User's Manual

Secure On-premises AI Meeting Documentation Solution

Meeting Insights On-Prem

Version 2.4.3

Notice

Date Published: March-17-2026

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Related Documentation

Document Name
Meeting Insights On-Prem Release Notes
Meeting Insights On-Prem Installation Manual
Meeting Insights On-Prem Integration Guide

Document Name
Meeting Insights On-Prem Solution Overview
Meeting Insights On-Prem Brochure

Document Revision Record

LTRT	Description
26038	Initial document release.

Table of Contents

1 Introduction

This manual provides step-by-step instructions on how to use AudioCodes Meeting Insights On-Prem to manage and proofread transcription recordings.

Intended Audience

The manual is intended primarily for the following types of Meeting Insights On-Prem users:

- **Task Manager** - Creates recordings within a tenant and assigns them to users for proofreading.
- **Task Editor** - Reviews and proofreads transcriptions assigned by a Task Manager.

This manual also covers some tasks and procedures for the following administrative users:

- **System Admin** - Manages all tenants across the system (highest-level role).
- **Tenant Manager** - Manages settings and users within a specific tenant.

Product Overview

Meeting Insights On-Prem is an on-premises application that records speech, transcribes it, and generates AI-powered insights from your meetings and dictations. The end result is a polished Microsoft Word document (*Meeting Insights and Transcript document*) that you can distribute to your team, stakeholders, or anyone else who needs the meeting record.

The app handles the entire workflow--from audio capture through transcription, AI analysis, proofreading, and final document export--without relying on external cloud services and ensuring sensitive data never leaves your internal network.

Key Features

- **Audio Recording:**

  Meeting Insights On-Prem supports the following methods for capturing audio:

  - **Physical meeting:**
    - **Online meeting:** Use Meeting Insights On-Prem web app with your computer's microphone to capture voices in the room.
    - **Dictation:** Use Meeting Insights On-Prem web app with your computer's microphone for personal dictation.
  - **Phone call:** Meeting Insights On-Prem telephony bot records the call, or captures audio from your phone's microphone.
  - **Offline meeting:** Upload a pre-recorded audio file(s) for transcription and analysis.

> ⚠ Dictation is available only in Meeting Insights On-Prem deployments with Hebrew-English language mode.

- **Transcription and Speaker Detection:**

  Meeting Insights On-Prem automatically transcribes recorded audio into text. It offers multi-language support, enabling it to transcribe a wide range of spoken languages It also uses speaker detection technology to identify who said what, so the transcription clearly attributes each segment of speech to the appropriate participant ("Speaker-1", "Speaker-2", "Speaker-3", and so on).

> ⚠ Speaker detection works best with clear audio and distinct voices. For optimal results, minimize background noise during recording.

  Meeting Insights On-Prem delivers a global experience with support for over 50 languages for speech-to-text transcription and AI-powered insights (for example, summaries, action items, and decisions). This extended language coverage enables organizations worldwide to capture and understand meeting content with unprecedented accuracy.

  Meeting Insights On-Prem offers two installation modes, giving organizations the flexibility to choose the infrastructure that best meets their needs:

  - **Multi-Language Mode:** Designed for organizations that require broad language coverage, this mode enables full multi-language processing. This mode supports the following task types:
    - Online Meeting tasks
    - Offline Meeting tasks
  - **Hebrew-English Mode:** For organizations focused on English and Hebrew transcription. This mode supports the following task types:
    - Online Meeting tasks
    - Offline Meeting tasks
    - Dictation tasks

- **AI-Powered Insights:**

  Once transcription is complete, Meeting Insights On-Prem can generate the following AI-powered insights:

  - Meeting summary
  - Main topics discussed
  - Decisions made
  - Title
  - Meeting participants
  - Details

- Action items that require follow-up
- Purpose or context of meeting (background)

These insights are generated automatically from the transcribed content and can be included in the downloaded Meeting Insights and Transcript document.

- **Proofreading Tool:**

Task Managers can assign a transcriber to review and edit a transcription before it is finalized. The built-in proofreading tool provides feature-rich capabilities:

- Edit and format transcribed text, including bullets and numbered lists
- Assign transcribed sentences to specific speakers, or rename speakers
- Create segments (subsections) within the transcription to organize content
- Play back the audio recording with synchronized text highlighting, so you can verify accuracy word by word

- **Word Document Export:**

When proofreading is complete, you can export the transcription as a formatted Microsoft Word document. The document is generated from a customizable template that controls:

- Which logos appear in the document header
- Which sections are included in the document and their order of appearance
- The content and order of AI-powered insight sections
- User-defined sections with custom content

Templates can be tailored to match your organization's branding and reporting requirements, making every exported document consistent and professional.

Workflow Overview

The following table summarizes the end-to-end workflow in Meeting Insights On-Prem.

Step	Action	Description
1	**Record audio**	Capture meeting audio through the web app microphone (physical online meeting or dictation), telephony bot (phone call), or upload an audio file (offline meeting).
2	**Transcribe**	The app automatically transcribes the audio and identifies speakers in the recording.
3	**Generate insights**	AI analyzes the transcription to produce a summary, key topics, decisions, and other insights.
4	**Proofread**	An assigned transcriber reviews the transcription, corrects errors, organizes content into segments, and verifies speaker

Step	Action	Description
		assignments using audio playback.
5	**Export**	Download the final, proofread transcription and insights as a Word document based on your organization's template.
6	**Distribute**	Share the Word document with meeting participants, stakeholders, or your records system.

2 Sign in to Meeting Insights On-Prem

Meeting Insights On-Prem is a web-based management tool.

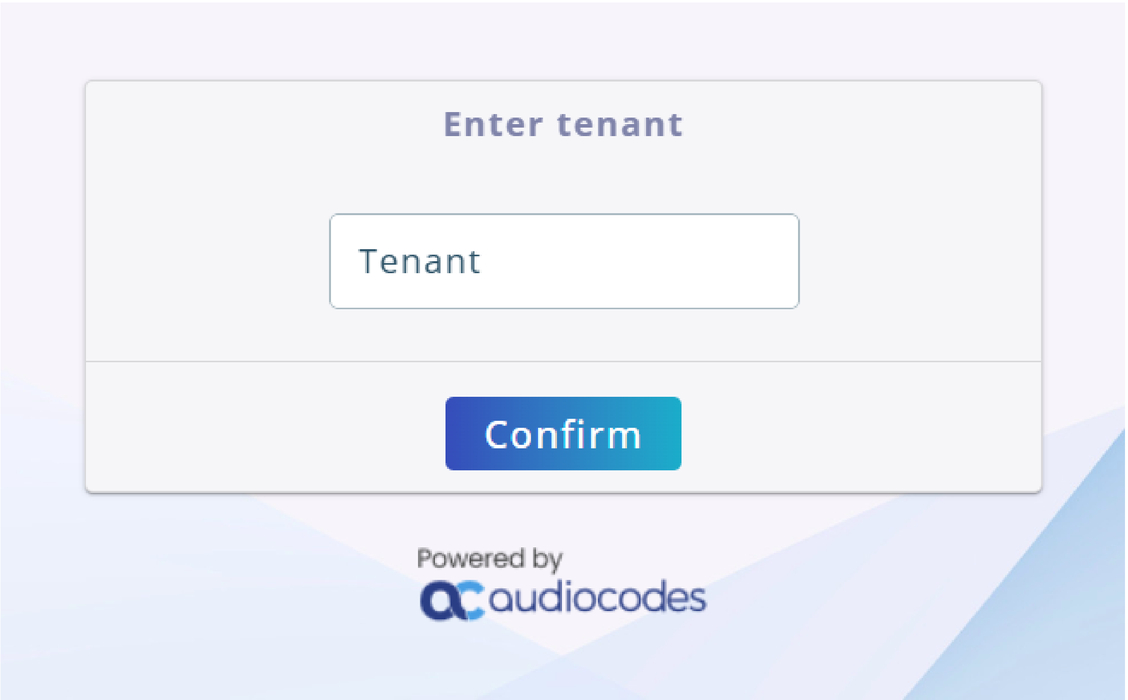
After signing in, available pages in Meeting Insights On-Prem depend on your assigned user permission level:

- **System Admin, Tenant Manager, or Task Manager:** You're directed to the main page - Transcription Task List page. This page lets you create and manage tasks and access all other pages. For more information, see Transcription Task List on page 50.
- **Task Editor:** You're directed to the File List page. This page lists all the transcription files of tasks that have been assigned to you as a transcriber for proofreading. For more information, see Transcription File List on page 60.

> Meeting Insights On-Prem supports the following web browsers:
> - Google Chrome
> - Microsoft Edge

➢ To sign in:

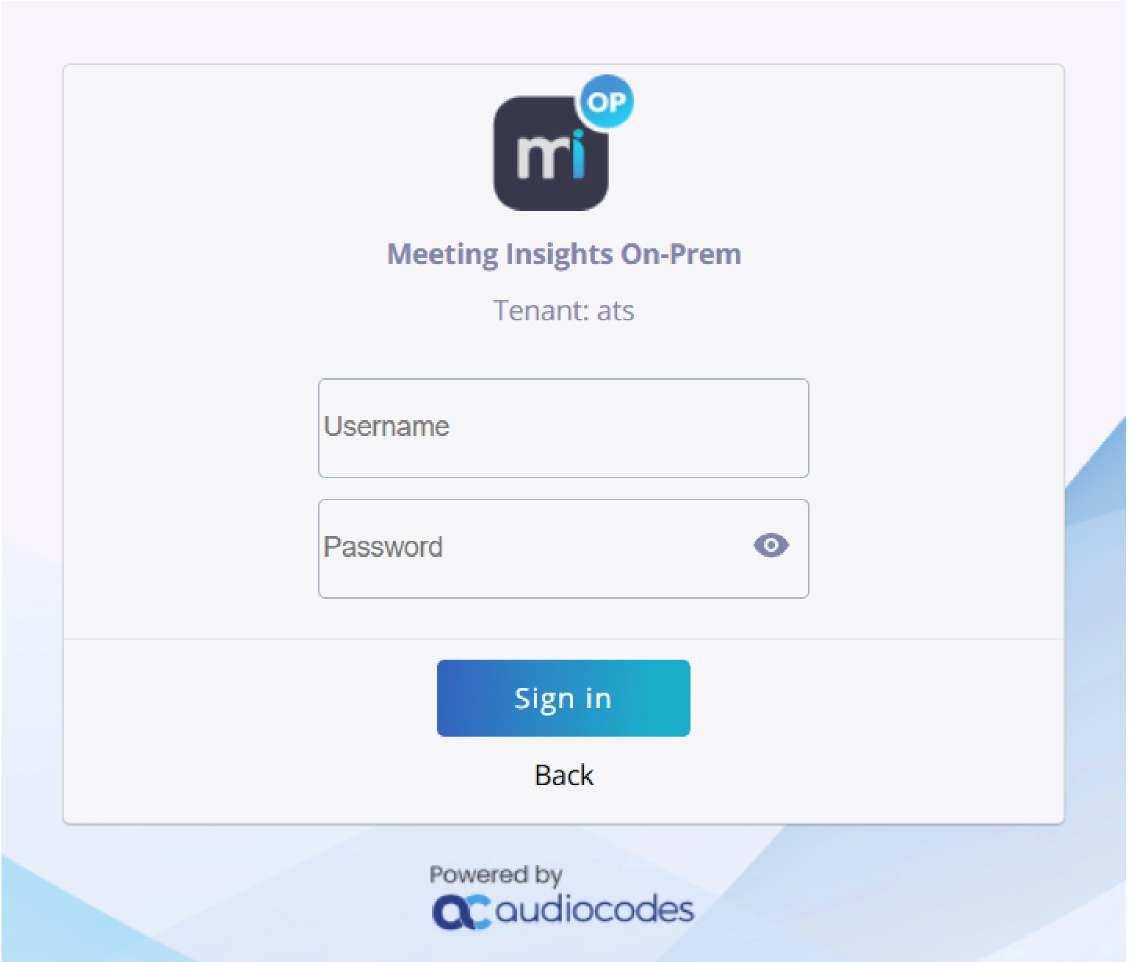
1. Go to the URL of your Meeting Insights On-Prem; you're prompted to enter the tenant name:



2. In the 'Tenant' field, enter the name of the tenant that you want to access.

> The tenant name is case-sensitive.

3. Click **Confirm**; you're prompted to sign in with your credentials:

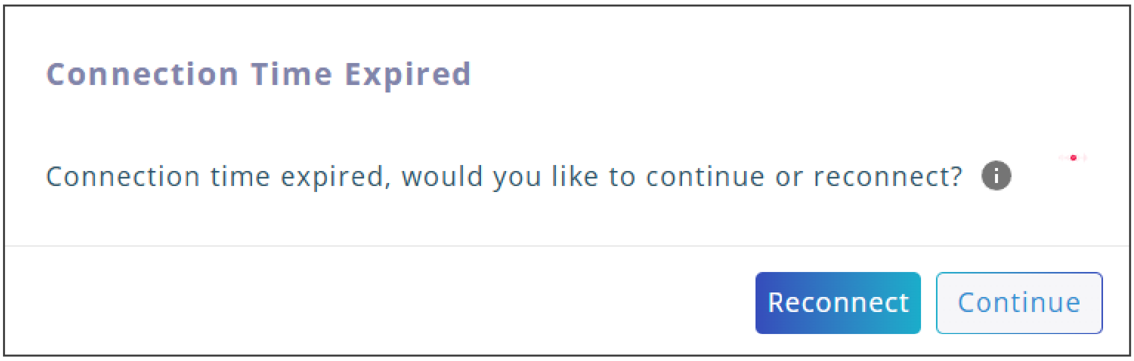


To change the tenant, click **Back**.

4. In the 'Username' field, enter your username.
5. In the 'Password' field, enter your password.
6. Click **Sign in**.

Refresh Session Timeout

If you're signed into Meeting Insights On-Prem and remain inactive for a period of time, the following session timeout message appears:



Click one of the following options:

- **Continue** to resume your currently signed-in session.
- **Reconnect** to sign in again to the application (see Sign in to Meeting Insights On-Prem on page 5).

Sign Out

AudioCodes recommends to sign out of Meeting Insights On-Prem when you've finished using it.

➢ **To sign out:**

1. Click your profile icon, located in the top-right corner; a drop-down box appears.
2. Click **Sign out**.

> Meeting Insights On-Prem automatically signs you out if you're inactive for a certain amount of time. Fior more information, see Refresh Session Timeout on the previous page.

3 Getting Started

This section provides a high-level workflow of how to use Meeting Insights On-Prem as a **Task Manager** and as a **Task Editor**. Follow the workflow and refer to the linked sections for detailed instructions.

Getting Started as a Task Manager

As a **Task Manager**, you're responsible for creating and managing meeting recording tasks and assigning editors.

➢ **Quick workflow:**

1. Add a new recording task (see Create a Task on page 12).
    a. Configure the meeting details (including a Task Editor) on the **General Settings** tab.
    b. Configure the template (logos and sections) for the Meeting Insights and Transcription Word document on the **Template Studio** tab (see Word Document Templates on page 42).
2. Start the meeting recording.
3. End the meeting recording.
4. Monitor transcription progress (see Transcription Task List on page 50 and Task Status on page 56).
5. (Optional) Change a Task Editor for proofreading (see Change the Transcriber on page 60).
6. Change the task status to **Ready for Review** (see Change a Task's Status on page 58).
7. Monitor task status (see Transcription Task List on page 50 and Transcription File List on page 60).

Getting Started as a Task Editor

As a **Task Editor**, you're responsible for reviewing and proofreading the meeting summary and transcription assigned to you.

➢ **Quick workflow:**

1. Open the assigned task. When you sign in to Meeting Insights On-Prem, you're automatically navigated to the File List page, which lists all the tasks assigned to you.
2. On File List page, change the task status to **In Review** (see Change a Task's Status on page 58).
3. Proofread the meeting summary (see Proofreading the Meeting Summary on page 62).
4. Proofread the transcription (see Proofreading the Transcription on page 65).

5. Download and share the Meeting Insights and Transcription Word document (see Download Meeting Insights and Transcript Word Document on page 77).

6. On the File List page, change the task status to **Completed** (see Change a Task's Status on page 58).

4 User Interface Preferences

You can define the following global preferences for the Meeting Insights On-Prem user interface (UI):

- Language (see Change Display Language below)
- Color theme (see Change Display Color Theme below)

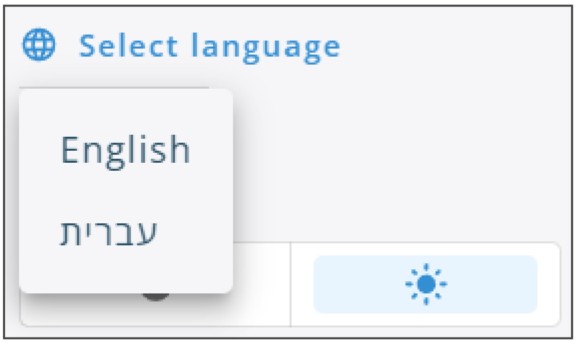
Change Display Language

Meeting Insights On-Prem user interface can be displayed in one of the following languages:

- English
- Hebrew

➢ **To change display language:**

1. Click your profile icon, located in the top-right corner; a drop-down box appears.
2. Click **Select language**; a drop-down list with languages appears:



3. Select the language you want; the Meeting Insights On-Prem display immediately switches to the chosen language.

Change Display Color Theme

Meeting Insights On-Prem offers the following display themes:

- **Light theme** (default) - black text on a white background
- **Dark theme** - white text on a black background

> You can also choose a different theme for the recording page of each task type (Online Meeting, Offline Meeting, or Dictation). For more information, see the relevant section.

➢ To change display theme:

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click one of the following buttons to select the theme:

    dark theme

    light theme

   The display immediately switches to the selected theme.

5 Create a Task

A *task* is an audio recording of a meeting or voice memo that is transcribed with summary insights and assigned to a person (**Task Editor** / transcriber) for proofreading.

You can perform one of the following recording types for the task:

- **Online Meeting Mic** - see Online Face-to-Face Meetings below
- **Online Meeting Telephony Bot** - see Online Telephony Meetings on page 19:
  - Record an In-Person Conversation using Telephony Bot on page 19
  - Record a Phone Call using Telephony Bot on page 20
- **Dictation** - see Dictations on page 21
- **Offline Meeting** - see Add an Offline Task for a Prerecording on page 37

Online Face-to-Face Meetings

This section describes how to start recording an Online Meeting where you are physically in a room with other participants.

Add an Online Meeting Task

Recording an online meeting starts with adding an **Online Meeting** task. Once added, you're redirected to a page for recording your online meeting.

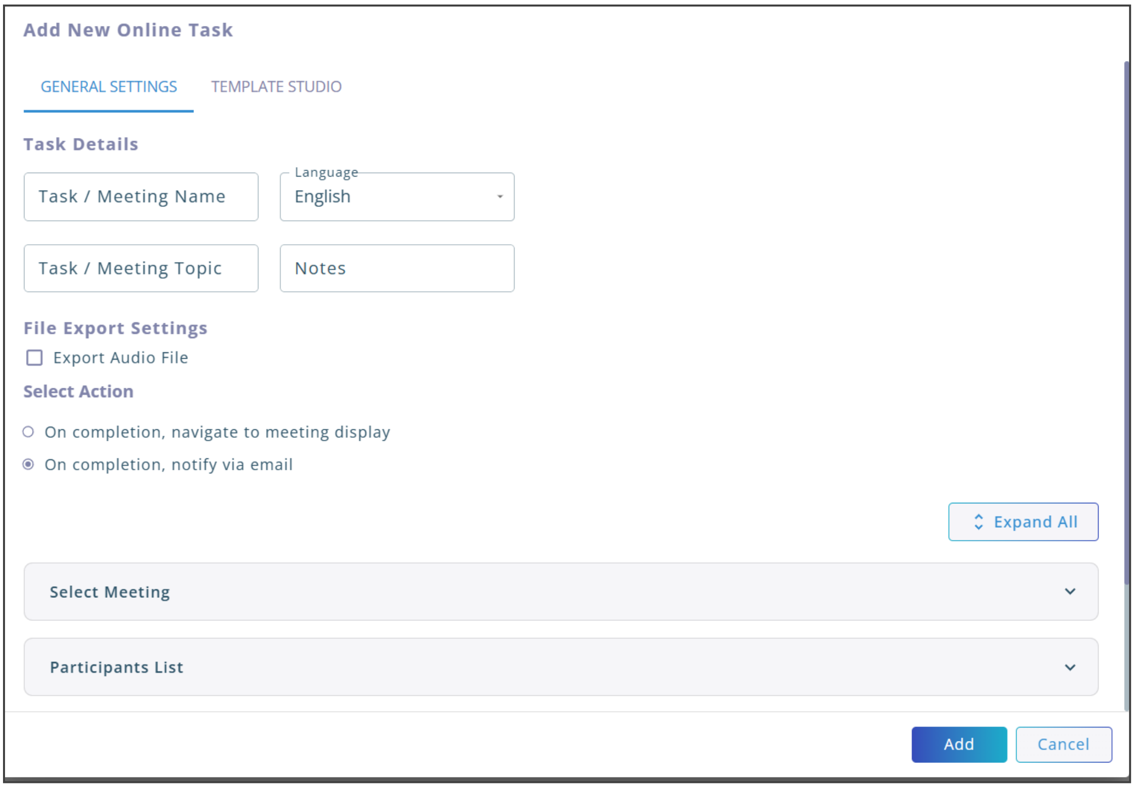
Adding an online meeting task includes the following:

- Selecting an existing template or creating a new template from an existing template.
- Uploading logos to include in the header of the downloaded Meeting Insights and Transcript document of the transcription. You can upload up to three logos and define their position in the header.
- Determining the sections to include in the downloaded Meeting Insights and Transcript document.

> The default templates, logos, and sections are configured by the **System Admin** or **Tenant Manager** (see Tenant Management on page 86).

➢ **To add an Online Meeting task:**

1. In the Transcription Task List page, click the **Add New Task** button; a drop-down menu appears.
2. Choose **Online Meeting**; the Add New Online Task dialog box appears:



3. Select the **General Settings** tab (default).
4. Under **Task Details:**
    a. In the 'Task / Meeting Name' field, enter a unique name for the meeting. This name identifies the meeting in the Task List and system notifications.

> - The 'Task / Meeting Name' field is mandatory.
> - The name can't include spaces.

    b. In the 'Task / Meeting Topic' field, enter the meeting's main subject.
    c. From the 'Language' drop-down list, select the language of the meeting. The language affects the speech recognition for the real-time transcription process.

> The default language is defined by the **System Admin** or **Tenant Manager** (see Edit a Tenant's Default Task Language on page 88).

    d. In the 'Notes' field, enter any optional comments. These comments appear in the Notes section of the downloaded Meeting Insights and Transcript document.
5. Under **File Export Settings**:

    If you want the audio file of the recording to be downloaded with the Meeting Insights and Transcript document, select the 'Export Audio File' check box.
6. Under **Select Action:**

    Select what happens when the recording of the Online Meeting finishes:

- **On completion, navigate to meeting display:** You're automatically navigated to the Files List page.
- **On completion, notify via email:** You're automatically navigated to the Transcription Task List page and an email is sent to you notifying you that the Online Meeting task completed successfully.

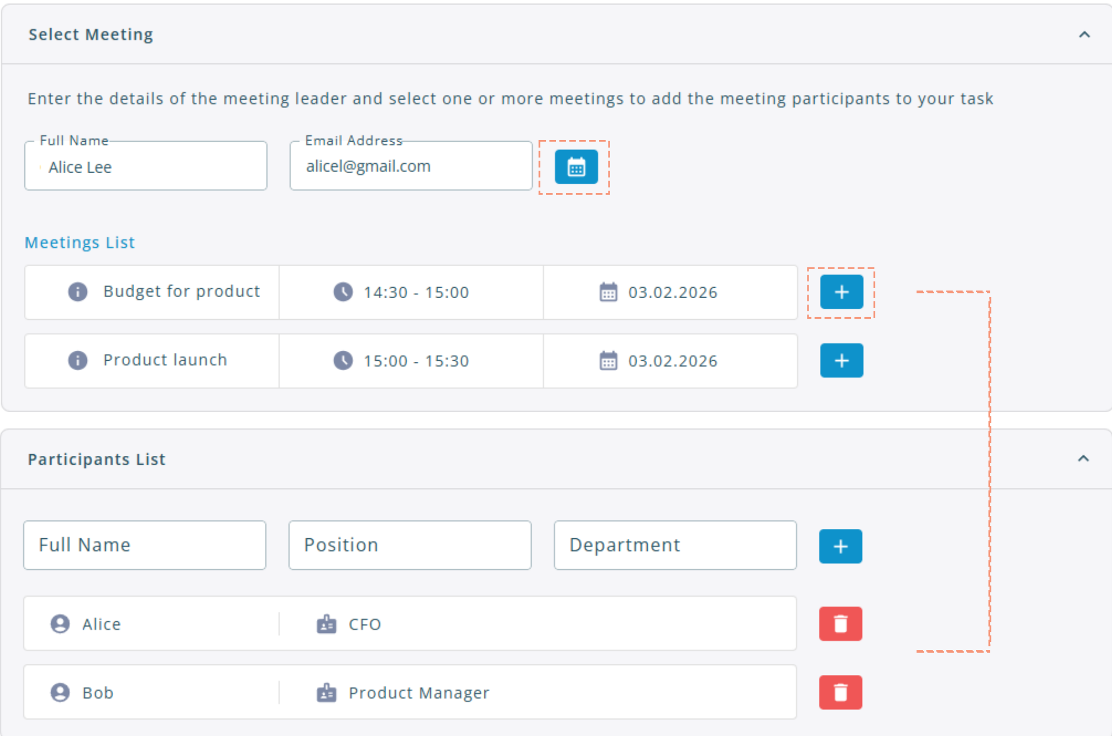
7. Expand the **Select Meeting** folder, and then define the owner (*meeting leader*) of the recording:

   a. In the 'Full Name' field and 'Email Address' field, enter the name and email address of the owner. This name appears in the Background section ("led by <name>") of the downloaded Meeting Insights and Transcript document.

   b. To add the participants from a meeting in the Outlook Calendar of the person you added in the previous step:

      i. Click the calendar button; the **Meetings List** group appears, listing a current meeting and all meetings in the next hour.

      ii. Click the plus button of the meeting you want; the participants of the meeting are automatically added under the **Participants List** folder, as shown in the following example:



If you don't define a meeting leader, the creator of the task is considered the owner.

8. Expand the **Participants List** folder, and then define the participants of the recording. This list appears in the Participants section of the downloaded Meeting Insights and Transcript document.
   a. To add participants:
      i. In the 'Full Name' field, enter the name of the participant.
      ii. In the 'Position' field, enter the position of the participant.
      iii. In the 'Department' field, enter the department in which the participant works.
      iv. To add more participants, click the plus button.
   b. To delete a participant, click the delete button.

You can automatically add the participants of a scheduled meeting in your Outlook calendar, as described in the previous step for the **Select Meeting** folder.

9. Expand the **Editors List** folder to define editors (transcribers) for proofreading the task's transcription.
   a. To add editors for the transcription:
      i. In the 'Full Name' field, enter the name of the editor.
      ii. In the 'Email Address' field, enter the email address of the editor.
      iii. To add more editors, click the plus button.
   b. To make an editor the manager of the task, click **Set Task Manager** of the editor.
   c. To delete an editor, click the delete button.

- The creator of the task is also considered an editor of the task.
- If you add multiple editors, you can select the editor (*transcriber*) after the recording, as described in Change the Transcriber on page 60.

10. Expand the **Distribution List** folder, define the people to whom you want to distribute the downloaded Meeting Insights and Transcript document. This list appears in the Distribution List section of the document.
    a. To add people:
       i. In the 'Full Name' field, enter the name of the person.
       ii. In the 'Email Address' field, enter the email address of the person.
       iii. To add more people, click the plus button.
    b. To delete a person, click the delete button.
11. Select the **Template Studio** tab, and then define the following:

- Template of the document. For more information, see Select or Create a Template on page 42.

If a Meeting Insights On-Prem software update deprecated an AI-powered section in your selected template, you must select a different template to create a new task.

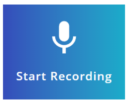
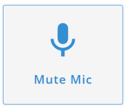
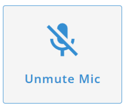
- Logos for the document header. For more information, see Upload Logos for Template on page 44.
- Sections to include in the document. For more information, see Define Sections for Template on page 46.

12. Click **Add**; the Recording Meeting Summary page opens.
13. Continue to Start Recording the Online Meeting below.

Start Recording the Online Meeting

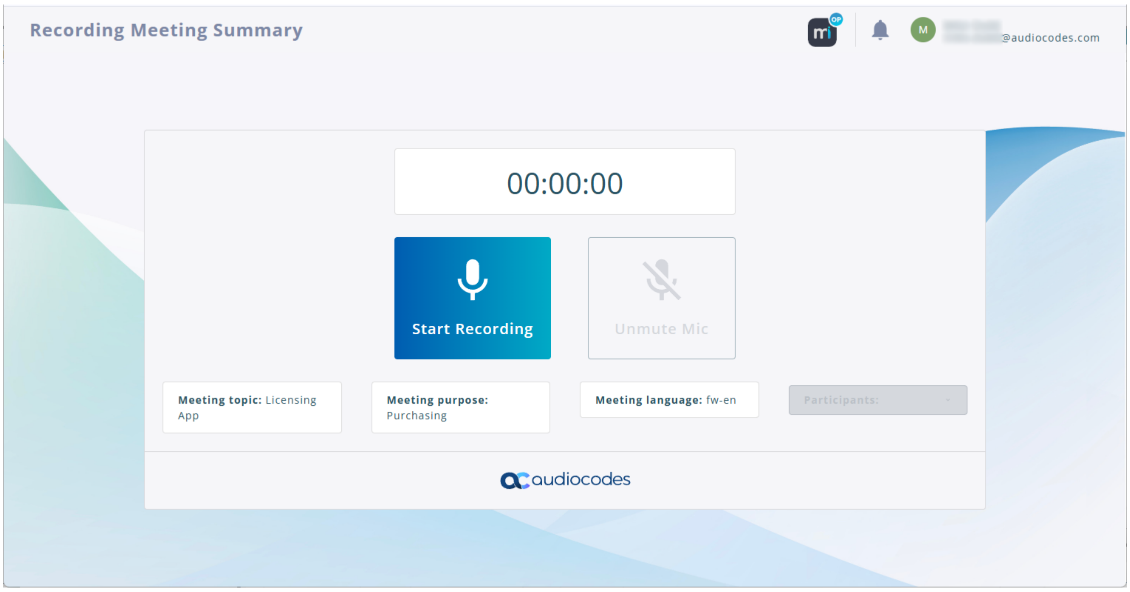
Once you've created a new task for the online meeting, as described in Add an Online Meeting Task on page 12, the Recording Meeting Summary page is displayed.

This page provides you with the following recording controls:

Button	Name	Description
	**Start Recording**	Starts recording the audio of the meeting.
	**Mute Mic**	Mutes the microphone and temporarily stops recording.
	**Unmute Mic**	Unmutes the microphone and resumes recording.
	**End Recording**	Ends the recording.

➢ **To start recording online meeting:**

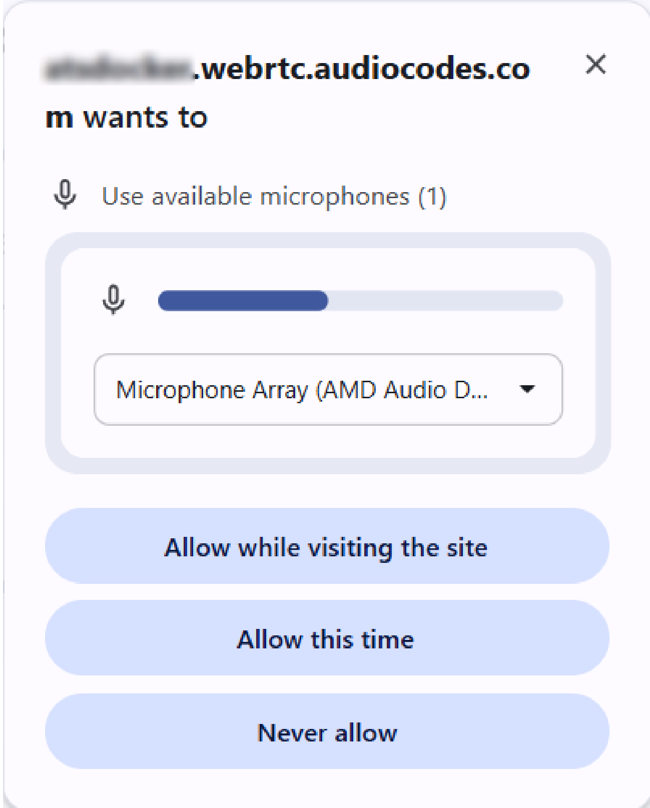
1. Create a new Online Meeting task (see in Add an Online Meeting Task on page 12); the Recording Meeting Summary page appears:



2. Click the **Start Recording** button to start recording the meeting.

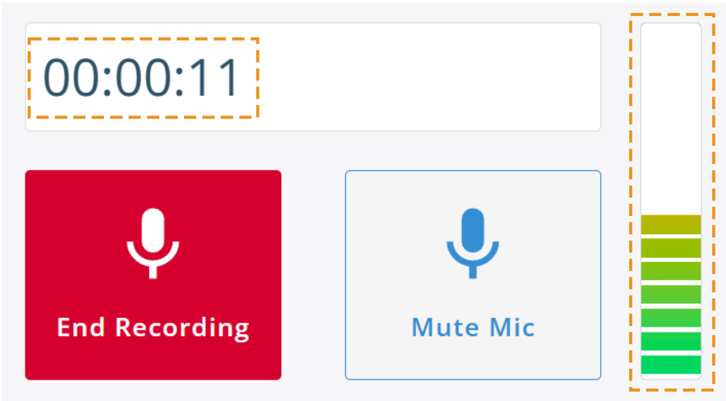
> ⚠ If Meeting Insights On-Prem doesn't detect your microphone, a message pops up to notify you. This could be caused by any of the following reasons:
>
> - Your microphone is not properly connected to your computer.
> - You need to allow your browser access to your microphone. Your browser typically prompts you to allow or block access.

If this is the first time that you're recording an online meeting on the current computer, you're prompted to select the available microphone and to choose the option for allowing Meeting Insights On-Prem to access it:

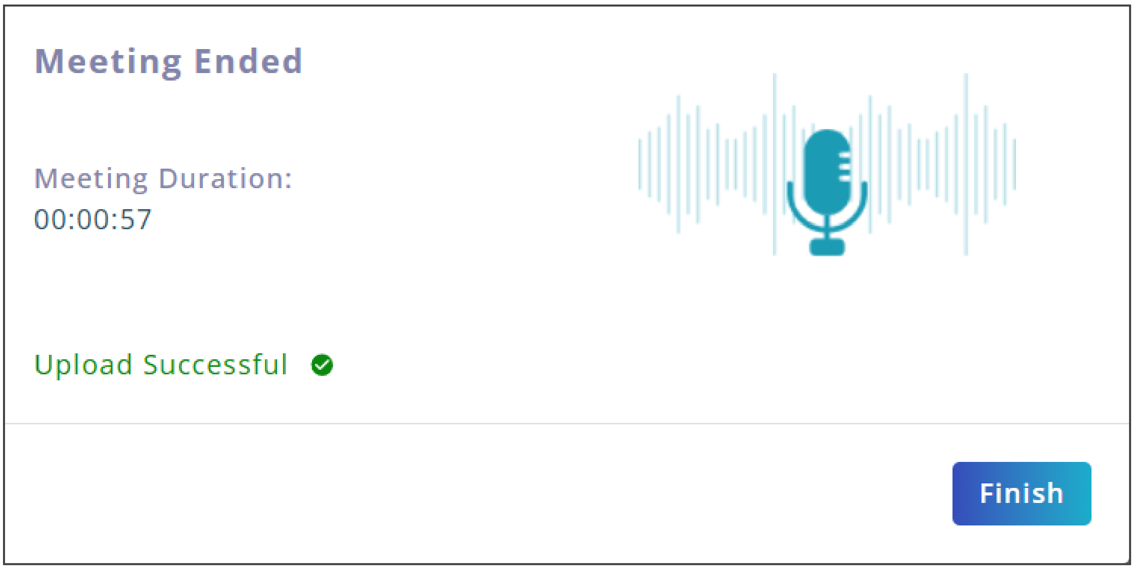


3. Select the microphone you want to use, and then choose one of the options to allow Meeting Insights On-Prem to use the microphone; Meeting Insights On-Prem starts recording and transcribing the meeting.

   The recording duration is displayed by the timer and the recording level is displayed by the gauge, which uses colored segments that illuminate or change position to indicate the strength or "loudness" of the audio signal:



4. To finish recording, click **End Recoding**; Meeting Insights On-Prem stops recording the meeting and uploads the audio and transcription files to its server. The following message is displayed:



If errors were experienced during the recording (e.g., microphone or speech not detected), a message is displayed listing the errors. You can do one of the following:

- Click **Confirm** to keep your recording despite the errors.
- Click **Cancel** to discard the recording and delete the task.

5. Click **Finish**; you're navigated to one of the following pages, depending on your settings (under **Select Action** group) when you created the Online Meeting task:
   - File List page, which lists the transcription file of the recorded meeting.
   - Transcription Task List, which lists all the tenant's tasks.

Online Telephony Meetings

Meeting Insights On-Prem telephony bot allows you to record audio directly from your mobile device without needing to access the web application. This is ideal for ad-hoc tasks when you are away from your computer.

You can use the bot in two ways:

- **Record an in-person conversation:** Use your device's microphone to record a face-to-face meeting, room audio, or yourself like a dictation. For more information, see Record an In-Person Conversation using Telephony Bot below.
- **Record a phone call:** Trigger the bot during an active call to record the phone conversation. For more information, see Record a Phone Call using Telephony Bot on the next page.

Record an In-Person Conversation using Telephony Bot

You can use Meeting Insights On-Prem telephony bot (*monologue*) to record conversations or meetings directly from your mobile device's (e.g., mobile phone) microphone. You can also use this feature to record yourself like a dictation (voice memo). This feature allows you to record ad-hoc discussions anywhere and anytime, without needing Meeting Insights On-Prem web app. For example, a face-to-face conversation with a colleague in the hallway.

These recordings are considered Online Meeting tasks and appear in the Transcription Task List page as an **Telephony Bot** task type.

When you want to record a meeting, you dial the telephone number of the bot, choose the language of the meeting, and the bot starts recording the audio detected by your device's microphone.

➢ **To record from device microphone using telephony bot:**

1. On your device, dial the telephone number of Meeting Insights On-Prem telephony bot (e.g., 1111); the bot answers and asks for the language of the meeting.

> Ask your administrator for the telephone bot number.

2. Press the key on your device's dial pad that corresponds to the meeting language. For example, if the prompt indicates that English is key "2", then press 2 on your dialpad. The bot immediately begins recording audio detected by your device's microphone.

> The available languages are configured by your **System Admin** or **Tenant Manager** (see Define a Tenant's Telephony Bot Settings on page 94).

3. To stop recording, end the call.

Meeting Insights On-Prem automatically saves the recording as an Online Meeting task and queues it for transcription. You can view the new task in the Transcription Task List (see Transcription Task List on page 50).

Record a Phone Call using Telephony Bot

You can use Meeting Insights On-Prem telephony bot (*dialogue*) to record phone calls on your mobile device. This feature allows you to record phone conversations with one or more participants, without needing Meeting Insights On-Prem web app.

When you want to record a phone call, you need to press a predefined key sequence to trigger the bot to start recording. When the call ends, Meeting Insights On-Prem does the following:

1. Saves the recording to its database.
2. Queues the recording for transcription.
3. Creates an Online Meeting task for the recording and displays it in the Transcription Task List as an **Telephony Bot** task type (see Transcription Task List on page 50).

- For the predefined number of the telephony bot, contact your Meeting Insights On-Prem Tenant Manager.
- To use this feature, your user account must have a valid phone number assigned. If necessary, contact your **System Admin** or **Tenant Manager** to configure this setting (see Add a User on page 80).

➢ **To record a phone call:**

1. On your device, call the person or group you want to speak with.
2. Press the predefined key sequence **#0** to start recording; the bot immediately begins recording the call.
3. You can pause and resume recording by doing the following:

   Press the key sequence **#1** to pause recording.

   Press the key sequence **#2** to resume recording.
4. To stop (end) recording, press **#3**.

Dictations

Meeting Insights On-Prem allows you to record and dictate in real time. As you speak, Meeting Insights On-Prem instantly transcribes your speech, displaying the text immediately on the dictation screen.

Recording a dictation includes two main actions:

1. Add a new task for dictation (see Add a Dictation Task below).
2. Trigger the recording of the dictation (see Start Recording a Dictation on page 27).

- Dictation is available only for Meeting Insights On-Prem deployments with Hebrew-English language mode.
- Dictation supports only the following languages:
  - ✓ Hebrew
  - ✓ English

Add a Dictation Task

Recording a dictation starts with adding a **Dictation** task. Once added, you're redirected to a page for recording your dictation.

Adding a Dictation task includes the following:

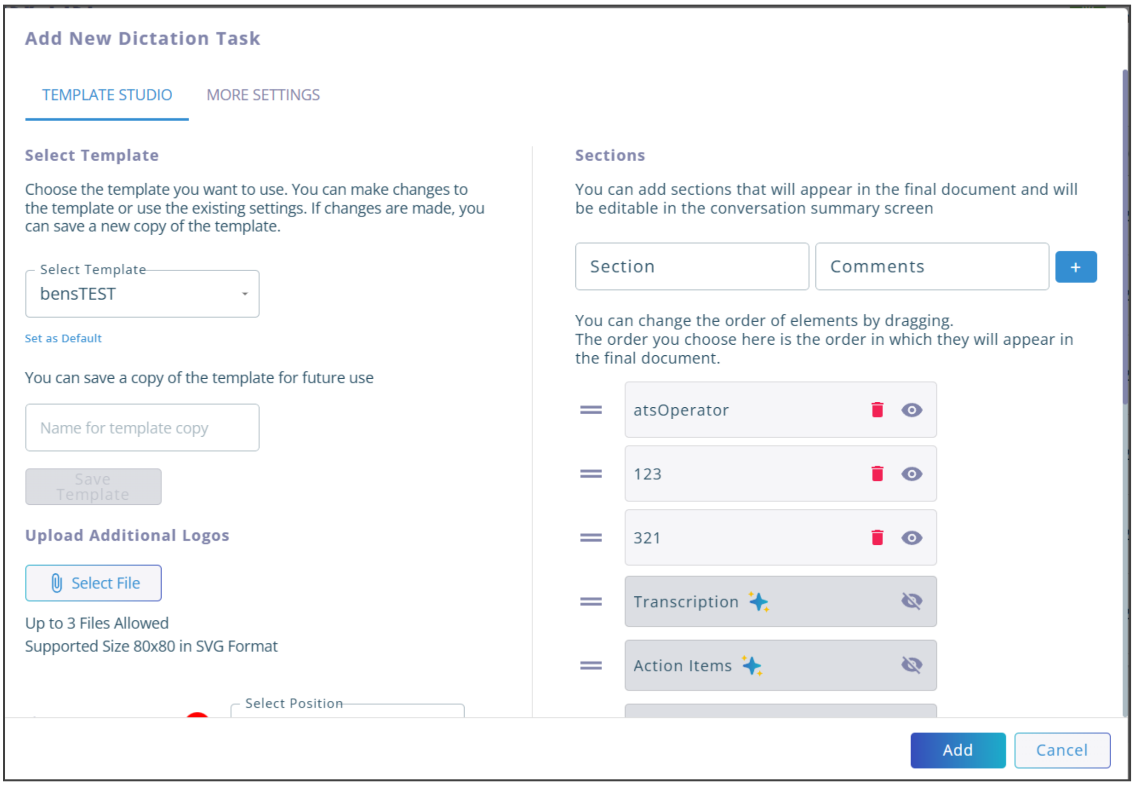
- Selecting an existing template or creating a new template from an existing template.
- Uploading logos to include in the header of the downloaded Meeting Insights and Transcript document. You can upload up to three logos and define their position in the header.

- Determining the sections (headings) to include in the downloaded Meeting Insights and Transcript document.

> ⚠ Dictation is available only for Meeting Insights On-Prem deployments with Hebrew-English language mode.

➢ To add a Dictation task:

1. In the Transcription Task List page, click the **Add New Task** button; a drop-down menu appears.
2. Choose **Dictation**; the Add New Dictation Task dialog box appears:



3. Select the **Template Studio** tab, and then define the following:
   - Template of the document. For more information, see Select or Create a Template on page 42.

> ⚠ If a Meeting Insights On-Prem software update deprecated an AI-powered section in your selected template, you must select a different template to create a new task.

   - Logos for the document header. For more information, see Upload Logos for Template on page 44.
   - Sections to include in the document. For more information, see Define Sections for Template on page 46.

4. Select the **General Settings** tab (default).
5. Under **Task Details:**
   a. In the 'Task / Meeting Name' field, enter a unique name for the meeting. This name identifies the meeting in the Task List and system notifications.

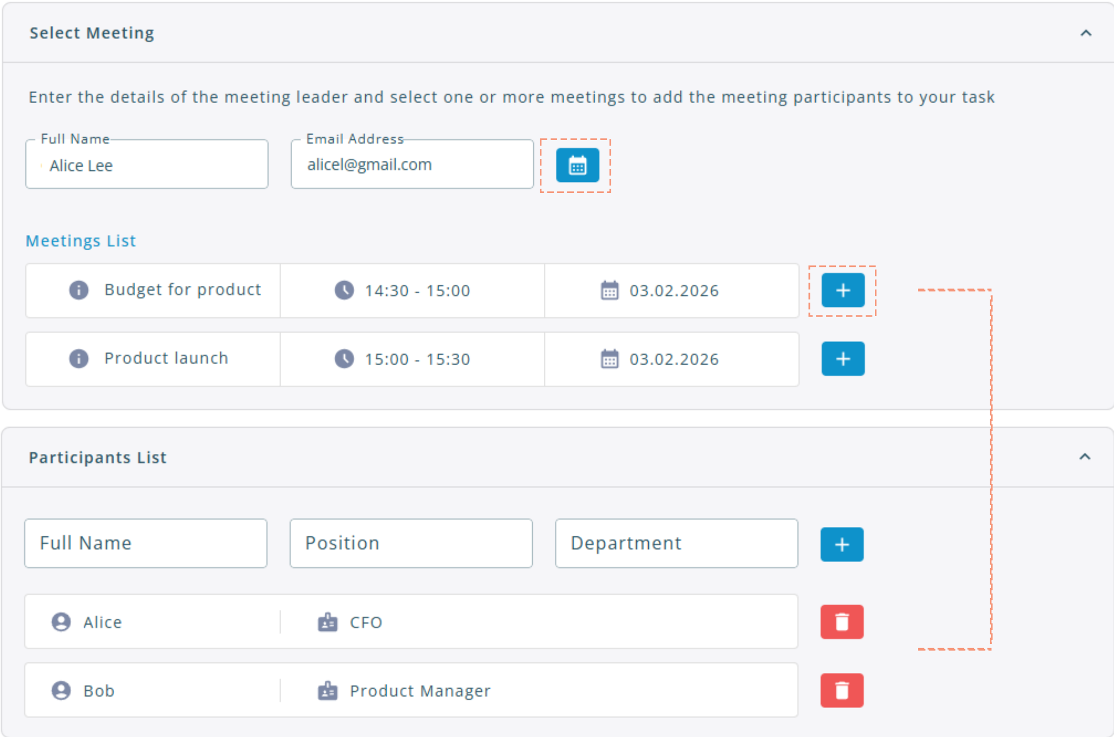
> - The 'Task / Meeting Name' field is mandatory.
> - The name can't include spaces.

   b. In the 'Task / Meeting Topic' field, enter the meeting's main subject.
   c. From the 'Language' drop-down list, select the language of the meeting. The language affects the speech recognition for the real-time transcription process.

> The default language is defined by the **System Admin** or **Tenant Manager** (see Edit a Tenant's Default Task Language on page 88).

   d. In the 'Notes' field, enter any optional comments. These comments appear in the Notes section of the downloaded Meeting Insights and Transcript document.
6. Under **File Export Settings**:

   If you want the audio file of the recording to be downloaded with the Meeting Insights and Transcript document, select the 'Export Audio File' check box.
7. Expand the **Select Meeting** folder, and then define the owner (*meeting leader*) of the recording:
   a. In the 'Full Name' field and 'Email Address' field, enter the name and email address of the owner. This name appears in the Background section ("led by <name>") of the downloaded Meeting Insights and Transcript document.
   b. To add the participants from a meeting in the Outlook Calendar of the person you added in the previous step:
      i. Click the calendar button; the **Meetings List** group appears, listing a current meeting and all meetings in the next hour.
      ii. Click the plus button of the meeting you want; the participants of the meeting are automatically added under the **Participants List** folder, as shown in the following example:



> ⚠ If you don't define a meeting leader, the creator of the task is considered the owner.

8. Expand the **Participants List** folder, and then define the participants of the recording. This list appears in the Participants section of the downloaded Meeting Insights and Transcript document.
   a. To add participants:
      i. In the 'Full Name' field, enter the name of the participant.
      ii. In the 'Position' field, enter the position of the participant.
      iii. In the 'Department' field, enter the department in which the participant works.
      iv. To add more participants, click the plus button.
   b. To delete a participant, click the delete button.

> ⚠ You can automatically add the participants of a scheduled meeting in your Outlook calendar, as described in the previous step for the **Select Meeting** folder.

9. Expand the **Editors List** folder to define editors (transcribers) for proofreading the task's transcription.
   a. To add editors for the transcription:
      i. In the 'Full Name' field, enter the name of the editor.
      ii. In the 'Email Address' field, enter the email address of the editor.

iii. To add more editors, click the plus button.

b. To make an editor the manager of the task, click **Set Task Manager** of the editor.

c. To delete an editor, click the delete button.

- The creator of the task is also considered an editor of the task.
- If you add multiple editors, you can select the editor (*transcriber*) after the recording, as described in Change the Transcriber on page 60.

10. Expand the **Distribution List** folder, define the people to whom you want to distribute the downloaded Meeting Insights and Transcript document. This list appears in the Distribution List section of the document.

    a. To add people:

        i. In the 'Full Name' field, enter the name of the person.

        ii. In the 'Email Address' field, enter the email address of the person.

        iii. To add more people, click the plus button.

    b. To delete a person, click the delete button.

11. Click **Add**; the dictation recording page opens.

12. Continue to Start Recording a Dictation on page 27 for recording your dictation.

Enable Audio Indications for Recording Buttons

You can enable Meeting Insights On-Prem to play an audio (voice) message when you click a recording control button to indicate its functionality. The voice message confirms the action you just performed.

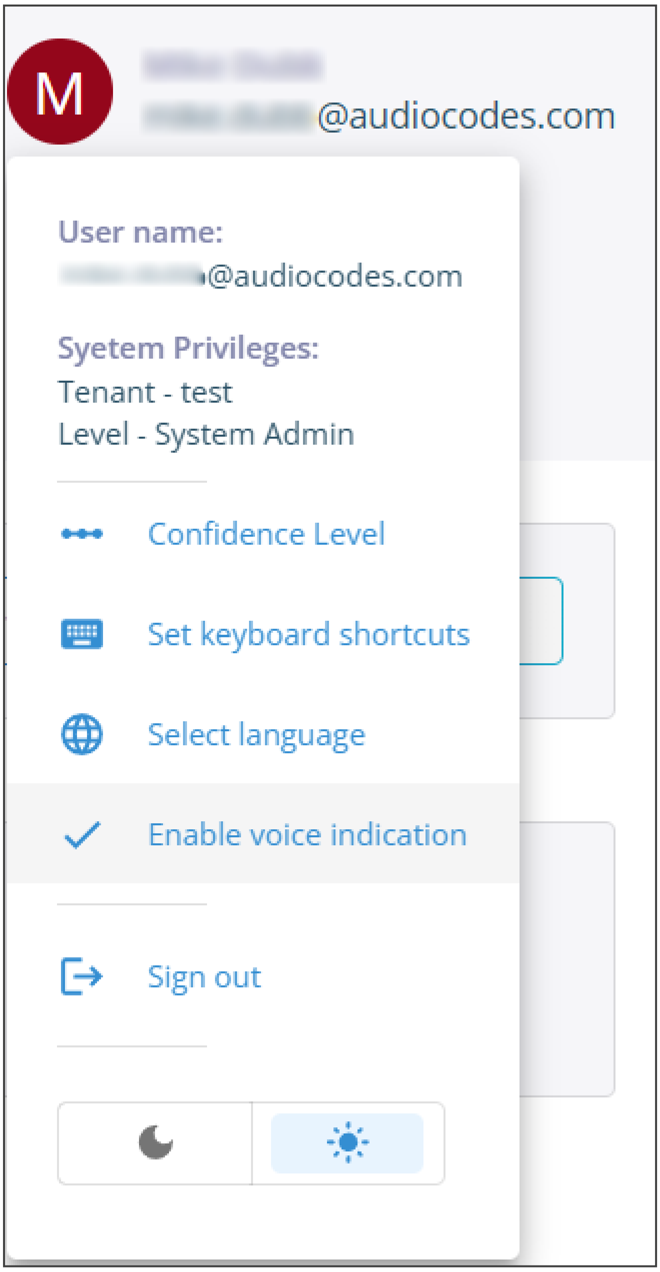
Audio indications are available for the following buttons:

- **Start Rec**
- **Mute Mic**
- **Un-mute Mic**
- **Stop Rec**

➢ **To enable audio indication for recording buttons:**

1. On the Dictation page, click your profile account icon in the top-right corner; a drop-down menu appears.

2. Click **Enable voice indication**:



Change Display Theme of Dictation Page

Meeting Insights On-Prem offers the following display themes:

- **Light theme** (default) - black text on a white background
- **Dark theme** - white text on a black background

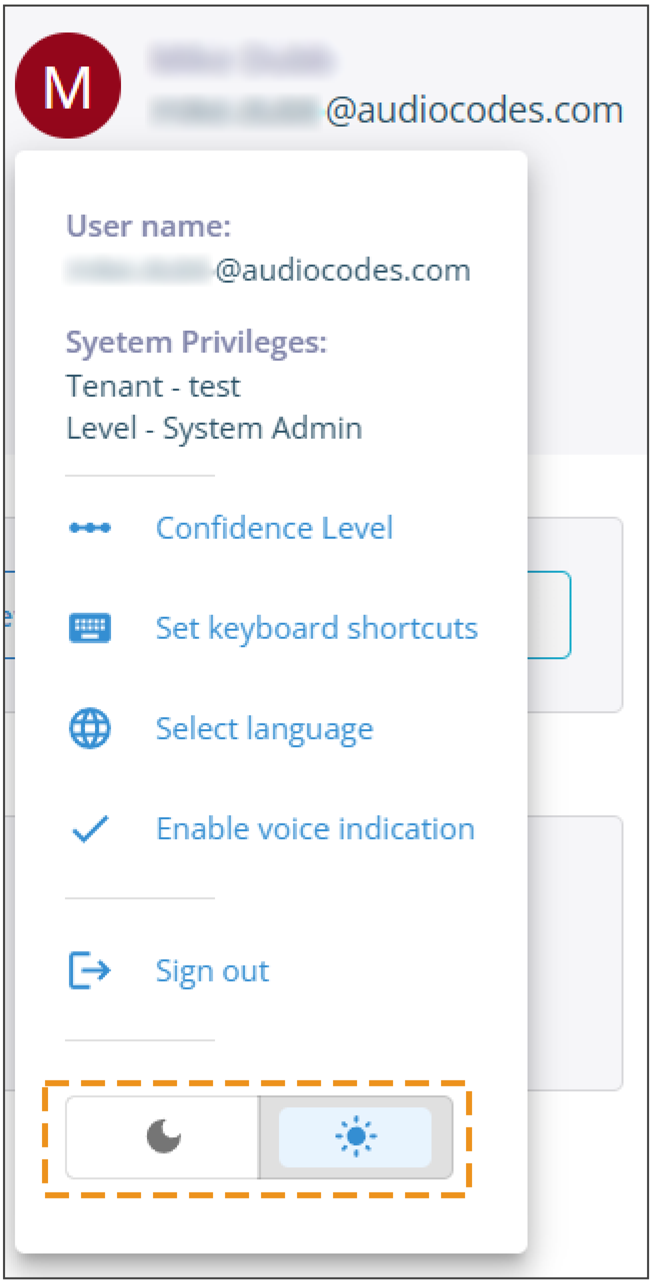
➢ **To change display theme:**

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click one of the following buttons to select the theme:

    - dark theme

 - light theme

The display immediately switches to the selected theme.



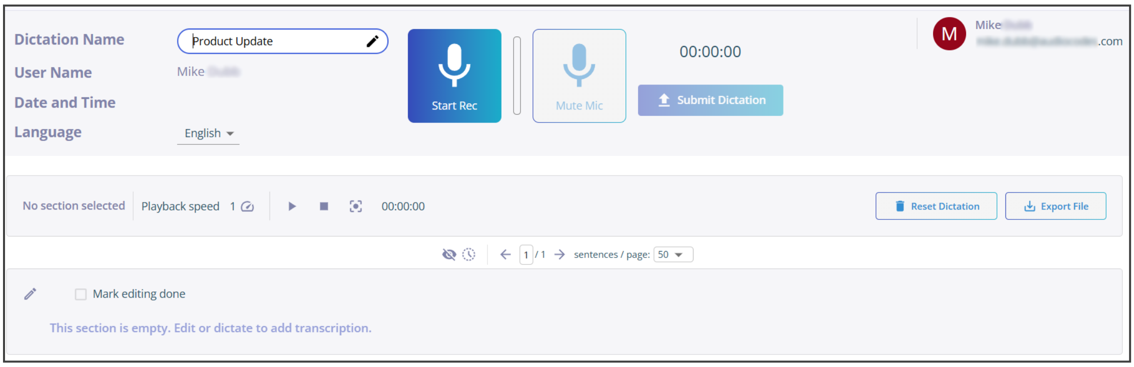
Start Recording a Dictation

Once you've created a new task for the dictation, as described in Add a Dictation Task on page 21, the dictation recording page is displayed.

This page provides you with the following recording controls:

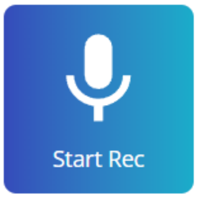
- Start recording
- Pause recording
- Resume recording after being paused

- End recording

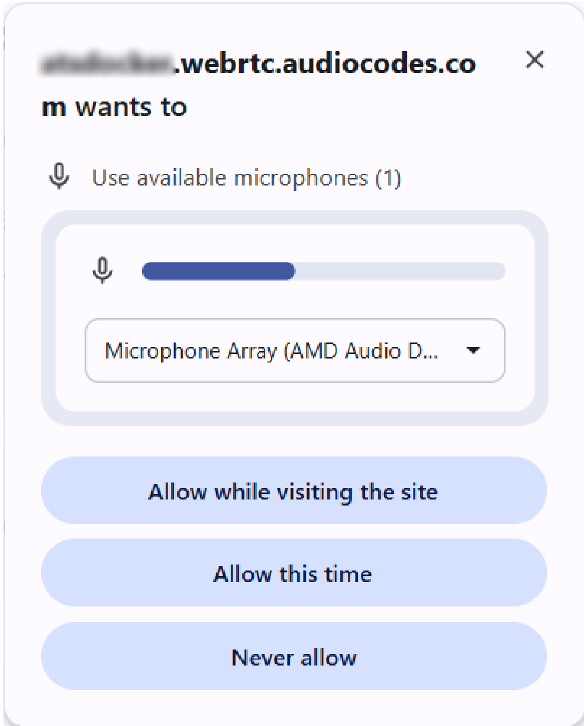


➢ To start recording dictation:

1. Create a new Dictation task (see Add a Dictation Task on page 21).
2. Configure the following fields (mandatory) if you didn't configure them in Step 1:
   - 'Dictation Name': Enter a unique name for the dictation.
   - 'Language': Select the language of the dictation.
3. Click the **Start Rec** button; Meeting Insights On-Prem connects to its speech-to-text service and then detects your voice and starts the recording and speech-to-text processes.

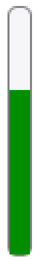


If this is the first time that you're recording a dictation on the current computer, you're prompted to select the available microphone and to choose the option for allowing Meeting Insights On-Prem to access it:

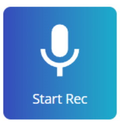
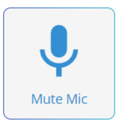


4. Select the microphone you want to use, and then choose one of the options to allow Meeting Insights On-Prem to use the microphone.

   The recorded audio level and microphone activity is displayed by the displayed gauge. When the volume level is good, the gauge is green. If the level is low or no voice detected, the gauge is red.



5. You can use the following recording controls:

Button	Name	Description
	**Start Rec**	Starts the recording your speech and performing real-time transcription.
	**Mute Mic**	Mutes the microphone and temporarily stops recording and transcription.

Button	Name	Description
	**Unmute Mic**	Unmutes the microphone and resumes recording and transcription.
	**Stop Rec**	Ends the recording.

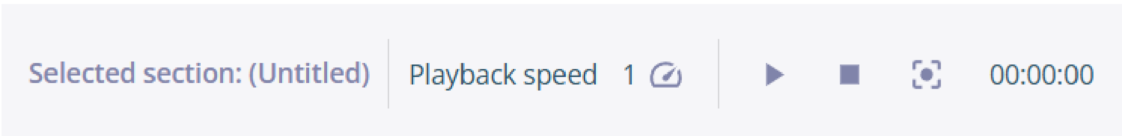
Actions after Ending Dictation Recording

When you've ended recording of your dictation as described in Start Recording a Dictation on page 27, you can do the following:

- Play recorded dictation - see Play Recorded Dictation below
- Show or hide the time (timestamps) at which each paragraph in the transcription was spoken - Show or Hide Speech Timestamps in Transcription on page 69
- Edit the transcription - see Edit Dictation Transcription on the next page
- Delete the dictation (transcription and audio recording) - see Delete Dictation on page 36
- Download the dictation (transcription and audio recording) to your computer - see Download Dictation Transcription and Recording Files on page 36
- Submit the dictation - see Submit Dictation on page 36

Play Recorded Dictation

After you finish recording (see Start Recording a Dictation on page 27), you can listen to the recorded dictation. Meeting Insights On-Prem provides playback controls, located above the transcription:



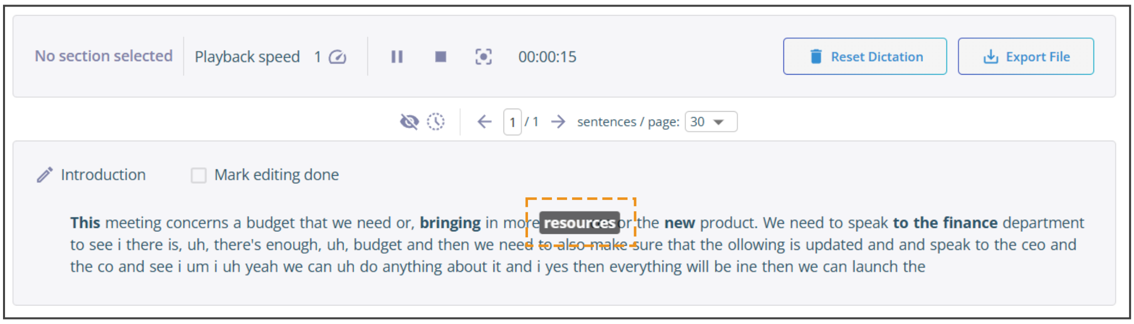
Playback Controls	Description
Selected section	Displays the selected segment in the transcription for playback.
Playback speed	Configures the playback speed: - **1** - **1.5**

Playback Controls	Description
	■ 2 ■ 2.5 ■ 3
Play	Plays the recorded dictation.
Stop	Stops playing the recorded dictation.
Jump to position	Play recorded dictation from the selected location in the transcription.
Time	Displays the time in the recorded dictation duration that the played word was spoken.

If your transcription has multiple segments, playback is limited to the selected segment. Playback stops automatically when it finishes playing the segment.

During playback, a cursor highlights the words as they're played. If Meeting Insights On-Prem can't fully synchronize the audio with the transcription (for example, after you edit the text), the system estimates the playback position. In this case, multiple words may be highlighted at the same time.

During playback, you can also jump to a different point within the same segment. Click the new location in the text, and playback resumes from that point.



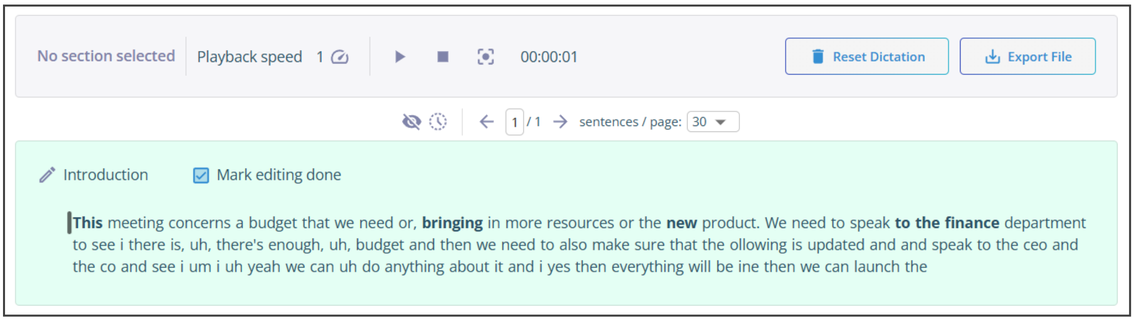
Edit Dictation Transcription

After you finish recording (see Start Recording a Dictation on page 27), you can edit the transcription of the dictation. You can make the following changes:

- Add, edit, or delete text.
- Add bulleted or numbered lists.
- Create a new segment from an existing segment in the transcription.
- Assign action items to people and set due dates.

- Assign a speaker to selected text.

When you finish editing a segment, you can mark it as complete, by selecting the 'Mark editing done' check box. The segment is then highlighted in green, as shown in the following example:



Your editing changes are saved automatically.

➢ To edit transcription of dictation:

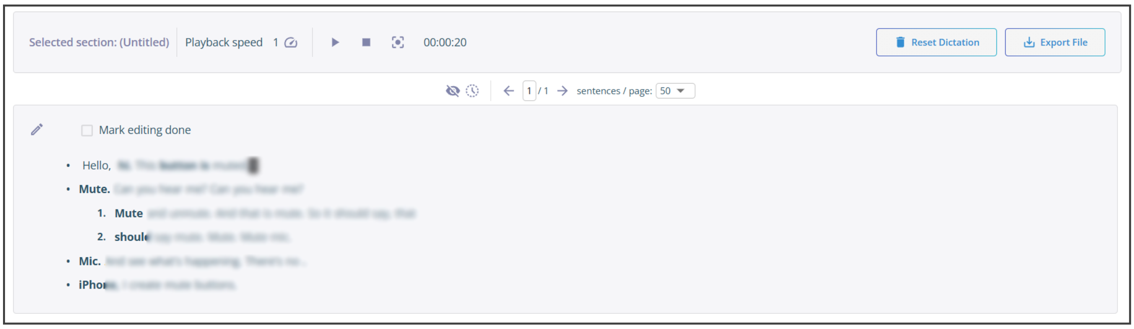
1. On the Dictation page, scroll down to the transcription.
2. **To modify text:**
   a. Click anywhere in the transcription where you want to make a change.
   b. Add, edit, or delete text as needed.

   Any text you add or modify appears in **bold**, as shown in the following example:

3. **To add a bulleted or numbered list:**
   a. Right-click the paragraph you want to format; a shortcut menu appears.
   b. Choose one of the following:
      -  **Increment bullet:** Indents the paragraph. If the paragraph doesn’t have a bullet, a bullet is added. If the paragraph already has a bullet, it’s further indented and changed to a numbered item.
      -  **Decrement bullet:** Outdents the paragraph.If the paragraph has a bullet, the bullet is removed. If the paragraph has a number, the number is changed to a bullet.

   After you add a bullet or number, you can create additional list items by pressing Enter:

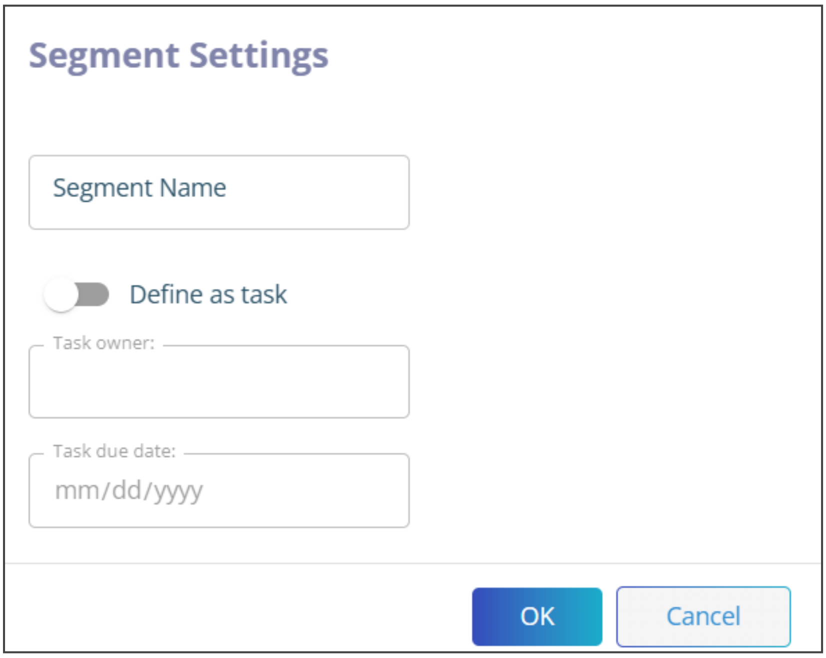
   - At the end of the paragraph to add the next item.
   - Before a word in the paragraph to start a new bullet or number at that position.



4. To create a new segment:

a. Right-click the paragraph in an existing segment from where you want the new segment to begin; a shortcut menu appears.

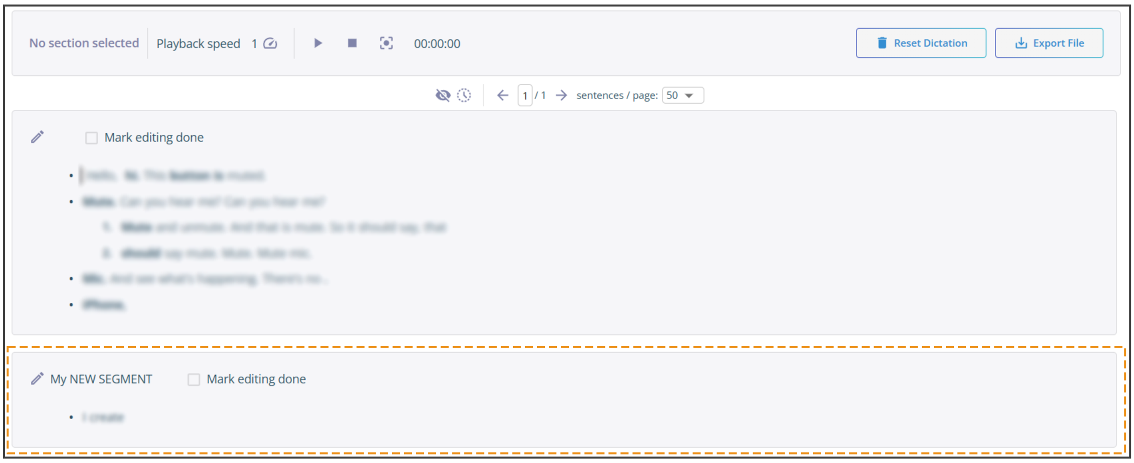
b. Choose **Create new segment**; the Segment Settings dialog box appears:



c. In the 'Segment Name', enter a name for the segment.

d. (Optional) To define the segment as a task (action item), click the **Define as Task** toggle button to turn it on. For more information, see the next step on assigning an action item.

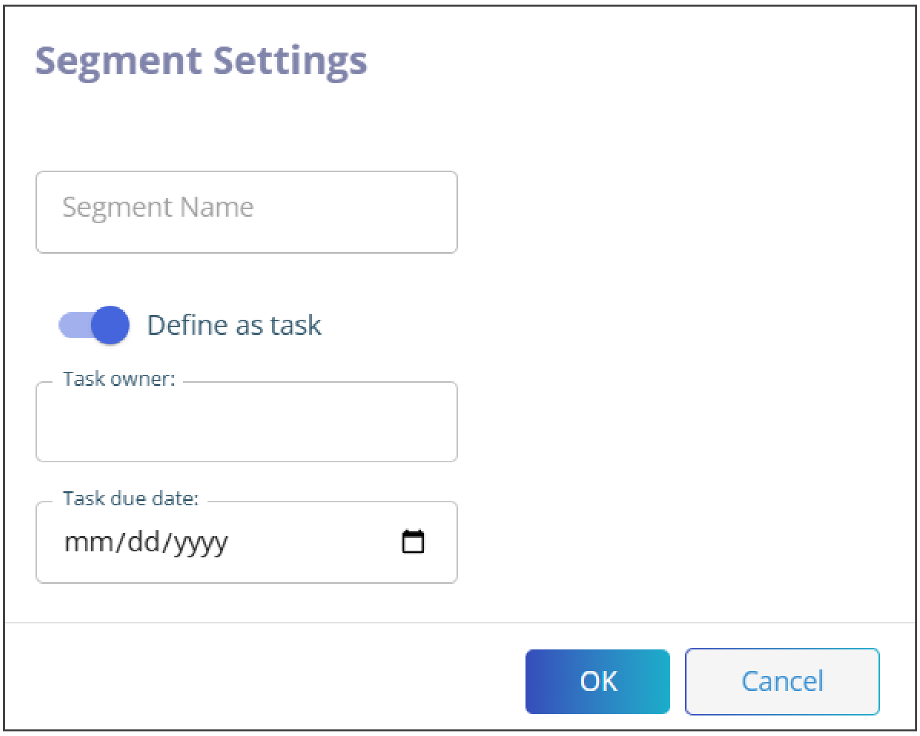
e. Click **OK**; a new segment is added below the current segment. The new segment includes all text from the original segment starting at the point where you right-clicked.



5. To assign an action item (task):

a. Right-click in the segment at the point where you want the new action item to begin; a shortcut menu appears.

b. Choose **Assign new action item**; the Segment Settings dialog box appears:

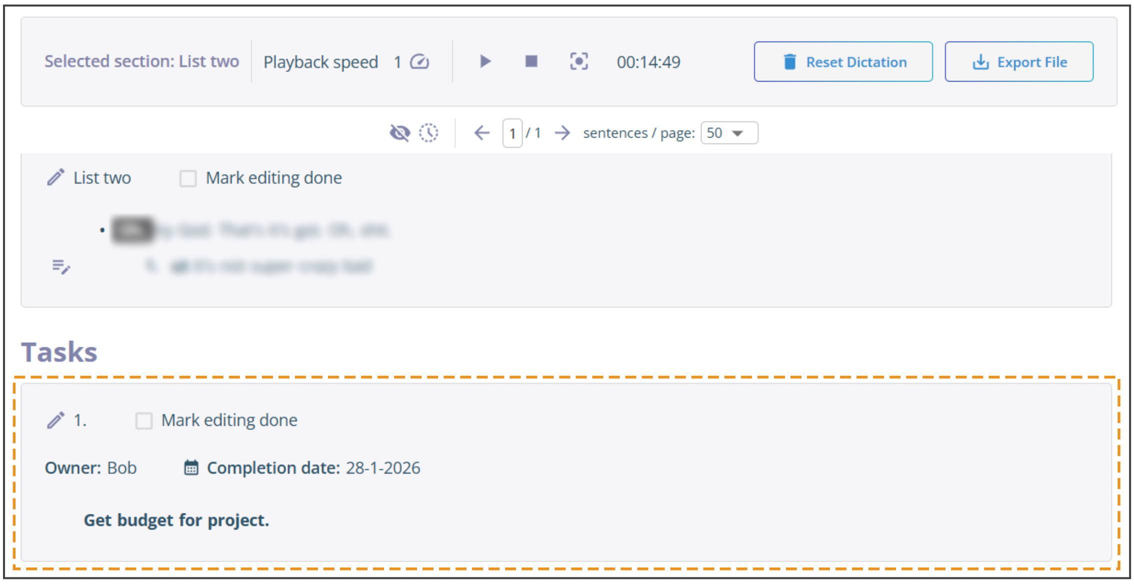


c. Click the **Define as Task** toggle button to turn it on.

d. In the 'Task Owner' field, enter the name of the person to whom you want to assign the action item.

e. In the 'Task due date' field, click the calendar icon, and then from the pop-up calendar, select the date at which the action item must be completed.

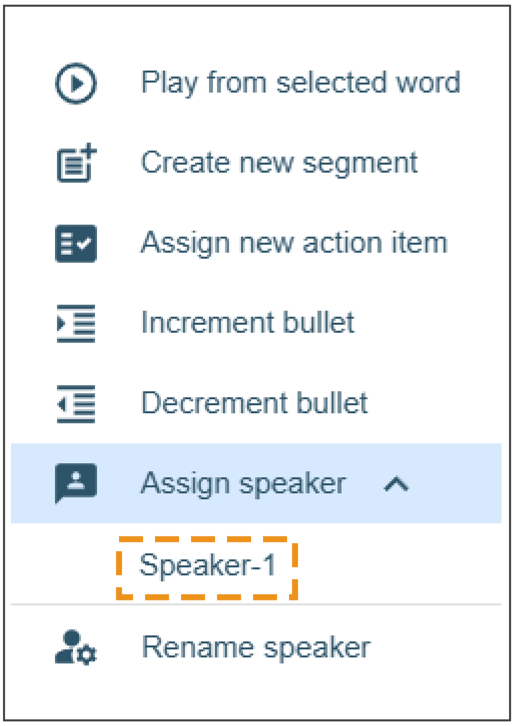
f. Click **OK**; the new action item is added under the **Tasks** group in the transcription. It includes all text from the original segment starting at the point where you right-clicked.



6. **To assign a different speaker to a selected line in transcription:**

   a. Right-click the line in the segment at the point where you want to assign to a different speaker; a shortcut menu appears.

   b. Choose **Assign speaker**; the shortcut menu expands to show a list of speakers that were detected in the dictation:



   c. Select the speaker you want to assign.

Download Dictation Transcription and Recording Files

After you finish recording of your dictation (see Start Recording a Dictation on page 27), you can download the transcription and recorded audio to your computer. The transcription saves as a Microsoft Word file (.docx), and the audio recording saves as an audio file (.webm).

➢ To download transcription and recording of dictation:

- On the Dictation page, click the **Export File** button; the transcription and recording files are downloaded to your computer.

Delete Dictation

After you finish recording (see Start Recording a Dictation on page 27), you can delete the dictation. This removes both the transcription and the recorded audio.

Deleting a dictation doesn't change the settings of your current dictation task (e.g., template, name, and language), so you can immediately start a new recording.

➢ To delete the transcription:

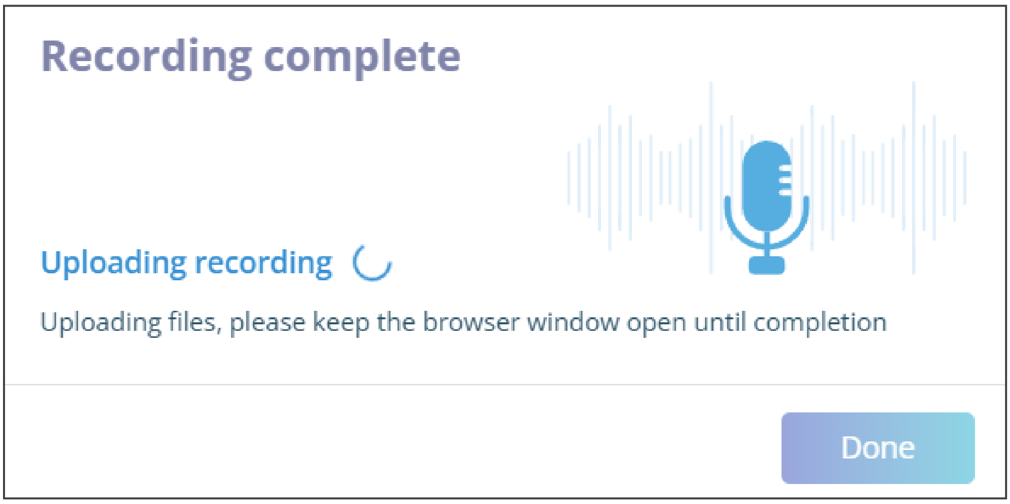
- On the Dictation page, click the **Reset Dictation** button; the transcription and recording are deleted.

Submit Dictation

After you finish reviewing and editing your dictation, you need to submit it to upload the audio recording and transcription to Meeting Insights On-Prem. When submitted, the dictation is stored in Meeting Insights On-Prem and appears in the Transcription List (see Transcription Task List on page 50).

➢ To submit a dictation:

1. On the Dictation page, click the **Submit Dictation** button; the following message appears:



2. Wait until the upload process completes.

⚠ Keep your browser open until the upload process completes.

3. Click **Done**.

Add an Offline Task for a Prerecording

Meeting Insights On-Prem enables you to generate transcriptions from offline meetings. Offline meetings are audio recordings captured using third-party tools outside of Meeting Insights On-Prem.

You can upload these audio files to Meeting Insights On-Prem to create an accurate, intelligent transcription.

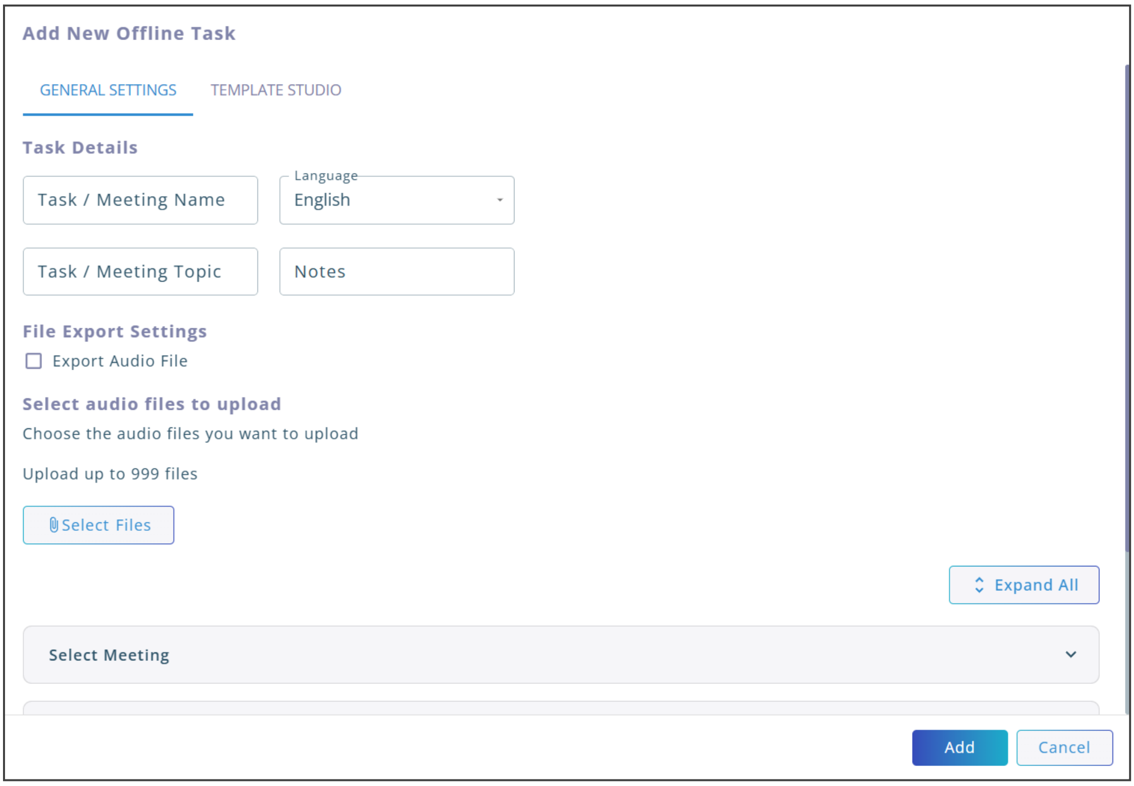
For processing a meeting that was recorded by a third-party tool, you first need to add an Offline Meeting task. Once added, you're redirected to a page for generating a transcription and for proofreading.

Adding a new Offline Meeting task includes the following:

- Selecting an existing template or creating a new template from an existing template.
- Uploading audio files. You can upload multiple files.
- Uploading logos to include in the transcription. You can upload up to three logos and define their position in the transcription.
- Determining the sections (headings) in the transcription.

➢ To add an Offline Meeting task:

1. In the Transcription Task List page, click the **Add New Task** button; a drop-down menu appears.
2. Choose **Offline Meeting**; the Add New Offline Task dialog box appears:



3. Select the **General Settings** tab (default).
4. Under **Task Details:**
    a. In the 'Task / Meeting Name' field, enter a unique name for the meeting. This name identifies the meeting in the Task List and system notifications.

> - The 'Task / Meeting Name' field is mandatory.
> - The name can't include spaces.

    b. In the 'Task / Meeting Topic' field, enter the meeting's main subject.
    c. From the 'Language' drop-down list, select the language of the meeting. The language affects the speech recognition for the real-time transcription process.

> The default language is defined by the **System Admin** or **Tenant Manager** (see Edit a Tenant's Default Task Language on page 88).

    d. In the 'Notes' field, enter any optional comments. These comments appear in the Notes section of the downloaded Meeting Insights and Transcript document.
5. Under **File Export Settings**:

    If you want the audio file of the recording to be downloaded with the Meeting Insights and Transcript document, select the 'Export Audio File' check box.
6. Under **Select audio files to upload**:

Click the **Select Files** button, and then browse your computer and select the audio files you want to upload; the button displays the total number of selected files (for example, "2" as shown below).

To change your selection, click the button again and choose the required files.

- You can upload multiple audio files.
- The following audio file formats are supported:
  - ✓ .wav
  - ✓ .mp3
  - ✓ .webm
  - ✓ .flac
  - ✓ .mp4
  - ✓ .mxf
  - ✓ .avi
  - ✓ .mov
  - ✓ .m4a

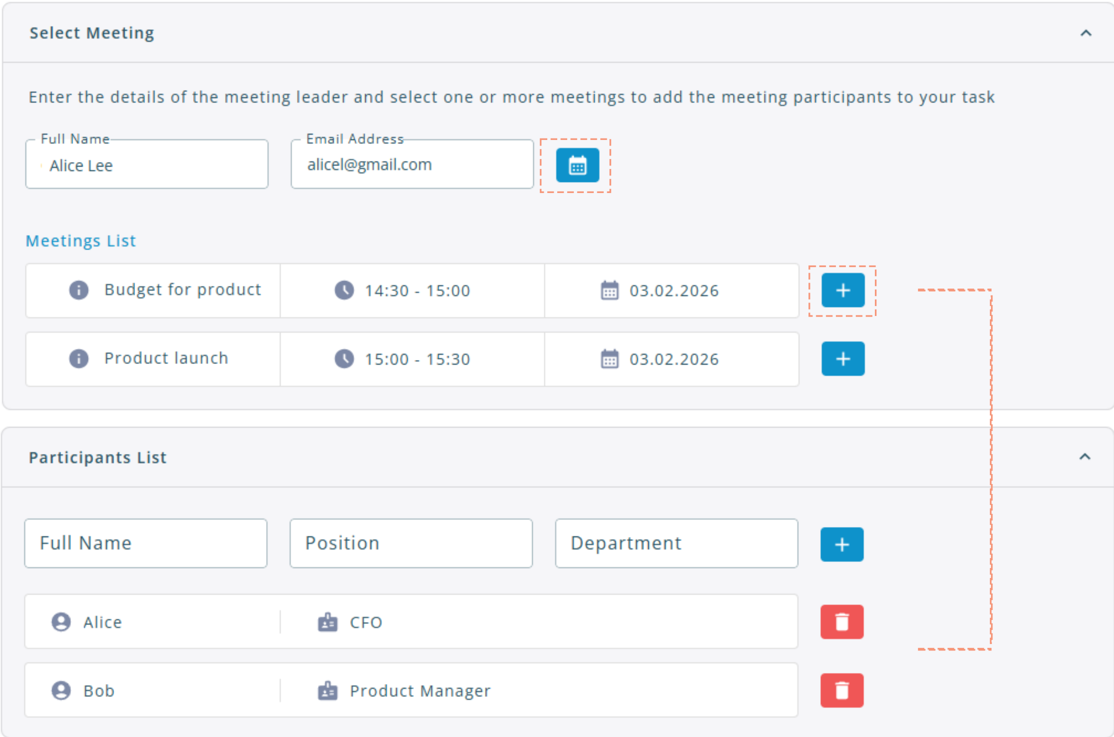
7. Expand the **Select Meeting** folder, and then define the owner (*meeting leader*) of the recording:

   a. In the 'Full Name' field and 'Email Address' field, enter the name and email address of the owner. This name appears in the Background section ("led by <name>") of the downloaded Meeting Insights and Transcript document.

   b. To add the participants from a meeting in the Outlook Calendar of the person you added in the previous step:

      i. Click the calendar button; the **Meetings List** group appears, listing a current meeting and all meetings in the next hour.

      ii. Click the plus button of the meeting you want; the participants of the meeting are automatically added under the **Participants List** folder, as shown in the following example:



If you don't define a meeting leader, the creator of the task is considered the owner.

8. Expand the **Participants List** folder, and then define the participants of the recording. This list appears in the Participants section of the downloaded Meeting Insights and Transcript document.

   a. To add participants:

      i. In the 'Full Name' field, enter the name of the participant.

      ii. In the 'Position' field, enter the position of the participant.

      iii. In the 'Department' field, enter the department in which the participant works.

      iv. To add more participants, click the plus button.

   b. To delete a participant, click the delete button.

You can automatically add the participants of a scheduled meeting in your Outlook calendar, as described in the previous step for the **Select Meeting** folder.

9. Expand the **Editors List** folder to define editors (transcribers) for proofreading the task's transcription.

   a. To add editors for the transcription:

      i. In the 'Full Name' field, enter the name of the editor.

      ii. In the 'Email Address' field, enter the email address of the editor.

   iii. To add more editors, click the plus button.

b. To make an editor the manager of the task, click **Set Task Manager** of the editor.

c. To delete an editor, click the delete button.

> - The creator of the task is also considered an editor of the task.
> - If you add multiple editors, you can select the editor (*transcriber*) after the recording, as described in Change the Transcriber on page 60.

10. Expand the **Distribution List** folder, define the people to whom you want to distribute the downloaded Meeting Insights and Transcript document. This list appears in the Distribution List section of the document.

    a. To add people:

       i. In the 'Full Name' field, enter the name of the person.

       ii. In the 'Email Address' field, enter the email address of the person.

       iii. To add more people, click the plus button.

    b. To delete a person, click the delete button.

11. Select the **Template Studio** tab, and then define the following:

    - Template of the document. For more information, see Select or Create a Template on page 42.

> If a Meeting Insights On-Prem software update deprecated an AI-powered section in your selected template, you must select a different template to create a new task.

    - Logos for the document header. For more information, see Upload Logos for Template on page 44.

    - Sections to include in the document. For more information, see Define Sections for Template on page 46.

12. Click **Add**; Meeting Insights On-Prem starts to upload the audio files and create a transcription for each of the audio files. A progress bar is displayed at the bottom of the dialog box and when the task is created, a successful message is displayed.

13. Click **Close** to close the dialog box; your offline task now appears in the Transcription List.

6 Word Document Templates

The downloaded Meeting Insights and Transcript document (.docx) is based on a template. The template defines the basic structure and appearance of the document as well as customizable elements:

- **Basic structure:**
  - Name (*subject*) of meeting
  - Date of meeting
  - Page numbering
- **Customizable elements:**
  - **Logos** displayed in the document's header. For more information, see Upload Logos for Template on page 44.
  - **Sections** in the document and their order of appearance. For more information, see Define Sections for Template on page 46.

Meeting Insights On-Prem provides a Template Studio that lets you choose ready-made templates and optionally, customize them to suite your needs. The Template Studio also lets you create a new template from an existing template and then customize the logos and sections. For more information, see Select or Create a Template below.

Select or Create a Template

Template Studio lets you select an available template or define a new template for your document. You can create a new template, by copying an existing one and saving it with modified settings (logos and sections) to suit your needs. You can also make a template the default.

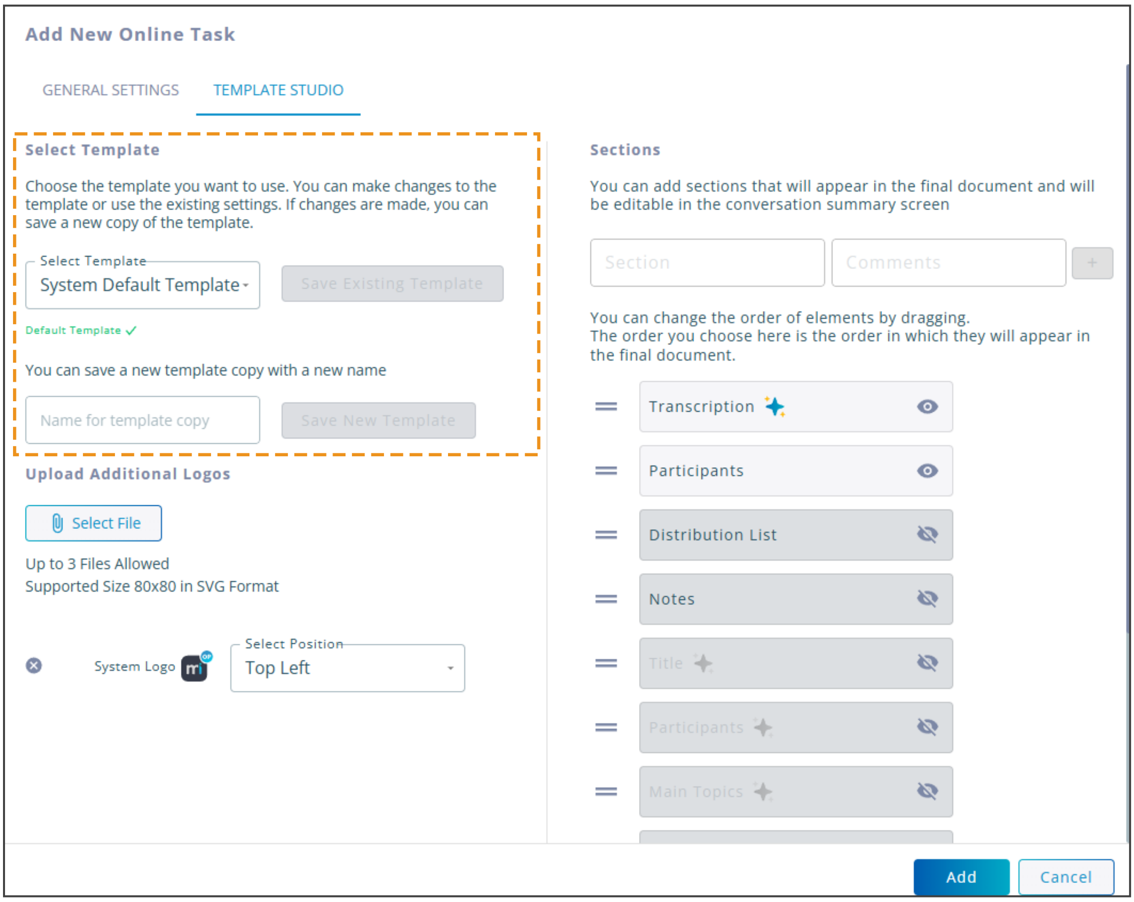
- Only the following users can delete templates:
  - ✓ **System Admin:** Can delete any template.
  - ✓ **Tenant Manager:** Can only delete templates created by the Tenant Manager.
  - ✓ **Task Manager:** Can only delete templates created by the Task Manager.
- Only the following users can make a template the default:
  - ✓ **System Admin**
  - ✓ **Tenant Manager**
  - ✓ **Task Manager**
- You can modify only **one** template when you add or edit a task. To modify another template, you need to save your current settings and then reopen the add or edit dialog box.

➢ **To select a template or create a new template:**

1. Access the Template Studio:

- When adding Online Meeting tasks, see Add an Online Meeting Task on page 12
- When adding Offline Meeting task, see Add an Offline Task for a Prerecording on page 37
- When editing Online Meeting or Offline Meeting tasks, see Edit a Transcription Task on page 54
- When editing a tenant, see Edit a Tenant's Templates on page 92

2. Select the **Template Studio** tab, and then go to the **Select template** group:



3. From the 'Select Template' drop-down list, select a template.

> If a Meeting Insights On-Prem software update deprecated an AI-powered section in your selected template, you must select a different template to create a new task. Deprecated AI-powered sections are displayed under the **Sections** group with a gray AI icon (instead of). Deprecated templates appear in the 'Select Template' drop-down list with the warning icon.

4. To make it the default template for all your tenants:
   a. Click **Set As Default**; a confirmation message is displayed.
   b. Click **Yes** to confirm; the default template is displayed with a green tick mark ✓ .
5. To delete the template:

a. Click **Delete Template**; a confirmation message is displayed.

b. Click **Yes** to confirm; the template is removed from the list.

6. To create a new template based on the currently selected template (see Step 3):

   a. In the 'Name for template copy' field, enter a name for the new template.

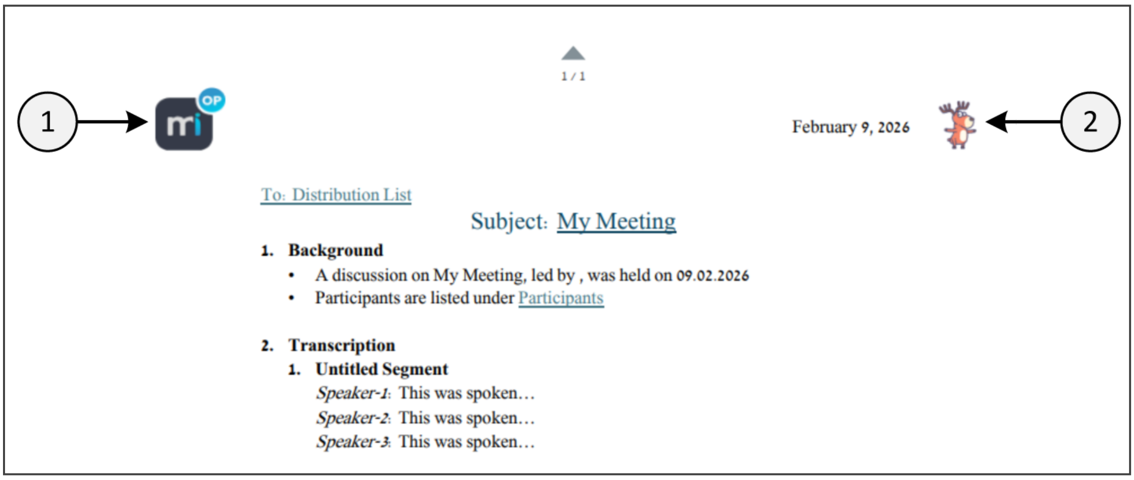
   b. Click **Save New Template**; the template appears in the 'Select Template' field (see above).

   c. Make changes to the template like logos and sections.

7. Save your settings.

Upload Logos for Template

Template Studio lets you define and manage the logos (images) in a template. These settings determine which logos appear in the header of the generated Word document. You can specify the position of each logo in the header - left (see **#1**) or right (see **#2**):



- Only the following user types can define Template Studio settings:
  - ✓ **System Admin**
  - ✓ **Tenant Manager**
  - ✓ **Task Manager**
- You can add up to three logos to a template.
- The logo file must meet the following requirements:
  - ✓ **File format:** .svg
  - ✓ **Image size:** 80 x 80 pixels

  If you upload a logo that doesn't meet these requirements, it appears in the Template Studio, but without a preview and is excluded from the document.

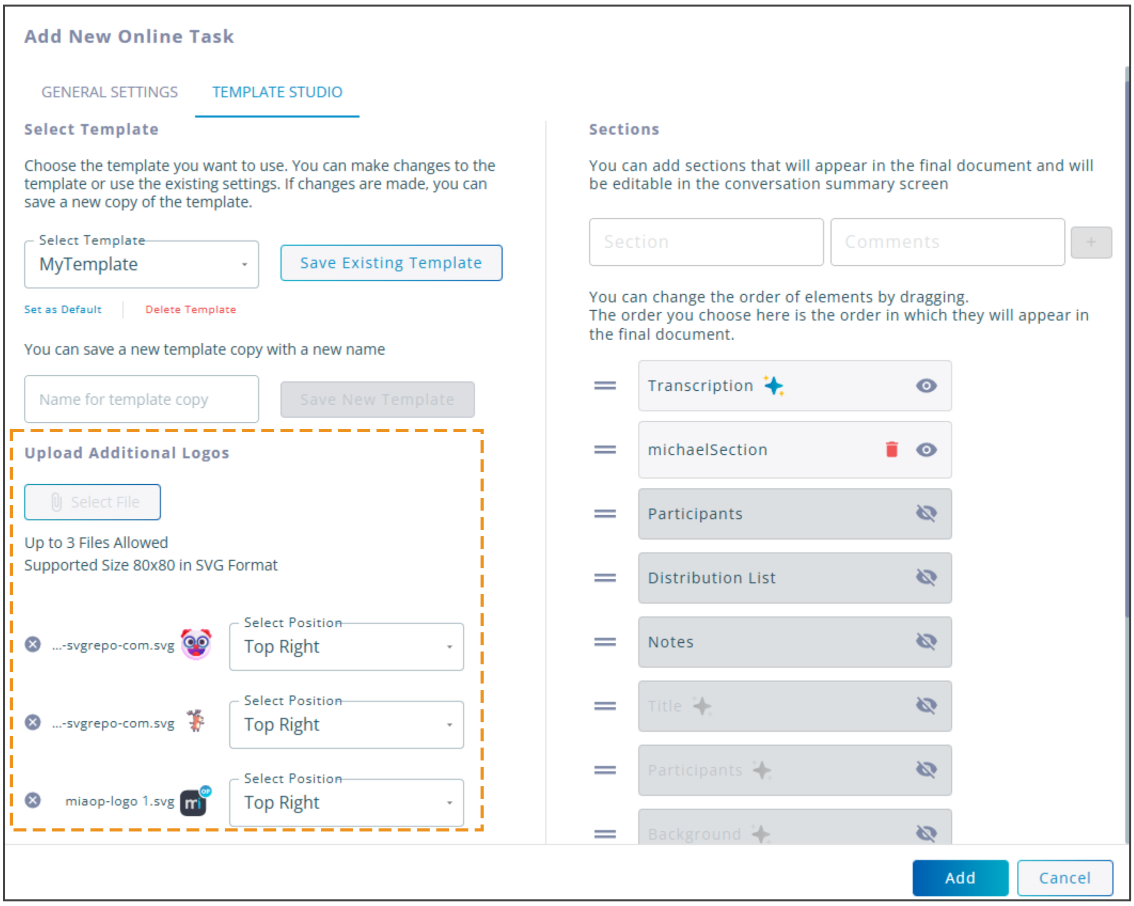
➢ To add logos to document template:

1. Access the Template Studio:

   - When adding Online Meeting tasks, see Add an Online Meeting Task on page 12

- When adding Offline Meeting task, see Add an Offline Task for a Prerecording on page 37
- When editing Online Meeting or Offline Meeting tasks, see Edit a Transcription Task on page 54
- When editing a tenant, see Edit a Tenant's Templates on page 92

2. Select the **Template Studio** tab, and then scroll down to the **Upload Additional Logos** group:



3. Click the **Select File** button.
4. Browse to the file on your computer and select it; the logo is displayed below the **Select File** button.
5. (Optional) To upload additional logo files, repeat steps 3 and 4.
6. (Optional) To delete an uploaded logo, click the icon next to the logo.
7. From the 'Select Position' drop-down list, select where the logo must appear in the header of the document:
   - **Top Left**: Positions the logo in the top-left corner of the header.
   - **Top Right**: Positions the logo in the top-right corner of the header.
8. Save your settings.

Define Sections for Template

Template Studio lets you define and manage the sections in a template. These settings determine which sections appear in the generated Meeting Insights and Transcript document (.docx) and their order of display.

You can do the following actions on sections in a template:

- **Include or exclude sections:** Control whether a section appears in the document.
- **Reorder sections:** Change the order in which sections appear in the document.
- **Add user-defined sections:** Define customized sections to include content specific to your needs.
- **Delete user-defined sections:** Remove sections you no longer need.

You can include the following section types in the template:

- **User-defined sections:** Custom sections with content. These sections are displayed in the proofing tool and document with "Created by transcriber".
- **Metadata Sections:**
  - **Participants:** A list of meeting participants, which is retrieved from the **Participants List** folder on the **General Settings** tab.
  - **Distribution List:** A list of people who should receive the document, which is retrieved from the **Distribution List** folder on the **General Settings** tab.
- **AI-Powered Sections:**

  If your tenant is enabled for **AI Support** (see Enable or Disable a Tenant's AI Support on page 88), you can include special sections with AI-generated content. In Template Studio, these sections appear with the the icon. In the proofing tool and the document, the section name is displayed as "Created by AI".

  If **AI Support** is disabled, you can still include these sections, but they won't contain AI-generated content. You can manually add text to them during proofreading. These sections appear in Template Studio with the icon, and the section name is displayed as "Created by AI (no content)".

  Depending on your **System Admin** configuration, the available AI sections include the following:

  - **Transcription** (always appears)
  - **Title**
  - **Participants** (list of detected participants)
  - **Main Topics** (key topics discussed in the meeting)
  - **Details** (detailed meeting information)
  - **Action Items** (tasks that require follow-up)

- **Decisions** (decisions made during the meeting)
- **Background** (purpose or context of the meeting)

The following figure displays an example of a document based on a template that includes sections Background (1), Transcription (2), Participants (3), Distribution List (4), and Action Items (5):

1 / 1

March 10, 2026

To: Distribution List

Subject: My Meeting

1. **Background**
   - A discussion on My Meeting, led by , was held on 09.02.2026
   - Participants are listed under Participants

2. **Transcription**
   1. **Untitled Segment**

      Speaker-1: This was spoken…
      Speaker-2: This was spoken…
      Speaker-3: This was spoken…

3. **Participants**

   Created at: 9/2/2026 12: 41

#	Full name	Position	Department
	Bob Lee		HR
	Alice Ros	CFO	Finance

4. **Distribution List**

   Created at: 9/2/2026 12: 41

#	Full name	email
	Nikola Tesla	example.com

5. **Action Items**

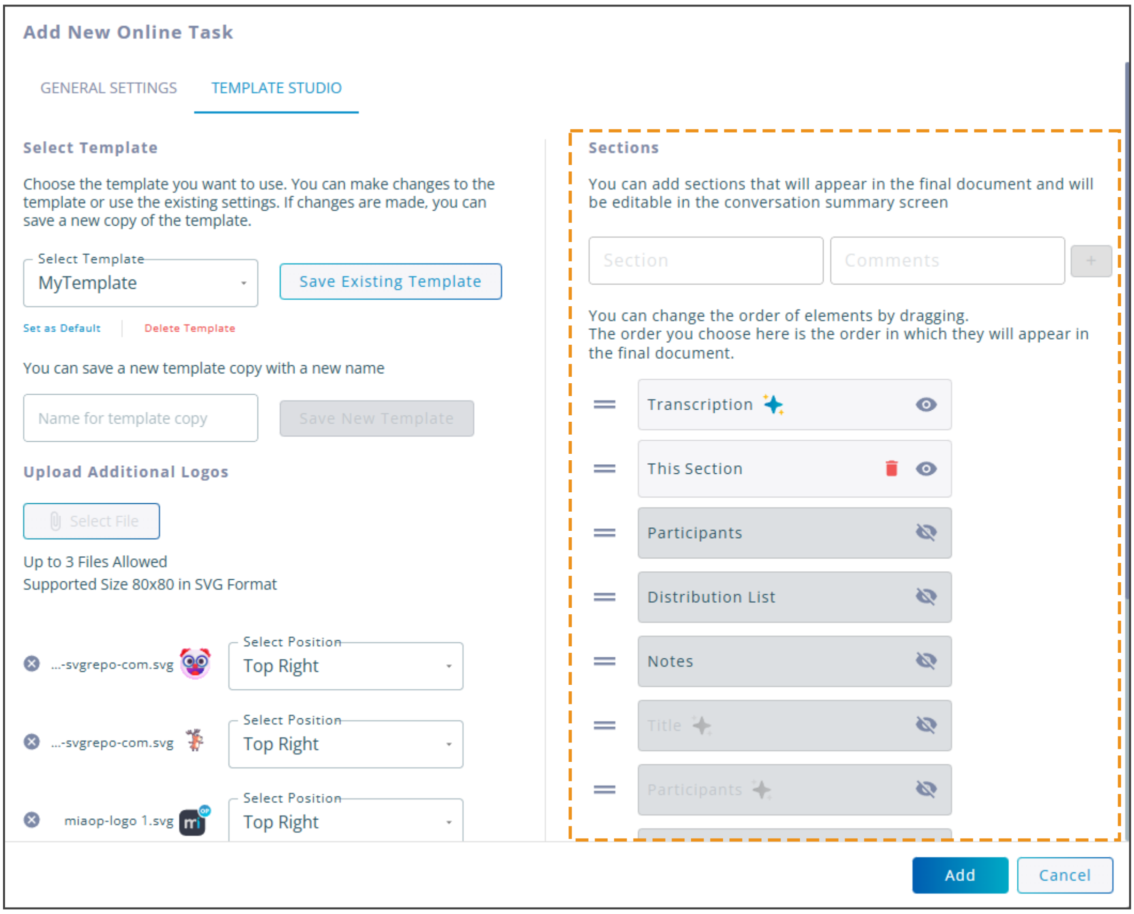
   Created by AI
   Created at: 9/2/2026 12: 43

#	Action items	Assigned by	Assigned to	Due date
1	Get quote		Bob	
2	Resources		Alice	

- If **AI Support** is disabled, a message appears above the list of sections informing you that AI-powered sections will be generated without content.
- The AI-powered **Transcription** section is always generated if included in the template, regardless of **AI Support**.
- You can delete only user-defined sections.

➢ To manage sections for template:

1. Access the Template Studio:
   - When adding Online Meeting tasks, see Add an Online Meeting Task on page 12
   - When adding Offline Meeting task, see Add an Offline Task for a Prerecording on page 37
   - When editing Online Meeting or Offline Meeting tasks, see Edit a Transcription Task on page 54
   - When editing a tenant, see Edit a Tenant's Templates on page 92
2. Select the **Template Studio** tab, and then go to the **Sections** group:



3. **To add a user-defined section:**
   a. In the 'Section' field, enter a name for the section.

b. (Optional) In the 'Comments' field, enter the text you want to appear under this section in the document.

c. Click the plus button; the new section is added to the bottom of the list of sections.

To delete a user-defined section: Click the icon of the section.

4. **To change the order of a section:** Drag the section's two-horizontal lines button up or down to the position you want.

5. **To include or exclude a section:**

   - **Exclude a section:** Click the icon; the section is grayed out and the icon is replaced with the icon.

   - **Include a section:** Click the icon to include the section; the icon is replaced with the icon.

6. Save your settings.

7 Transcription Task List

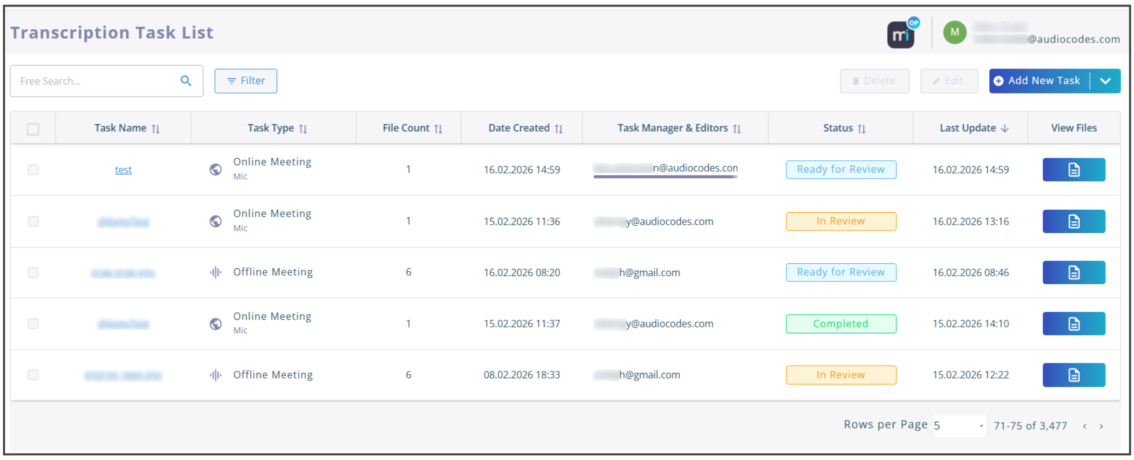
All your transcription tasks appear on the Transcription Task List page. This page is the main page of Meeting Insights On-Prem and opens automatically when you sign in. This is also the page from where you add a new task.

If you're on another page, you can always return to the Transcription Task List page, by clicking the **Back to Transcription List** button. This button is available on every page in Meeting Insights On-Prem.

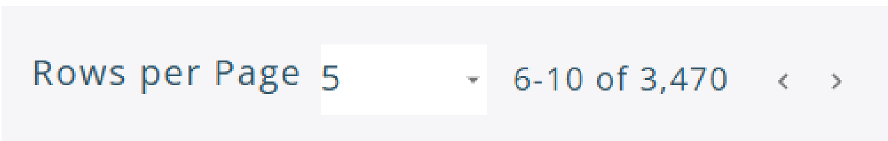
The Transcription Task List page lets you do the following:

- Filter the transcription tasks list (see Filter Transcription Task List on page 52)
- Sort the transcription tasks list by ascending or descending order (see Sort Transcription Task List on page 52)
- Search for a transcription task (see Search for a Transcription Task on page 53)
- Edit a transcription task (see Edit a Transcription Task on page 54)
- Delete a transcription task (see Delete a Transcription Task on page 55)
- View status of a transcription task (see Task Status on page 56)
- Open the File List page to view the list of recording and transcription files of a specific task. From the Files List page, you can open the Transcript Proofing page to proofread the transcription.

The following figure shows an example of the Transcription Task List page with created tasks:



To change the number of rows (tasks) displayed per page, from the 'Rows Per Page' drop-down list (located in the bottom-right corner), select a value from 5 to 100. To view other pages, click the **Go to next page** › icon or **Go to previous page** ‹ icon. In the following example, rows per page is set to 5, displaying rows 6 through 10, out of a total of 3,470 rows.



The following table describes the columns of the Transcription Task List:

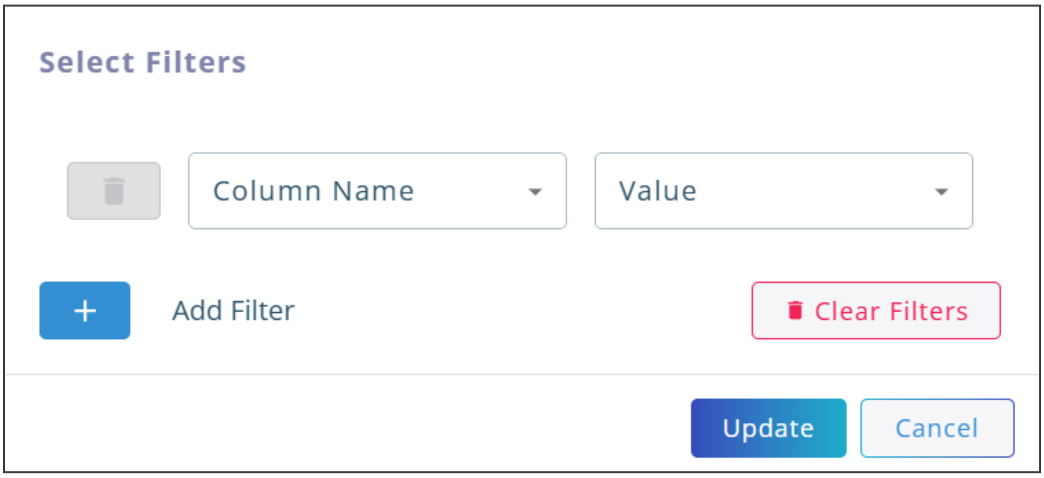
Column	Description
Task Name	Displays the name of the task (meeting name).
Task Type	Displays the type of task: ■ **Online Meeting Mic** For more information on these task types and recording them, see Online Face-to-Face Meetings on page 12. ■ **Telephony Bot** For more information on these task types and recording them, see Online Telephony Meetings on page 19. ■ **Dictation** For more information on these task types and recording them, see Dicta-tions on page 21. ■ **Offline Meeting** For more information on these task types and recording them, see Add an Offline Task for a Prerecording on page 37.
File Count	Displays the number of transcription files that were created for the task. For example, if you uploaded two audio files for an Offline Meeting task, the number "2" is displayed.
Date Created	Displays the date and time the task was added.
Task Manager & Editors	Displays the Task Manager and Task Editors of the task. Task Manager is the user that created the task. Task Editors are the defined editors under **Editors List** when creating a task. If you've configured multiple Task Editors, a number appears next to the Task Manager. If you hover your mouse over the number, a pop-up list displays the email addresses of the Task Editors.
Status	Displays the status of the task. For more information, see Task Status on page 56.
Last Update	Date and time the task was last modified.
View Files	Opens the File List page (see Transcription File List on page 60).

Filter Transcription Task List

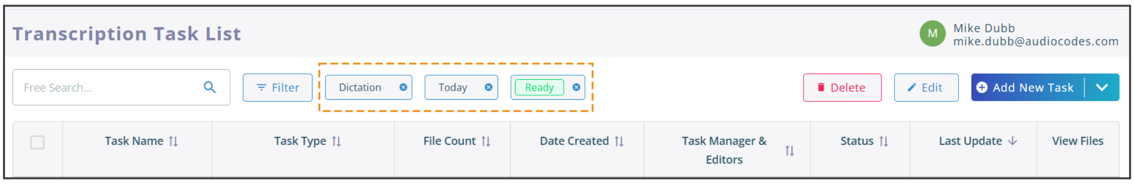
You can filter transcription tasks to help you find a task on the Transcription Task List page.

➢ **To filter transcription task list:**

1. Open the Transcription Task List page (see Transcription Task List on page 50).
2. Click the **Filter** button; the Select Filters dialog box appears:



3. From the 'Column Name' drop-down list, select the column you want to filter by, and then from the 'Value' drop-down list, select the value of the column.
4. (Optional) To add another filter, click the **Add Filter** button and then repeat Step 3.
5. Click **Update**; the Transcription Task List displays the filtered result. The applied filters appear next to the **Filter** button, as shown in the following example:



To remove filters, do one of the following:

- Click the icon of the filtered value.
- Click the **Filter** button, and then click the icon of the filter you want to delete.
- To remove all filters, click the **Filter** button, and then click the **Clear Filters** button.

Sort Transcription Task List

You can sort the Transcription Task List in ascending or descending order by a single column or multiple columns:

- **Ascending:** Sorts text from A to Z, numbers from smallest to largest, and dates from oldest to newest.

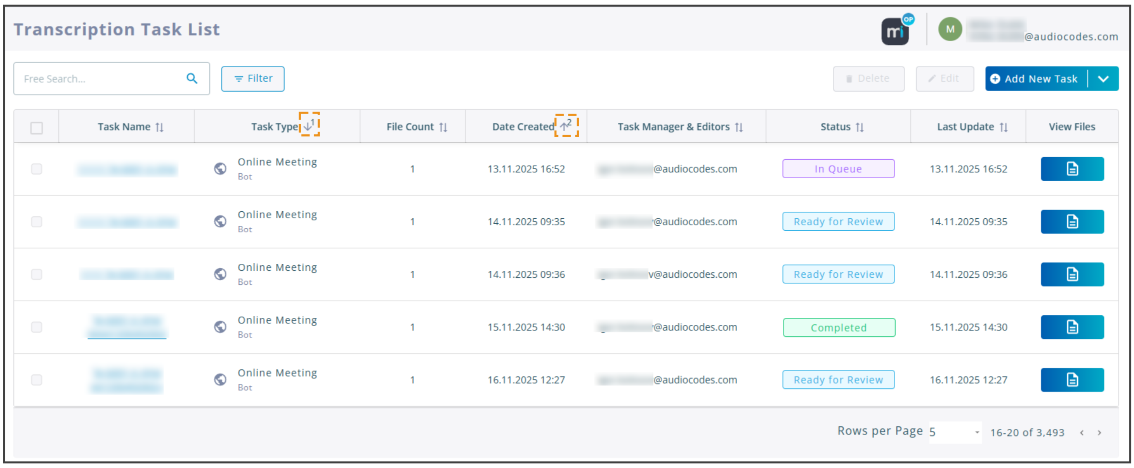
- **Descending:** Sorts text from Z to A, numbers from largest to smallest, and dates from newest to oldest.

Instead of sorting by one column, you may want to implement multi-level sorting using multiple columns. For example, you might want to sort by Task Type (ascending) first and then by Date Created (descending).

➢ To sort transcription list:

1. Open the Transcription Task List page (see Transcription Task List on page 50).
2. Click the column header to toggle between ascending or descending order; an arrow on the header indicates the sort order:
   - (up arrow): The column is sorted in ascending order.
   - (down arrow): The column is sorted in descending order.
   - (up and down arrows): The column is not sorted.
3. To add another column to the sort:
   a. While pressing the Shift key on your keyboard, click the column you want to add; the number "2" appears next to the sort arrow, indicating that it's the second sorting criteria.
   b. To change the sort order (ascending or descending), click the column header again.
   c. To remove the column from your order, click the column header again.

The following example shows the transcription list sorted by both the Task Type and Date Created columns:



Search for a Transcription Task

You can search for transcription tasks on the Transcription Task List page by entering a text string or a number. You can search using:

- Text, such as a task name or task manager email address

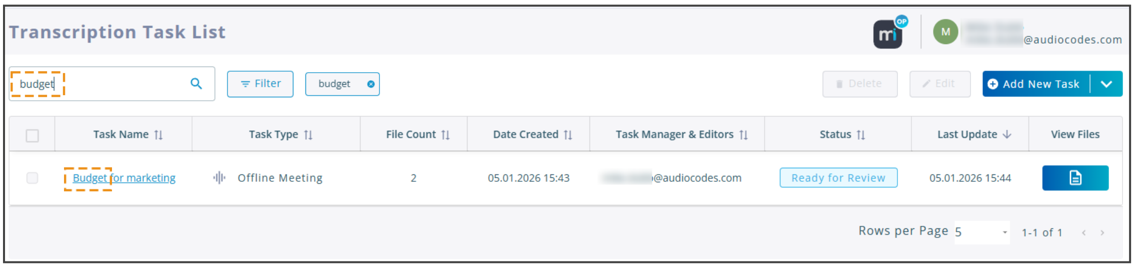
- Numbers, such as a creation date or time

> The search doesn't apply to the following columns:
> - Status
> - File Count

➢ **To search for a transcription task:**

1. Open the Transcription Task List page (see Transcription Task List on page 50).
2. In the 'Free Search' text box, type the string you want to find; the search string appears next to the **Filter** button and the transcription task list displays the tasks with the closest match at the top of the list.

The following example shows a search for tasks whose name contains the string "budget":



Edit a Transcription Task

You can edit an existing task from the Transcription Task List.

> You can only edit one task at a time.

➢ **To edit a task:**

1. Open the Transcription Task List page (see Transcription Task List on page 50).
2. Select the check box of the task you want to edit.
3. Click the **Edit** button; the Edit Task dialog box appears.
4. Modify the task as needed.

   For a description of each setting:

   - Online Meeting task - see Add an Online Meeting Task on page 12
   - Offline Meeting task - see Add an Offline Task for a Prerecording on page 37
   - Dictation task - see Add a Dictation Task on page 21
5. Click **Save**; the task is updated and the dialog box closes.

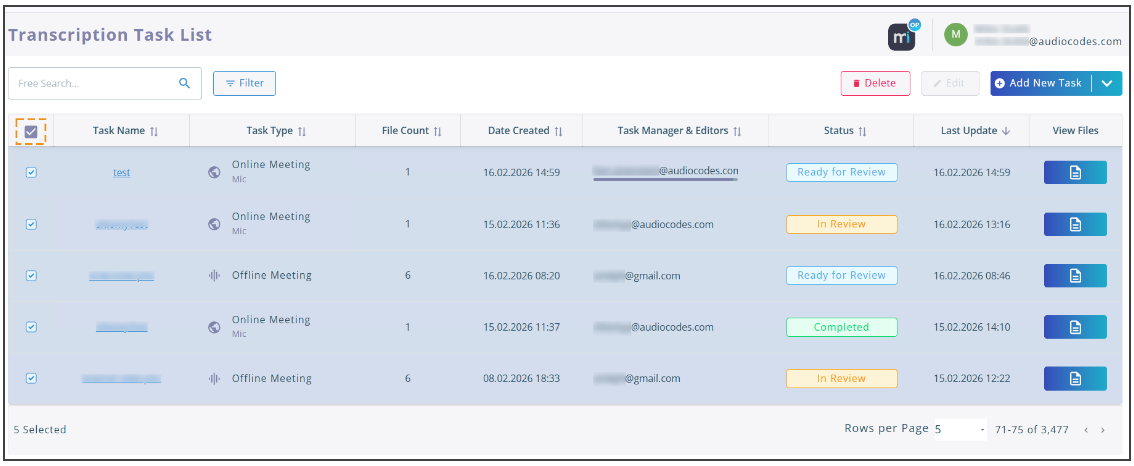
Delete a Transcription Task

You can delete transcription tasks from the Transcription Task List page. You can delete a single task, multiple tasks, or all tasks on the currently displayed page number.

- When you delete a task, all associated data is deleted, including recorded audio files.
- Deleting a task depends on your permission level (see User Permissions on page 79).

➢ To delete transcription tasks:

1. Open the Transcription Task List page (see Transcription Task List on page 50).
2. Select the check box of each task you want to delete. To delete all the tasks on the currently displayed page, click the Select all check box, as shown below:



3. Click the **Delete** button; a confirmation message appears.
4. Click **Confirm**; the selected tasks are deleted and no longer appear in the Transcription Task List.

8 Task Status

Meeting Insights On-Prem implements task statuses that allows you to effectively track and manage transcription tasks. Some of the statuses are automatically set while others you need to set manually.

If a task includes multiple transcription files, each of them has a status. In these cases, the status of the task depends on the status of all its individual transcription files.

> ⚠ Multiple recordings are queued for transcription and processed sequentially. Therefore, some recordings may take longer than others to transcribe.

The following table describes the different task statuses:

Status		Description
In Queue	**In Queue**	The audio recording of the meeting is waiting to be transcribed. **Note:** This status is set automatically.
Transcribing	**Transcribing**	The audio recording of the meeting is currently being transcribed. **Note:** This status is set automatically.
Generating Insights	**Generating Insights**	AI insights are currently being generated for the transcription. **Note:** ■ This status is applicable only if AI support is enabled. For more information, see Enable or Disable a Tenant's AI Support on page 88. ■ This status is set automatically.
Ready for Review	**Ready for Review**	The transcription (and AI summary if enabled) is complete and ready to be

Status		Description
		proofread by a user (Transcriber). Meeting Insights On-Prem sends a notification email to the following people: ■ The user that added the task. ■ The selected transcriber of the task (as described in Change the Transcriber on page 60 **Note:** This status is set automatically. However, if the status was later changed to **In Review** or **Completed**, you can change the status back to **Ready for Review**.
In Review	**In Review**	The transcription is currently being proofread by a user (Transcriber). **Note:** This status is set manually by the user.
Completed	**Completed**	The transcription has been proofread and is ready to be distributed as a Word document. Meeting Insights On-Prem sends a notification email to the user that added the task (i.e., Task Manager). **Note:** This status is set manually by the user.
Error	**Error**	An error occurred during the transcription of one or more audio recordings. Meeting Insights On-Prem sends a notification email to the user that added the task

Status		Description
		(i.e., Task Manager). For more information, see View a Task's Error Message on the next page.

Change a Task's Status

You can change the status of a transcription task. If the task includes multiple transcription files like for an Offline Meeting, you can change the status of each transcription file.

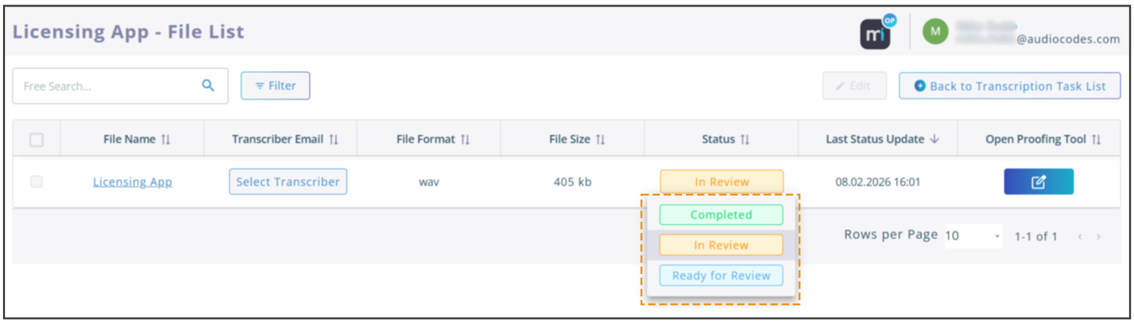
You can only change a task's status to one of the following (other statuses are automatically set):

- **Ready for Review**
- **In Review**
- **Completed**

> If you update a task's status to **Ready for Review**, the transcriber can open the transcription file(s) and proofread them.

➢ **To change status of task:**

1. Open the Transcription Task List page (see Transcription Task List on page 50).
2. Click the task's name or **View Files** button; the Files List page opens, listing the transcription files of the task.
3. In the 'Status' column, click the current status of the transcription file; a drop-down list appears with possible status values, as shown in the following example:



4. Select a status; the status is updated.

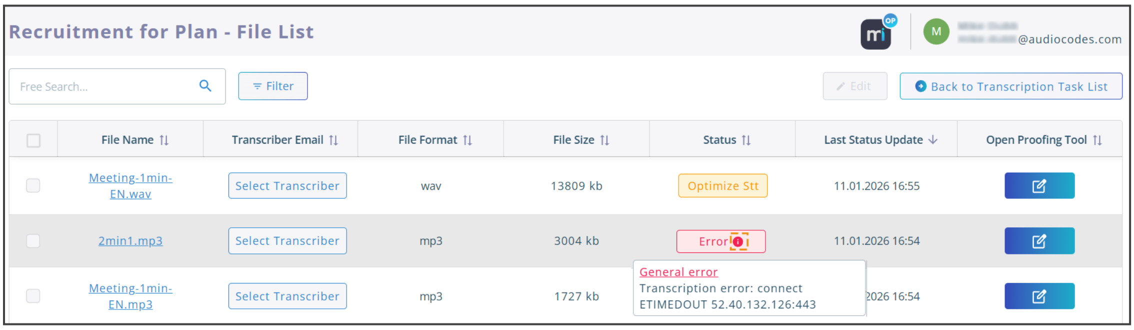
View a Task's Error Message

If a transcription fails, the task is automatically set to the **Error** status. In the File List page, an "i" (Information) icon appears next to the status. This icon contains the reason for the error.

Meeting Insights On-Prem sends a notification email to the user who created the task.

➢ To view an error message:

1. Open the Transcription Task List page (see Transcription Task List on page 50).
2. Click the task's name or **View Files** button; the Files List page opens, listing all the recorded files of the task.
3. Under the 'Status' column, hover your mouse over the "**i**" icon on the status of the recorded file; a pop-up message appears, explaining the error. The following shows an example of an error message.



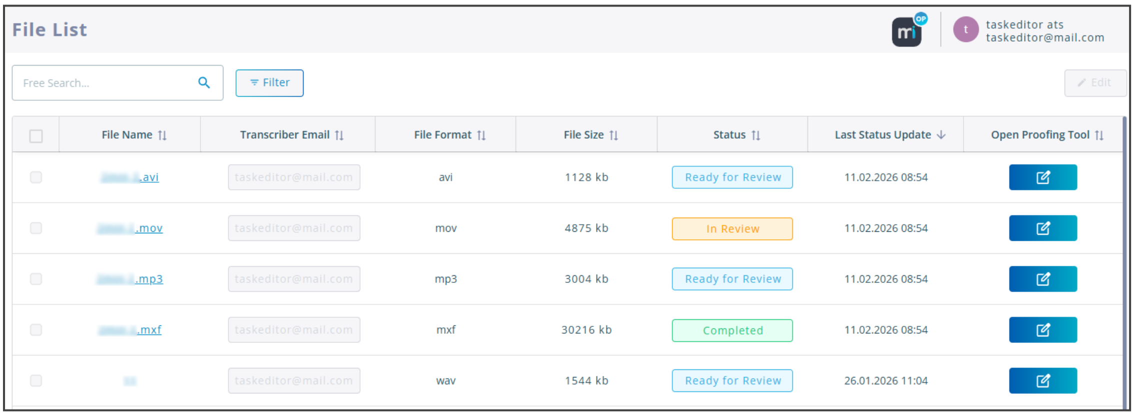
9 Transcription File List

The File List page displays a list of recorded files that were transcribed (or that are queued for transcription). You open the Proofing tool for proofreading a selected file from this page.

When you receive an email from Meeting Insights On-Prem notifying you that a task is ready for review, a link is provided in the email to sign in to Meeting Insights On-Prem, which then automatically opens the File List page.

Your access to the File List page and the files that are displayed also depends on your permission level:

Permission Level	How to open page	Files displayed
Tenant Manager or **Task Manager**	On the Transcription Task List page, select a task, and then click **View Files** (see Transcription Task List on page 50).	Only the files associated with the selected task.
Task Editor	Sign in to Meeting Insights On-Prem. The File List page opens automatically.	All files assigned to you (as a *transcriber*) for proofreading, as shown in the following example:



Change the Transcriber

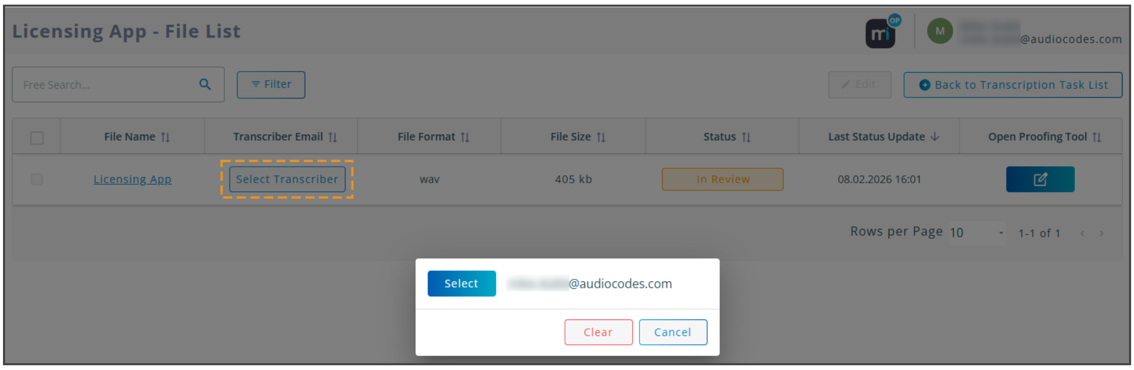
You can change the transcriber to proofread the transcription of the task. If you didn't specify a transcriber when you added the task (in the **Editors List** folder on the **General Settings** tab), Meeting Insights On-Prem automatically assigns you as the transcriber. If you added a transcriber(s) when you added the task, you can select a different transcriber.

When you select a transcriber, you can enable Meeting Insights On-Prem to send an email notification to the transcriber. The email provides a link to the transcription for proofreading.

> ⚠ Changing a transcriber can only be done by users with the **Tenant Manager** or **Task Manager** permission level.

➢ To change a transcriber:

1. Open the Transcription Task List page (see Transcription Task List on page 50).
2. Click the task's name or **View Files** button; the Files List page opens, listing all the recorded files of the task.
3. In the 'Transcriber Email' column of the transcription file, click **Select Transcriber** or click the currently displayed email address; a dialog box appears, listing all the defined transcribers of the task:



4. Click the **Select** button of the email address of the person you want to assign as the transcriber; you're prompted to choose if you want an email sent to notify the user.
5. Click **Yes** if you want to send an email; Meeting Insights On-Prem sends an email to the selected transcriber with a link to the transcription for proofreading. The File List page displays the email address in the 'Transcriber Email' column of the task.

10 Proofing Tool

Meeting Insights On-Prem provides the easy-to-use and feature-rich Proofing tool.

The Proofing tool provides two pages for proofreading:

- **Meeting Summary page:** This page lets you proofread the meeting summary, which includes the user-defined sections, metadata sections, and AI-powered sections for the downloaded Meeting Insights and Transcript document (see Proofreading the Meeting Summary below).
- **Transcript Proofreading page:** This page lets you proofread the transcription for the downloaded Meeting Insights and Transcript document (see Proofreading the Transcription on page 65).

> To download (export) the meeting summary and transcription as a Microsoft Word document (during or after proofreading), see Download Meeting Insights and Transcript Word Document on page 77.

Proofreading the Meeting Summary

In addition to proofreading the transcription (see Proofreading the Transcription on page 65), the Proofing tool allows you to review and refine the meeting summary before downloading the Meeting Insights and Transcript document.

The meeting summary contains the selected (or user-defined) sections of the template in the Template Studio (Define Sections for Template on page 46) for inclusion in the document. These sections may include:

- Metadata sections (e.g., Participants)
- AI-powered sections (e.g., Title and Main Topics)
- User-defined sections

How you review and modify these sections depends on their layout:

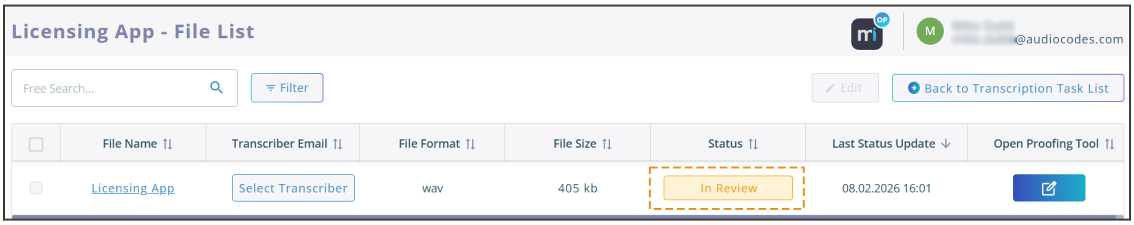
- Sections in text layout - see Edit Sections in Text Layout on page 64
- Sections in table layout - see Edit Sections in Table Layout on the next page

Proofreading the meeting summary is done on the Meeting Summary page of the Meeting Insights On-Prem Proofing tool.

➢ To open the Meeting Summary page:

1. Open the Transcription Task List page (see Transcription Task List on page 50).
2. Click the name of the task or the **View Files** button whose meeting summary you want to proofread; the Files List page opens, listing all the recorded audio files of the task.

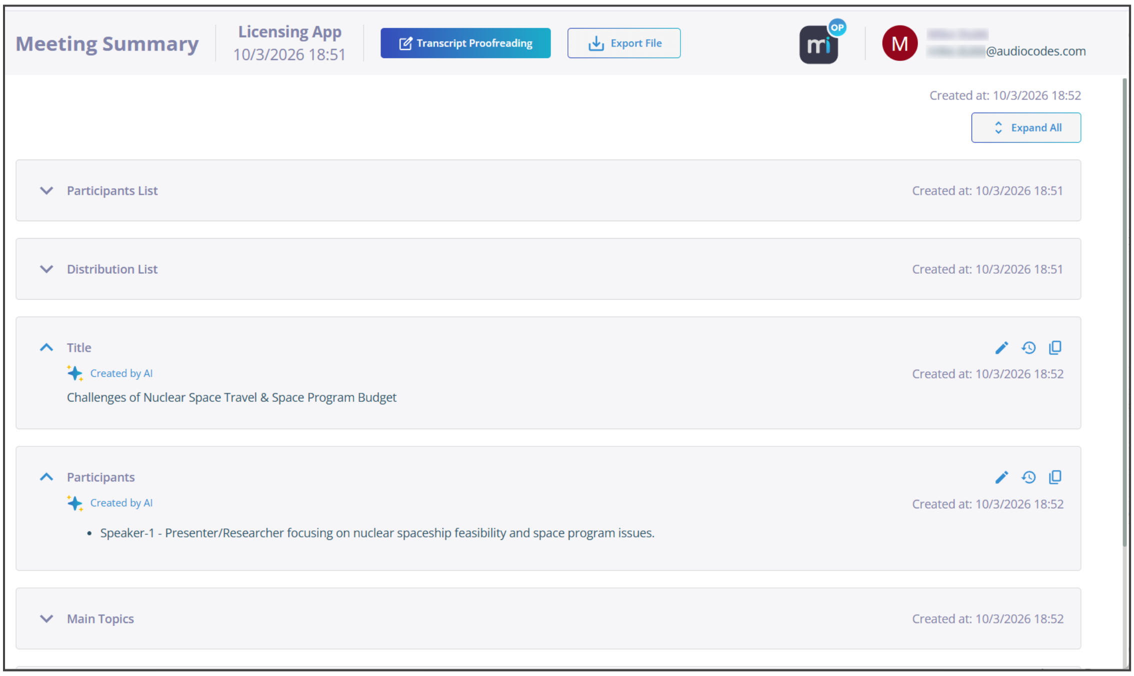
3. Change the transcription status of the recorded file to **In Review** (see Change a Task's Status on page 58), as shown in the following example:



4. Under the Open Proofing Tool column, click of the recorded file; the Proofing tool's Meeting Summary page appears, as shown in the following example.

The sections are displayed collapsed. To view a section's content, expand the section by clicking the section's name or arrow. You can also use the **Expand All** / **Collapse All** button to expand all sections or collapse all sections.

If **AI Support** is enabled, AI-powered sections contain AI-generated content and are displayed with the icon and "Created by AI". If **AI Support** is disabled, AI-powered sections are empty and are displayed with the icon and "Created by AI (no content)".



Edit Sections in Table Layout

Several sections on the Meeting Summary page use table layout, for example:

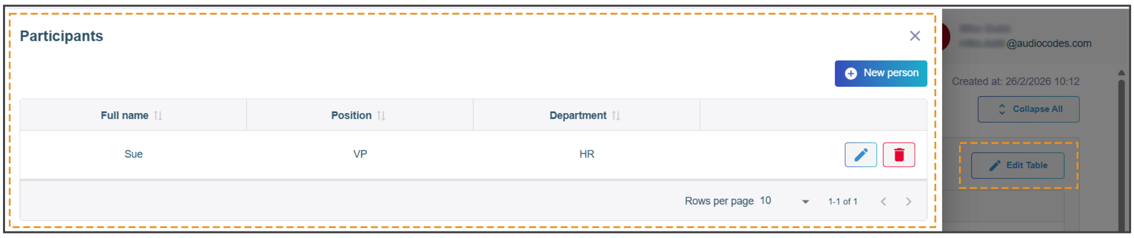
- Participants section
- Distribution List section
- Action Items section

In these sections, you can add, edit, or delete rows to update the table content.

➢ To edit sections in table format:

1. Expand the section you want to edit, by clicking the arrow next to the section's name; the table of the section appears.
2. Click the **Edit Table** button; the table becomes editable.
3. **To add a row:**
   - Participants or Distribution List: Click the **New Person** button, enter the details, and then click **Confirm**.
   - Action Items: Click the **New Task**button, enter the details, and then click **Confirm**.
4. **To edit an existing row:**
   a. Click the icon of the row you want to edit.
   b. Make your changes.
   c. Click **Confirm**.
5. **To delete a row:** Click the icon of the row you want to delete.
6. Close the widow, by clicking the button in the top-right corner of the window.

The example below shows how to edit the Participants section using the editable table:



Edit Sections in Text Layout

Several sections on the Meeting Summary page use a text layout, for example:

- AI-powered sections, such as Title, Main Topics, and Participants
- Notes section
- User-defined sections

In these sections, you can:

- **Modify text:** Add, edit, or delete content.
- **Format text:** Apply basic formatting, such as bold text, bulleted lists, and numbered lists.
- **Revert changes:** Restore the text to its original version if you need to undo your edits.
- **Copy content:** Copy the text to your clipboard to paste it elsewhere.

➢ To edit sections in text layout:

1. Expand the section you want to edit, by clicking the arrow next to the section's name; the content of the section appears.
2. Click the Edit icon; the text becomes editable.

3. Add, edit or delete text as desired. You can also use the formatting tools to:
   - Bold text.
   - Make a list bullet.
   - Make a numbered list.
   - Undo or redo previous editing action
4. When you finished editing, click anywhere outside of the editable pane to automatically save your changes.
5. To discard all your changes and restore the text to its original version:
   a. Click the Reset editing icon; a confirmation message appears.
   b. Click **OK** to confirm.
6. To copy the content of the section to your clipboard:
   a. Click the Copy content icon.
   b. Paste the content from your clipboard to wherever you want it (e.g., in an email).

Proofreading the Transcription

Once a transcription of your task has been generated, you can use Meeting Insights On-Prem built-in Transcript Proofreading tool to review and edit the transcription.

You can use the Transcript Proofreading tool to do the following:

- Customize shortcut keys for various actions (see Customize Shortcut Keys on the next page).
- Show or hide timestamps of spoken speech (see Show or Hide Speech Timestamps in Transcription on page 69).

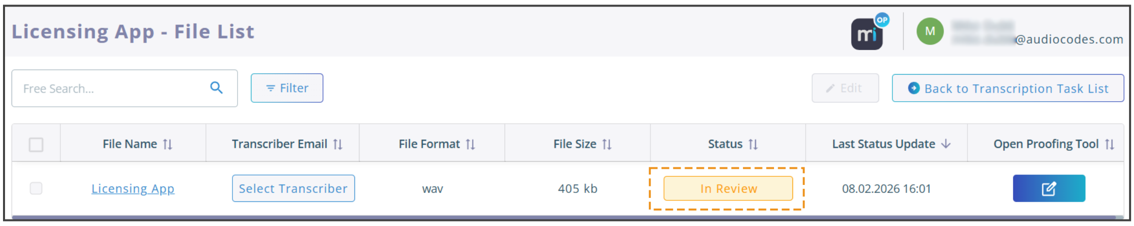
- Add, edit, or delete text (see Modify Transcription Text on page 69).
- Add bullets or numbers (see Add Bullets and Numbers in Transcription on page 70).
- Add segments (sections) from paragraphs (see Add a Segment in Transcription on page 71).
- Add and assign action items (see Add an Action Item in Transcription on page 72).
- Change the speaker of a segment (see Assign a Speaker to Transcribed Line on page 74).
- Rename a speaker (see Rename a Speaker on page 75).
- Discard proofreading changes (see Discard Proofreading Changes on page 76).

Open the Transcript Proofreading Page

Proofreading the transcription is done on the Transcript Proofreading page of the Meeting Insights On-Prem Proofing tool.

➢ **To open Transcript Proofreading page:**

1. Open the Transcription Task List page (see Transcription Task List on page 50).
2. Click the name of the task or the **View Files** button whose transcription you want to proofread; the Files List page opens, listing all the recorded audio files of the task.
3. Change the transcription status of the recorded file to **In Review** (see Change a Task's Status on page 58), as shown in the following example:



4. Under the Open Proofing Tool column, click of the recorded file; the Proofing tool's Meeting Summary page appears.
5. Click the **Transcript Proofreading** button; the Transcript Proofreading page appears.

Customize Shortcut Keys

Meeting Insights On-Prem provides default keyboard shortcuts for various actions. Each shortcut includes one **fixed** key that can't be changed, combined with one or more **modifier** keys - **Alt**, **Ctrl**, or **Shift**.

You can customize a shortcut by changing the modifier keys:

- All three modifier keys.
- Any two modifier keys.
- A single modifier key.

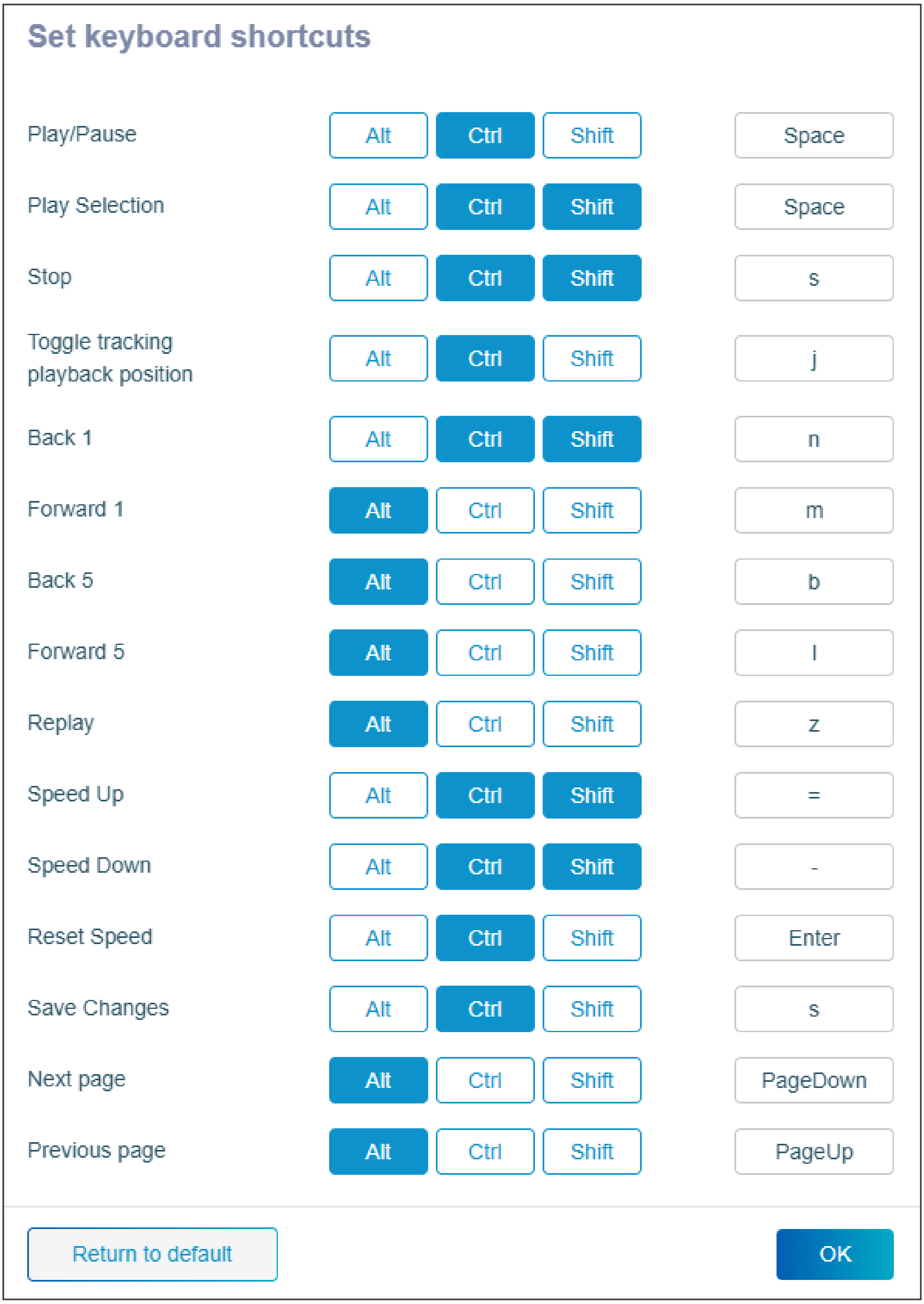
For example, the default shortcut for play or pause recording is the modifier key **Ctrl** with the fixed key **Spacebar**. You can change it to **Alt** + **Shift** + **Spacebar**.

The following table displays the default shortcut keys:

Functionality	Modifier Keys			Fixed Key
	Alt	Ctrl	Shift	
Player functionality				
Play / Pause		✓		Space
Play Selection		✓	✓	Space
Stop		✓	✓	S
Toggle tracking playback position		✓		J
Back 1 (one second backward)		✓	✓	N
Forward 1 (one second forward)	✓			M
Back 5 (five seconds backward)	✓			B
Forward 5 (five seconds forward)	✓			L
Replay (play from beginning)	✓			Z
Speed Up		✓	✓	=
Speed Down		✓	✓	–
Reset Speed		✓		Enter
Save				
Save Changes		✓		S
Pagination				
Next page	✓			Page Down
Previous page	✓			Page Up

➢ To customize shortcut keys:

1. On the Meeting Summary page, click your profile account icon in the top-right corner; a drop-down menu appears.
2. Click **Set keyboard shortcuts**; the Set keyboard shortcuts dialog box appears:



3. Configure the modifier keys (Alt, Ctrl, and Shift) for the shortcut key you want to change.
4. Click **OK**.

To restore the default settings, click **Return to default**.

Show or Hide Speech Timestamps in Transcription

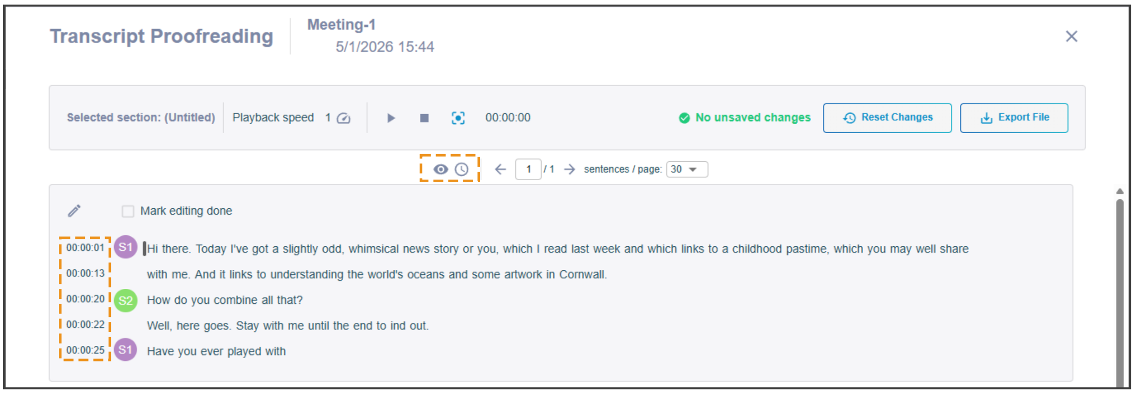
You can show or hide timestamps that indicate when each spoken paragraph started in the recording.

Timestamps help you:

- Edit the transcription more accurately
- Understand the order of speakers
- Identify when each part of the conversation starts

By default, timestamps are turned on.

The figure below shows the icon used to show or hide timestamps and where the timestamps appear in the transcription:



➢ To show or hide timestamps in transcription:

1. Open the Transcript Proofreading page (see Open the Transcript Proofreading Page on page 66).
2. To hide the timestamps, click .
3. To show the timestamps, click .

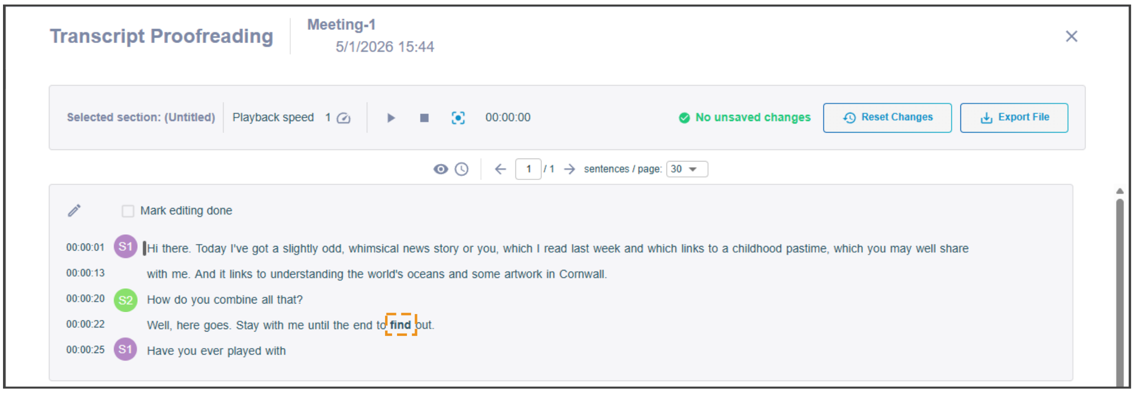
Modify Transcription Text

You can modify the transcription by adding, editing, or deleting text.

➢ To modify text:

1. Open the Transcript Proofreading page (see Open the Transcript Proofreading Page on page 66).
2. Click in the line of text where you want to make the change. To select a word, double-click it.
3. Add, edit, or delete text as needed.

Text you add or modify appears in **bold**, as shown in the following example ("**find**"):



Add Bullets and Numbers in Transcription

You can add list bullets and numbers to the transcription.

➢ To add list bullets or numbers:

1. Open the Transcript Proofreading page (see Open the Transcript Proofreading Page on page 66).
2. Right-click the paragraph you want to format; a shortcut menu appears.
3. Choose one of the following:

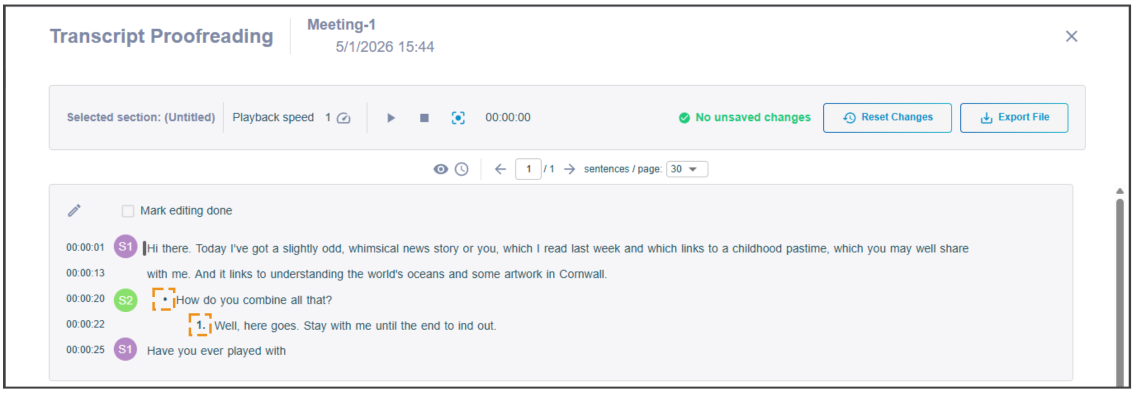
   Increment bullet:

   - Indents the paragraph.
   - If the paragraph doesn't already have a bullet, a bullet is added.
   - If the paragraph already has a bullet, it's further indented and changed to a numbered item.

   Decrement bullet:

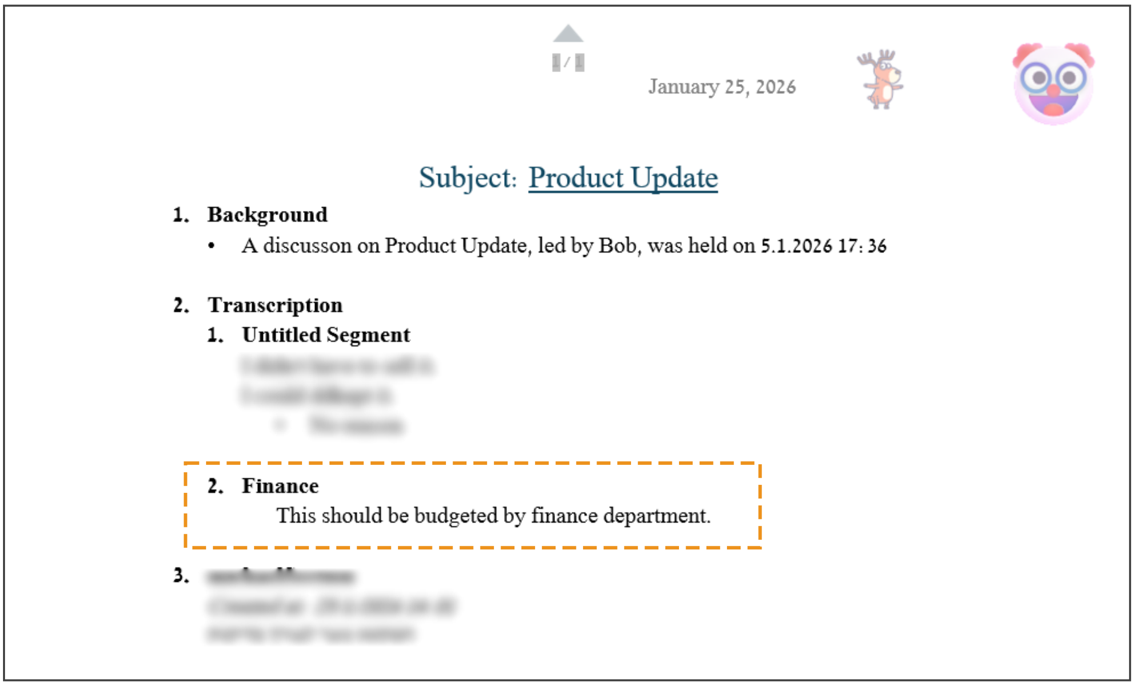
   - Outdents the paragraph.
   - If the paragraph has a bullet, the bullet is removed.
   - If the paragraph has a number, the number is changed to a bullet.
4. After adding a bullet or number, you can create additional list items by pressing Enter:
   - At the end of the paragraph to add the next item.
   - Before a word in the paragraph to start a new bullet or number at that position.

An example of list bullets and numbers is shown below:



Add a Segment in Transcription

You can create segments of paragraphs in the transcription. These segments appear as subsections under the Transcription section in the downloaded Meeting Insights and Transcript document, as shown in the following example for the added segment "Finance":

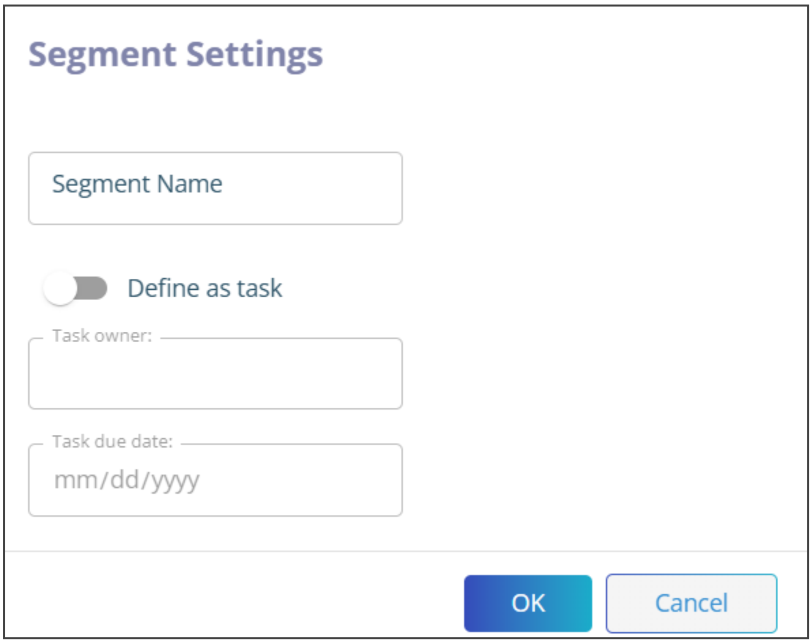


➢ To add a segment:

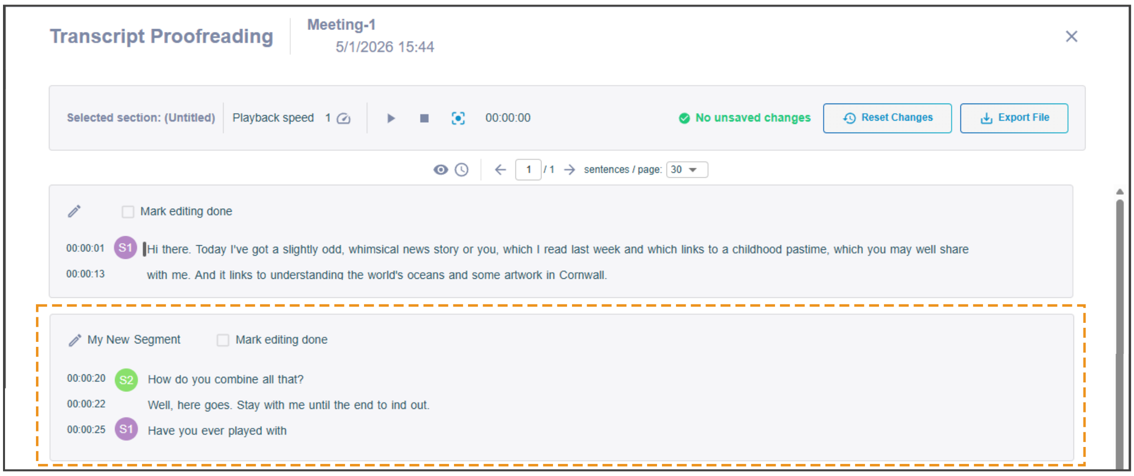
1. Open the Transcript Proofreading page (see Open the Transcript Proofreading Page on page 66).
2. Right-click the paragraph in an existing segment from where you want the new segment to begin; a shortcut menu appears.

> All text in the segment from where you right-clicked is moved into the new segment.

3. Choose **Create new segment**; the Segment Settings dialog box appears:



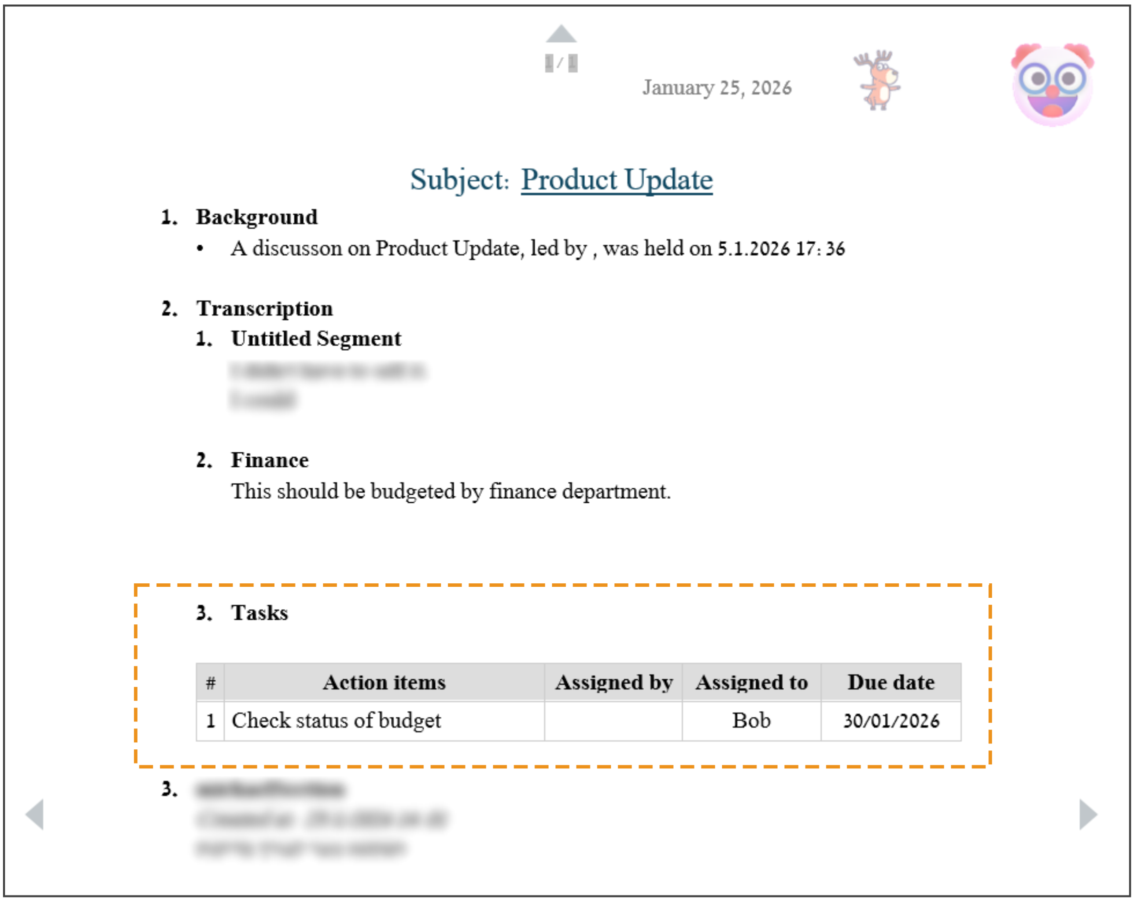
4. In the 'Segment Name', enter a name for the segment.
5. (Optional) To define the segment as a task (action item), click the **Define as Task** toggle button to turn it on. For more information, see Add an Action Item in Transcription below.
6. Click **OK**; a new segment is added below the current segment. The new segment includes all text from the original segment starting at the point where you right-clicked.



Add an Action Item in Transcription

You can create action items (tasks to be done) from the transcription and assign it to someone with a due date for completion.

In the downloaded Meeting Insights and Transcript document, action items appear in the Tasks subsection under the Transcription section, as shown in the following example:

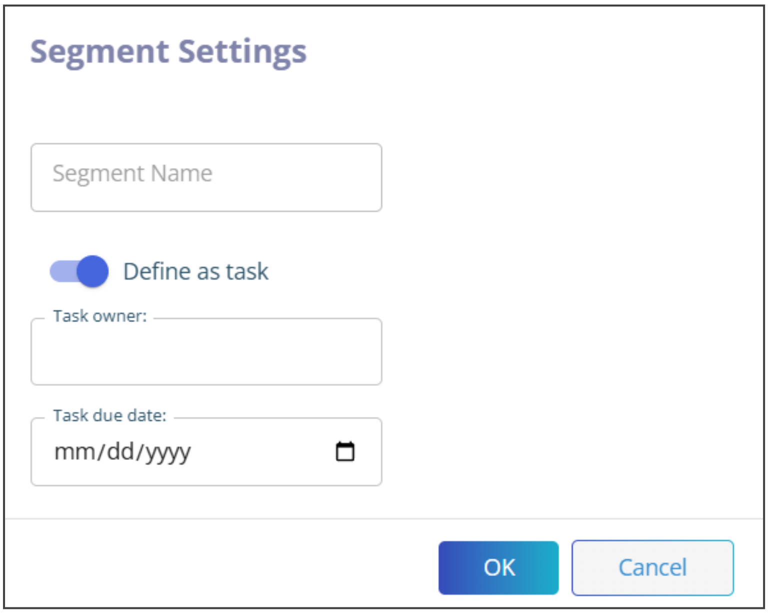


➢ **To add an action item:**

1. Open the Transcript Proofreading page (see Open the Transcript Proofreading Page on page 66).
2. Right-click in the segment of the transcription at the point where you want the new action item to begin; a shortcut menu appears.

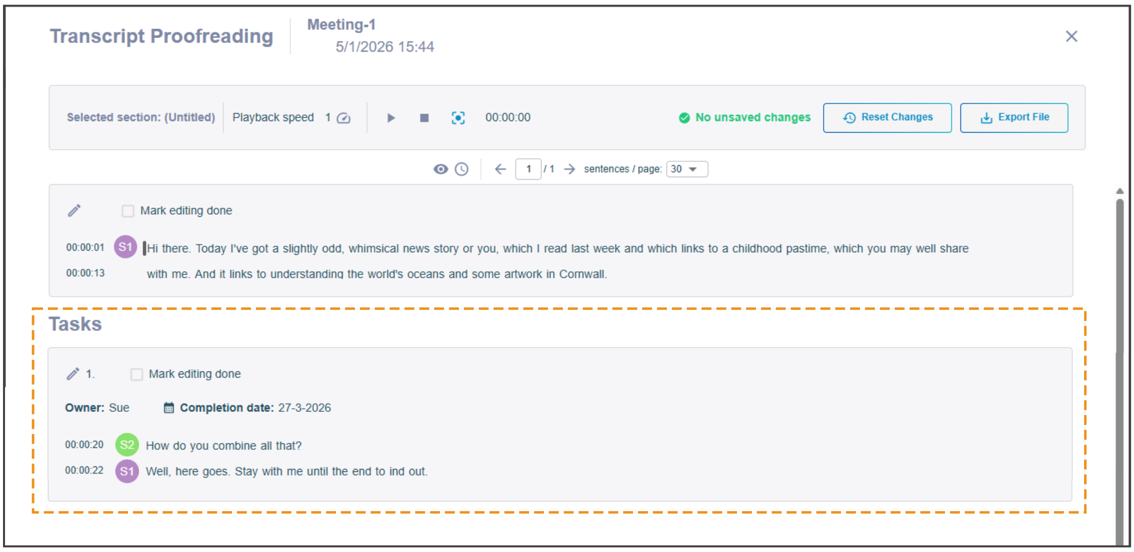
> All text in the segment from where you right-clicked will be moved into the new action item (task).

3. Choose **Assign new action item**; the Segment Settings dialog box appears:



4. Click the **Define as Task** toggle button to turn it on (default).
5. In the 'Task owner' field, enter the name of the person to whom you want to assign the action item.
6. In the 'Task due date' field, click the calendar icon, and then from the pop-up calendar, select the date at which the action item must be completed.
7. Click **OK**; the new action item is added under the **Tasks** group in the transcription. It includes all text from the original segment starting at the point where you right-clicked.

The following hows an example of a task created for "Sue" with a completion date:



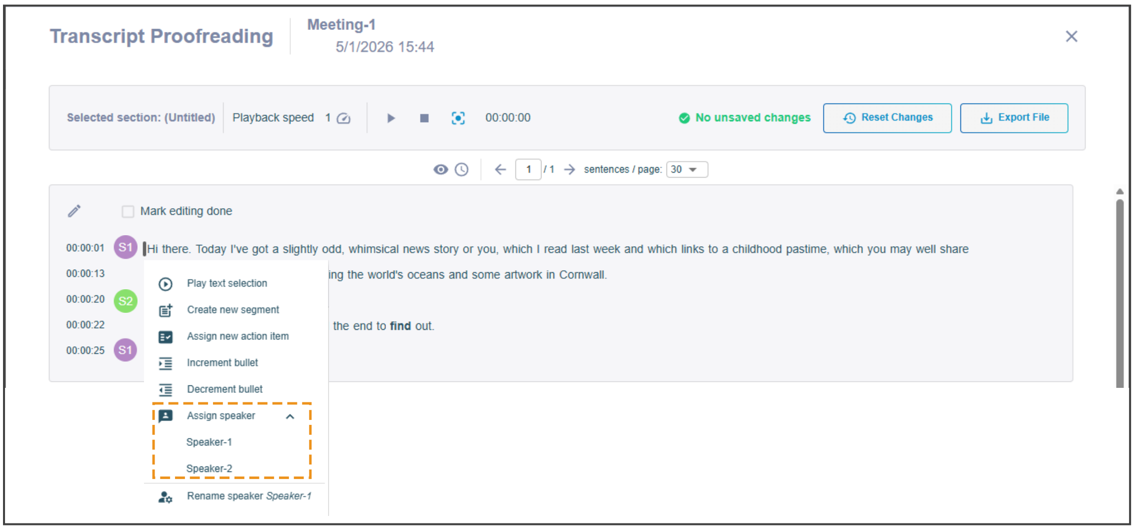
Assign a Speaker to Transcribed Line

You can assign a speaker to a line in the transcription.

⚠ To rename a speaker, see Rename a Speaker below.

➢ To assign a speaker to a spoken line:

1. Open the Transcript Proofing page (see Open the Transcript Proofreading Page on page 66).
2. In the transcript, locate the line from where you want to assign a speaker.
3. Right-click the line, and then from the shortcut menu, expand the **Assign speaker** item; a list of speakers that were detected during the recording is displayed:



4. Select the speaker you want to assign.

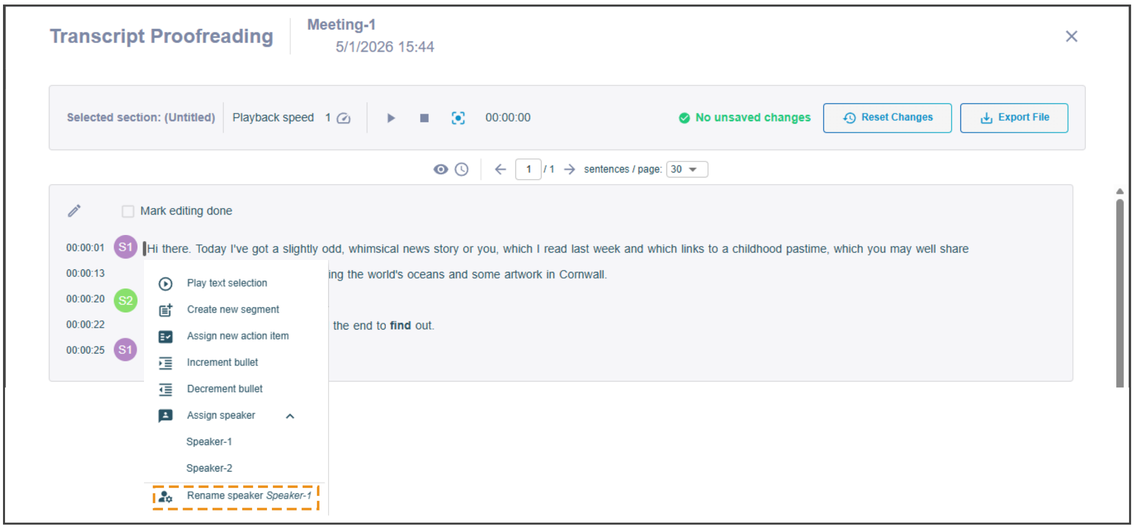
Rename a Speaker

You can rename a speaker in the transcription. When you rename a speaker, the new name is applied to all of that speaker's entries throughout the transcript.

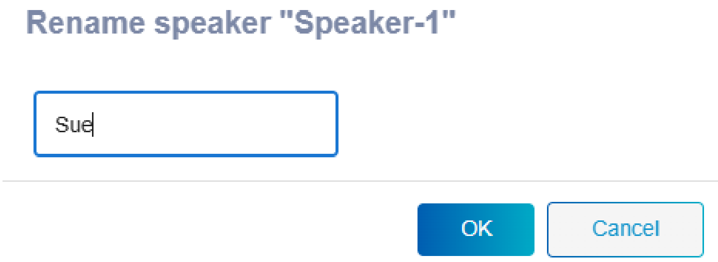
By default, Meeting Insights On-Prem assigns speaker names using the format **Speaker-<number>** (e.g., "Speaker-1", "Speaker-2", "Speaker-3", and so on).

➢ To rename a speaker:

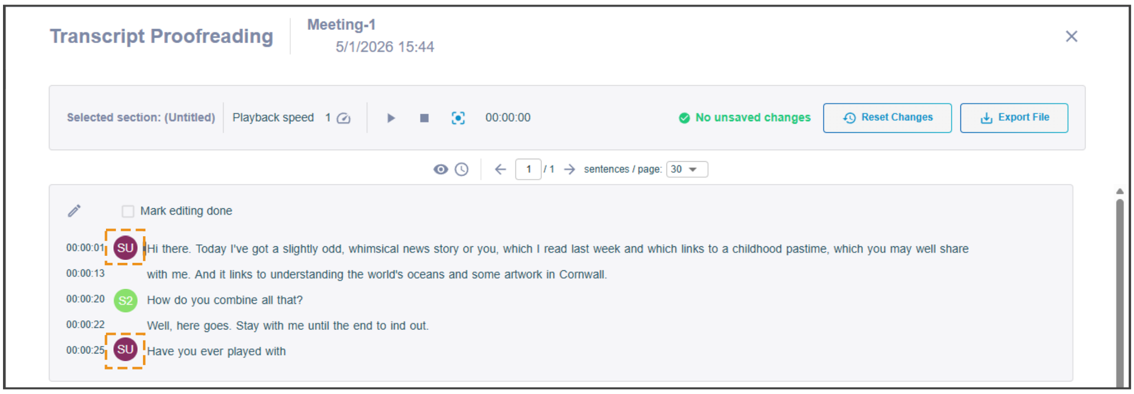
1. Open the Transcript Proofing page (see Open the Transcript Proofreading Page on page 66).
2. In the transcript, locate any line spoken by the speaker you want to rename.
3. Right-click the line, and then from the shortcut menu, choose **Rename speaker**:



The Rename speaker dialog box appears:



4. Type a new name for the speaker.
5. Click **OK**; the speaker's name is updated throughout the transcript. The speaker icon displays the first two letters of the assigned name (e.g., SU):



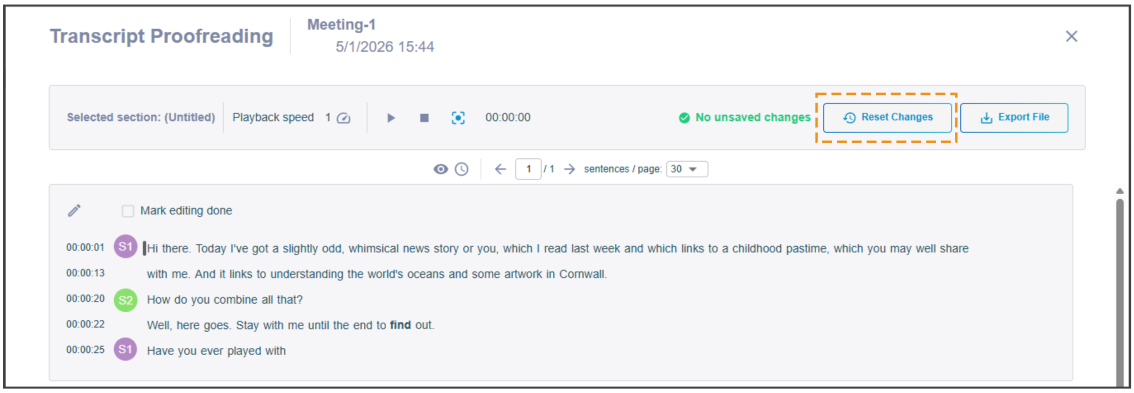
Discard Proofreading Changes

You can discard all proofreading changes and restore (reset) the transcription to its original version.

➢ To reset the transcription:

1. Open the Transcript Proofing page (see Open the Transcript Proofreading Page on page 66).

2. Click the **Reset Changes** button:



A confirmation message appears.

3. Click **OK** to confirm; all the proofreading changes are discarded and the transcription is returned to its original state.

Download Meeting Insights and Transcript Word Document

You can download (export) the meeting summary (insights) and transcription as a Microsoft Word document (.docx).

During proofreading, you may download the Meeting Insights and Transcript document at any time to review its formatting and layout. After reviewing the document, you can return to the Proofing tool to make additional corrections or adjustments.

When proofreading is complete, you can download the document and distribute the final version.

The document file name is based on the 'Task / Meeting Name' configured on the task's **General Settings** tab. For example, if the task's name is "Budget for Product", the file is named *Budget for Product.docx*.

> The audio file of the recording is also downloaded with the document if this option is enabled for the task ('Export Audio File' checkbox on the **General Settings** tab).

➢ To download the Meeting Insights and Transcript document:

1. Open the Proofing tool:

   - Meeting Summary page (see Proofreading the Meeting Summary on page 62)

     \- or -

   - Transcript Proofing page (see Open the Transcript Proofreading Page on page 66)

2. Click the **Export File** button; the document is downloaded to your computer.

11 Administration

This section describes functionality in Meeting Insights On-Prem that can be performed only by **System Admin** or **Tenant Manager** users.

User Management

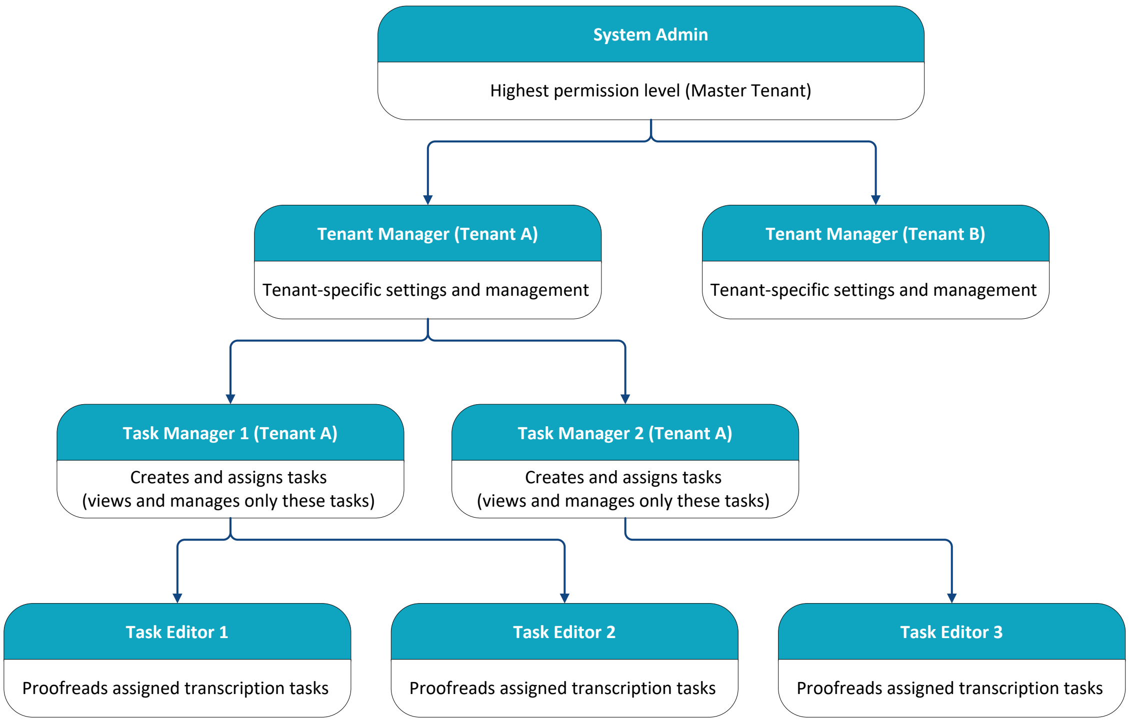
This section describes how to manage Meeting Insight On-Prem users.

User Levels and Tenants

Meeting Insights On-Prem offers mult-tenant management. An example of a multi-tenant implementation in Meeting Insights On-Prem could be the military, where each unit - Navy, Army, Air Force, and Intelligence - is a tenant.

Meeting Insights On-Prem provides role-based user management, where each role (referred to as *Permission Level*) determines what actions the user can do in Meeting Insights On-Prem. These are the following user types:

- **System Admin:** This user has the highest authority level and is responsible for initial tenant provisioning and for managing global parameters that apply to all your tenants.
- **Tenant Manager:** This user is the manager of a specific tenant and defines global settings for the tenant.
- **Task Manager:** This user is restricted to creating and organizing tasks within a tenant, but cannot change global or tenant-level configurations.
- **Task Editor:** This user is assigned by the Task Manager to proofread a specific task transcription.



User Permissions

The permissions each type of Meeting Insights On-Prem user is allowed to do is summarized in the following table.

Action	Master Tenant (All Tenants)	Within Specific Tenant		
	System Admin	Tenant Manager	Task Manager	Task Editor
Tenants				
Add tenant	✓	×	×	×
View tenant	✓	✓	×	×
Edit tenant	✓	✓	×	×
Delete tenant	✓	×	×	×
License management				
Upload license	✓	×	×	×
Enable / disable AI Support	✓	×	×	×
User management				
Add user	✓	✓	×	×
Edit user	✓	✓	×	×
Delete user	✓	✓	×	×
Authentication by Central Server	✓	×	×	×
Tasks				
Add task	×	✓	✓	×
View task	×	✓	✓	×
Edit task	×	✓	✓	×
Delete task	✓	✓	✓	×
Transcription				

Action	Master Tenant (All Tenants)	Within Specific Tenant		
Proofreading	✗	✓	✓	✓ (if assigned)
Change transcriber	✗	✓	✓	✗
Download	✗	✓	✓	✓ (if assigned)
Pages				
Transcription Task List page	✓	✓	✓	✗
File List page	✓	✓	✓	✓ (only assigned)

User Management Options

Meeting Insights On-Prem lets you implement one of the following user management methods:

- **Local user management:** Users are created and managed directly through Meeting Insights On-Prem. For more information, see Local User Management below
- **External user management:** Users are managed on an external identity provider, such as Microsoft Entra ID, and synchronized with Meeting Insights On-Prem. For more information, see External Users in Microsoft Entra ID on page 85.

Local User Management

You can manage (add, edit, or delete) users directly through Meeting Insights On-Prem.

Add a User

You can add users for Meeting Insights On-Prem. These are users within the specific tenant scope.

A user can have one of the following permission levels (roles):

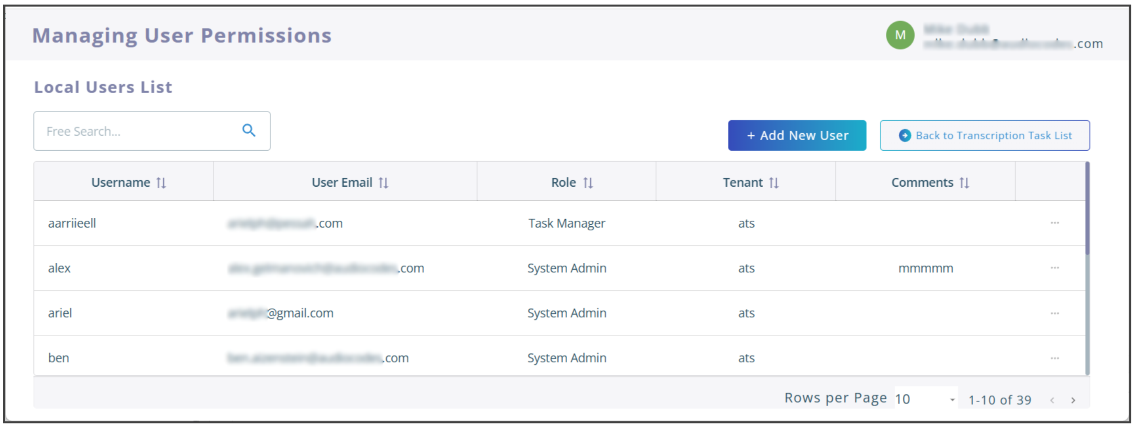
- Tenant Manager
- Task Manager
- Task Editor

The permission level determines what actions the user can do in Meeting Insights On-Prem. For more information on permissions per level, see User Permissions on the previous page.

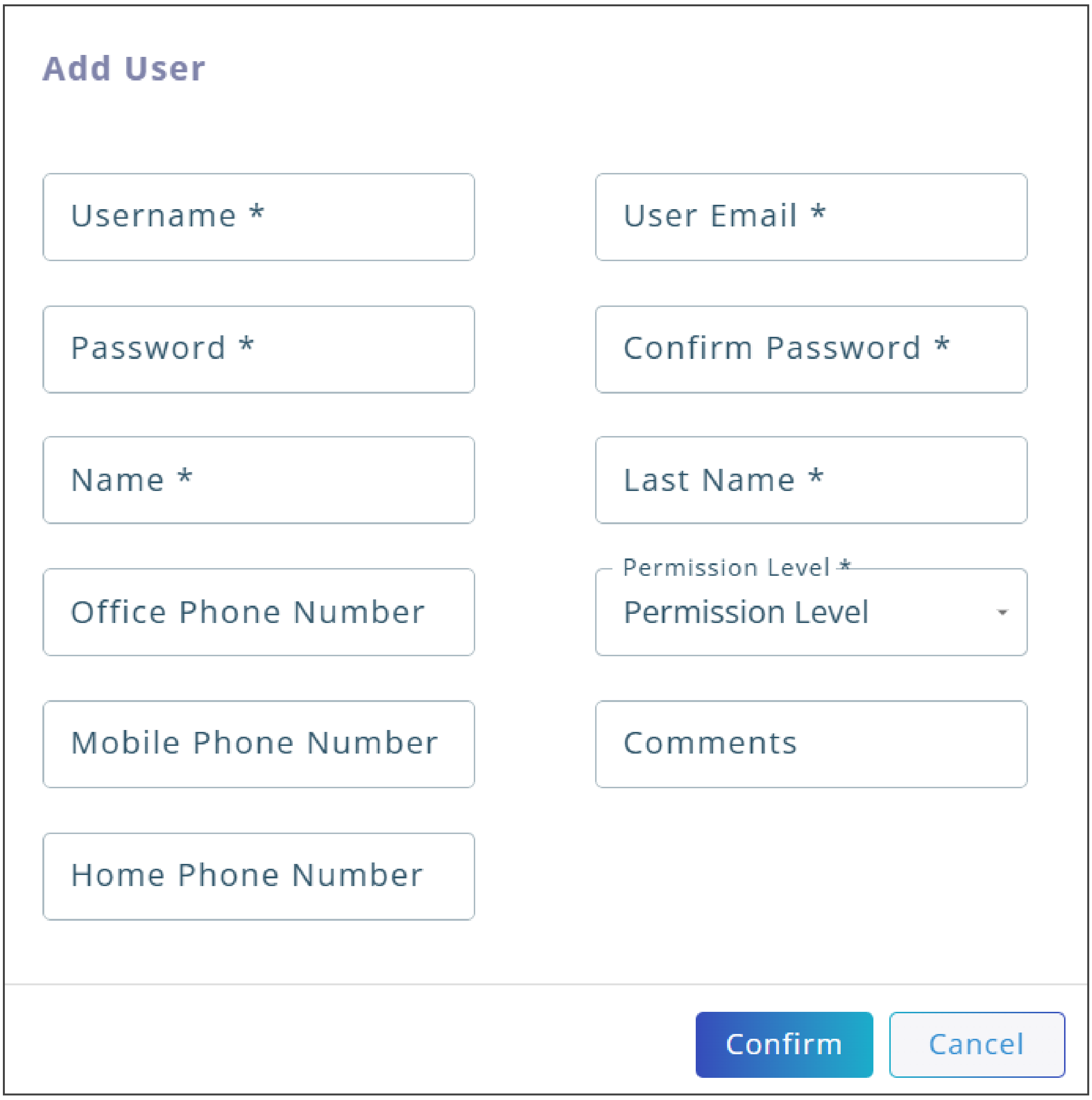
- Only the **Tenant Manager** or **System Admin** can add users.
- To return to the Transcription Task List, click the **Back to Transcription Task List** button.

➢ To add a user:

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **Local Users List**; the Managing User Permissions page opens, displaying the Local Users List table:



3. Click the **Add New User** button; the Set New User Details dialog box appears:



4. In the 'Username' field, enter a username. This is used to sign in to Meeting Insights On-Prem.

> ⚠ The username can only contain alphabetical letters and can't contain spaces.

5. In the 'Password' field, enter a password, and then in the 'Confirm Password' field, enter the password again to confirm.

> ⚠ The password must meet the following complexity policy:
> - Contain at least eight characters.
> - Contain at least one lower case letter.
> - Contain at least one upper case letter.
> - Contain at least one number.
> - Contain at least one of these special characters: @ $! % * ? &
> - Can only contain special characters that are mentioned above.

6. In the 'User Email', enter the user's email address.
7. In the 'Name' field and 'Last Name' field, enter the user's first name and last name (surname), respectively.
8. (Optional) Enter the user's phone number:
   - 'Office Phone Number': Enter the user's office phone number.
   - 'Mobile Phone Number': Enter the user's mobile phone number.
   - 'Home Phone Number': Enter the user's home phone number.

> - The office phone number must be unique.
> - To allow the user to record phone calls using Meeting Insights On-Prem telephony bot, you must enter a phone number that the user will use. For more information on the telephony bot, see Online Telephony Meetings on page 19.

9. From the 'Permission Level' drop-down list, select the user's permission level:
   - **Tenant Manager**
   - **Task Manager**
   - **Task Editor**
10. (Optional) In the 'Comments' field, enter any useful information about this user.
11. Click **Confirm**; the user is added to the Local Users List table.

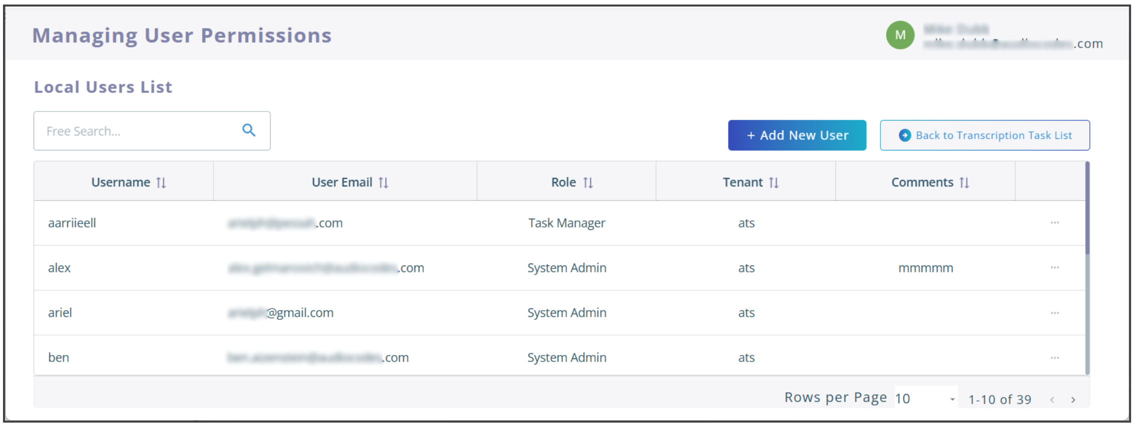
Delete a User

You can delete a user. Once deleted, the user can't sign in to Meeting Insights On-Prem. If the user is currently signed in, Meeting Insights On-Prem automatically ends the user's sessions.

> To return to the Transcription Task List window, click the **Back to Transcription Task List** button.

➢ To delete a user:

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **Local Users List**; the Managing User Permissions page opens, displaying the Local Users List table:



3. Click the ellipsis icon of the user you want to delete, and then from the drop-down menu, choose **Delete User**; a confirmation message appears.
4. Click **Confirm** to confirm deletion; the user is removed from the Local Users List table.

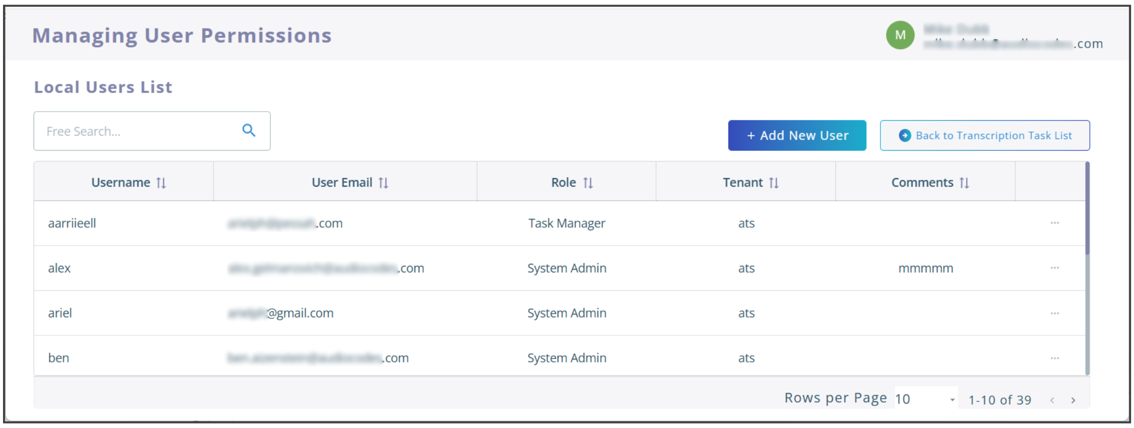
Modify a User's Details

You can modify the details of a user, for example, the user's email address or permission level.

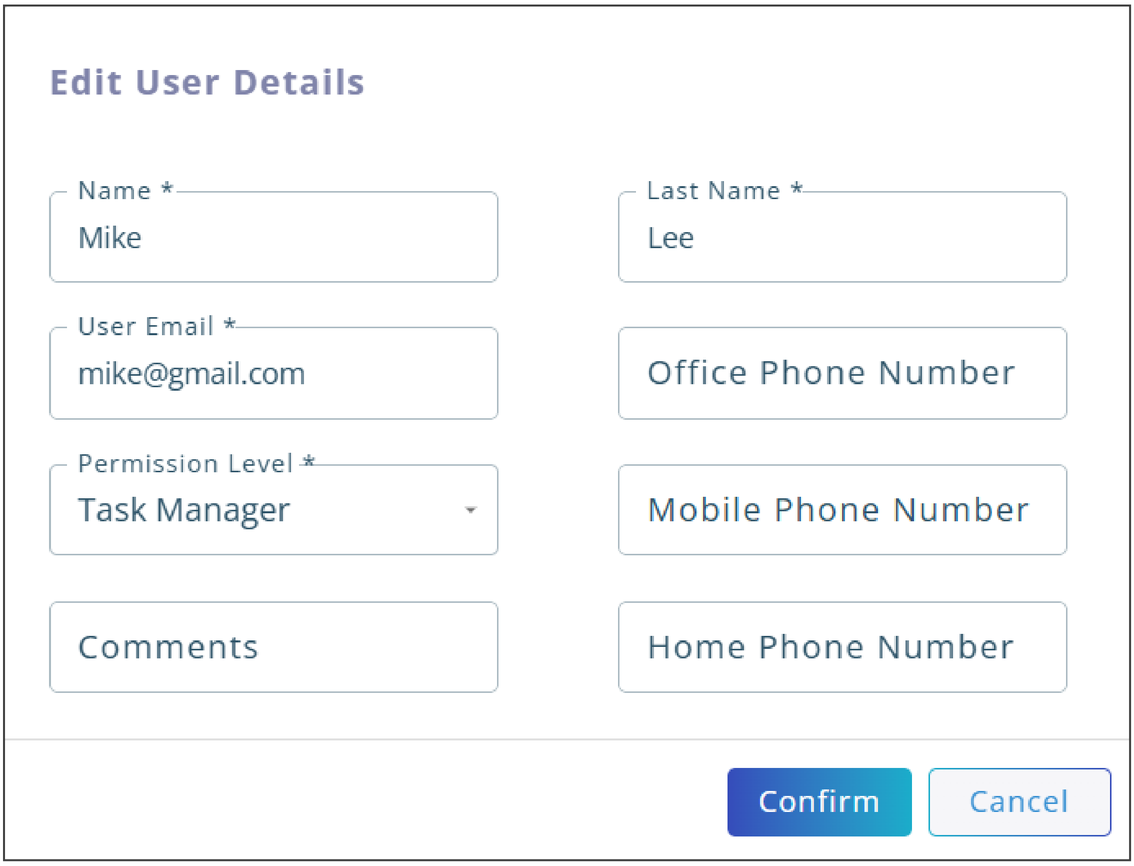
> To return to the Transcription Task List window, click the **Back to Transcription Task List** button.

➢ To edit a user:

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **Local Users List**; the Managing User Permissions page opens, displaying the Local Users List table:



3. Click the ellipsis icon of the user you want to edit, and then from the drop-down menu, choose **Edit User Details**; the Edit User Details dialog box appears:



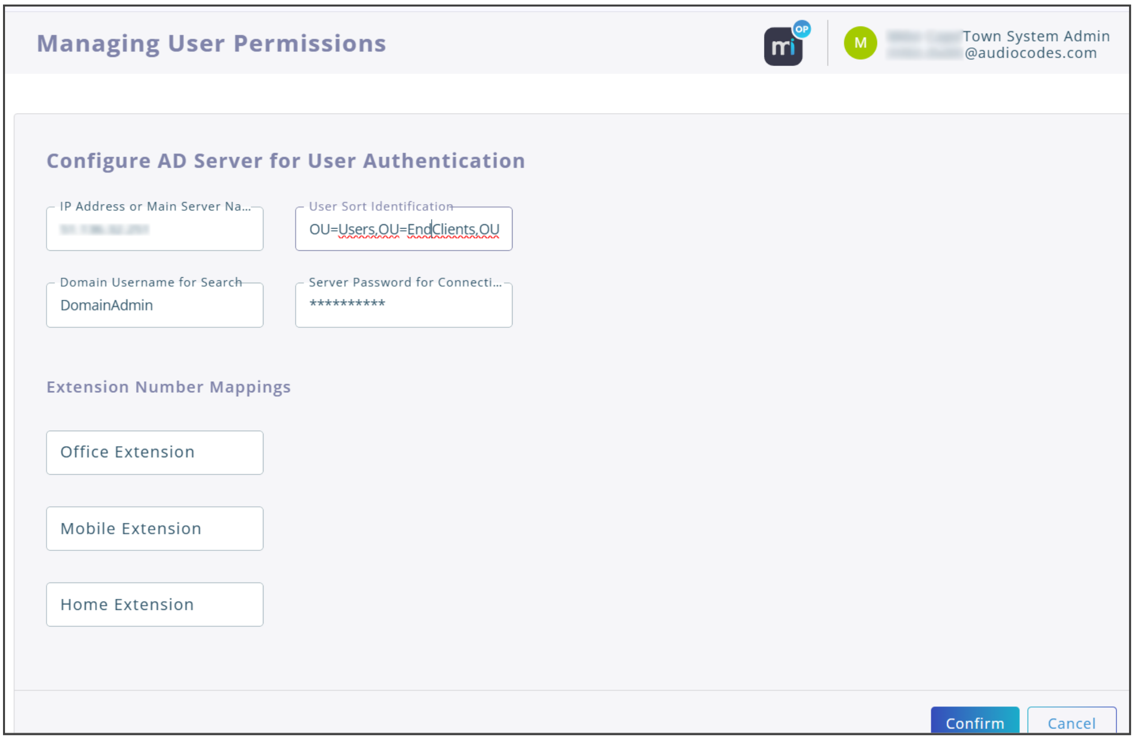
4. Modify the fields you want.
5. Click **Confirm**.

External Users in Microsoft Entra ID

You can manage users through your organization’s Microsoft Entra ID (formerly Azure Active Directory). Once you've configured the required Entra ID settings, Meeting Insights On-Prem connects to Entra ID and synchronizes its local user list with the users defined in Entra ID. During this process, user information (e.g., usernames, email addresses, and permission levels) is automatically retrieved and kept up to date.

➢ **To link Meeting Insights On-Prem to your Entra ID users:**

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **Authentication by Central Server**; the Managing User Permissions page opens:



3. Fill in the fields as needed:
   - 'IP Address or Main Server Name': Enter the server's IP address.
   - 'User Sort Identification': Attribute to uniquely identify and sort users.
   - 'Domain Username for Search': Account to authenticate when querying the server.
   - 'Server Password for Connection': Password to authenticate with server.
4. Click **Confirm**; Meeting Insights On-Prem synchronizes with your Entra ID platform and updates its Users List page with your users.

Tenant Management

You can configure various settings for a tenant:

- Description of the tenant (see Edit a Tenant's Description on the next page).
- Default language of recordings (see Edit a Tenant's Default Task Language on page 88).
- AI support for AI-powered insights (see Enable or Disable a Tenant's AI Support on page 88).
- Obtain URL of tenant and share with users (see Obtain a Tenant's URL on page 90
- Logo of user interface (see Customize a Tenant's User Interface Logo on page 91).
- Templates for the Word document of transcription tasks (see Edit a Tenant's Templates on page 92).
- Voice Prompt and DTMF telephone keys for selecting language when recording a phone call (see Define a Tenant's Telephony Bot Settings on page 94).

Only the **System Admin** or **Tenant Manager** can edit tenant-level settings.

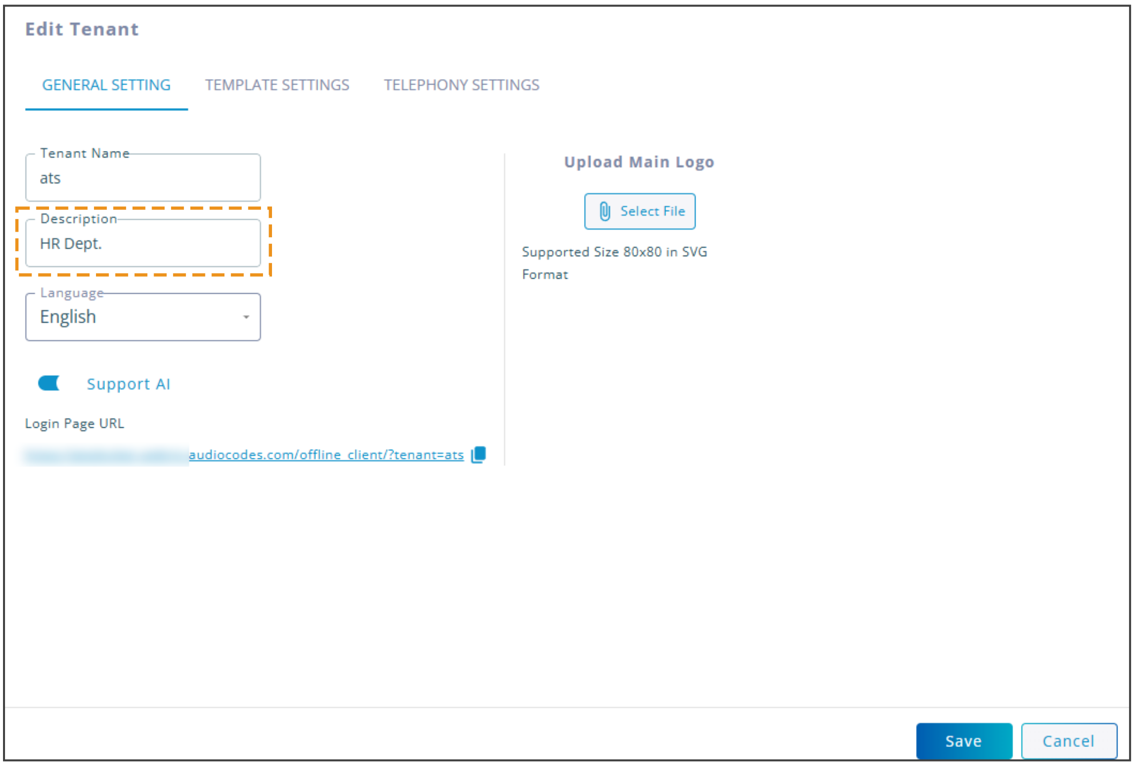
Edit a Tenant's Description

You can edit the description of a tenant.

- Only the **System Admin** and **Tenant Manager** can edit a tenant's description.
- You can't edit the tenant name through the Meeting Insights On-Prem web app.

➢ To edit tenant description:

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **Edit Customer (Tenant)**.
3. **(System Admin only)** On the Edit Customers (Tenants) page, select the check box of the tenant you want, and then click the **Edit** button.
4. In the Edit Tenant dialog box, select the **General Setting** tab (default).
5. In the 'Description' field, modify the description.



6. Click **Save**.

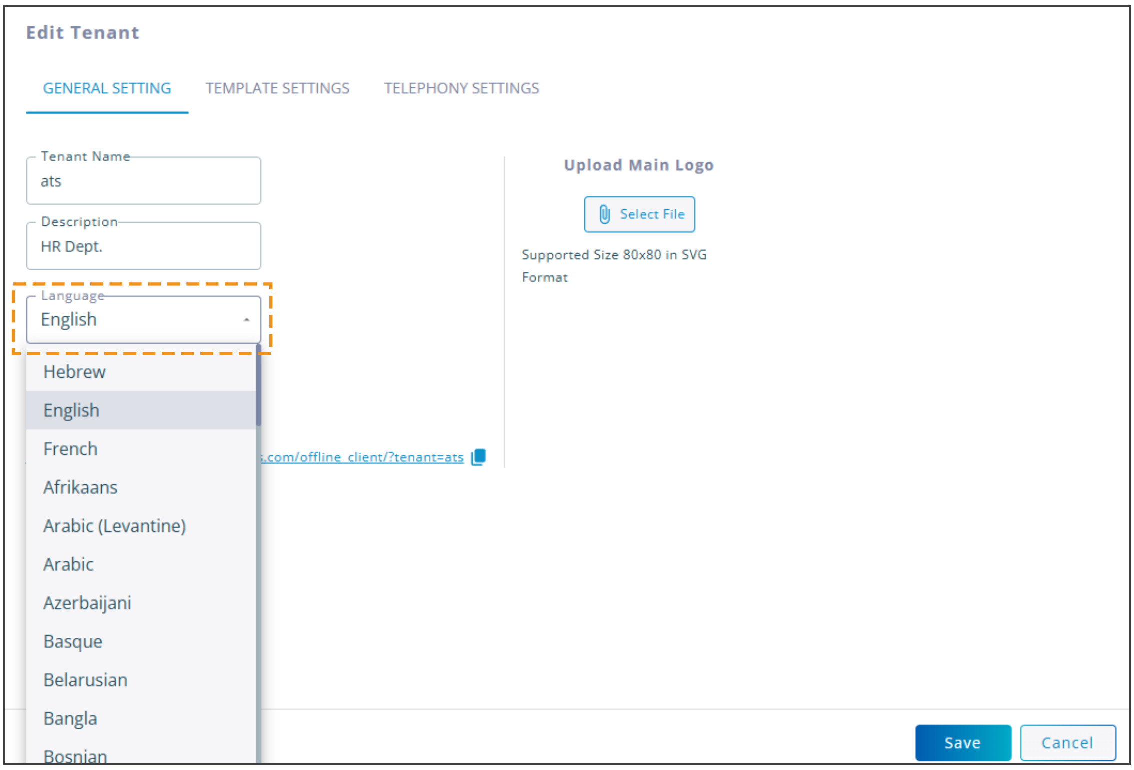
Edit a Tenant's Default Task Language

You can define the default language of tasks for a tenant. When adding a task, this is the language that is automatically selected. The user adding the task (e.g., **Task Manager**) can change the language. This is used to specify the language spoken in the meeting or dictation.

> Only the **System Admin** or **Tenant Manager** can define the default language for a tenant.

➢ To define default task language:

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **Edit Customer (Tenant)**.
3. **(System Admin only)** On the Edit Customers (Tenants) page, select the check box of the tenant you want, and then click the **Edit** button.
4. In the Edit Tenant dialog box, select the **General Setting** tab (default).
5. From the 'Language' drop-down list, select the language:



6. Click **Save**.

Enable or Disable a Tenant's AI Support

You can enable or disable AI support for a tenant. AI support enables Meeting Insights On-Prem to create AI-powered insights (meeting summary) from the transcription, which can be included as sections in the Insights and Transcription Word document.

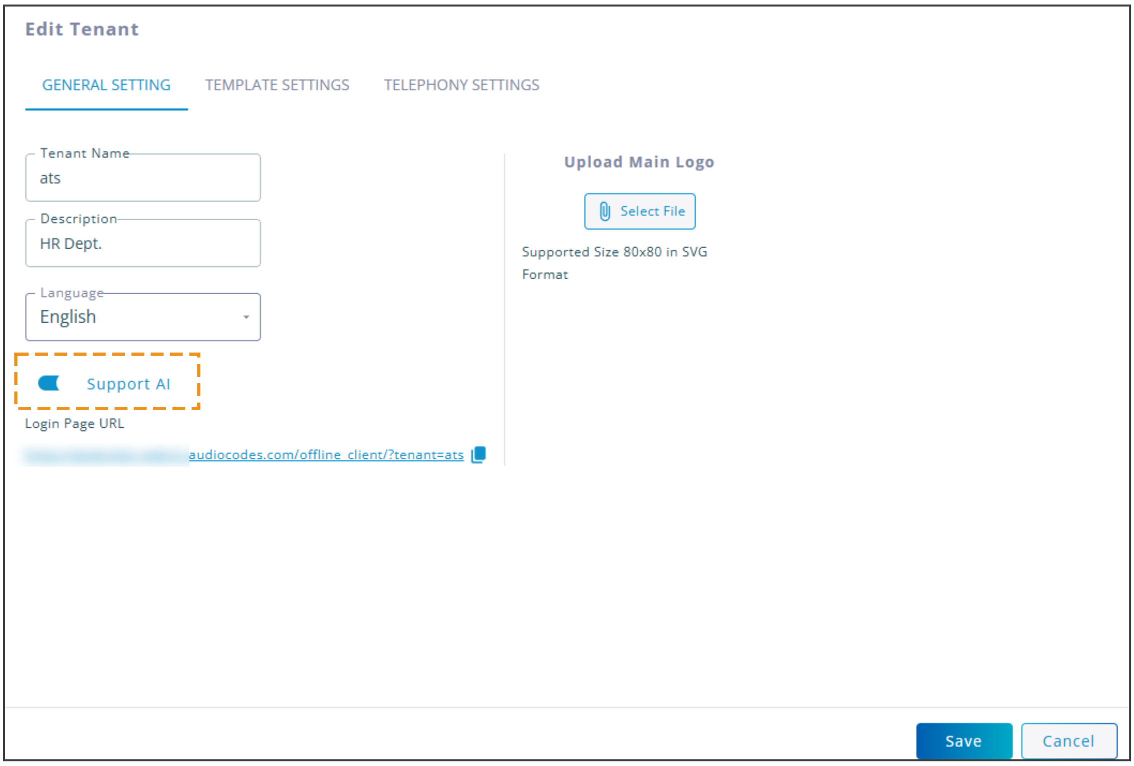
AI-powered sections appear in the Template Studio with the icon (see Define Sections for Template on page 46) and displayed in the document with "Powered by AI". The following lists some of the AI-powered sections:

- **Transcription**
- **Title**
- **Participants**
- **Main Topics**
- **Details**
- **Action Items**
- **Decisions**
- **Background**

- Only the **System Admin** or **Tenant Manager** can enable or disable AI support:
  - ✓ **System Admin:** Controls AI support at the license level. AI support must be enabled in the license before it can be configured for any tenant. For more information, see Control AI Support on page 99.
  - ✓ **Tenant Manager:** Can enable or disable AI support only for their assigned tenant, and only if AI support is enabled by the **System Admin** at the license level. If AI support is not enabled in the license by the **System Admin**, the **Tenant Manager** cannot configure AI support for their tenant.
- Even if AI support is disabled, the AI-powered sections are still available in the Template Studio, allowing a user to include them in the document. These sections are added without AI-powered content and the user can manually add content while proofreading. Disabling AI support doesn't affect AI-generated insights of existing tasks.

➢ To control AI support:

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **Edit Customer (Tenant)**.
3. **(System Admin only)** On the Edit Customers (Tenants) page, select the check box of the tenant you want, and then click the **Edit** button.
4. Click the **Support AI** toggle switch to turn it on or off:



5. Click **Save**.

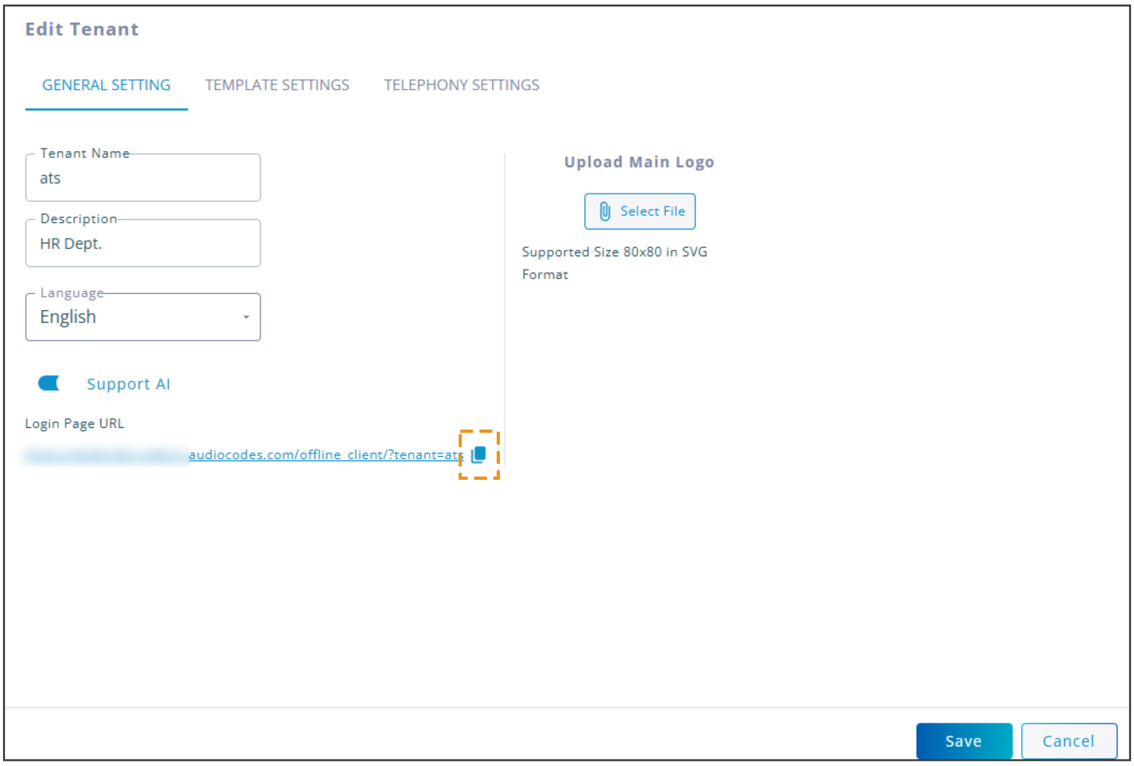
Obtain a Tenant's URL

You can share a tenant's URL with other users so they can easily sign in to the tenant in Meeting Insights On-Prem.

Only the **System Admin** or **Tenant Manager** can obtain and copy the tenant's URL.

➢ To copy URL of tenant:

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **Edit Customer (Tenant)**.
3. **(System Admin only)** On the Edit Customers (Tenants) page, select the check box of the tenant you want, and then click the **Edit** button.
4. In the Edit Tenant dialog box, select the **General Setting** tab (default).
5. Under **Login Page URL**, click the copy-to-clipboard icon; the URL is copied to your clipboard.



6. Paste the URL into an email, for example, and send it to the user.

7. Click **Cancel** to close the dialog box.

Customize a Tenant's User Interface Logo

You can customize the logo that appears in Meeting Insights On-Prem user interface for a tenant to comply with your organization's branding or needs.

By default, the following logo is displayed throughout Meeting Insights On-Prem user interface:

- Only the **System Admin** or **Tenant Manager** can replace the logo:
  - **System Admin:** Changes apply to all tenants.
  - **Tenant Manager:** Changes apply to their assigned tenant only and override the **System Admin** setting.
- The logo file must meet the following requirements:
  - **File format:** .svg
  - **Image size:** 80 x 80 px

➢ To replace user interface logo:

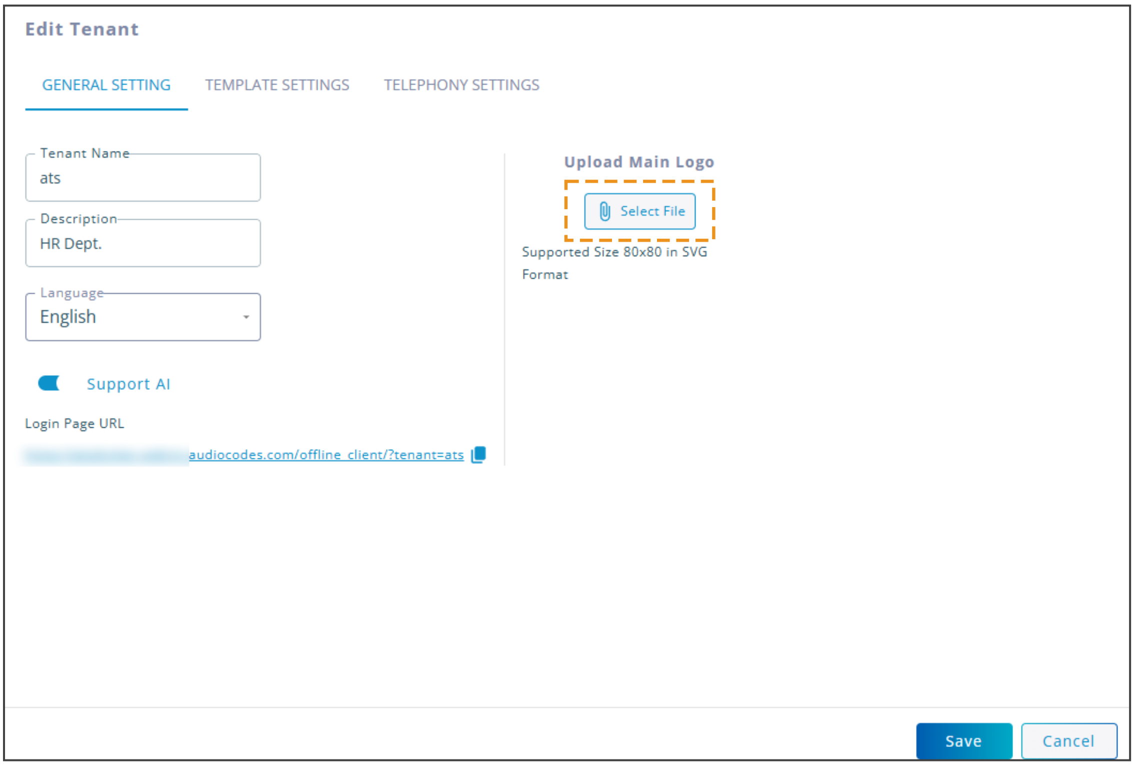
1. Click your profile icon in the top-right corner; a drop-down box appears.

2. Click **Settings**, and then from the drop-down menu, choose **Edit Customer (Tenant)**.

3. **(System Admin only)** On the Edit Customers (Tenants) page, select the check box of the tenant you want, and then click the **Edit** button.

4. In the Edit Tenant dialog box, select the **General Setting** tab (default).

5. Under **Upload Main Logo**, click the **Select File** button:



6. Browse to and select the new logo on your computer.

7. Click **Save**.

Edit a Tenant's Templates

You can edit the templates of a tenant. When a user of the tenant creates a transcription task, these templates are available to the user.

Template settings determine the structure of the downloaded Meeting Insights and Transcript document and includes the following:

- Selecting (or deleting) a template.
- Creating a new template from an existing template and saving it with your new template settings.
- Uploading logos to include in the document header.
- Determining the sections (headings) to include in the document.

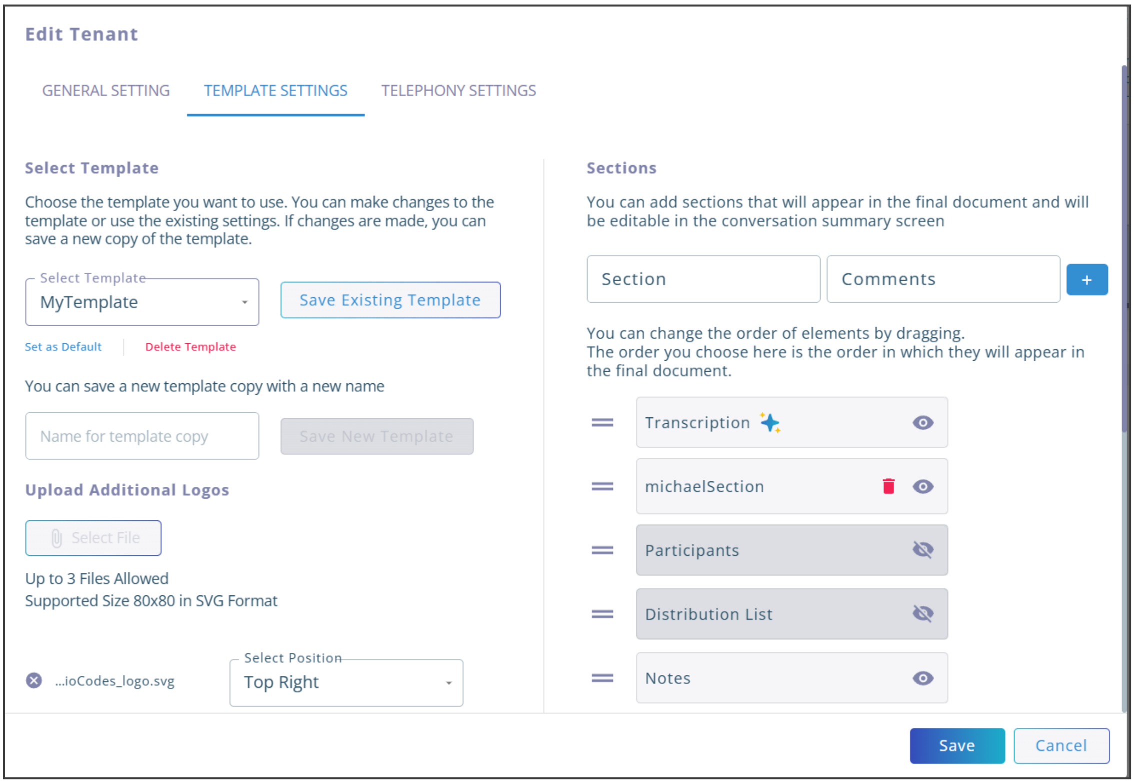
- Only the **System Admin** or **Tenant Manager** can define templates:
  - ✓ **System Admin:** Changes apply to all tenants.
  - ✓ **Tenant Manager:** Changes apply to their assigned tenant only and override the **System Admin** setting.
- The **Task Manager** can also create additional templates that are available only to the specific **Task Manager** when creating a task.

➢ **To edit template settings for tenant:**

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **Edit Customer (Tenant)**.
3. **(System Admin only)** On the Edit Customers (Tenants) page, select the check box of the tenant you want, and then click the **Edit** button.
4. Select the **Template Studio** tab, and then define the following:
   - Template of the document. For more information, see Select or Create a Template on page 42.

If a Meeting Insights On-Prem software update deprecated an AI-powered section in your selected template, you must select a different template to create a new task.

   - Logos for the document header. For more information, see Upload Logos for Template on page 44.
   - Sections to include in the document. For more information, see Define Sections for Template on page 46.



5. Click **Save**.

Define a Tenant's Telephony Bot Settings

Telephony settings is needed for recording meetings through a phone's microphone by Meeting Insights On-Prem bot, as described in Record an In-Person Conversation using Telephony Bot on page 19. As described, the user calls the telephone number of the bot and when the bot answers, it records audio detected by the phone's microphone.

Telephony settings includes the following:

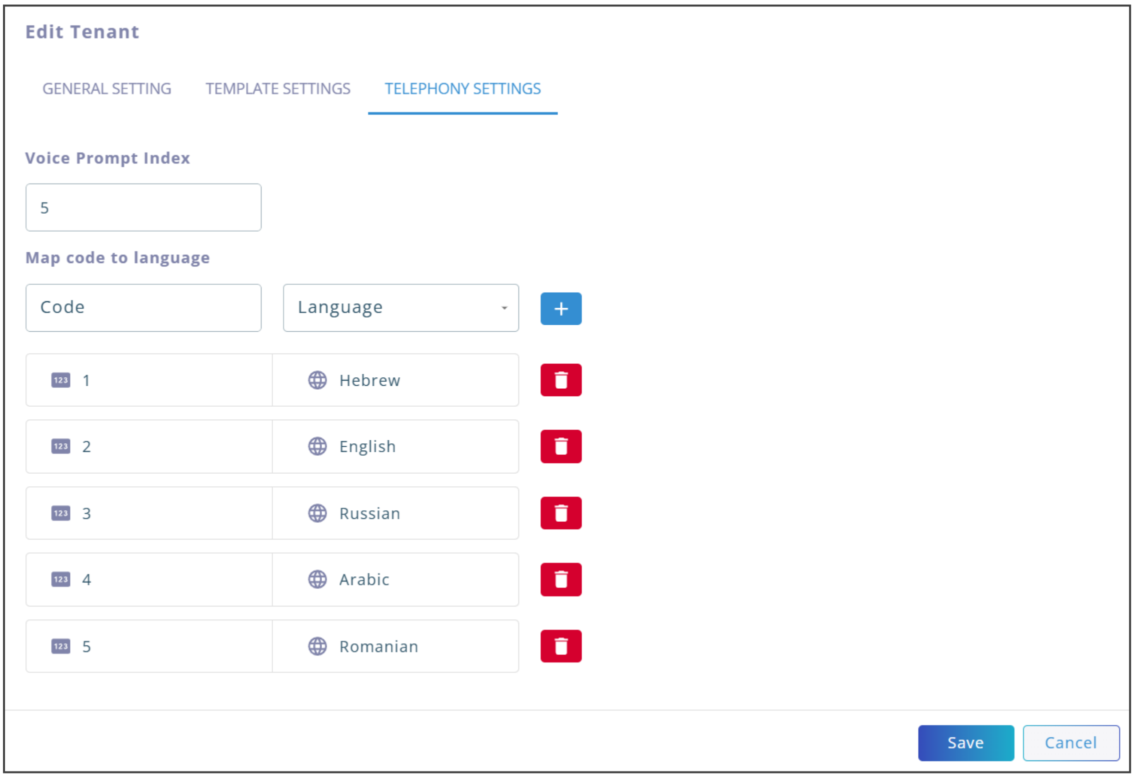
- Specify the voice prompt that you want played by the bot when the bot answers. The voice prompt asks the user to select the language of the meeting, by pressing the relevant key on the phone keypad. The voice prompt is specified by an index number, which is listed in a Voice Prompt file managed by a remote AudioCodes device (Session Border Controller / SBC). Ask your AudioCodes support for the index number.
- Defines the phone key per language. When the bot asks for the language of the meeting, the user presses the relevant key. For example, if the meeting is in English and key "2" is defined for English, the user would press the "2" on the phone's keypad.

> Only the **System Admin** or **Tenant Manager** can define telephony settings for a tenant.

➢ To define telephony settings:

1. Click your profile icon in the top-right corner; a drop-down box appears.

2. Click **Settings**, and then from the drop-down menu, choose **Edit Customer (Tenant)**.
3. **(System Admin only)** On the Edit Customers (Tenants) page, select the check box of the tenant you want, and then click the **Edit** button.
4. In the Edit Tenant dialog box, select the **Telephony Settings** tab:



5. In the 'Voice Prompt Index' field, enter the voice prompt index that is defined in the Voice Prompt file. This specifies the voice prompt that is played by the bot.
6. In the 'Map code to language' field, enter a key number, and then from the 'Language' drop-down list, select the language for the key.
7. To edit or delete a mapping, click the button of the mapping row.
8. Click **Save**.

Switch Tenants

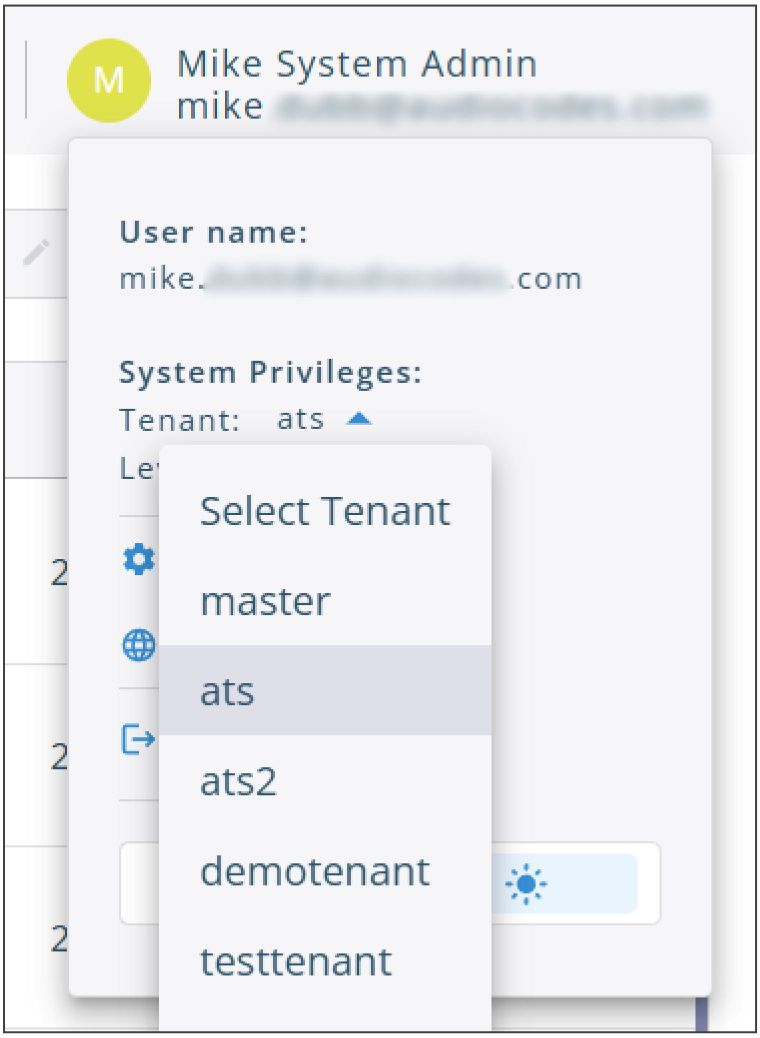
If you're user account is associated with multiple tenants, you can easily switch to another tenant without signing out and in again for that specific tenant.

> Only the **System Admin** (or **Tenant Manager** if associated with multiple tenants) can switch tenants.

➢ To switch tenants:

1. Click your profile icon in the top-right corner; a drop-down box appears.

2. Under **System Privileges**, click the arrow of the 'Tenant' field, and then from the drop-down list, select the tenant you want to manage:



License Management

The Meeting Insights On-Prem license determines the following:

- License expiration date
- Total transcription hours

Your license becomes invalid when either the expiration date is reached or all the transcription hours are used - whichever occurs first. To continue using Meeting Insights On-Prem, you must purchase a new license and upload it to Meeting Insights On-Prem.

To help you avoid service interruptions, Meeting Insights On-Prem automatically sends email notifications as your license approaches expiration or as transcription hours are nearly depleted:

License expiration notifications are sent:

- Two months before expiration
- One month before expiration

- Two weeks before expiration
- One week before expiration

Transcription hours notifications are sent when usage:

- Exceeds 80%
- Exceeds 90%
- Reaches 100%

> - Only the **System Admin** can manage your Meeting Insights On-Prem license.
> - To purchase a new license, contact your AudioCodes sales representative.

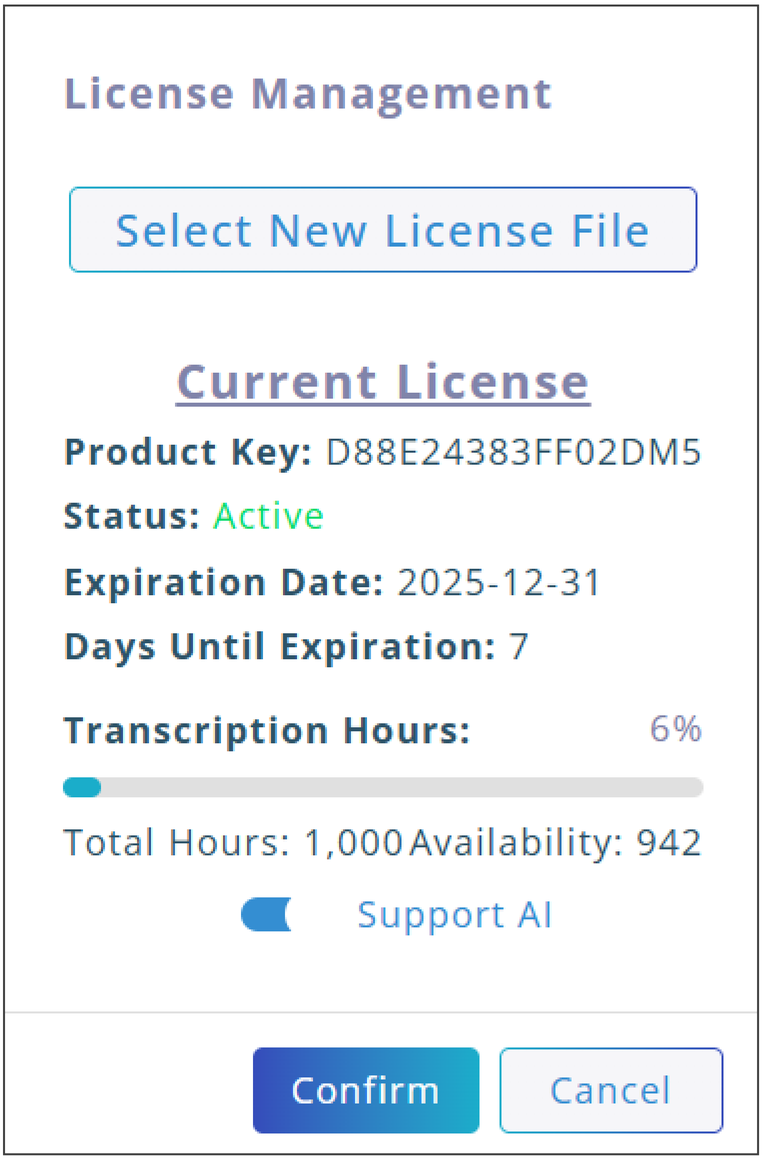
View the License

The following procedure describes how to view your Meeting Insights On-Prem license.

> Only the **System Admin** can manage and view your Meeting Insights On-Prem license.

➢ **To view license:**

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **License Management**; the License Management dialog box appears:



The license displays the following information:

Field	Description
Product Key	Unique Product Key number associated with your Meeting Insights On-Prem platform.
Status	Status of the license according to expiration date: ■ "Active": The license is still valid **Note:** If all the transcription hours have been utilized (100%), you can't create tasks, but you can still use the other functionality of Meeting Insights On-Prem, for example, proofreading transcriptions of tasks. ■ "Not Active": The license has expired.

Field	Description
Expiration Date	Expiration date of the license.
Days Until Expiration	Number of days remaining until the license reaches the expiration date.
Transcription Hours	Percentage (and progress bar) of currently utilized hours of transcription. The number of hours remaining ('Availability') out of the total hours ('Total Hours') is also displayed.
Support AI	For more information, see Control AI Support below.

Control AI Support

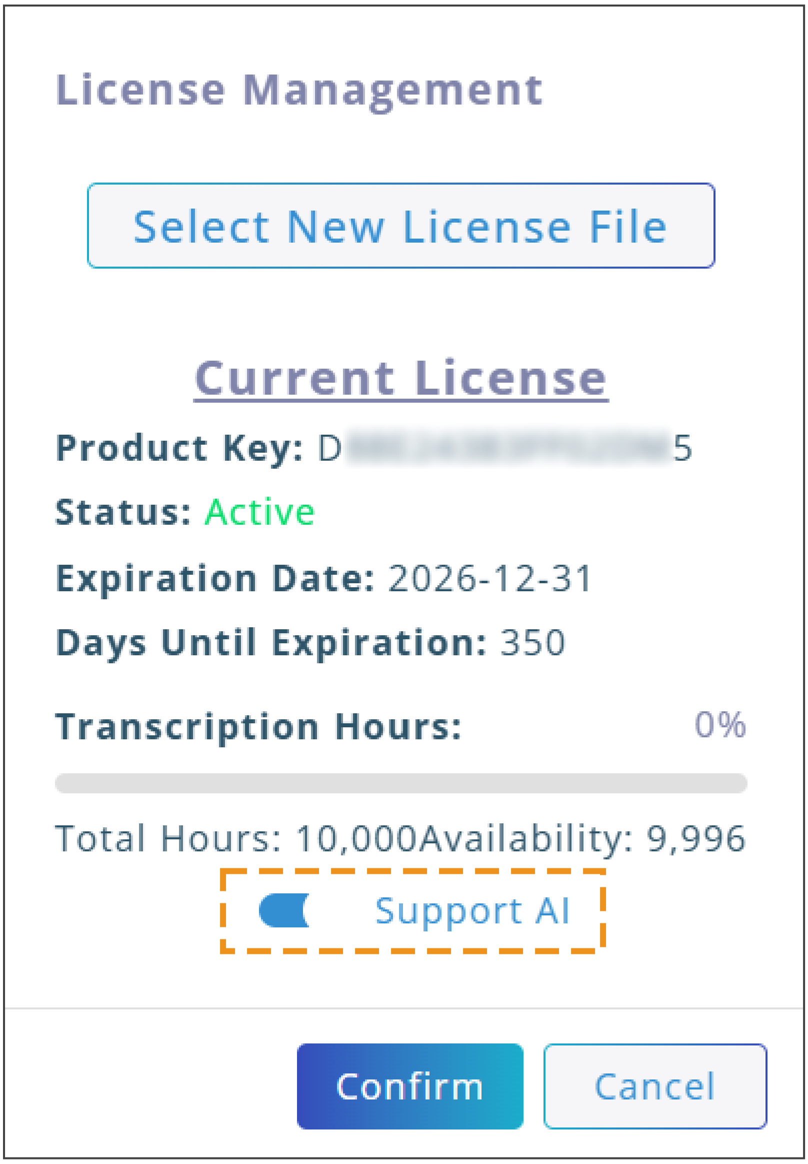
You can enable or disable AI support in the license for your tenants. AI support enables Meeting Insights On-Prem to generate the following AI-powered insights from the transcription, which can be included as sections in the transcription document:

- **Transcription** (always generated regardless of AI support setting)
- **Title**
- **Participants** (list of detected participants)
- **Main Topics** (key topics discussed in the meeting)
- **Details** (detailed meeting information)
- **Action Items** (tasks that require follow-up)
- **Decisions** (decisions made during the meeting)
- **Background** (purpose or context of the meeting)

> - Only the **System Admin** can enable or disable AI support in your Meeting Insights On-Prem license.
> - If you've enabled AI support in the license, the **System Admin** or **Tenant Manager** can control AI support (enable or disable) for a specific tenant (see Enable or Disable a Tenant's AI Support on page 88).

➢ To enable or disable AI support:

1. Click your profile icon in the top-right corner; a drop-down box appears.
2. Click **Settings**, and then from the drop-down menu, choose **License Management**; the License Management dialog box appears.
3. Click the **Support AI** toggle switch to turn it on or off:



4. Click **Confirm**.

Install a New License

When your Meeting Insights On-Prem license is about to expire, AudioCodes recommends that you purchase a new license from AudioCodes to continue using it.

Once you've received the new license file from AudioCodes, you need to install it on Meeting Insights On-Prem.

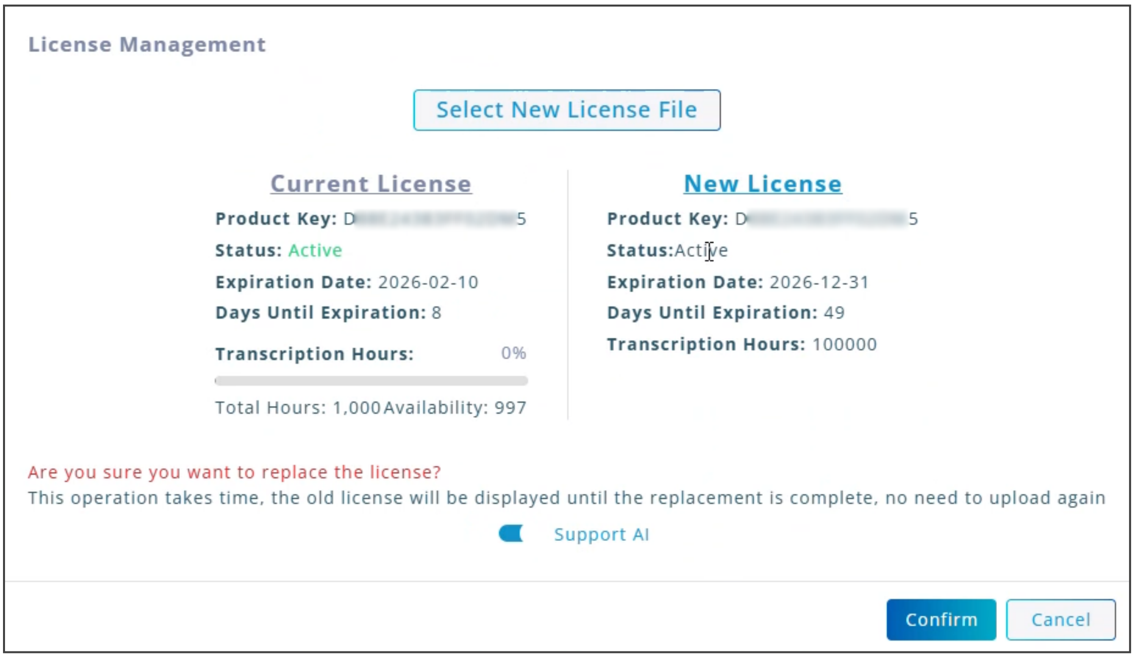
- Only the **System Admin** can install a new Meeting Insights On-Prem license.
- To purchase a new license, contact your AudioCodes sales representative.

➢ **To install new license:**

1. Click your profile icon in the top-right corner; a drop-down box appears.

2. Click **Settings**, and then from the drop-down menu, choose **License Management**; the License Management dialog box appears.

3. Click **Select New License**, and then browse to and select the license file (.lic); the following dialog box appears, displaying the uploaded license under **New License**:



Make sure that the status of the new license is "Active".

4. Click **Confirm**; a success message is briefly displayed to indicate that the new license has being installed.

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Document #: LTRT-26038