommended) so that it'll be displayed for users by default.

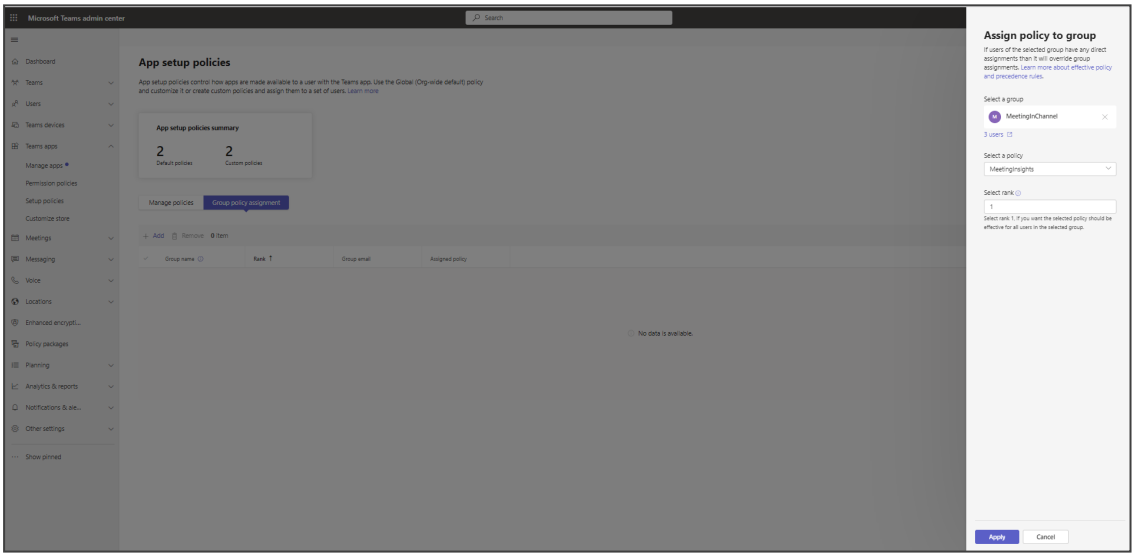


3. To apply to a group, create a separate policy, add the Meeting Insights Teams app to the installed and pinned apps, and then assign group(s) as shown below.

4. To assign to a group, click **Group policy assignment** under the setup policy option.



5. To assign groups, click **Apply**.



14 Proof of Concept

The ability of Meeting Insights to meet business challenges and expedite business objectives can be demonstrated in a Proof of Concept (POC).

View details under:

Hosted by Customer below

Overview of Terms and Conditions for POC on the next page

Hosted by Customer

In a collaborative trial (POC) hosted by the customer, the following requirements will be necessary:

Minimum Server Requirements for POC below

Virtual Assistant/Teams Bot below

Meeting Insights Application Server below

Media Storage Space below

AI Engine Servers (Voice Commands, Speaker Identification) below

See also:

Overview of Terms and Conditions for POC on the next page

Minimum Server Requirements for POC

The following specification is recommended for the recording of up to four concurrent meetings. See Minimum Server Requirements on page 10 for more information.

Virtual Assistant/Teams Bot

- Windows Server 2019
- VM node of size **Ds2_v2**

Meeting Insights Application Server

- Windows Server 2019
- 64 GB data disk for logs and database

Recommended: D2as_v4 (2 vCPUs, 8GB RAM)

Media Storage Space

Azure Blob storage space for recordings and meta-data.

AI Engine Servers (Voice Commands, Speaker Identification)

- Windows Server 2019
- Recommended: F8s_v2 (8 vCPUs, 16GB RAM)

Overview of Terms and Conditions for POC

The following Terms and Conditions will apply:

Customer Responsibilities below

AudioCodes Responsibilities during the POC below

Post-Trial Responsibilities below

Customer Responsibilities

In a POC, the customer is responsible for providing

- a minimum of 10 users who will use Meeting Insights' Advanced license for a two-month free trial (excluding Premium Transcription services).
- a project lead / owner who will meet with a Meeting Insight's Customer Success manager on bi-weekly calls.
- all resources, including virtual machines, Azure resources requirements, network and application access security, maintenance of the resources (Windows updates, etc.), configuration changes to Teams Tenant and all billing. AudioCodes will assist, as needed.

AudioCodes Responsibilities during the POC

AudioCodes' responsibilities during the POC are to:

- Provision, provide technical support and train customer's staff on configuring and using the Meeting Insights application.
- Provide a Meeting Insights Customer Success manager to provide support to the customer during the trial period.
- If Meeting Insights is deployed in AudioCodes' Azure Tenant, then AudioCodes will be responsible for providing all necessary machines and storage requirements.

Post-Trial Responsibilities

After Meeting Insights' trial (POC) ends, the customer is not obligated to make any payment or purchase the Meeting Insights software or professional services.

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