User's Manual

AudioCodes Continuous Enterprise Productivity Powered by Voice.AI

Next Generation Meeting Insights

Notice

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Security Vulnerabilities

All security vulnerabilities should be reported to vulnerability@audiocodes.com.

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Related Documentation

Document
Meeting Insights Administrator's Manual

Table of Contents

1 Welcome

AudioCodes Meeting Insights is an AI-powered enterprise solution, enabling users to record any meeting-generated content (audio and video) of Microsoft Teams meetings or Zoom meetings.

Meeting Insights enables organizations to centralize insights from all meeting data, providing a comprehensive view of organizational knowledge and fostering informed decision-making. Meeting Insights records, transcribes, and organizes all aspects of online meetings. It provides a centralized company platform for all meetings, webinars and conference calls, making them easily shareable across the organization. It shifts the focus from individual access to meeting content, to a company-wide approach, aiding informed decision-making.

During the meeting, Meeting Insights logs all notes, action items, decisions and a summary, while allowing you to highlight specific areas in the meeting with one click so that you can easily locate them after the meeting. Meeting Insights provides regular recording options, enabling you to pause and resume recording anytime during the meeting.

Once the meeting recording has ended, you can use Meeting Insights feature-rich and flexible web-based management tool to manage and edit the meeting recording. This includes publishing and sharing the meeting recording so that all participants and optionally, all or specific contacts in your organization can also view it even if they weren't present (or invited), and editing the slide presentation (add, replace or delete slides).

For more information on Meeting Insights, go to AudioCodes website.

Meeting Recording User Types

Before you begin, it's important to familiarize yourself with the different types of users for meeting recordings:

User	Description
Owner	An Owner is the person that organized the meeting. The Owner has full privileges over the meeting recording (e.g., view, edit, delete, and publish).
Representative	A Representative is a person that has the same privileges (full) as the Owner, for all the Owner's meeting recordings. A Representative is defined by the Owner, as described in Adding a Representative.
Co-owner	A Co-owner is a person that has the same privileges (full) as the Owner, for a specific meeting recording. A Co-owner is defined by any of the following ways: ■ Assigned by the Owner (or Representative) with full privileges ("Can edit") for the specific meeting recording

User	Description
	(see Assigning Privileges to Participants on page 247). ■ Added as a co-organizer when creating the invitation for the specific Teams meeting.
Participant	A Participant is a person that was either: ■ Invited to the meeting recording and joined it. ■ Added to the participant list after the meeting recording. Participants can only do the following: ■ View (play) the meeting recording (if published by Owner). ■ Add notes to the meeting recording. ■ Assign tags to the meeting recording. To manage participants, see Managing Participants on page 245. **Note:** Your Meeting Insights Administrator can give you full editing permissions to all meeting recordings to which you're invited as a participant. To check if you've been given such permissions, see the 'Auto Can Edit' field on the Settings page, as described in Viewing Account Information on page 23.
Viewer	A Viewer is a person that was either: ■ Invited to the meeting recording, but didn't join. ■ Not invited to the meeting recording, but the published meeting recording was shared with the person. Viewers can only do the following: ■ View (play) the meeting recording. ■ Add notes to the meeting recording. ■ Assign tags to the meeting recording. **Note:** The Owner can make change a Viewer into a Co-owner for a meeting recording.

2 New Features and Enhancements

The new features and enhancements released for AudioCodes Meeting Insights are listed in the following table:

Table 2-1: New Features and Enhancements

LTRT	Date	Features and Enhancements
13007	June 2025	Recording external (other organizations) Microsoft Teams meetings.
13006	June 2025	▪ **Seamless File Sharing from Mobile:** Easily upload recording files stored on your mobile phone to the Meeting Insights standalone mobile app using your phone's built-in file sharing capabilities. ▪ **Smarter Transcriptions with Find & Replace:** Quickly locate and update words or phrases in transcriptions of meeting recordings with the new find-and-replace feature. ▪ **Enhanced Speaker Reassignment:** Reassign a specific speaker in the entire transcription to someone else. ▪ **New Meeting Insights Platform - Standalone Mobile App:** Easy-to-use standalone mobile app, providing full Meeting Insights functionality as well as unique admin-enabled features that allow you to ad hoc record conversations via your phone's microphone or upload recordings created by third-party tools. ▪ **Join Zoom Meetings Directly from the App:** Now you can join Zoom meetings right from Meeting Insights mobile app.
13005	April 2025	▪ Replacing speaker (Speaker Tracking bar, transcription, and action items)
12919	March 2025	▪ Integration with Salesforce, enabling users to send AI-power summaries to Salesforce. ▪ Import icon in List View and Player page, indicating meeting recording was created by a third-party recording tool and imported into Meeting Insights.

LTRT	Date	Features and Enhancements
12918	January 2025	- Meeting Insights for mobile devices support for Zoom meetings. - Reassigning speakers in summary.
12917	Dec 2024	- Page redesign for importing recorded meetings - Limitations for attaching files to meeting recordings
12916	Nov 2024	Reassigning specific transcription to different user
12915	Oct 2024	- Support for recording Zoom meetings - **Back To Top** button in List View - Icons indicating Zoom meeting connect stages
12913	Jul 2024	- AI-powered Meeting Prep for recurring meetings - Settings panel - Meeting Insights mobile interface - Supported file formats of imported meeting recordings
12912	May 2024	- AI-powered summary includes summary by speakers and by topics - Support for meeting recordings of Microsoft Teams channels
12911	Feb 2024	Initial release of Next-Generation Meeting Insights

3 Meeting Insights Platforms

Meeting Insights provides you with the following management platform options:

- **Meeting Insights Web-based management interface (Web interface)**- see Meeting Insights Web Interface below
- **Meeting Insights App for Microsoft Teams Desktop Client**- see Meeting Insights App for Microsoft Teams Desktop on page 9
- **Meeting Insights App for Microsoft Teams Mobile Client** - see Meeting Insights App for Teams Mobile Client on page 13.
- **Meeting Insights Standalone Mobile App** - see Meeting Insights Standalone Mobile App on page 17

The different Meeting Insights platforms offer similar functionality. The main differences between these platforms are listed in the following table:

Meeting Insights Feature	Meeting Insights Web Interface	Meeting Insights App for Teams Desktop Client	Meeting Insights App for Teams Mobile Client	Meeting Insights Standalone Mobile App
Importing meeting recordings created by third-party programs	√	√	×	√
Audio recording of surroundings using mobile phone's microphone	×	×	×	√

Meeting Insights Web Interface

Meeting Insights web-based management tool (web interface) provides full management capabilities of your meeting recordings.

- Meeting Insights' web interface has been successfully tested on Google Chrome and Microsoft Edge web browsers.
- The web interface and the Meeting Insights app for your Teams client provide similar functionality. The web interface offers the following main features that are not provided by Meeting Insights Teams app:
  - ✓ Importing meeting recordings created by third-party programs (see Importing Meeting Recordings Created by Third-Party Tools on page 260).
  - ✓ General Meeting Insights settings (see General Settings on page 23).

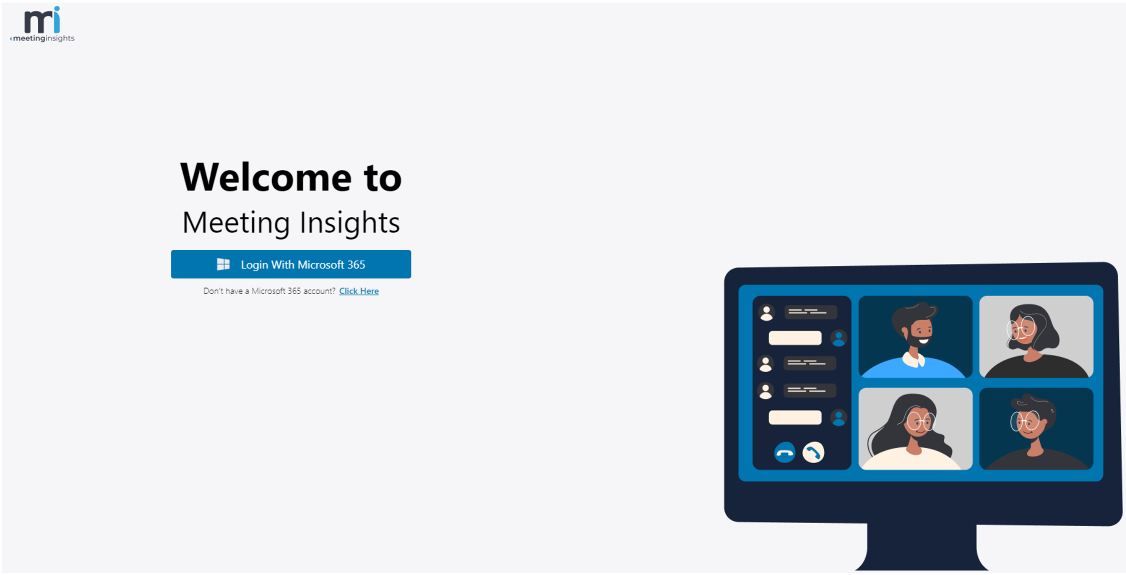
Logging in

Logging in to Meeting Insights web-based management tool is done using your Microsoft 356 account that you use at your organization.

> ⚠ Currently, Meeting Insights web-based management tool is supported by Google Chrome only.

➢ To log in to Meeting Insights web-based management tool:

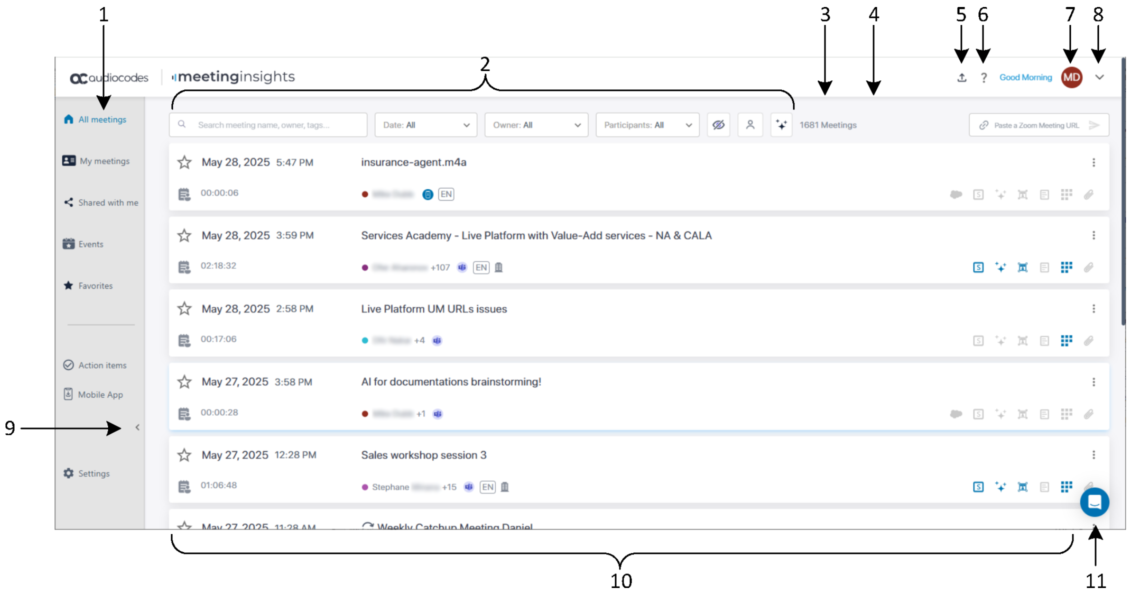
1. In your web browser, go to the URL of your organization's Meeting Insights web interface (e.g., https://online.meetinginsights.abc.com/ui/office-365-login/login-page.php):



2. Click **Login With Microsoft 365**.
3. Select your Microsoft 365 account, enter your password, and then click **Sign in**; you're signed in to your Microsoft 365 account and Meeting Insights web-based management interface opens, displaying the **All Meetings** page (Home page), as described in Viewing Meeting Recordings List on page 150.

Get Familiar with the Web Interface

The following figure displays the main window of Meeting Insights web interface:



Item #	
1	Navigation pane: ▪ **All Meetings:** Displays meeting recordings where you're the Owner or were a participant, as well as meeting recordings that were shared with you (if you were a participant or not). ▪ **My Meetings:** Displays meeting recordings where you're the Owner or were a participant. ▪ **Shared with Me:** Displays meeting recordings that you were not invited to, but that were shared with you. ▪ **Events:** Displays meeting recordings that were shared with everyone in your organization. ▪ **Favorites:** Displays meeting recordings that you marked as favorites. ▪ **Action items:** Displays action items - those that others assigned to you and those that you assigned to others and yourself. For more information, see Managing Action Items on page 185. ▪ **Mobile App:** Displays QR codes that can be scanned by your mobile phone to download Meeting Insights standalone mobile app from Apple Store or Google Play Store. For more information, see Installing Meeting Insights Standalone Mobile App on page 17. **Note:** The standalone mobile app is available only if enabled by your organization's Meeting Insights administrator . ▪ **Settings:** Allows you define global settings for Meeting Insights (see

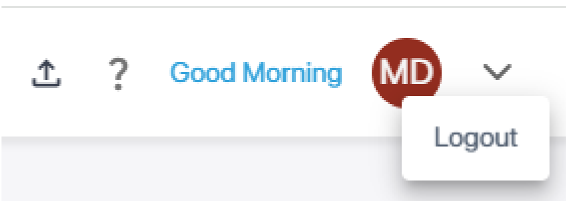
Item #	
	General Settings on page 23). **Note:** You can minimize or maximize the Navigation pane (see Item #9 below).
2	Search field and filters for searching and filtering the meeting recordings list.
3	Displays the number of listed meeting recordings (based on the search criteria).
4	**Clear all** button clears your search filters.
5	The icon allows you to import meeting recordings created by third-party programs (see Importing Meeting Recordings Created by Third-Party Tools on page 260).
6	The ? icon displays options for getting help on Meeting Insights (see Getting Help on page 266).
7	Your Meeting Insights account avatar.
8	Drop-down menu with the **Logout** command for logging out of Meeting Insights (see Logging Out below).
9	Arrow to minimize or maximize the Navigation pane. By default, the Navigation pane is maximized, displaying both icons and their names. If you minimize the Navigation pane, only the icons are displayed.
10	List view of all the Meeting recordings (see Viewing Meeting Recordings List on page 150).
11	Help chat bot for getting help (see Using the Help Bot on page 266).

Logging Out

For security, it's recommended that you log out of Meeting Insights whenever you finish working with Meeting Insights.

➢ **To log out of Meeting Insights:**

1. Click the arrow located in the top-right corner of the window next to your profile icon, and then from the drop-down list, choose **Logout**:



A confirmation message box appears.

2. Click **Yes**.

Meeting Insights App for Microsoft Teams Desktop

You can use Meeting Insights within your Microsoft Teams desktop client, by adding the Meeting Insights app to Teams.

> The Meeting Insights app for Teams desktop client and the Meeting Insights web-based management tool provide almost identical functionality.

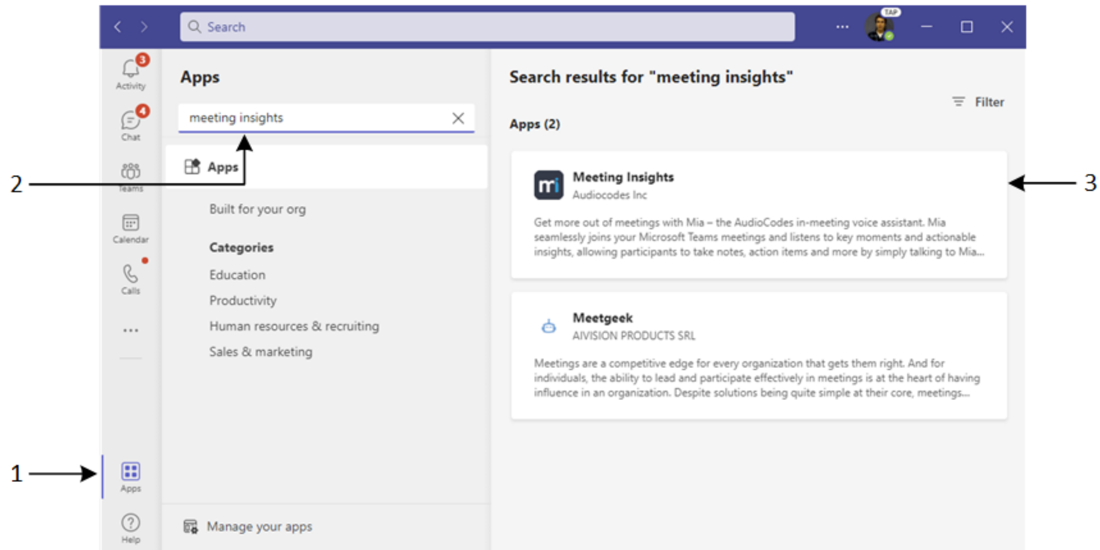
Adding Meeting Insights App to Teams Desktop

To integrate Meeting Insights with Teams, you need to add the Meeting Insights app to your Teams client. Accessing Meeting Insights through Teams is done using single sign-on (SSO) authentication, whereby you're automatically logged in to your Meeting Insights account (using the same credentials as your Microsoft Office 365 account).

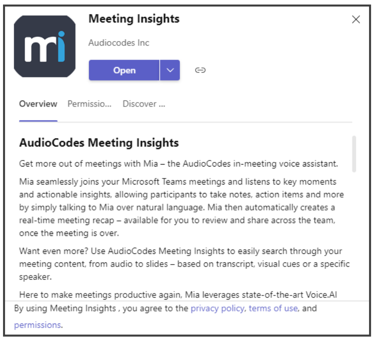
> The Meeting Insights app is not available for participants that are outside of your organization.

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

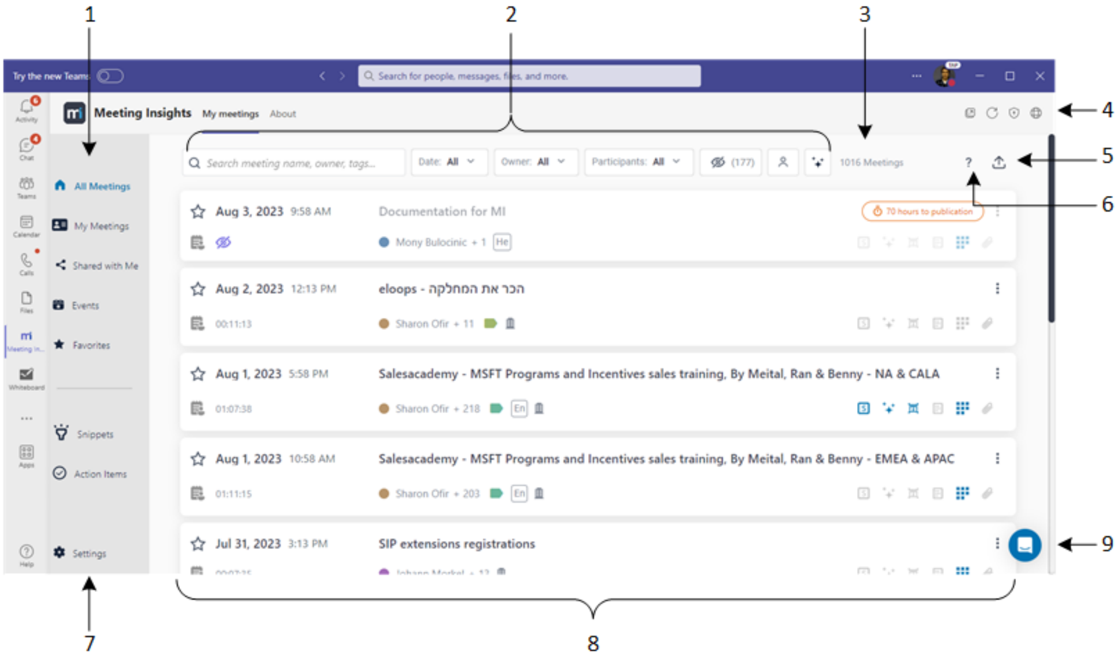
1. On your Teams client side panel, click **Apps** (#1 in figure), and then search for AudioCodes' Meeting Insights app (#2 in figure):



2. Click the **Meeting Insights** app (#3 in above figure); the following dialog box appears:



3. Click **Open**; the Meeting Insights app is added to your Teams client side panel and you're automatically logged in to your Meeting Insights account, displaying the Home page, which lists all meeting recordings where you were the owner or a participant as well as meeting recordings that were shared with you:



Item #	
1	Navigation pane: ■ **All Meetings:** Displays meeting recordings where you're the Owner or were a participant, as well as meeting recordings that were shared with you (if you were a participant or not). ■ **My Meetings:** Displays meeting recordings where you're the Owner or were a participant. ■ **Shared with Me:** Displays meeting recordings that you were not invited to, but that were shared with you. ■ **Events:** Displays meeting recordings that were shared with everyone in

Item #	
	your organization. ■ **Favorites:** Displays meeting recordings that you marked as favorites. ■ **Action items:** Displays action items - those that others assigned to you and those that you assigned to others and yourself. For more information, see Managing Action Items on page 185.
2	Search field and filters for searching and filtering the list of meeting recordings.
3	Displays the number of listed meeting recordings.
4	Toolbar icons: ■ : Displays Meeting Insights in a pop-out window (see Viewing Meeting Insights App in Pop-Out Window below). ■ : Refreshes Meeting Insights display (see Refreshing Display of Meeting Insights on the next page). ■ : Opens the Meeting Insights web interface in your web browser (see Opening Meeting Insights Web Interface from Teams Desktop on the next page).
5	The icon allows you to import meeting recordings created by third-party programs (see Importing Meeting Recordings Created by Third-Party Tools on page 260).
6	The ? icon displays options for getting help on Meeting Insights (see Getting Help on page 266).
7	The **Settings** icon allows you define global Meeting Insights settings (see General Settings on page 23).
8	List of meeting recordings (see Viewing Meeting Recordings List on page 150).
9	Chat bot assistance (see Using the Help Bot on page 266).

Viewing Meeting Insights App in Pop-Out Window

You can view the Meeting Insights app in a pop-out window instead of within your Teams client window. This may be useful if you want to work in parallel with your Teams client (e.g., send chat messages and call people) and Meeting Insights.

➢ To view Meeting Insights app in a pop-out window:

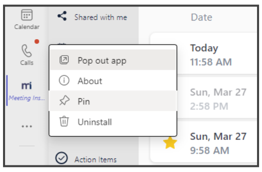
- In the top-right corner of the window, click the **Pop out app** icon.

Pinning Meeting Insights App to Teams Desktop

You can pin the Meeting Insights app to the Teams side panel so that it will always appear on the side panel whenever you open your Teams client. If you don't pin the app, you need to select the app using the ellipsis (three dots) button on the side panel each time you want to use the app.

➢ **To pin the app:**

1. Add the Meeting Insights app, as described in Adding Meeting Insights App to Teams Desktop on page 9.
2. Right-click the Meeting Insights app icon in the side panel, and then from the drop-down menu, choose **Pin**:



Refreshing Display of Meeting Insights

On the toolbar of the Meeting Insights app, you can refresh (reload) Meeting Insights. When clicked, Meeting Insights reloads and you're navigated back to the home page (**All Meetings**). This may be useful, for example, if you have performed some search query in the home page and you want to view all the meeting recordings again instead of the search results.

➢ **To refresh Meeting Insights:**

- In the top-right corner of the window, click the **Reload** icon.

Opening Meeting Insights Web Interface from Teams Desktop

You can easily open the Meeting Insights web interface in your browser from Meeting Insights in your Teams desktop client. This may be necessary if you want to perform operations that are only supported in the web interface.

➢ **To open Meeting Insights web interface from Teams:**

1. In the top-right corner of the window, click the **Go to website** icon; your web browser navigates to the URL of your organization's Meeting Insights.
2. Log in with your Microsoft 365 account's credentials that you use in your organization (as described in Logging in on page 6).

Mobile App

Meeting Insights provides an app for mobile phones. The mobile app is offered in two flavors:

- Meeting Insights app integrated into your organization's Microsoft Teams mobile client - see Meeting Insights App for Teams Mobile Client below.
- Standalone Meeting Insights mobile app - see Meeting Insights Standalone Mobile App on page 17.

> Meeting Insights mobile apps are supported on Android or iOS mobile phones.

Meeting Insights App for Teams Mobile Client

Meeting Insights offers an app that you can use in your organization's Microsoft Teams mobile client. This app allows you to do the following:

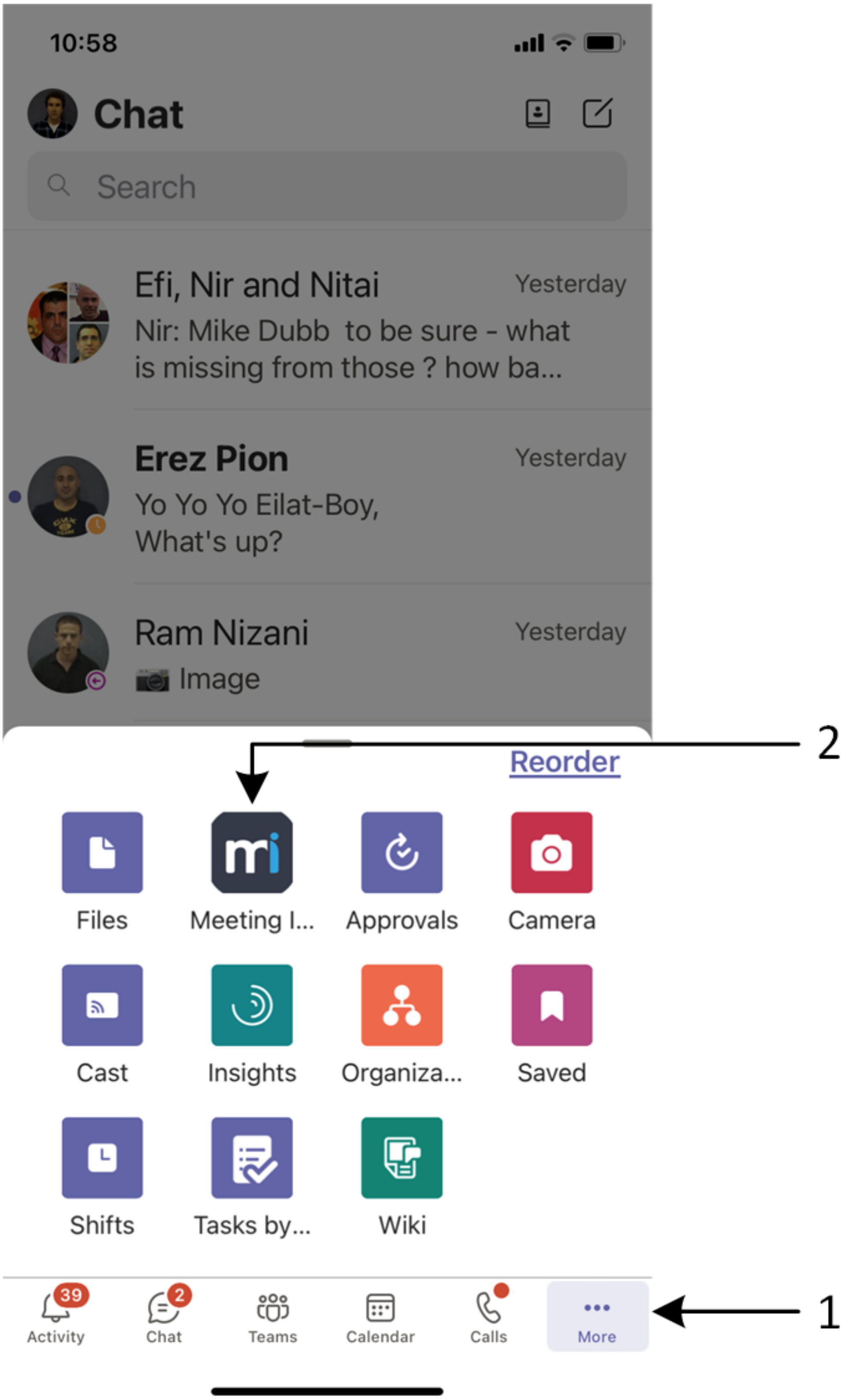
- View the list of all meeting recordings in your Meeting Insights account within Teams, play their videos, view their recap, and view and manage Action Items
- During a meeting recording:
  - View live updates of the meeting recap and add recap items
  - View and add meeting recap items
- View completed meeting recordings through the Teams calendar

Adding Meeting Insights App to Teams Mobile

Before you can use Meeting Insights app with your Teams mobile client, you need to add the Meeting Insights app to it.

➢ **To add Meeting Insights app to Teams mobile client:**

1. On your mobile phone, open the Teams app, and then sign in to your Microsoft Office 365 account that you use in your organization.
2. Tap the ellipsis **More** button (#1 in figure), and then from the pop-up, tap the Meeting Insights icon (#2 in figure):


10:58
Chat
Search
Efi, Nir and Nitai
Yesterday
Nir: Mike Dubb to be sure - what is missing from those ? how ba...
Erez Pion
Yesterday
Yo Yo Yo Eilat-Boy, What's up?
Ram Nizani
Yesterday
Image
Reorder
2
Files
Meeting I...
Approvals
Camera
Cast
Insights
Organiza...
Saved
Shifts
Tasks by...
Wiki
39
Activity
2
Chat
Teams
Calendar
Calls
More
1

- Meeting Insights opens through Teams using single sign-on (SSO) authentication (automatically logged in to your Meeting Insights account using the same credentials as your Microsoft Office 365 account).
- Instead of always doing the above step, you can pin the Meeting Insights app to the app bar so that it's easier to locate. For more information, see Pinning Meeting Insights App to Teams Mobile below.

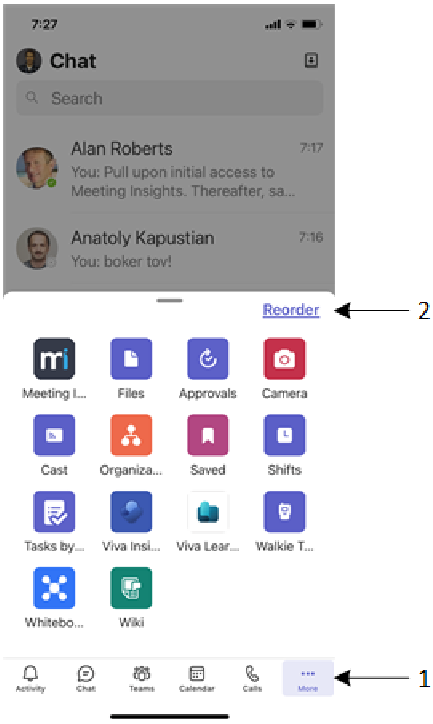
Pinning Meeting Insights App to Teams Mobile

You can pin the Meeting Insights app to the app bar located at the bottom of the Teams mobile client. This allows quick-and-easy access to Meeting Insights in your Teams mobile client.

The procedure below uses the Teams mobile client for Apple. If your mobile device is based on a different operating system (e.g., Android), follow its instructions for performing the functionality described.

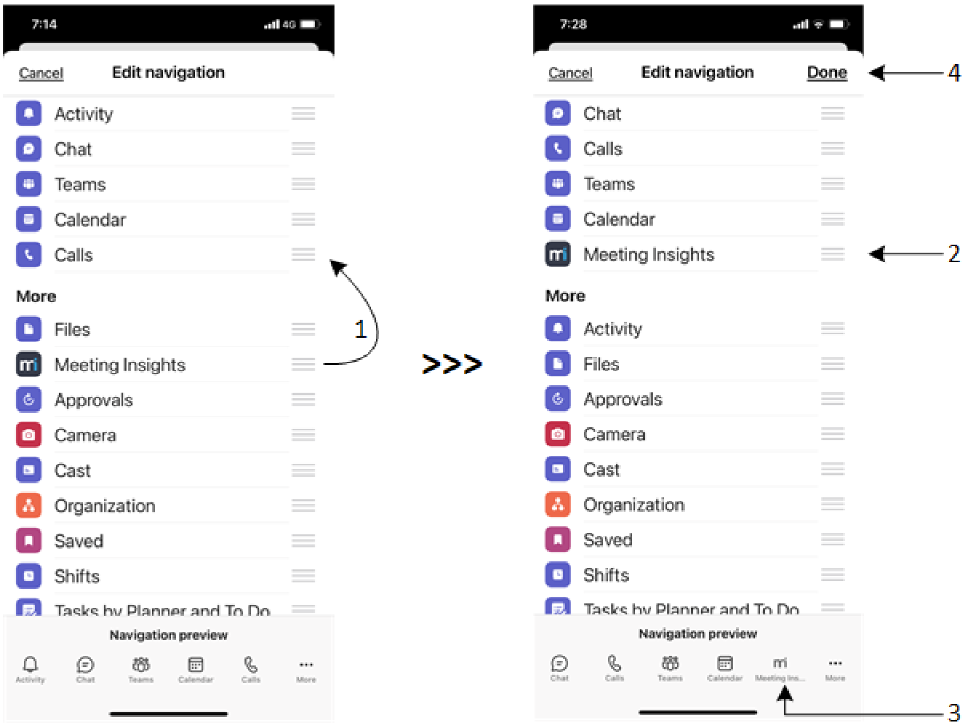
➢ To pin Meeting Insights app to Teams mobile:

1. On your mobile phone, open the Teams app, and then sign in to your Microsoft Office 365 account that you use in your organization.
2. On the app bar, tap the **More** button (#1 in figure below), and then from the pop-up, tap **Reorder** (#2 in figure) to open the Edit navigation pop-up:

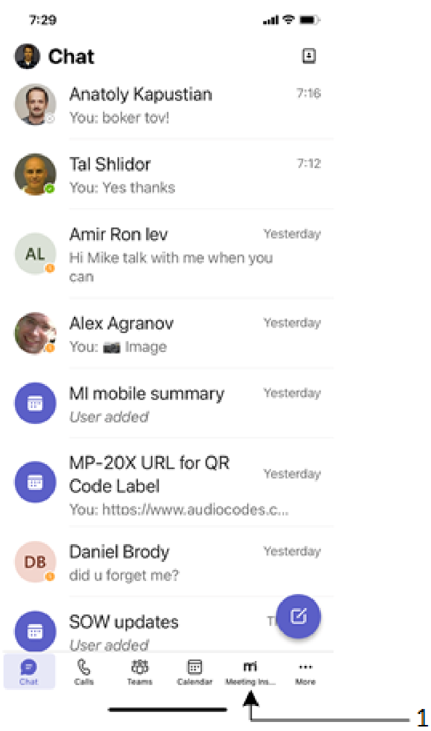


3. Drag the three horizontal lines icon corresponding to the **Meeting Insights** app (#1 in figure below) to the area above the 'More' group (#2 in figure below). This group can

contain up to five apps and therefore, when you drag the app into it, one of the other apps in this group automatically moves back into the 'More' group. The app bar shows a preview of your changes (#3 in figure).



4. Tap **Done** (#4 in figure above); the **Meeting Insights** app is now always available on the app bar (#1 in figure):



Meeting Insights Standalone Mobile App

The Meeting Insights standalone app for mobile phones runs independently (i.e., not integrated into Microsoft Teams mobile client). The app provides similar functionality to the other Meeting Insights platforms (see main differences in Meeting Insights Platforms on page 5).

This app offers a unique experience in that it allows you to **capture conversations anytime, anywhere** (if enabled for your organization and by your organization's administrator). With the Meeting Insights mobile app, you're not limited to scheduled calendar meetings. The powerful ad hoc recording feature lets you capture conversations—whether it's a quick hallway chat, an impromptu brainstorming session, or a chance meeting on the go. Simply tap the **mic** icon in the mobile app to start recording using your phone’s microphone—no calendar invite required. For initiating ad hoc recording, see Ad Hoc Recording using Meeting Insights Standalone Mobile App on page 39.

> Meeting Insights standalone mobile app is available only if enabled for your organization and enabled by your organization's administrator.

Installing Meeting Insights Standalone Mobile App

You can download and install the Meeting Insights standalone mobile app on your phone (Android or iOS) from the app store:

- Google Play Store
- Apple Store

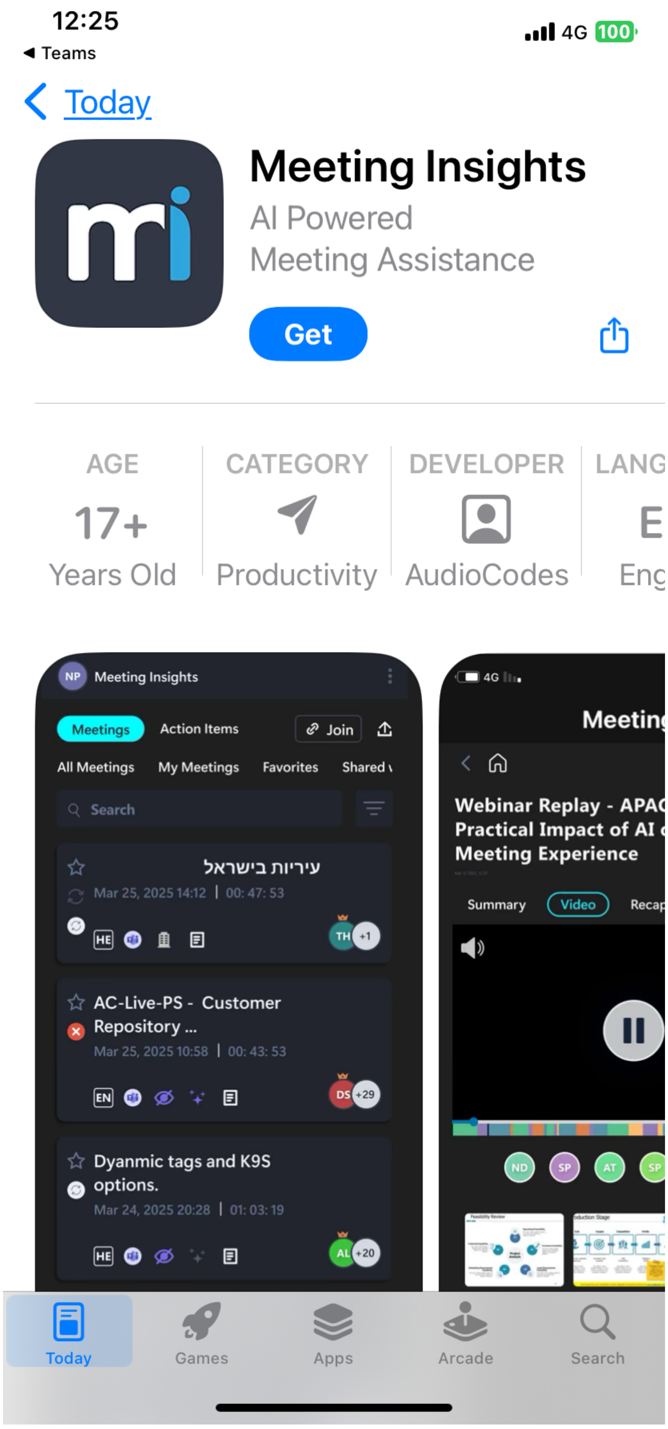
Alternatively, with your mobile phone, you can scan the QR code provided in Meeting Insights web interface or app for Teams Desktop, as described below.

➢ **To download and install Meeting Insights standalone mobile app:**

1. On your computer, open the Meeting Insights web interface or Meeting Insights app for Teams Desktop client.
2. In the Navigation pane, click **Mobile App**; a window appears, displaying the QR codes for Apple Store and Google Play Store:

3. Scan the relevant QR code with your mobile phone; your phone automatically displays the URL link to the store (App Store or Play Store) where you can get the app.

4. Tap the link to open the store, and then download and install the Meeting Insights mobile app. The following figure provides an example of how the Meeting Insights app looks like in Apple's App Store:



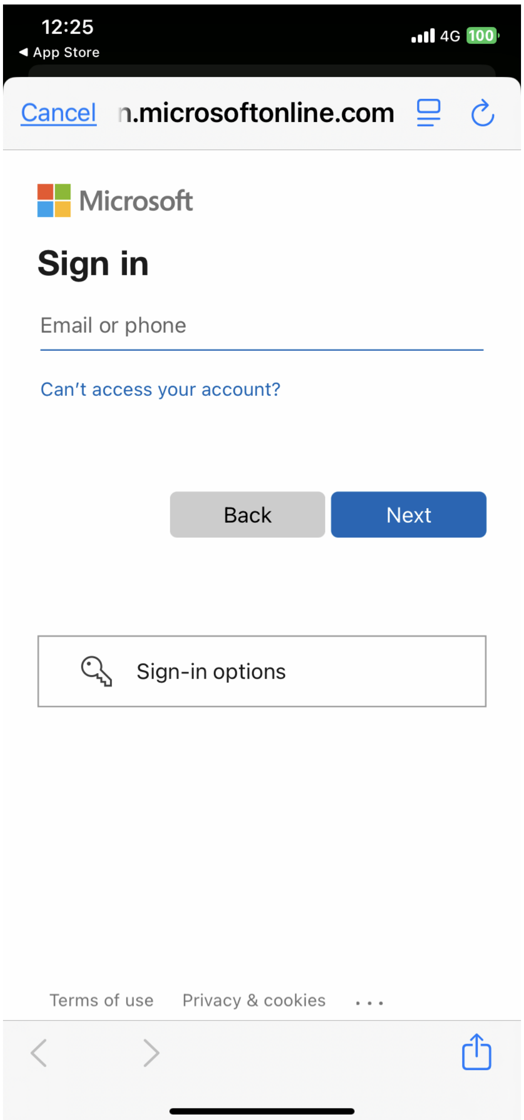
Logging into Meeting Insights Standalone Mobile App

After you've installed the app (see Installing Meeting Insights Standalone Mobile App on page 17), you can log into the Meeting Insights standalone mobile app and start experiencing its many exciting features.

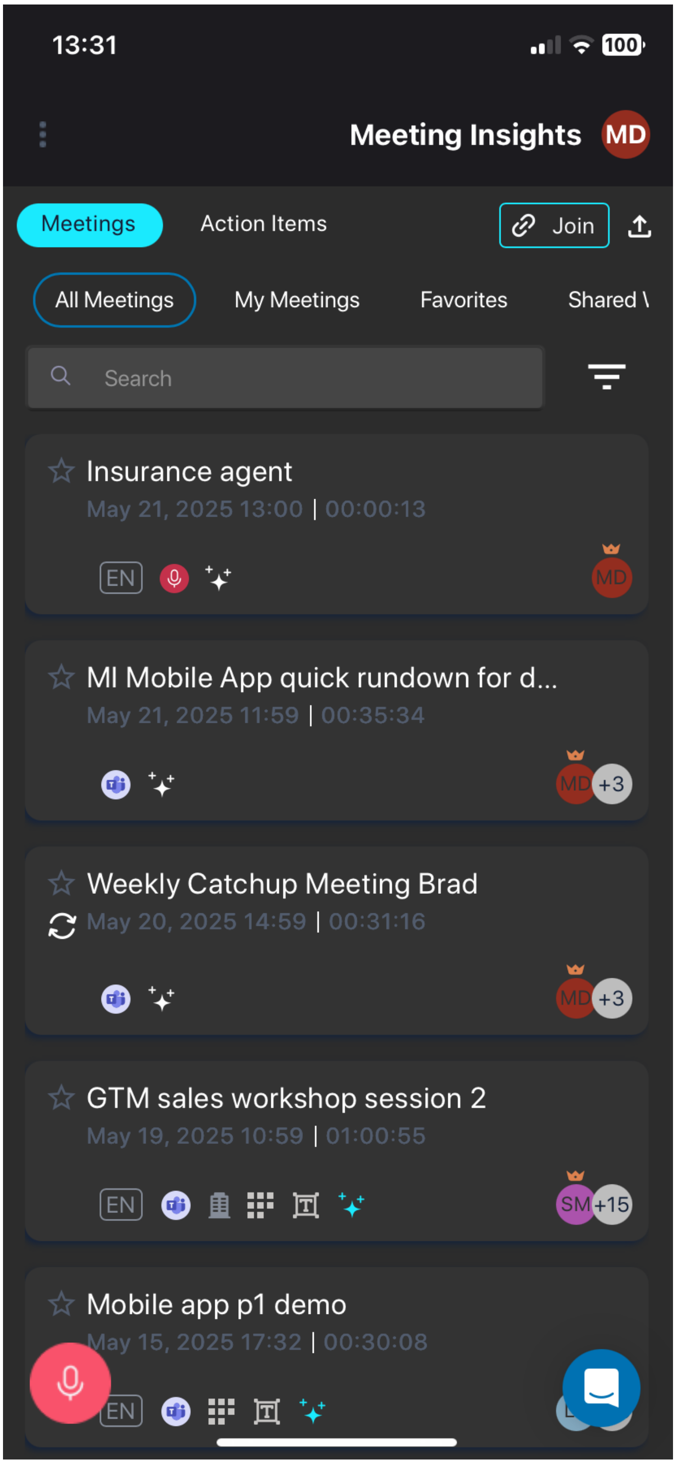
Logging into the Meeting Insights mobile app is required only upon initial use. Subsequent access to the app is done without logging in (unless you specifically logged out of the app).

➢ **To log into Meeting Insights standalone mobile app:**

1. On your mobile phone, tap the Meeting Insights app icon; the Microsoft Sign in screen appears:



2. Sign in to your Microsoft Office 365 account that you use in your organization; the Meeting Insights standalone mobile app opens, as displayed in the following example:

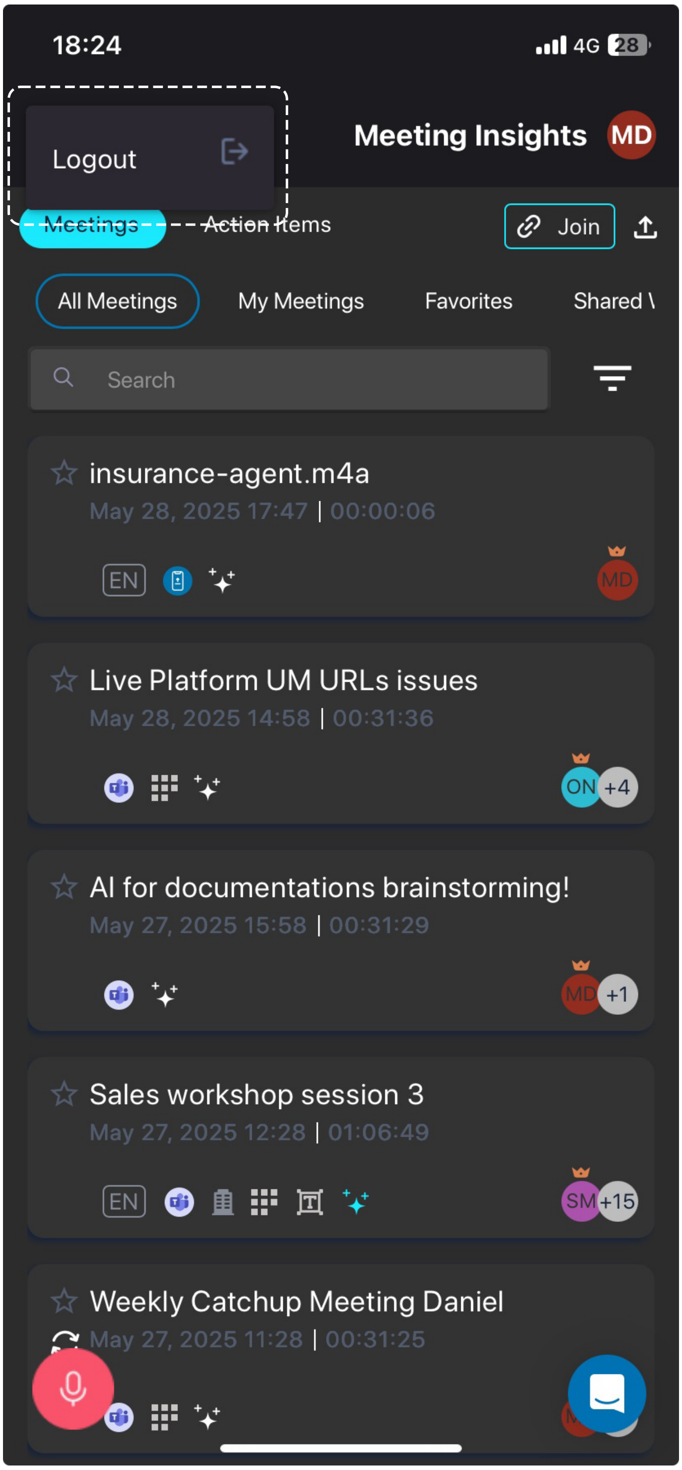


Logging Out of Standalone Mobile App

If you want, you can log out the Meeting Insights standalone mobile app.

➢ **To log out standalone mobile app:**

1. In the top-left corner of the screen, tap the ellipsis ⋮ icon (three vertical dots); the **Logout** button appears:



2. Tap **Logout**; a confirmation message box is displayed.
3. Tap **Logout** to confirm (or **Cancel** to stay logged in).

4 General Settings

You can define the following global settings for your Meeting Insights account:

- Viewing Account Information below
- Configuring Personal Tags on page 25
- Configuring Representative Users on page 26
- Subscribing to Email Notifications on page 28
- Configuring Meeting Publishing Time and Integration Preferences on page 30

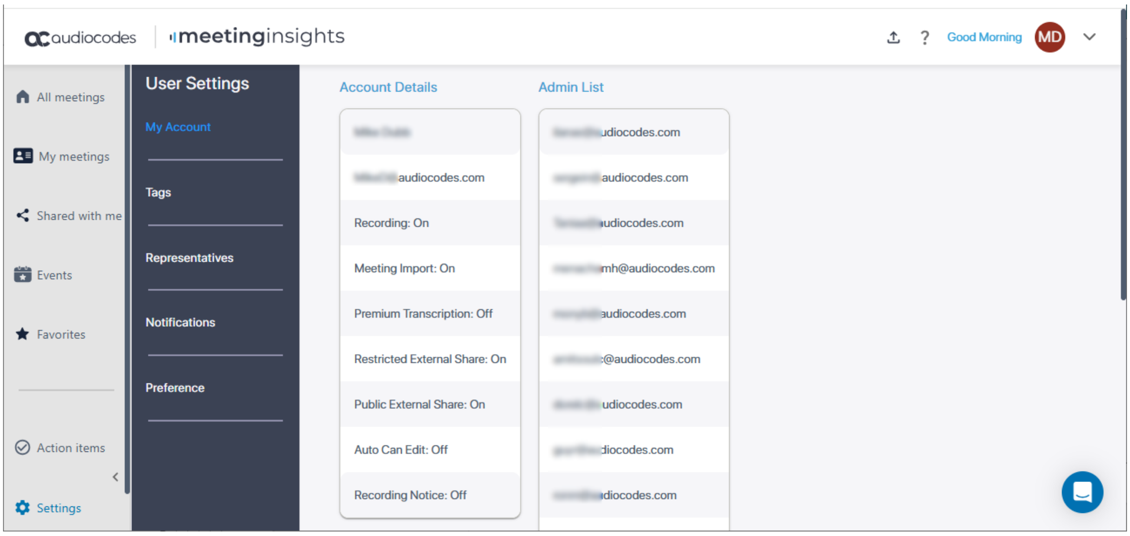
> You can only configure these general settings through the following Meeting Insights platforms:
> - Meeting Insights Web interface
> - Meeting Insights app for Teams desktop client

Viewing Account Information

The **My Account** tab lets you view your Meeting Insights account information and your organization's Administrators for Meeting Insights.

➢ **To view your account information and Meeting Insights' Administrators:**

1. From the Navigation pane, click **Settings**; the User Settings pane appears.
2. Select the **My Account** tab; the following page appears, listing your account details and your administrators:



The following table describes the information displayed on the page:

List	Description
Account Details	
<first line>	Your account name.
<email>	The email address associated with your account.
Recording	Indicates if your Meeting Insights Administrator has given you permission ("On" or "Off") to record audio in meeting recordings that you initiate.
Meeting Import	Indicates if your Meeting Insights Administrator has given you permission ("On" or "Off") to import a meeting recordings, as described in Importing Meeting Recordings Created by Third-Party Tools on page 260.
Restricted External Share	Indicates if your Meeting Insights Administrator has given you permission ("On" or "Off") to share your meeting recordings with users from outside your organization that had joined the meeting.
Public External Share	Indicates if your Meeting Insights Administrator has given you permission ("On" or "Off") to share your meeting recordings with users from outside your organization, regardless of whether they had joined the meeting.
Auto Can Edit	Indicates if your Meeting Insights Administrator has given you full editing permission ("On" or "Off") to all meeting recordings that you're invited to (like being a representative of the owner of the meeting recording).
Recording Notice	Indicates if your Meeting Insights Administrator has enabled the feature ("On" or "Off") whereby your meeting recordings are recorded only when you (the Owner) are present at the meeting. When you leave the meeting, an audio message is played to all participants to notify that recording has stopped. When you join (or rejoin) the meeting, an audio message is played to all participants to notify that recording has started.
Admin List	
Displays email addresses of your organization's Administrators for Meeting Insights. This may be useful, for example, when you need help from an Administrator on performing a specific task in Meeting Insights.	

Configuring Personal Tags

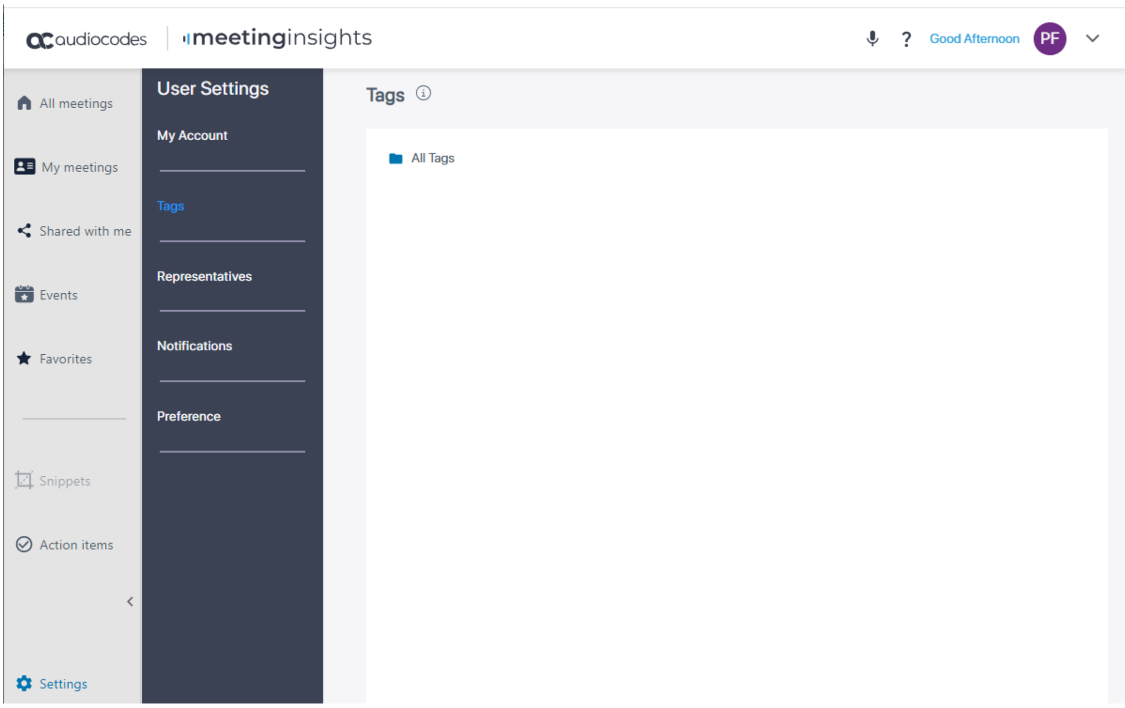
Tags are useful for identifying and searching for meeting recordings. For example, you may want to tag all meeting recordings that concern employee salaries with a tag named "Finance". Once tagged, you can easily search for these meeting recordings in the meeting recordings list, by using the tag name "Finance" as the search filter ("tag: Finance").

To tag meeting recordings, you can use Meeting Insights default tags or your own user-defined tags. To add tags to your meeting recordings, see Managing Tags on page 224.

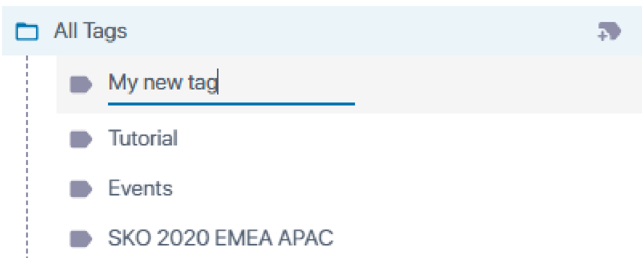
> Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can view and use your personal tags.

➢ To add a tag:

1. From the Navigation pane, click **Settings**; the User Settings pane appears.
2. Select the **Tags** tab; the following page appears:



3. Click **All Tags**; a list of all the tags is displayed.
4. Click the icon; a text field appears:



5. Type a name for your new tag, and then click anywhere outside the field.

Once you've added a tag, you can do the following:

- **Delete a tag:**
  a. Click the delete icon corresponding to the tag that you want to delete; a confirmation message appears.
  b. Click **Delete**.
- **Edit a tag:**
  a. Click the edit icon corresponding to the tag that you want to modify; the tag's field becomes available for editing.
  b. Make your changes, and then click anywhere outside the text field.

Configuring Representative Users

A Representative user (also referred to as *Co-owner*) has the same privileges as you for **all** your meeting recordings (i.e., where you're the Owner). Everything you can do on your meeting recordings can also be done by your Representative.

Configuring representatives includes the following sections:

- Adding a Representative User below
- Deleting a Representative User on the next page

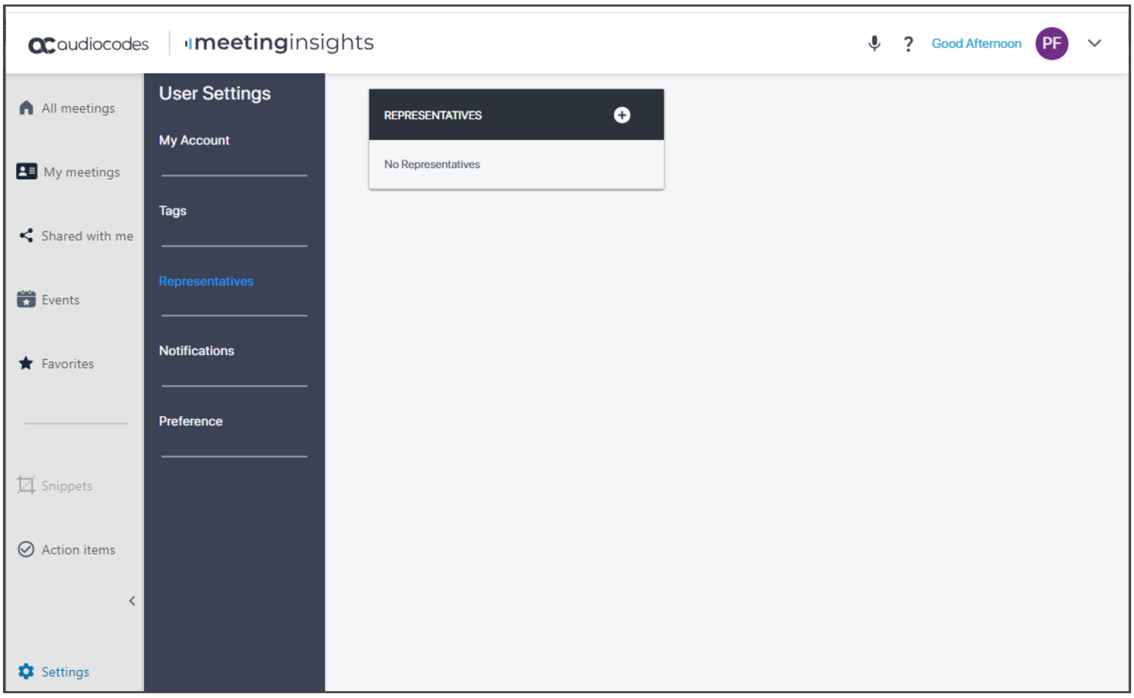
When scheduling a meeting through Outlook Calendar (see Scheduling Meeting Recordings through Microsoft Outlook Calendar on page 33), you can make one of the invitees a representative (*co-organizer*).

Adding a Representative User

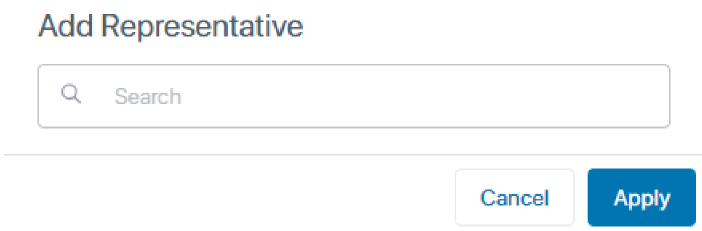
You can select users to be your Co-owners, which gives them full privileges (view and edit) to all your meeting recordings.

➢ **To add a representative user:**

1. From the Navigation pane, click **Settings**; the User Settings pane appears.
2. Select the **Representatives** tab; the following page appears:



3. Click ; the following dialog box appears:



4. In the field, start typing the user's name. As you start typing, a drop-down list offers you possible matches of names to your currently typed letters. When the user's name appears in the list, select it.
5. Click **Apply**; a confirmation message appears.
6. Click **OK**.

Deleting a Representative User

You can delete your Co-owner users. When you do, the user no longer has Co-owner privileges to your meeting recordings.

➢ **To delete a Co-owner:**

1. Click the delete icon corresponding to the Co-owner that you want to delete; a confirmation message appears.
2. Click **Remove** to delete.

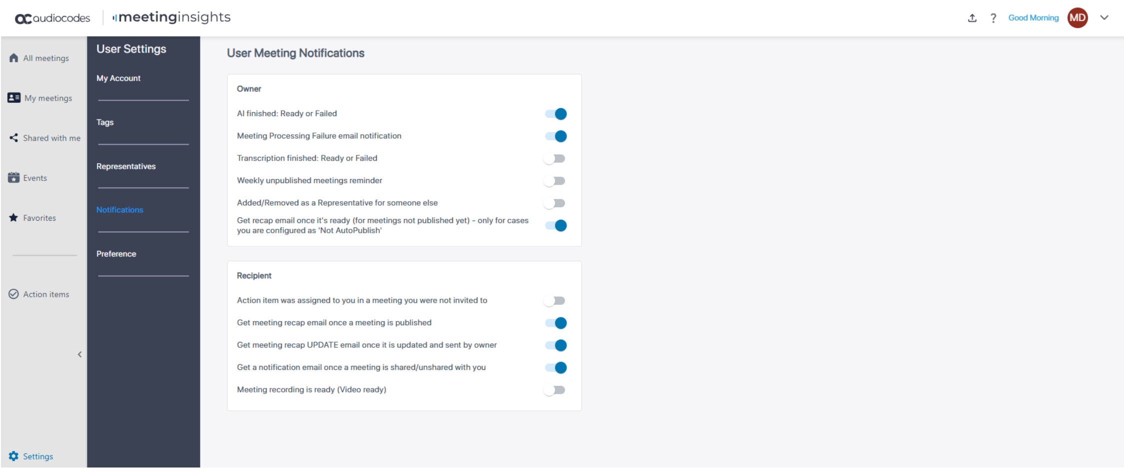
Subscribing to Email Notifications

You can subscribe to Meeting Insights different email notifications. Some notifications inform you, for example, of processes that have finished, while others include the recap of the meeting recording. Some notifications are turned on by default (which you can turn off if you wish).

> The email to which Meeting Insights sends the notifications is the email of your Meeting Insights account (see Viewing Account Information on page 23).

➢ To subscribe or unsubscribe to notifications:

1. From the Navigation pane, click **Settings**; the User Settings pane appears.
2. Select the **Notifications** tab; the following page appears:



3. To subscribe or unsubscribe to an mail notification, toggle the corresponding switch button to turn it on or off.

   The following table provides a description of the different email notifications:

Notification	Description
Owner	
AI finished: Ready or Failed	Notifies you (as the Owner, or initiator of the AI / transcription) by email that the AI-generated summary process finished and indicates its status ("Ready" or "Failed").
Meeting Processing Failure email notification	Notifies you (as the Owner) by email that the meeting process failed.
Transcription finished: Ready or	Notifies you (as the Owner, or initiator of the AI / transcription) by email that the transcription process finished and indicates its status

Notification	Description
Failed	("Ready" or "Failed").
Weekly unpublished meetings reminder	Notifies you by email once a week of unpublished meetings to which you are the Owner.
Added/Removed as a Representative for someone else	Notifies you by email that you've been added or removed as a Representative for some other user.
Get recap email once it's ready (for meetings not published yet) - only for cases you are configured as 'Not AutoPublish'	Notifies you (as the Owner) by email that a recap is ready for an unpublished meeting. **Note:** This notification is sent only if the Owner is configured to **not** automatically publish meeting recordings (see Configuring Meeting Publishing Time and Integration Preferences on the next page). If the Owner is configured to automatic or delayed publishing of meeting recordings, the Owner is sent this email notification regardless of this notification setting.
Recipient	
Action item was assigned to you in a meeting you were not invited to	Notifies you by email that an action item was assigned to you in a meeting to which you weren't invited.
Get meeting recap email once a meeting is published	Sends an email to you with the recap when the meeting is published.
Get meeting recap UPDATE email once it is updated and sent by owner	Sends an email to you with the recap whenever it's updated and sent by the Owner.
Get a notification email once a meeting is shared/unshared with you	Notifies you by email that a meeting recording has been shared or unshared with you.
Meeting recording is ready (Video ready)	Notifies you by email that the meeting recording is ready (video ready).

Configuring Meeting Publishing Time and Integration Preferences

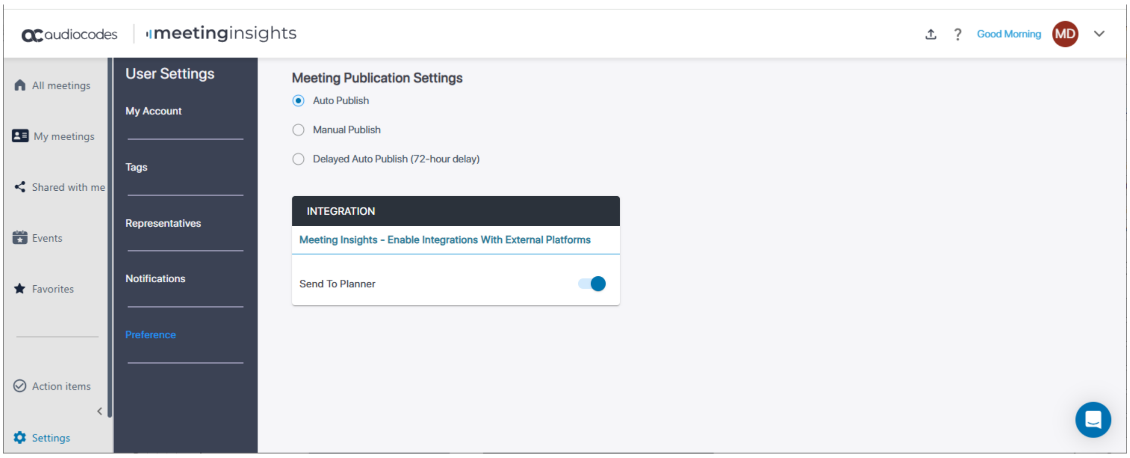
You can define the following preferences under the **Preferences** tab:

- Publishing time preferences for meeting recordings.
- Enabling integration with third-party applications.

> - Available publishing time options and default publishing time depends on your organization's Administrator settings.
> - Available third-party apps integration options depends on your organization's Administrator settings.

➢ To configure publishing time and integration preferences:

1. From the Navigation pane, click **Settings**; the User Settings pane appears.
2. Select the **Preferences** tab; the following page appears:



3. Under **Meeting Publication Settings**, select one of the following publishing options:
   - **Auto Publish:** (Default) Meeting Insights automatically publishes your meeting recordings immediately after they end.
   - **Manual Publish:** To publish a meeting recording, you need to manually publish it, by clicking the meeting recording's **Publish** button (see Publishing Meeting Recordings on page 166).
   - **Delayed Auto Publish:** Meeting Insights automatically publishes your meeting recordings three days (72 hours) after they have ended (if you haven't already published them manually).
4. Under **Integrations**, click the 'Send To Planner' switch button to turn on or off the integration of action items with Microsoft Planner. For sending action items to Planner, see Sending Action Items to Planner on page 188.

5 Initiating a Meeting Recording

You can initiate a meeting recording by Meeting Insights, using any of the following methods:

- Scheduling a Microsoft Teams meeting recording through Microsoft Teams Calendar - see Scheduling Meeting Recordings through Microsoft Teams Calendar below
- Scheduling a Microsoft Teams meeting recording through Microsoft Outlook Calendar - see Scheduling Meeting Recordings through Microsoft Outlook Calendar on the next page
- Adding Meeting Insights ad hoc during a scheduled meeting - see Adding Meeting Insights Ad Hoc during Scheduled Meetings in Teams Desktop on page 35
- Ad hoc recording using your mobile phone's microphone in Meeting Insights standalone mobile app - see Ad Hoc Recording using Meeting Insights Standalone Mobile App on page 39

> ⚠ For recording Zoom meetings, see Zoom Meetings on page 50.

> ⚠ Currently, Meeting Insights doesn't record shared content of **PowerPoint Live** in Teams.

Scheduling Meeting Recordings through Microsoft Teams Calendar

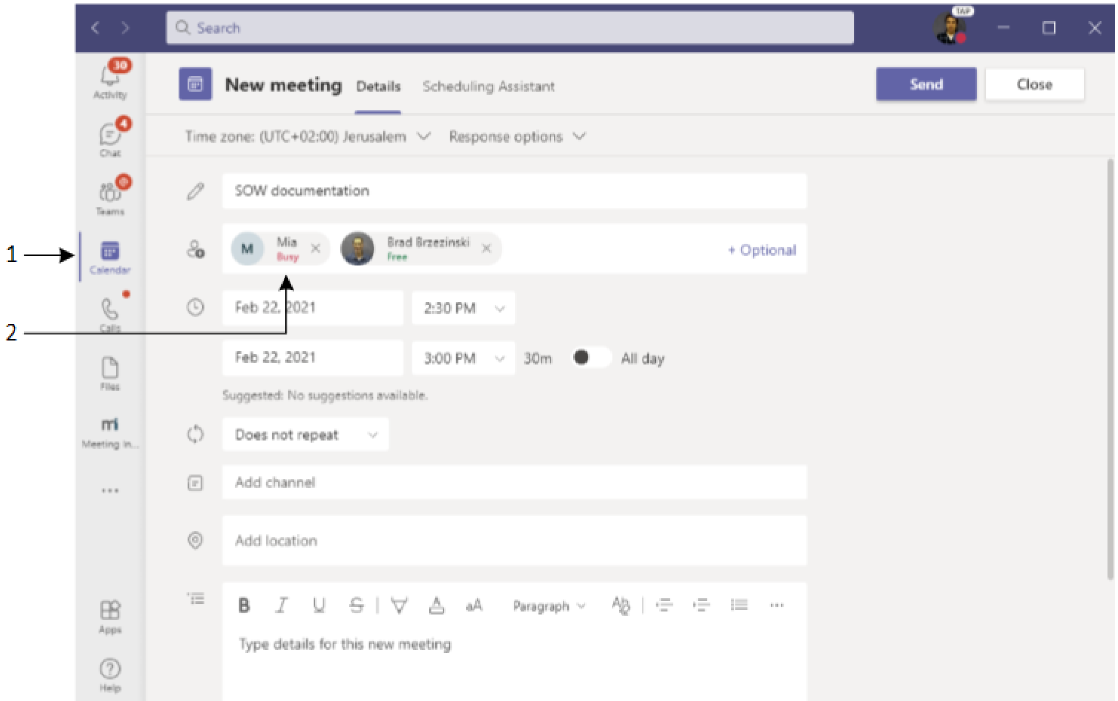
You can use Meeting Insights to record meetings that are scheduled through Microsoft Teams Calendar. When scheduling a meeting, you can specify each participant and/or the Teams channel.

> ⚠
> - When recording a meeting of a Teams channel, Meeting Insights displays the channel as a participant with the name "<Teams channel name>@<company domain on Microsoft>" (e.g., TaniaTest@audiocodes365.onmicrosoft.com).
> - A few minutes before a scheduled meeting starts, Meeting Insights automatically begins recording to avoid missing any audio or media content at the beginning of your meeting. When the meeting ends, Meeting Insights automatically stops recording and then processes the meeting recording.

➢ **To schedule a meeting recording through Teams Calendar:**

1. Open your Microsoft Teams client.
2. Click the **Calendar** icon on the left side of the Teams client window, and then click **+ New meeting** in the top-right corner.
3. In the 'Add required attendees' text box, add Meeting Insights by selecting **Mia**. Invite additional people as required.

4. (Optional) To schedule and record a Teams channel meeting, in the 'Add channel' text box, select the Teams channel.



Legend:

1 = Calendar icon

2 = Participant "Mia"

5. Fill out any other details for the meeting as desired.

6. Click **Send** to send the meeting invite.

Scheduling Meeting Recordings through Microsoft Outlook Calendar

Meeting Insights is typically used to record meetings that are scheduled through Microsoft Outlook's Calendar. A few minutes before a scheduled Outlook meeting starts, Meeting Insights automatically begins recording so that it doesn't miss any audio or media content at the beginning of your meeting. When the meeting ends, Meeting Insights automatically stops recording and then processes the meeting recording.

For actions that you can do in Meeting Insights (Live Panel) during the meeting recording, see In-Meeting Experience using Web Interface on page 77. For actions that you can do after the meeting recording, see Post-Meeting Actions in Meeting Insights Web Interface and Teams Desktop App on page 150.

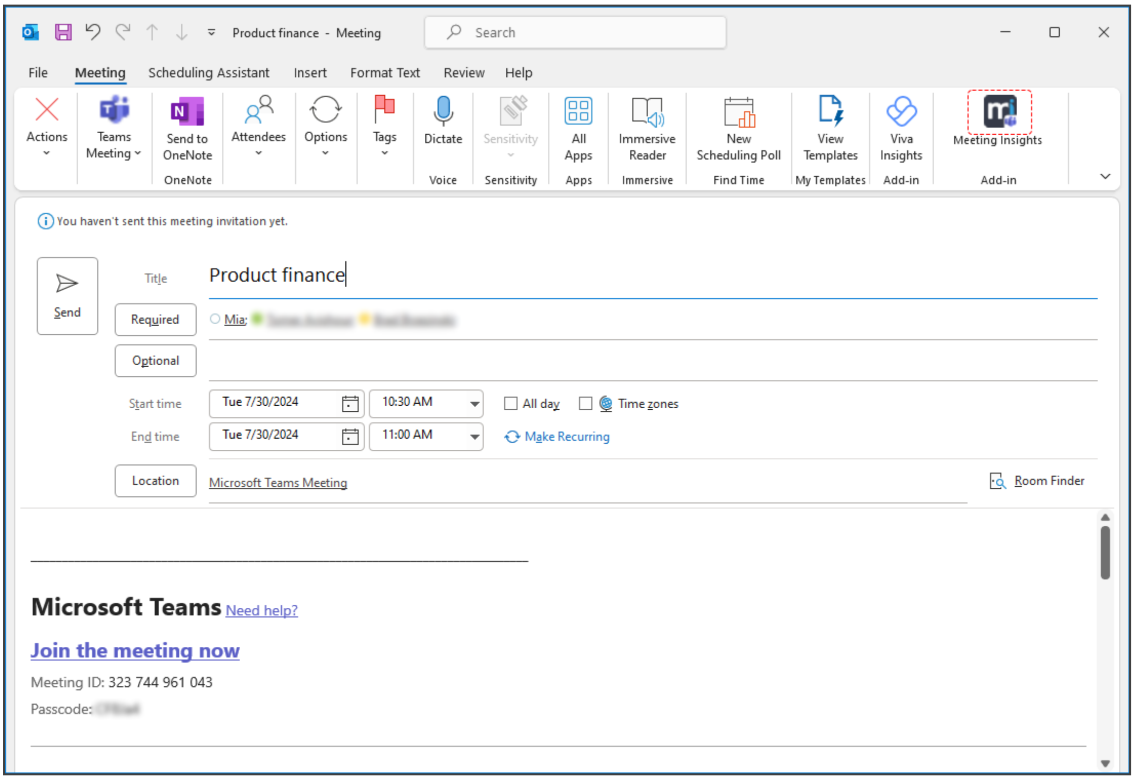
➢ **To schedule a meeting recording through Outlook Calendar:**

1. On your computer, start Microsoft Outlook.

2. Access Outlook's Calendar and create a meeting request (e.g., right-click the required date and time box on the calendar, and then choose **New Meeting Request**).

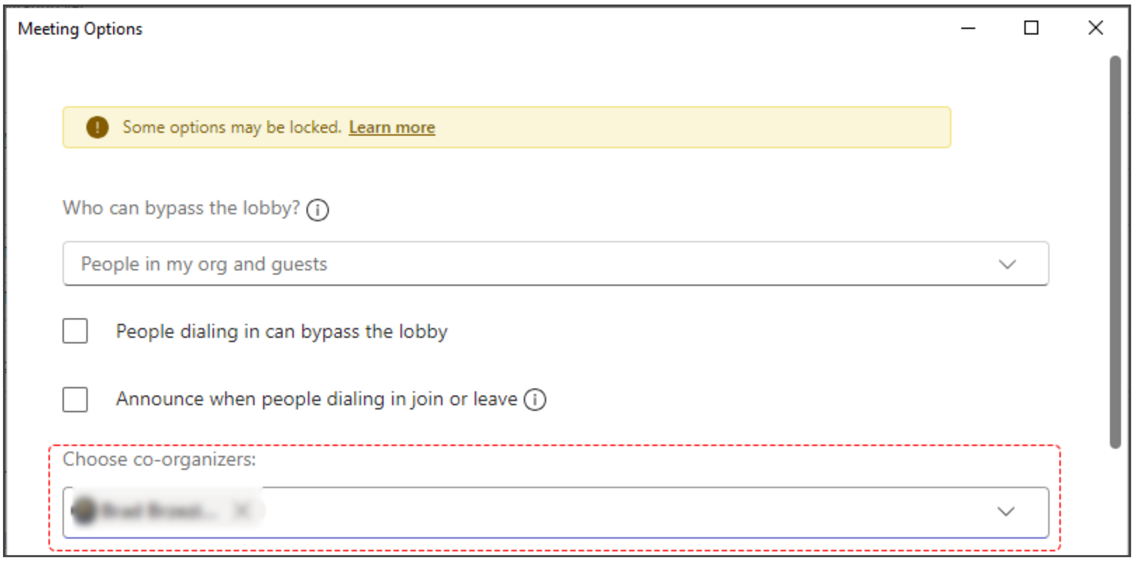
3. On the Meeting menu's ribbon, click the **Meeting Insights** add-in icon; the Meeting Insights bot called "Mia" is automatically added to the 'Required' field.

- The add-in icon appears only if your organization's IT administrator has enabled this add-in for Outlook.
- Instead of clicking the add-in icon, you can manually invite Meeting Insights by adding "Mia" in the 'Required' field.



4. Complete the meeting request as you would normally do (i.e., add attendees that you want to invite, type a title for the meeting, and choose a date for the meeting).

5. If you want to make one of the invitees a representative (Co-owner) of the meeting, from the Meeting menu's ribbon, click **Meeting Options** , from the 'Choose co-organizers' drop-down list, select the invitee that you want, and then click **Save**:



6. Click **Send** to send your scheduled meeting request.

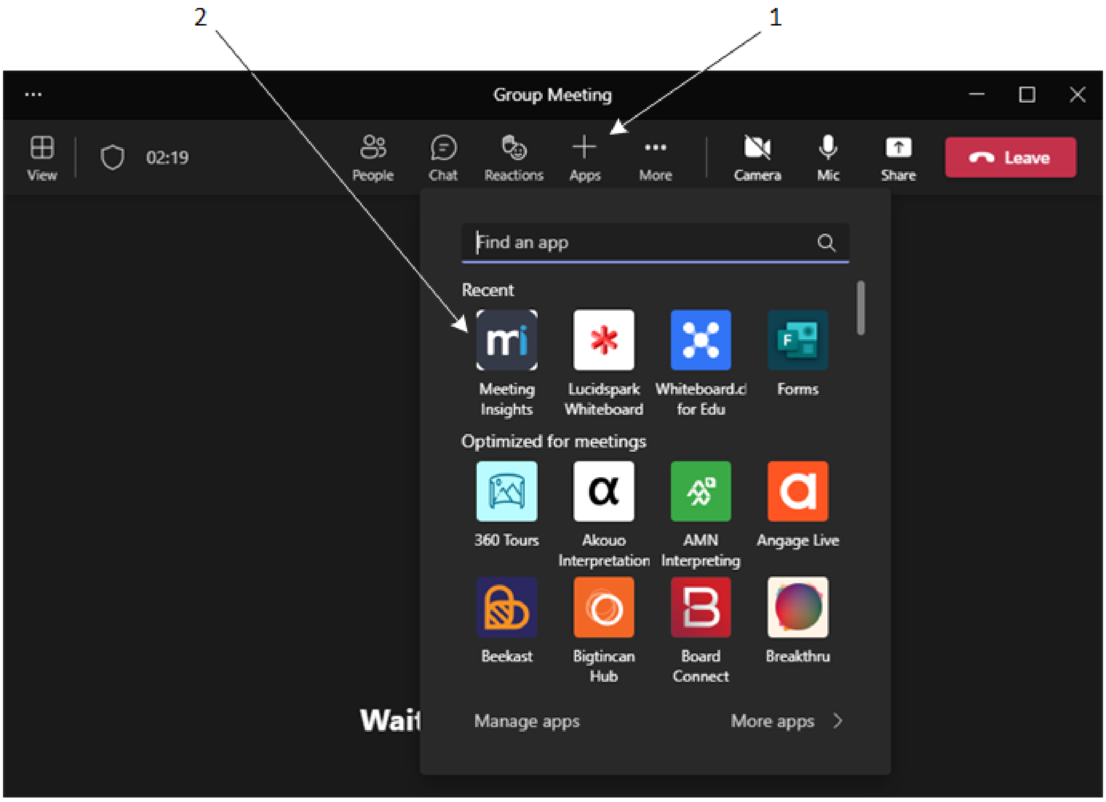
Adding Meeting Insights Ad Hoc during Scheduled Meetings in Teams Desktop

If a meeting was initially scheduled without Meeting Insights (Mia), you or any of the participants can add it during the meeting.

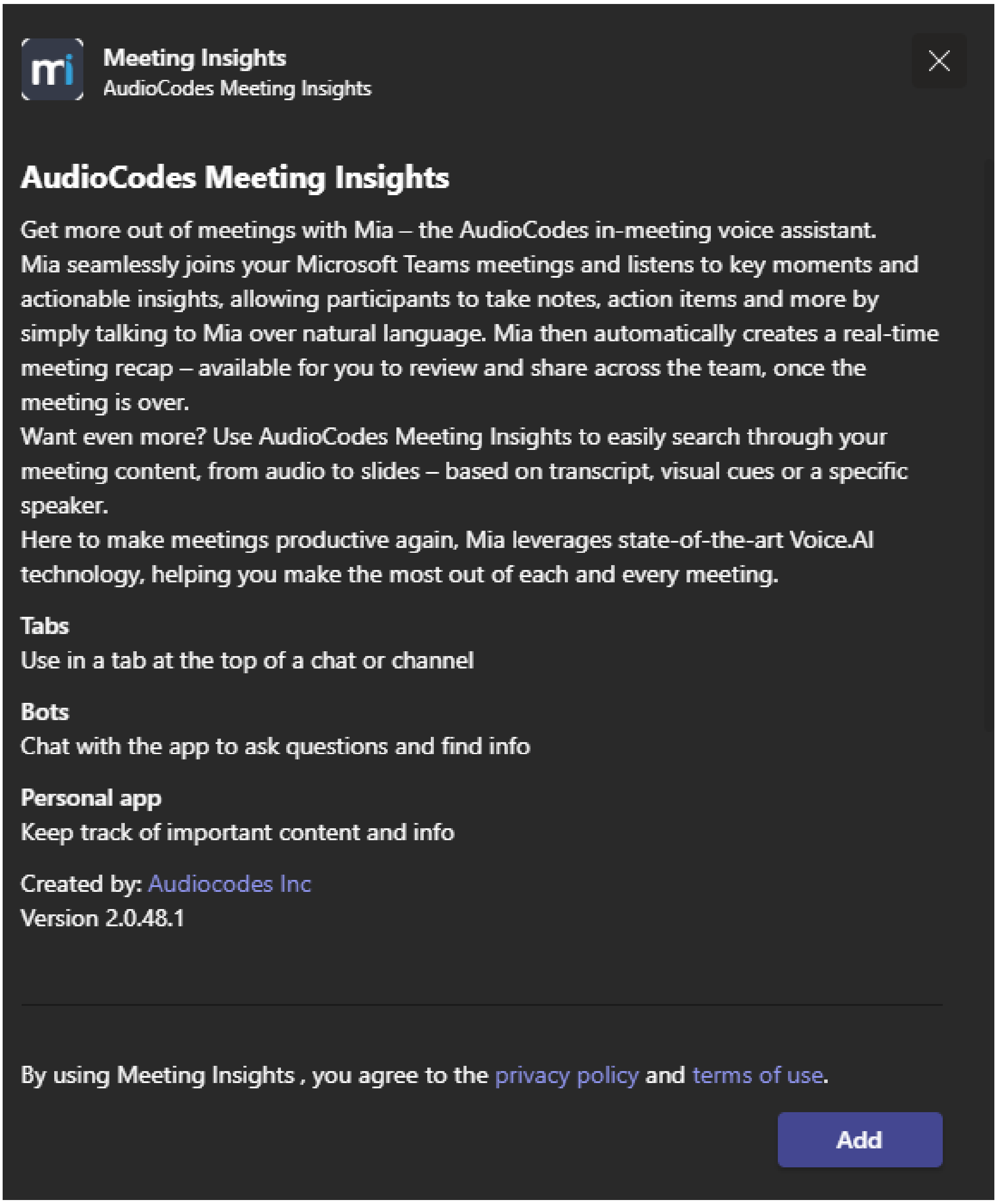
> Currently, Meeting Insights doesn't record shared content of **PowerPoint Live** in Teams.

➢ **To add Meeting Insights ad hoc during scheduled meeting:**

1. Join the scheduled meeting as usual.
2. Click the **Apps** icon on the Teams window toolbar (#1 in figure).

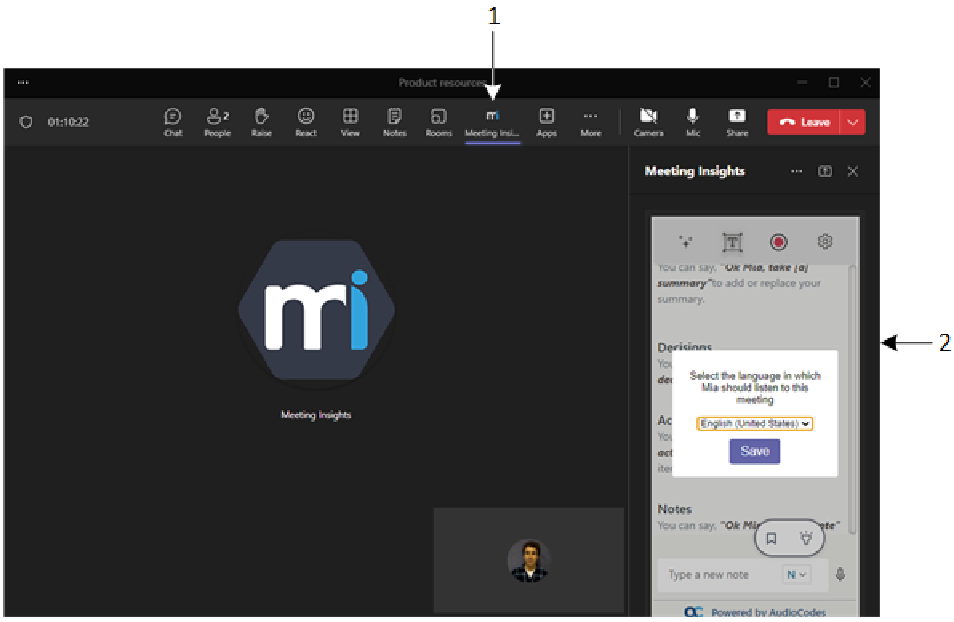


3. Click the Meeting Insights app (#2 in figure).



4. Click **Add** to agree to Meeting Insights privacy policy and terms of use.

5. Click **Save**; Meeting Insights app is added to your meeting. The **Meeting Insights** app icon is displayed on the toolbar of the Teams window (#1 in figure) and the Meeting Insights panel is displayed (#2 in figure):



6. Select the language, and then click **Save**.

- If Mia is removed from a meeting, it cannot rejoin.
- If a call starts 15 minutes or more earlier than the scheduled time, you cannot bring Mia in ad hoc.

Ad Hoc Recording using Meeting Insights Standalone Mobile App

Meeting Insights standalone mobile app allows you to record conversations anytime and anywhere, using your mobile phone's microphone. This powerful ad hoc recording feature lets you capture conversations, whether it's a quick hallway chat, an impromptu brainstorming session, or a meeting on the go.

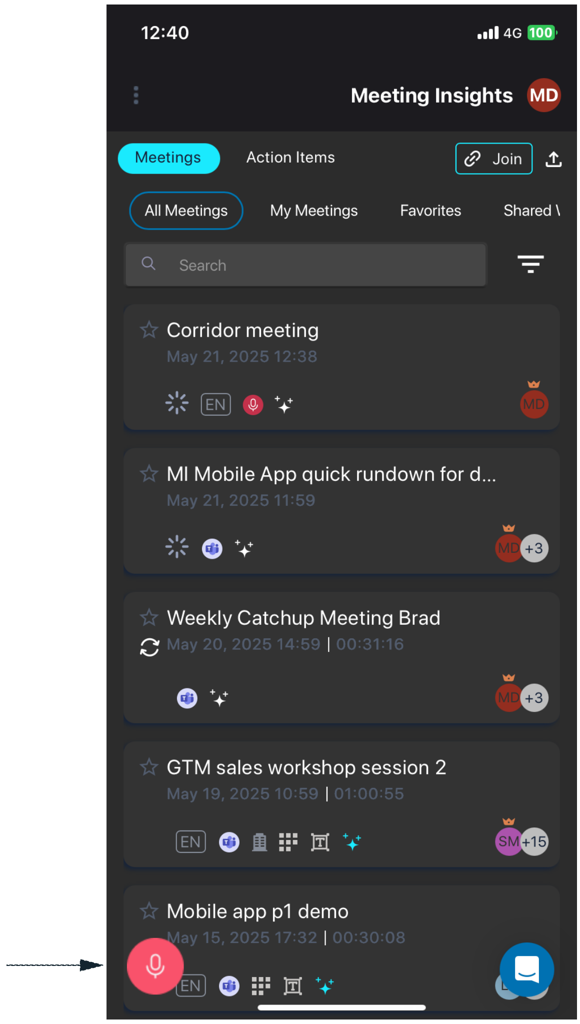
During your meeting, you can pause and resume recording whenever you want. Once you stop recording, you can upload it immediately to Meeting Insights or save it on your mobile phone and upload later.

- The Meeting Insights standalone mobile app's ad hoc recording feature is available only if enabled by your organization's Meeting Insights administrator.
- If you answer an incoming call on your mobile phone during recording, Meeting Insights automatically pauses recording. Once the call ends, you can resume or end recording.
- If you play media (e.g., a YouTube video) during recording, only the media is recorded. When you finish playing the media, recording of the surrounding audio is recorded.

➢ To ad hoc record audio:

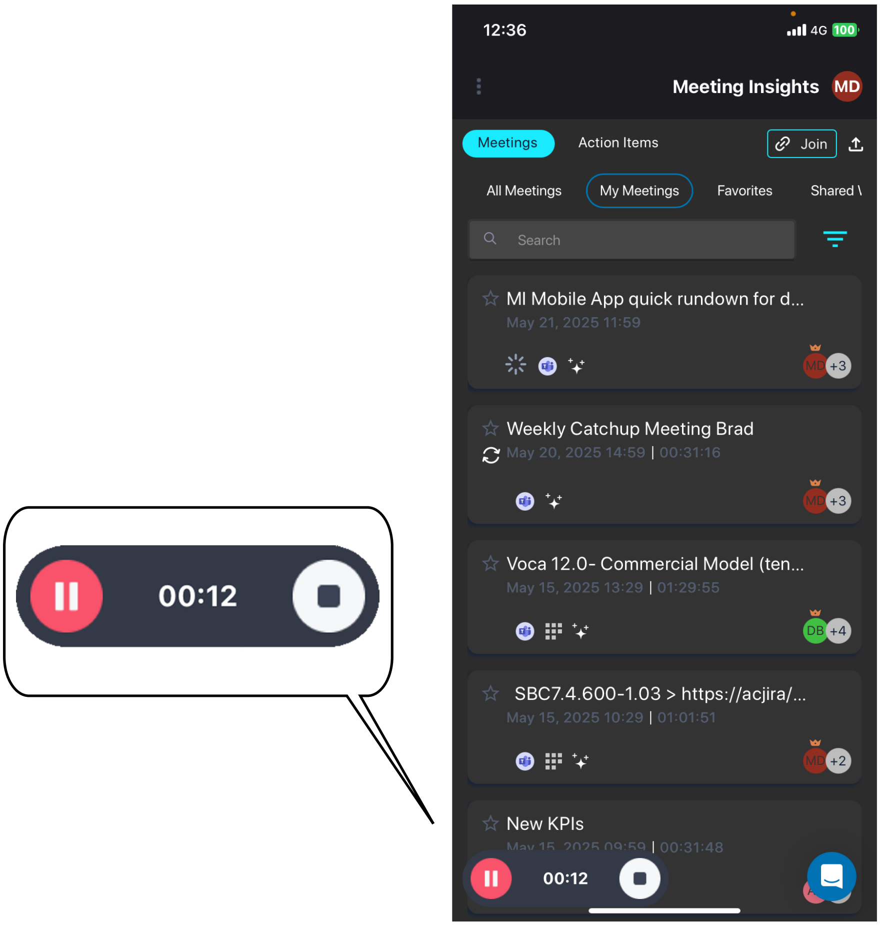
1. On your mobile phone, open the Meeting Insights standalone app (see Logging into Meeting Insights Standalone Mobile App on page 19).

2. When you are ready to record, tap the  microphone button, located at the bottom of the Meeting Insights screen, as shown below:



When you tap the microphone button, a message pops up at the top of the screen, informing you that recording is in progress, and the microphone button is replaced by the following (as shown in the following figure):

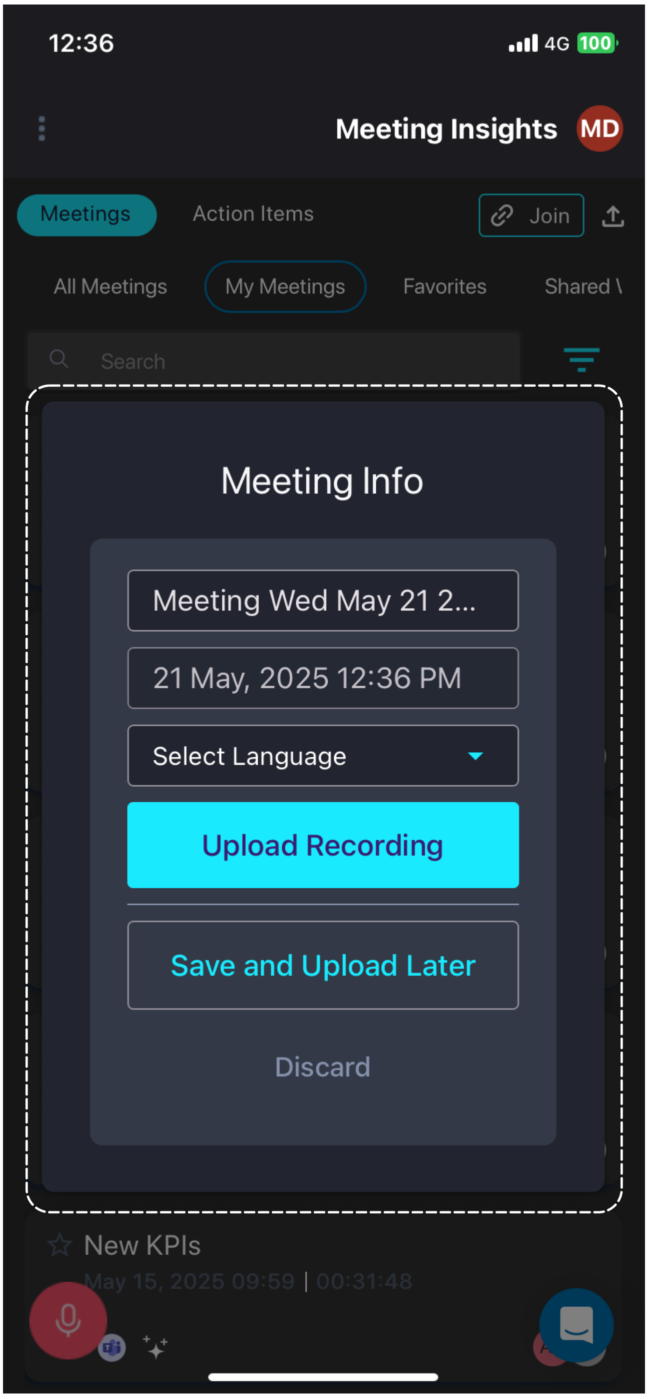
- Pause button
- Timer displaying the duration of the recording
- Stop button



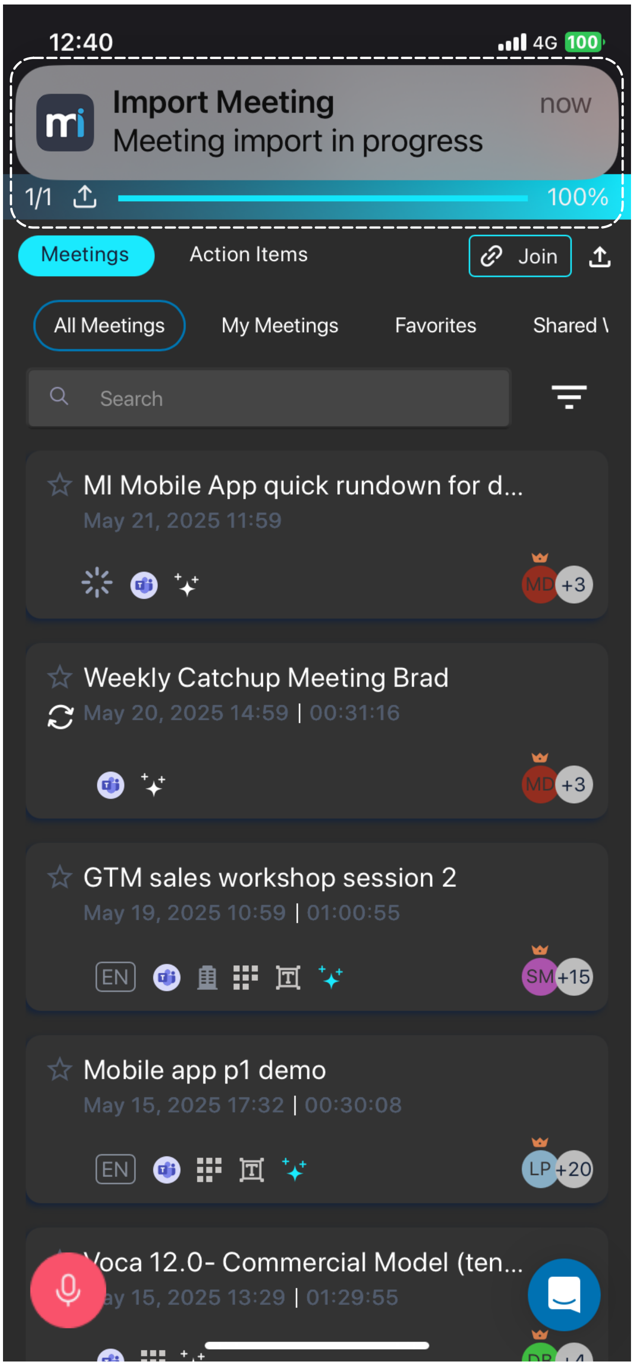
3. To pause the recording, tap the pause button; the recording is paused and the button is replaced by the resume button.

4. To resume recording, tap the resume button.

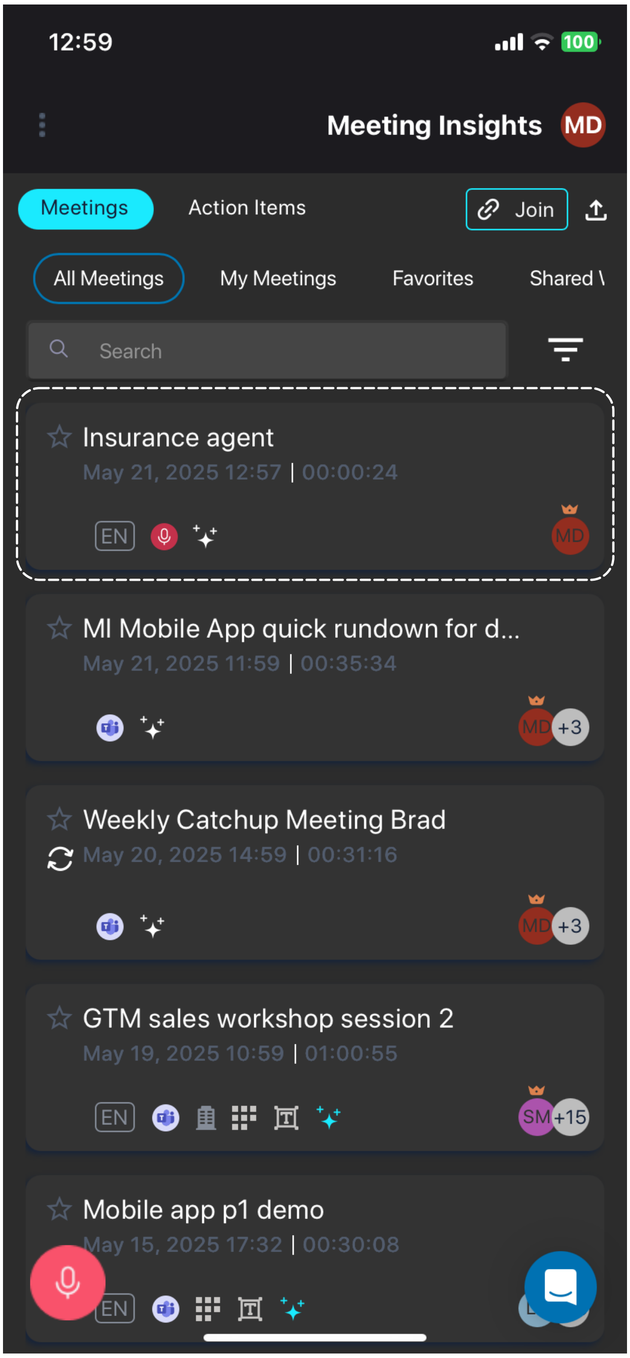
5. To stop recording, tap stop button; Meeting Insights stops and ends the recording, and displays the Meeting Info dialog box:



6. In the top field, type a name for the recorded meeting. By default, the name is "Meeting" followed by the date and time of the recording.
7. From the 'Select Language' drop-down list, select the language of the meeting.
8. Tap one of the following buttons to upload the recording from your phone's file storage now or later:
   - **Upload Recording:**A message and progress bar are displayed at the top of the screen during file upload:



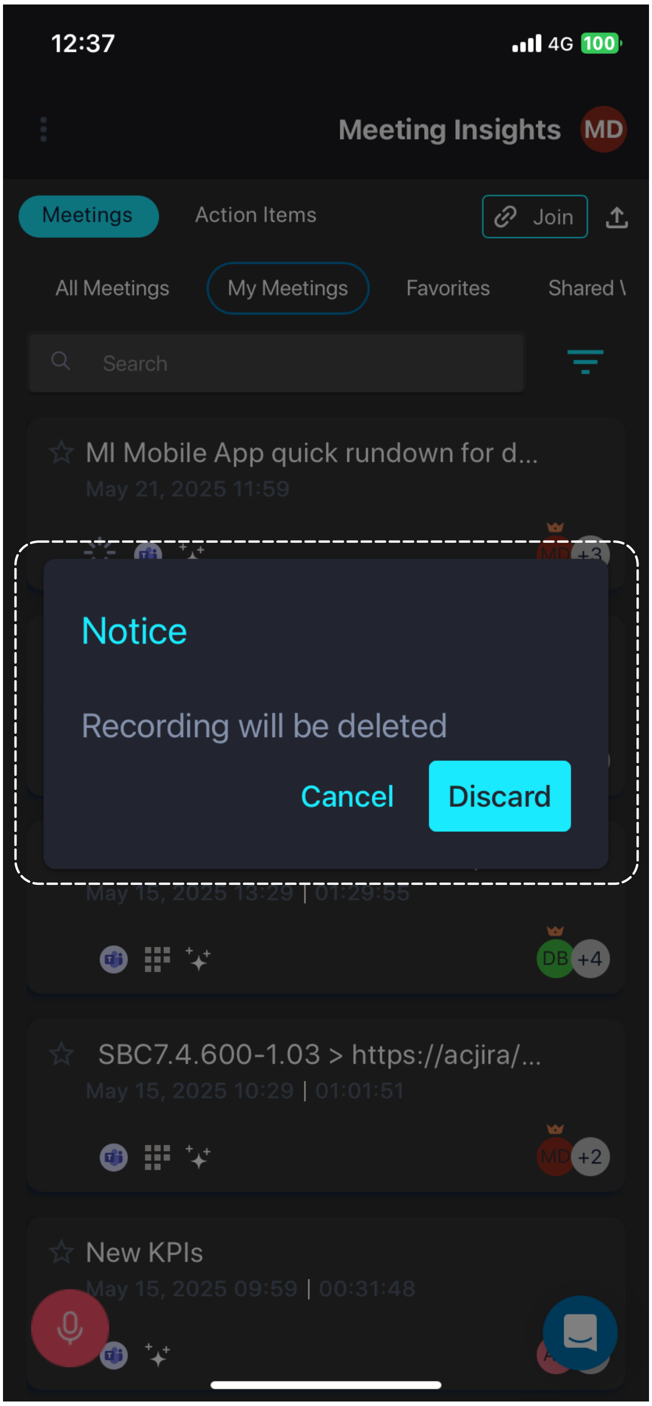
Uploaded ad-hoc recordings are displayed in the List View with the microphone icon, as shown in the following example:



- **Save and Upload Later:** Saves the recording on your mobile phone. To upload saved ad hoc recording files, see Uploading Saved Ad-Hoc Recordings on page 118.

9. To delete the recording:

   a. Tap **Discard**; the following confirmation message appears:



b. Tap **Discard** to confirm.

External Microsoft Teams Meetings

Meeting Insights can record Microsoft Teams meetings that are hosted (initiated) by other organizations (i.e., not your organization).

The external Teams meeting can be recorded ad hoc during the meeting or recorded by forwarding the scheduled meeting to Meeting Insights bot (Mia):

- Recording external Teams meetings ad hoc - Ad Hoc Recording of External Teams Meetings below
- Recording scheduled external Teams meetings - Recording Scheduled External Teams Meetings on page 50

- Recording of external Teams meetings is possible only if the following conditions exist:
  - ✓ The feature has been enabled for your organization by AudioCodes and your organization's Meeting Insights admin has enabled it for you.
  - ✓ The Teams policy of the organization hosting the meeting allows anonymous users to join their Teams meetings. For more details, consult with your Meeting Insights admin.
- The Meeting Insights side panel which can be displayed during a meeting is not supported for external Teams meetings.
- The name of the Meeting Insights bot that joins external Teams meetings is defined by your Meeting Insights admin. By default, the bot name is the first name of the participant that added the Meeting Insights bot to the meeting followed by "Meeting Assistant" (e.g., "John Meeting Assistant").
- Participants from the other organization aren't given access to the meeting recording in Meeting Insights. However, the Owner of the meeting recording can share it to these participants.

Ad Hoc Recording of External Teams Meetings

You can add the Meeting Insights bot during an external Microsoft Teams meeting hosted by another organization. To join Meeting Insights to the external Teams meeting on the fly so that it can record the meeting, you need to obtain the URL of the meeting and then paste it into Meeting Insights.

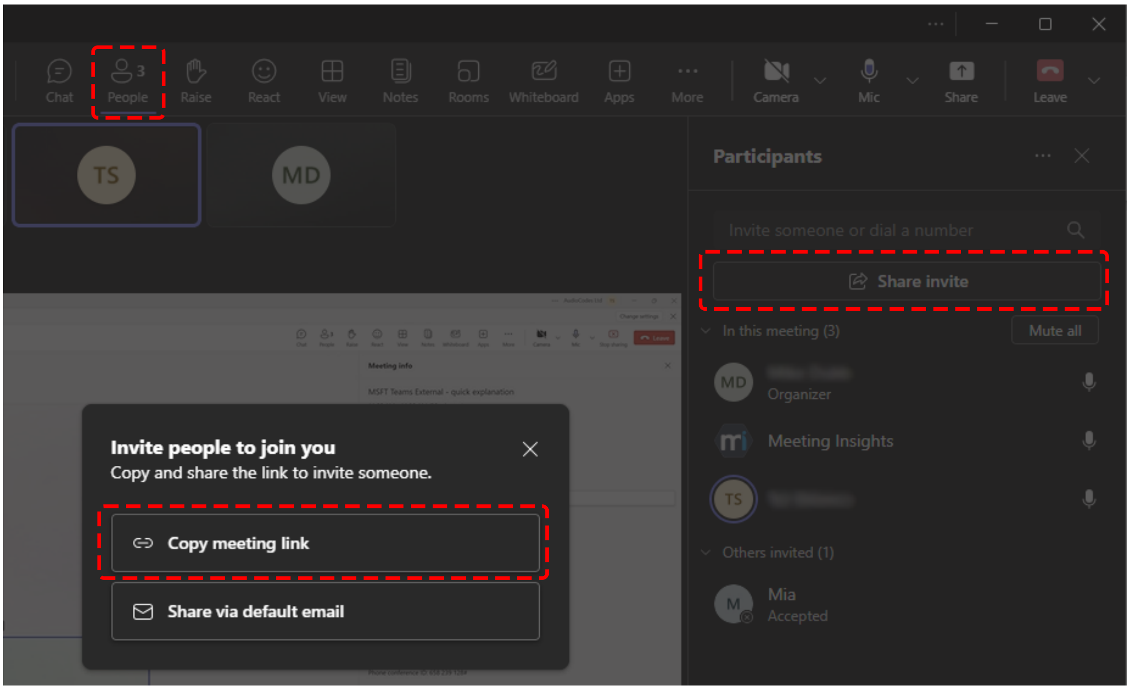
Meeting Insights offers the same feature support to external meetings as internal meetings (within your organization), except for the in-meeting side panel. The Meeting Insights user that pastes the Teams meeting URL is the Owner of the meeting recording. Participants of the other organization are indicated in the participant list as "External user".

- The user who initiates the recording of the external Teams meeting becomes the Owner of the meeting recording. Subsequent users who also add Mia to the external Teams meeting become co-owners (edit permissions) on the existing meeting recording.
- Participants from the other organization are not granted access to the meeting recording. However, the Owner of the meeting recording can share it with them.

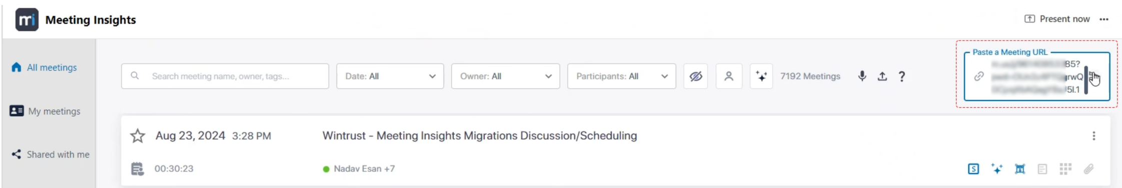
➢ To record external Teams meeting ad hoc:

1. Obtain the Teams meeting URL (copy to clipboard):
   - **In the Teams Calendar:** Open the meeting in your Teams calendar and find the "Join Microsoft Teams Meeting" section.

- **From an Email Invite:** In the meeting invite email, look for the "Join the meeting" or similar link.
- **In an Existing Meeting:** If you're already in a meeting, click the **People** icon, click **Share Invite**, and then click **Copy meeting link**:



2. Paste the Teams meeting URL into Meeting Insights:
   - **Meeting Insights Web Interface and Teams Desktop Client:**
     i. Log in to the Meeting Insights Web interface.
     ii. In the List View, paste the Teams meeting URL from your clipboard into the 'Paste a Meeting URL' field located in the top-right corner of the window:

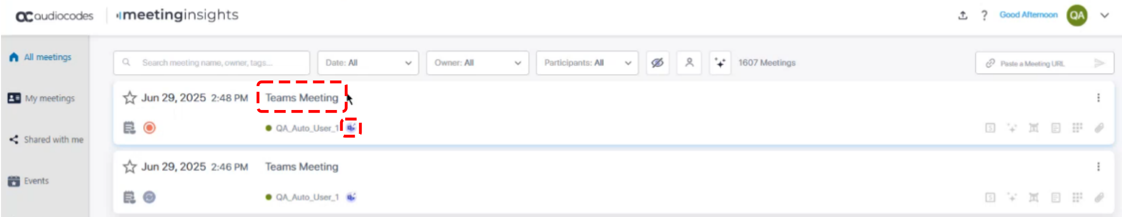


a. Click the icon to submit the URL; a message appears informing you that Meeting Insights has sent a request to join the Teams meeting (as Mia or the configured bot name). You'll see the meeting added to your meeting list with the following connection statuses:

- "Connecting" - Meeting Insights bot is attempting to join the Teams meeting (may take some minutes).
- "Pending Admission" Meeting Insights bot has connected to the Teams meeting and is waiting in the lobby to be admitted.

- Meeting Insights bot has been rejected by the external meeting to join.

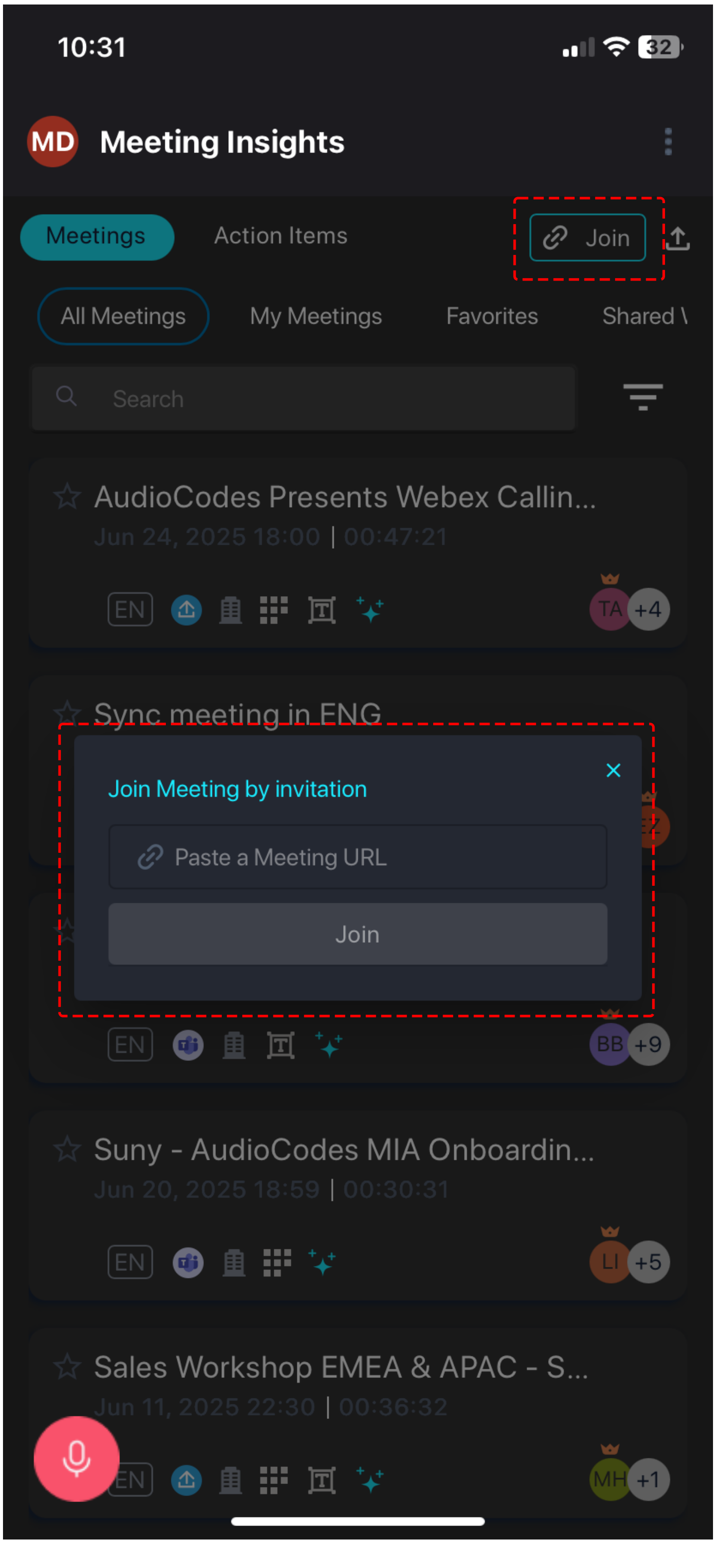
Once joined, Meeting Insights displays the external Teams meeting in the meeting recording list with the label "Teams Meeting" and the Teams icon:



- **Meeting Insights for Mobile Devices:**

  a. Open the Meeting Insights mobile app on your mobile device; the meetings list page appears.

  b. Tap the **Join** button, located in the top-right corner of the screen; the Join meeting by Invitation dialog box appears:



c. In the 'Paste a Meeting URL' field, paste the Teams meeting URL from your clipboard.

d. Click **Join**.

Recording Scheduled External Teams Meetings

You can record scheduled external Microsoft Teams meetings hosted by other organizations, by forwarding the scheduled meeting invite to Mia the Meeting Insights bot (mia@audiocodes.com). Mia automatically joins the meeting when it starts.

- The meeting invitation is accepted by Mia only if at least one of the invitees belongs to your organization and has permission to record external Teams meetings.
- All invitees that belong to your organization and have permission to record external Teams meetings become Owners of the meeting recording; the other invitees get view-only permission.

Zoom Meetings

You can use Meeting Insights to record Zoom meetings. These include both internal and external Zoom meetings. Internal meetings are those that are hosted by your organization and initiated by one of your Meeting Insights users. External meetings are those that are hosted by an outside organization, organized by an external party, where Meeting Insights users are invited to the meeting.

You can use Meeting Insights to record Zoom meetings for different scenarios:

- **Scenario 1: Receiving a Zoom Meeting Invitation**

  Upon receiving a Zoom meeting invitation, you wish to utilize Meeting Insights to record the session (see Adding Recording to a Zoom Meeting Invitation below).

- **Scenario 2: Recording Ad Hoc in a Zoom Meeting**

  During an ongoing Zoom meeting, you spontaneously opt to record the session using Meeting Insights (see Ad Hoc Recording of Zoom Meetings on page 52).

- **Scenario 3: Scheduling a Recorded Zoom Meeting**

  You intend to schedule a Zoom meeting, pre-configuring it to be recorded through Meeting Insights (see Scheduling a Zoom Meeting with Recording on page 57).

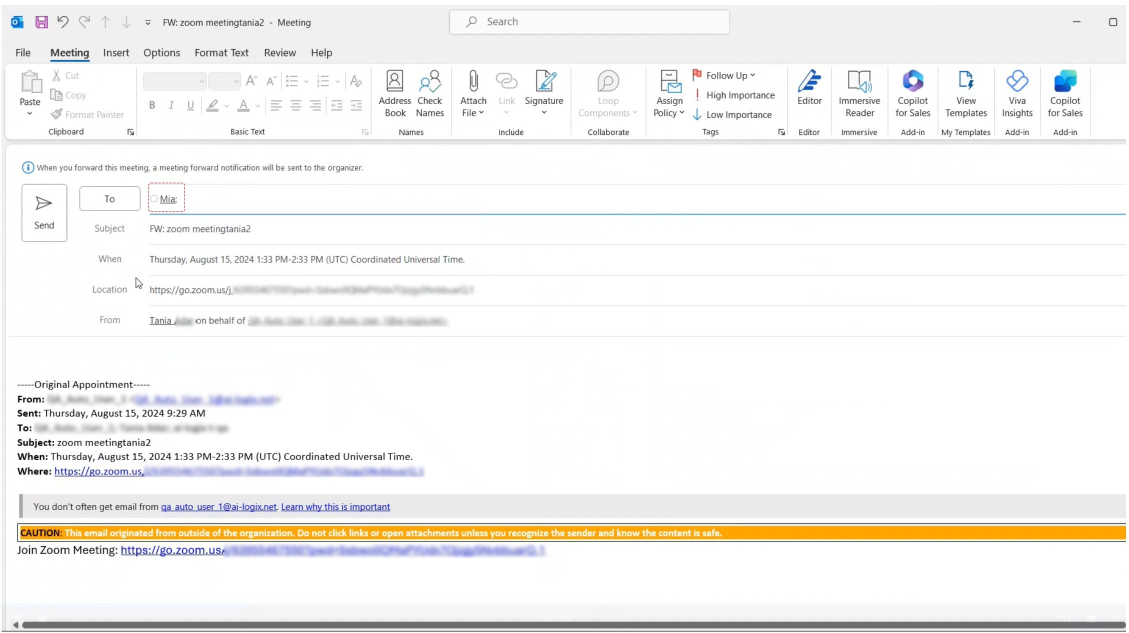
Adding Recording to a Zoom Meeting Invitation

If you have received a Zoom meeting invitation, you can get Meeting Insights to record it by forwarding the meeting to Meeting Insights Mia. When the Zoom meeting starts, Mia will join automatically.

- For Zoom meetings that are initiated by a person within your organization (i.e., internal meeting):
  - ✓ The meeting is recorded (invitation accepted by Mia) only if the organizer of the meeting has permission to record Zoom meetings (enabled by your Administrator), regardless of who sent the invitation.
  - ✓ The organizer of the meeting is the Owner.
  - ✓ All invitees within your organization have access to the recorded meeting.
  - ✓ Participants not originally invited to the meeting can access the recorded meeting only if it's shared with them by the organizer.
- For Zoom meetings that are initiated by a person outside of your organization (i.e., external meeting):
  - ✓ The Zoom meeting is recorded (invitation accepted by Mia) only if at least one of the invitees within your organization is a Meeting Insights user that has permission to record Zoom meetings (enabled by your Administrator).
  - ✓ All invitees within your organization that have permission to record Zoom meetings can forward the invitation and have Owner permission; the remaining invitees have view permission only.

➢ To forward Zoom meeting invitation for recording:

1. In your Outlook Inbox, right-click the received Zoom meeting invitation, and then from the shortcut menu, choose **Forward**
2. In your Outlook Calendar, right-click the saved appointment, and then from the shortcut menu, choose **Forward**.
3. In the To field, add the Meeting Insights "Mia" contact:



4. Click **Send**.

Alternatively, you can first accept the Zoom meeting invitation and then forward it:

1. In your Outlook Inbox, right-click the received Zoom meeting invitation, and then from the shortcut menu, choose **Accept**.
2. In your Outlook Calendar, right-click the accepted Zoom meeting invitation, and then from the shortcut menu, choose **Forward**.
3. In the To field, add the Meeting Insights "Mia" contact.
4. Click **Send**.

Ad Hoc Recording of Zoom Meetings

At any time during a Zoom meeting, you can invite Meeting Insight's Mia ad hoc to start recording the meeting.

Recording a Zoom meeting by Meeting Insights includes the following main steps:

1. Obtaining the URL of the Zoom meeting (see Obtaining URL of Zoom Meeting below).
2. Pasting the URL into Meeting Insights management interface (see Pasting Zoom URL into Meeting Insights on page 54).

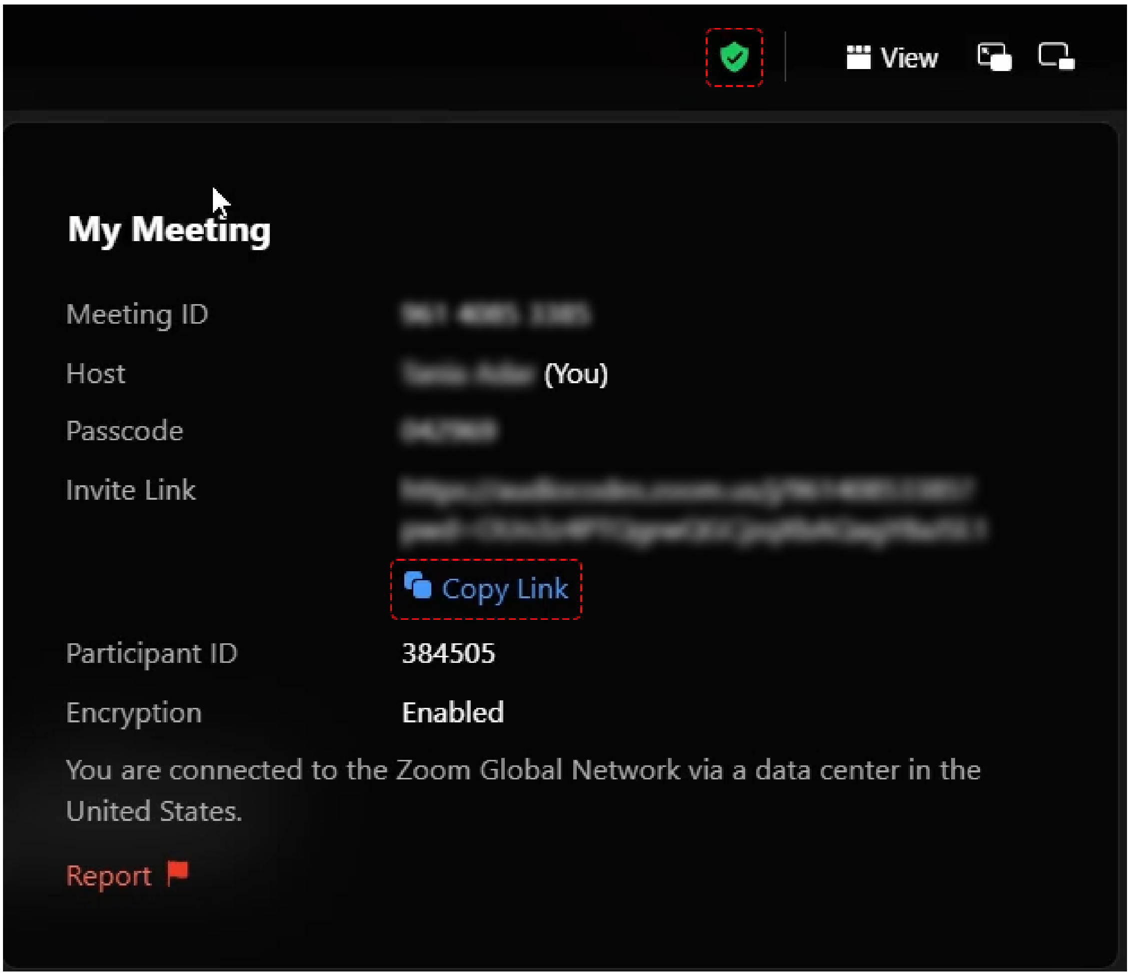
- Ad hoc recording of Zoom meetings can only be done by Meeting Insights users that have permission (enabled by your Administrator) to record Zoom meetings.
- The user who initiates the ad hoc recording of the Zoom meeting is granted Owner permissions.
- Other meeting participants or users can access the ad hoc recorded Zoom meeting only if the Owner shares it with them.

Obtaining URL of Zoom Meeting

Before you can add Meeting Insights ad hoc to a Zoom meeting for recording, you need to obtain the URL of the Zoom meeting.

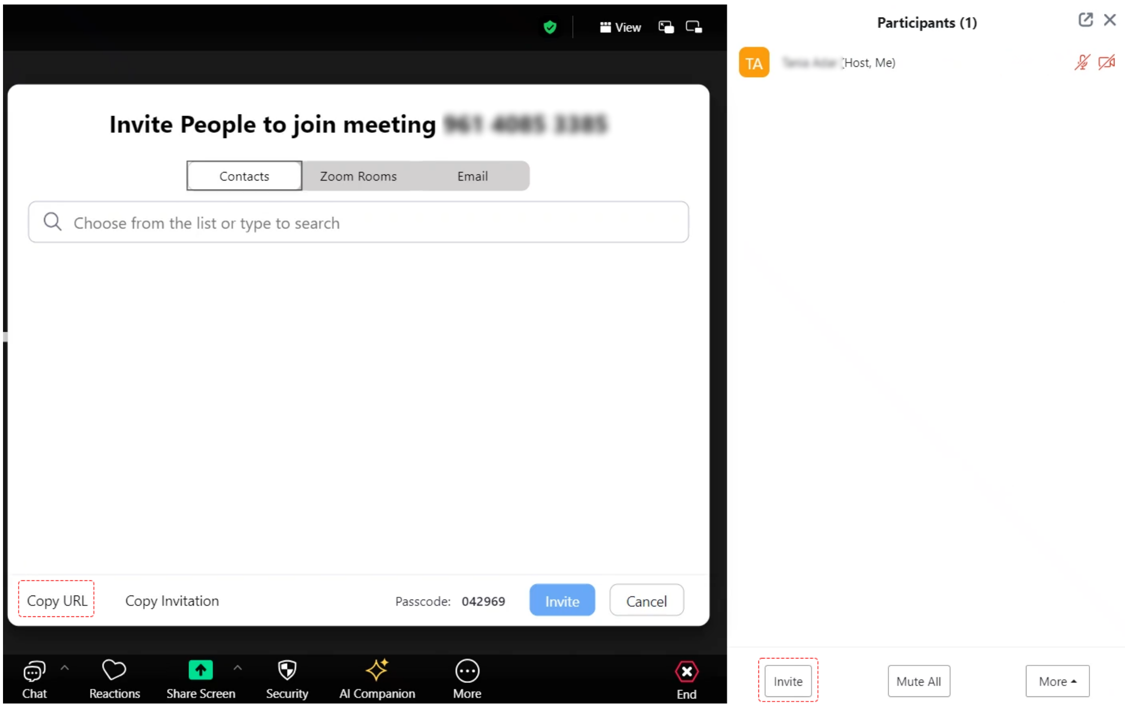
➢ **To obtain URL of Zoom meeting:**

1. In the Zoom meeting's web portal, click the Meeting Information icon, located in the top corner of the meeting window; the My Meeting dialog box appears.
2. Click **Copy Link** under the 'Invite Link' field; the URL is copied to your clipboard:



You can also copy the link when viewing or inviting participants:

1. At the bottom of the Participants panel, click **Invite**; a dialog box appears.
2. In the dialog box, click **Copy URL**:



Pasting Zoom URL into Meeting Insights

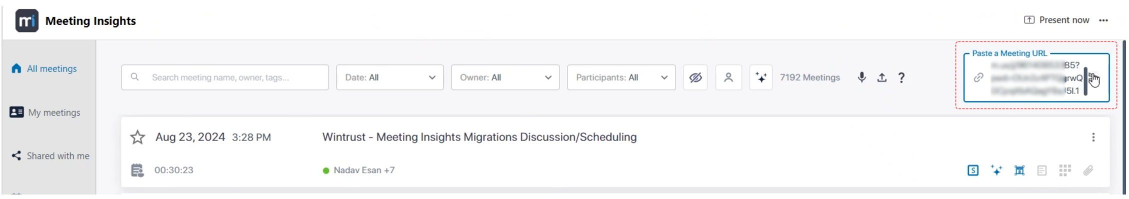
Once you have obtain the Zoom meeting's URL (see Obtaining URL of Zoom Meeting on page 52), you need to paste it into Meeting Insights.

➢ To paste Zoom meeting URL into Meeting Insights:

■ **Meeting Insights Web Interface and Teams Desktop Client:**

a. Log in to the Meeting Insights Web interface.

b. In the 'Paste a Meeting URL' field located in the top-right corner of the window, paste the Zoom meeting invite link from your clipboard:

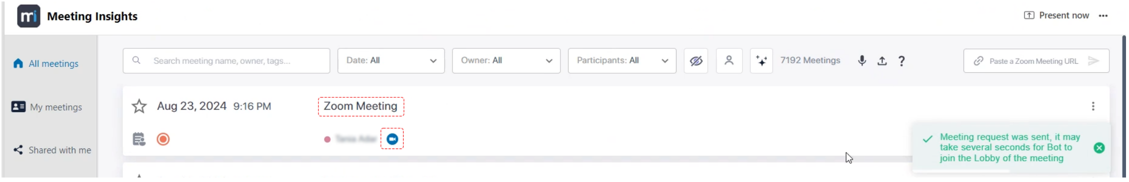


c. Click the icon to submit the URL; a message appears informing you that Meeting Insights has sent a request to join the Zoom meeting (as Mia). In the meeting recording list, the meeting displays the following connection stages:

- "Connecting" - Meeting Insights bot is attempting to join the Zoom meeting (may take some minutes).
- "Pending Admission" Meeting Insights bot has connected to the Zoom meeting and is waiting in the lobby to be admitted.

- Meeting Insights bot has been rejected by the external meeting to join.

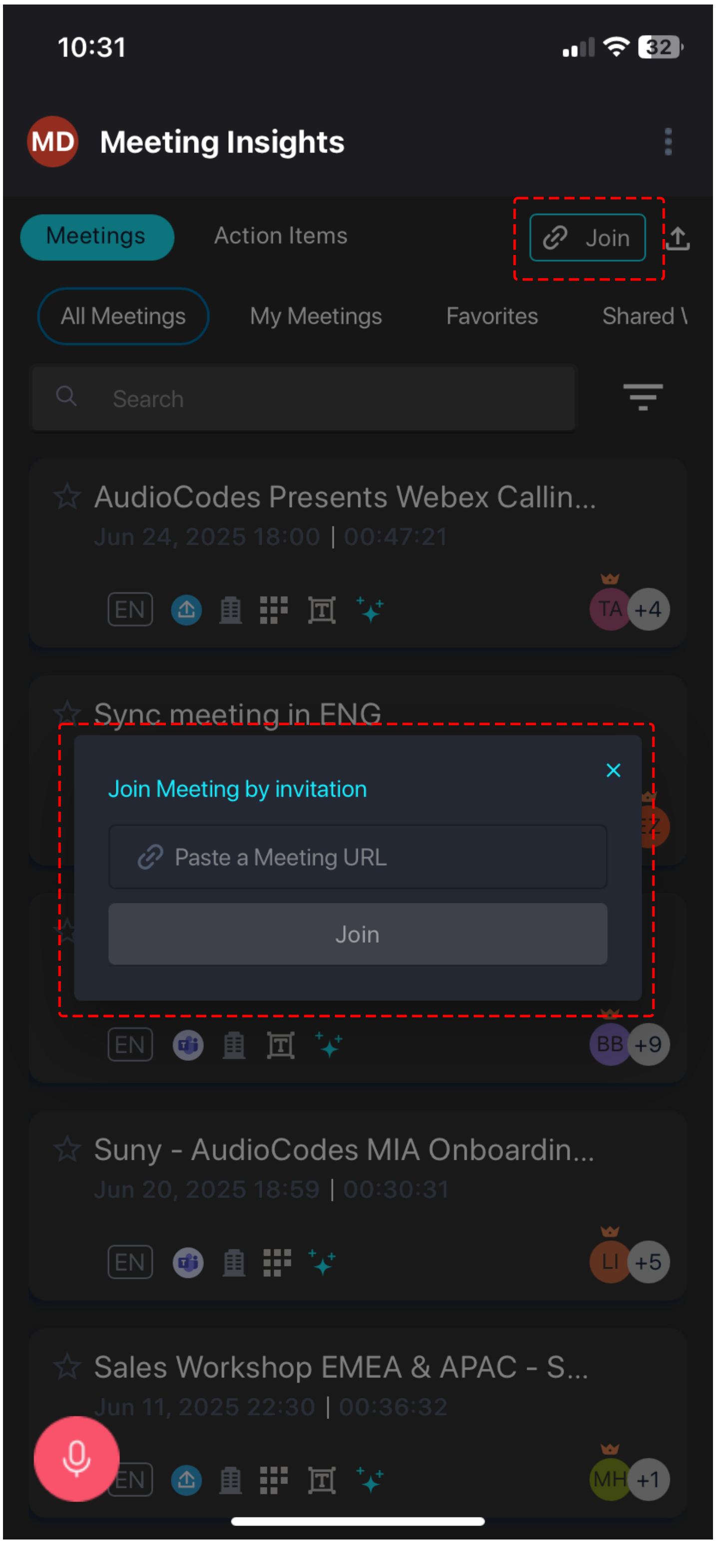
Once joined, Meeting Insights displays the external Zoom meeting in the meeting recording list with the label "Zoom Meeting" and the Zoom icon:



- **Meeting Insights for Mobile Devices:**

  a. Open the Meeting Insights mobile app on your mobile device; the meetings list page appears.

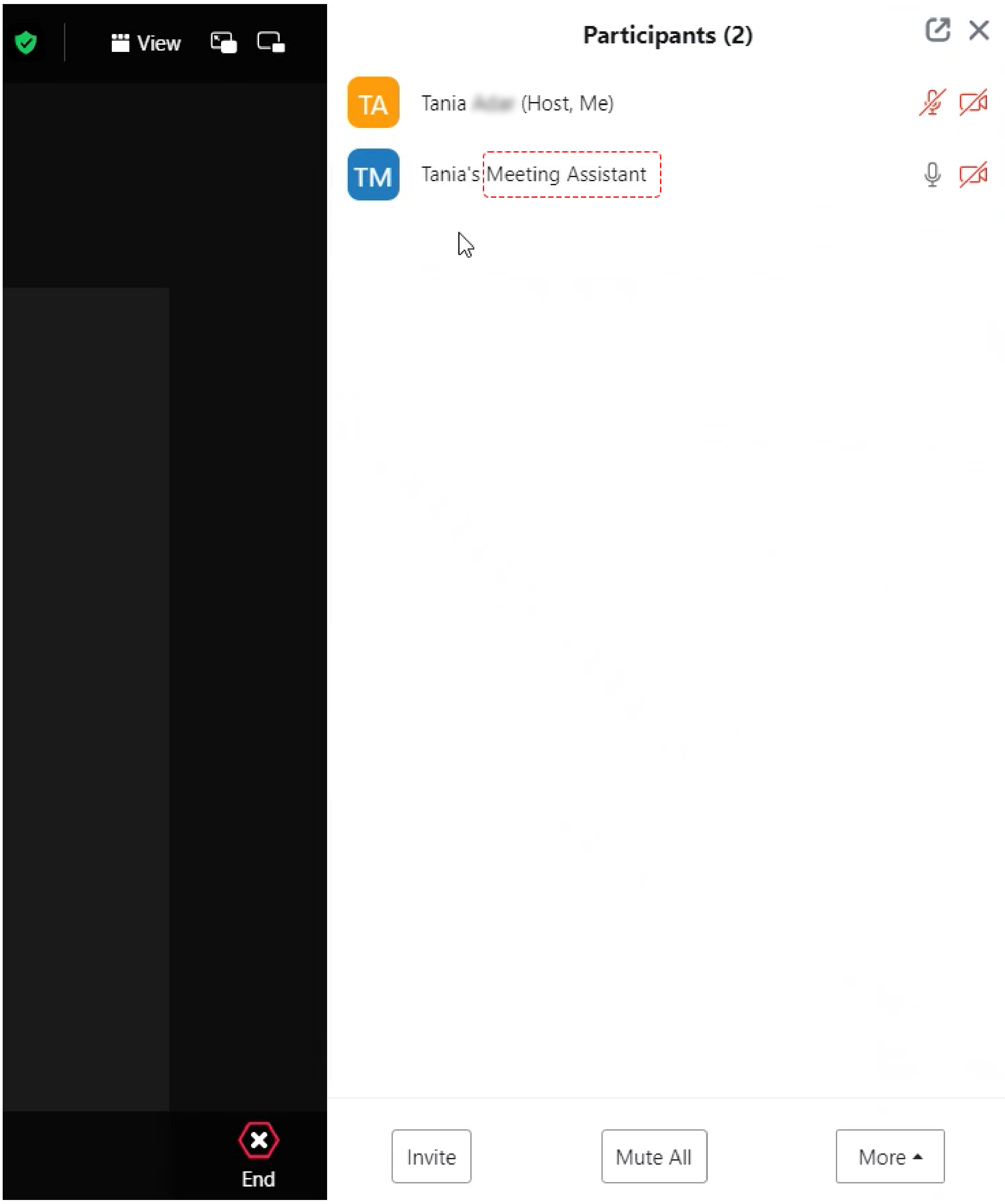
  b. Tap the **Join** button, located in the top-right corner of the screen; the Join meeting by Invitation dialog box appears:



c. In the 'Paste a Meeting URL' field, paste the Zoom meeting URL (invite link) from your clipboard.

d. Click **Join**.

Once you've pasted the Zoom URL into Meeting Insights and joined the meeting, in your Zoom meeting, the Participants panel displays the Meeting Insights bot as an additional participant. The bot name is defined by your Administrator. In the example below, the bot's name includes the first name of the participant that invited Meeting Insights bot, followed by "Meeting Assistant":



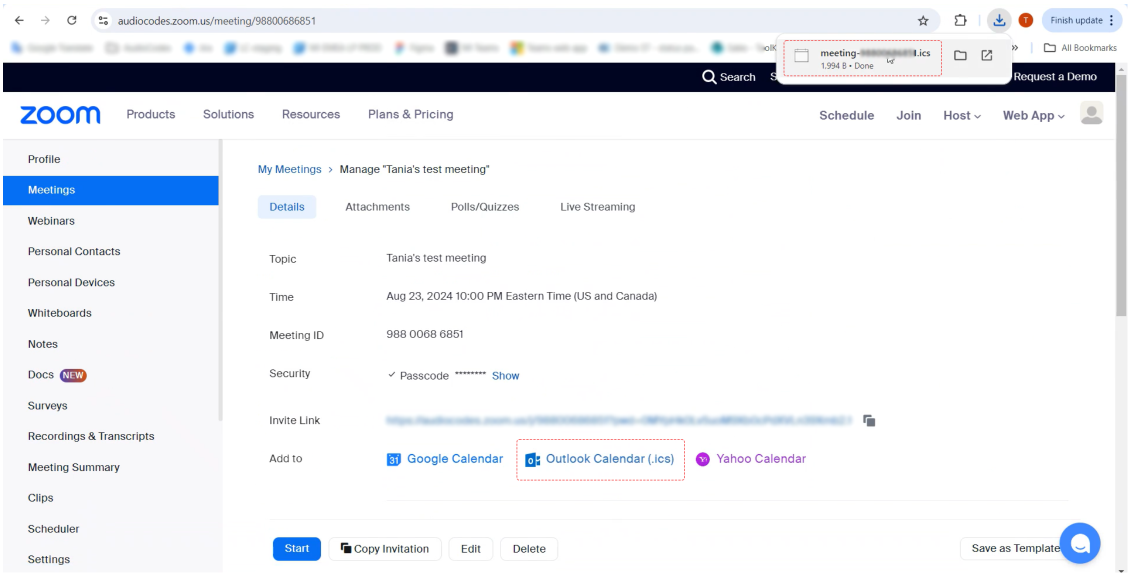
Scheduling a Zoom Meeting with Recording

You can get Meeting Insights to record scheduled Zoom meetings. This is done by adding the scheduled Zoom meeting to your Microsoft Outlook Calendar, and then forwarding it to all the participants that you want to invite, including Meeting Insights Mia.

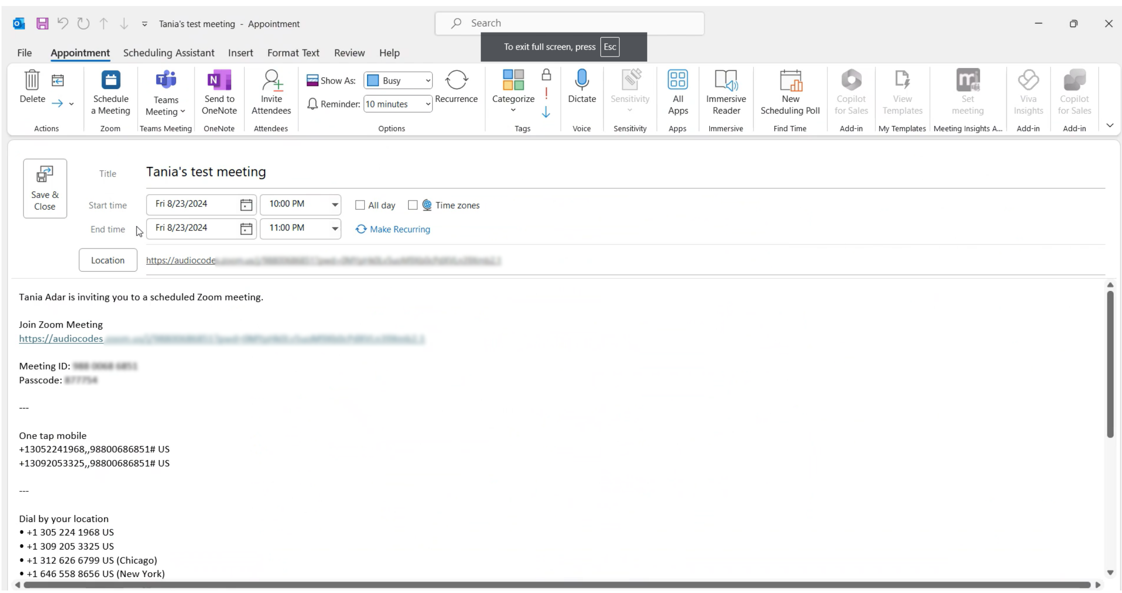
> Participants not originally invited to the Zoom meeting can access the recorded meeting only if it's shared with them by the organizer.

➢ To record a scheduled a Zoom meeting:

1. Sign in to the Zoom portal.
2. On the left menu pane, select **Meetings**, and then click the **Schedule a Meeting** button located on the right pane.
3. Enter the necessary information for your meeting such as the meeting's topic and the meeting's date and time.
4. Click **Save**; Zoom displays the details of your scheduled meeting and offers you various calendar services to which you can add the scheduled meeting and with which you can invite participants.
5. Select the **Outlook Calendar (.ics)** option, and then click the ICS filename displayed in the pop-up box in the top-right corner of the window:



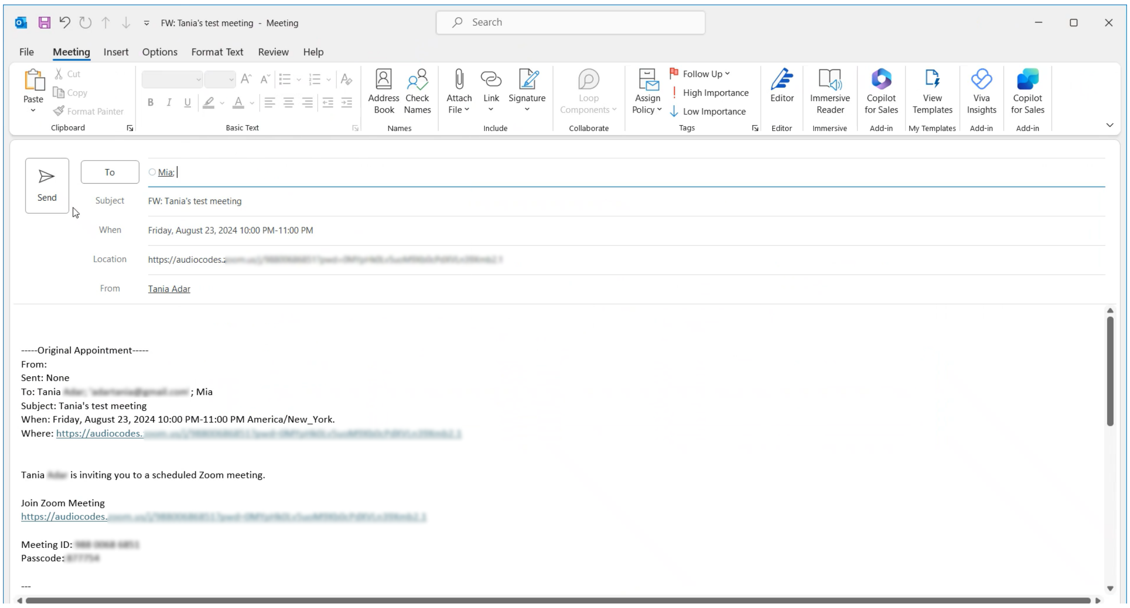
Your Microsoft Outlook Calendar opens and an appointment for the Zoom meeting is automatically created:



6. Click **Save & Close**.

7. In your Outlook Calendar, right-click the saved appointment, and then from the shortcut menu, choose **Forward**.

8. In the To field, add Meeting Insights "Mia" and all the participants that you want to invite to the Zoom meeting:



9. Click **Send** to send your scheduled Zoom meeting invitation.

Stopping Meeting Insights Recording of a Zoom Meeting

At any stage during the Zoom meeting, you can stop Meeting Insights recording by removing Mia from the meeting.

> ⚠ Meeting Insights provides a recording of the meeting up until Mia was removed from the meeting.

➢ To stop Meeting Insights recording of Zoom meeting:

1. In your Zoom meeting, open the Participants panel by clicking the **Participants**  icon.

2. Hover your mouse over Meeting Insights bot name, and then click **More**; a drop-down menu appears.

> ⚠ The Meeting Insights bot name is defined by your Administrator. For example, the bot name can include the first name of the participant that invited Meeting Insights bot, followed by "Meeting Assistant" (e.g., "Sue Meeting Assistant").

3. From the drop-down menu, choose **Remove**; a confirmation message box appears.

4. Click **OK** to confirm removal; Meeting Insights bot is removed from the meeting and recording stops.

6 In-Meeting Experience

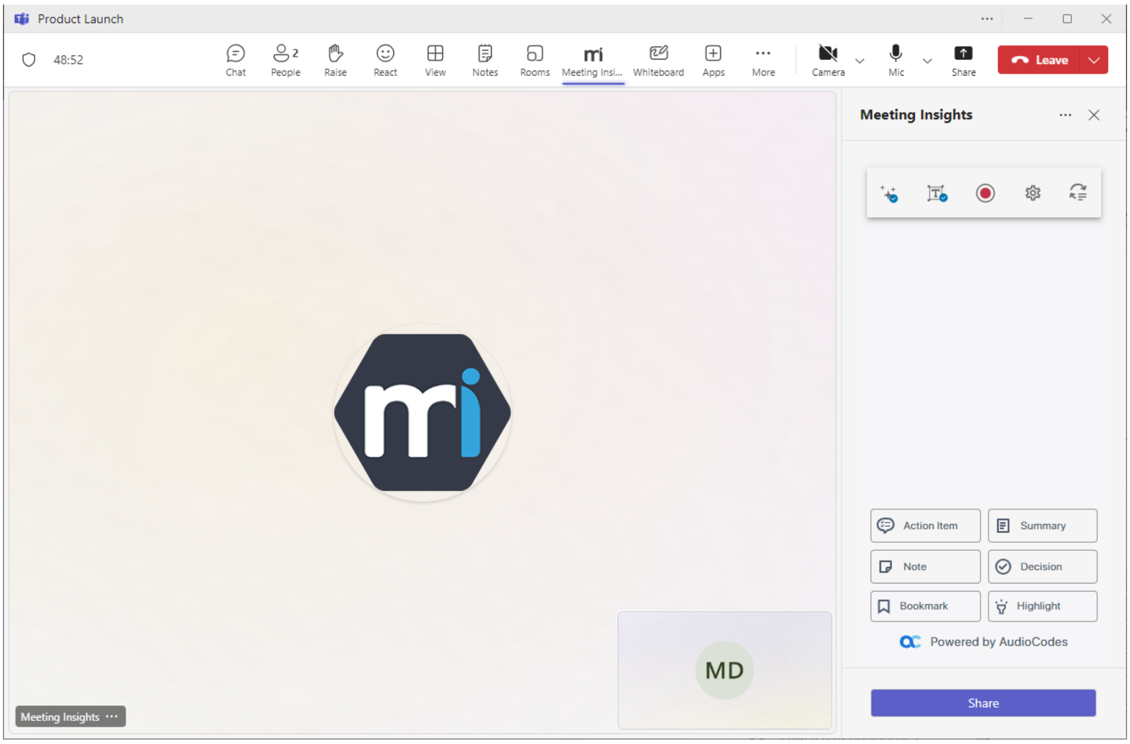
During the meeting recording, Meeting Insights lets you and participants perform various actions. The supported actions and ways to do them depend on the platform:

- Meeting Insights Web-based management tool (see In-Meeting Experience using Web Interface on page 77)
- Meeting Insights app for Teams desktop client (see In-Meeting Experience using App for Teams Desktop below)
- Meeting Insights mobile app (see In-Meeting Experience using Mobile App on page 82)

In-Meeting Experience using App for Teams Desktop

The Meeting Insights app provides you with an in-meeting experience for meeting recordings that were scheduled through Microsoft Outlook Calendar (as described in Scheduling Meeting Recordings through Microsoft Outlook Calendar on page 33). The in-meeting experience allows you and participants of the meeting recording to view and add meeting recap items from their Teams client meeting window during the meeting, using Meeting Insights app embedded in the Teams side panel, as shown below.

> Before you can use Meeting Insights in-meeting experience, make sure that you have integrated Meeting Insights into your Teams client, as described in Adding Meeting Insights App to Teams Desktop on page 9.

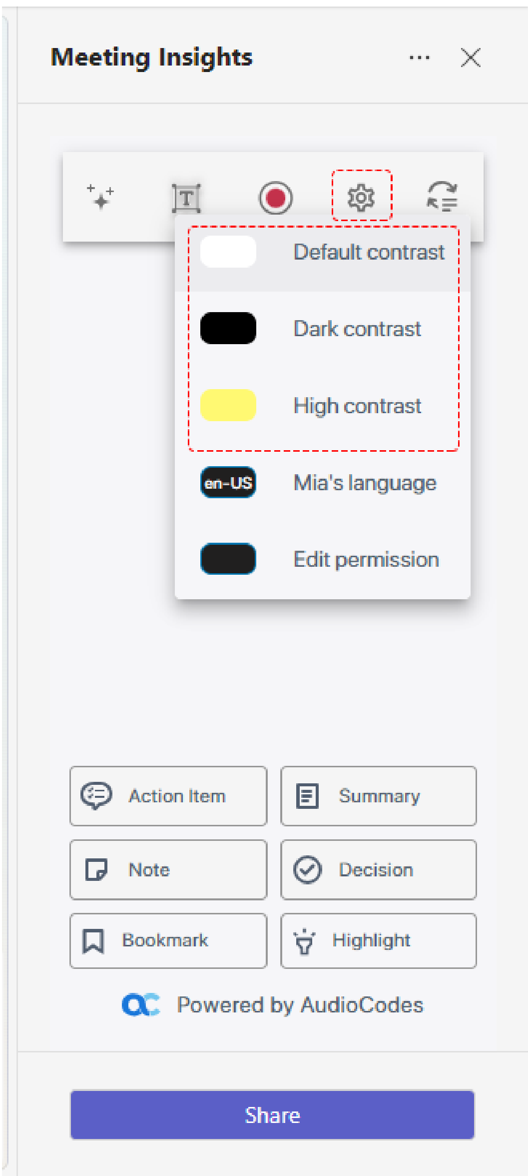


Changing Contrast of Meeting Insights Side Panel

To make it easier for you to read, you can change the contrast theme of the Meeting Insights side panel in your Teams meeting window.

➢ To change contrast of Meeting Insights side panel:

1. On the toolbar of the Meeting Insights side panel, click the **Settings** icon; a drop-down menu appears:



2. Select the contrast theme that you want:
   - **Default contrast:** (Default) Text is displayed in a black font color on a grayish background.
   - **Dark contrast:** Text is displayed in a white font color on a grayish background.

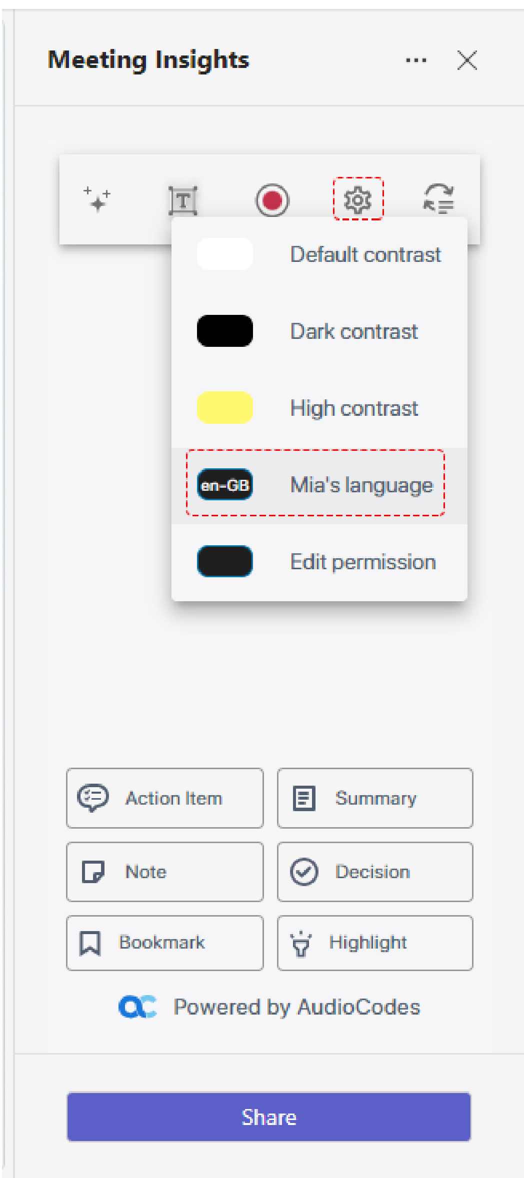
- **High contrast:** Text is displayed in a white font color on a black background and certain elements are displayed in a yellow.

Changing Language of Voice Assistant Mia

By default, voice-assistant Mia recognizes English phrases for activating the recording and transcription of your recap items. However, you can change the language during your in-meeting experience.

➢ **To change Mia's language:**

1. On the toolbar of the Meeting Insights side panel, click the **Settings** icon; a drop-down menu appears:



2. Choose **Mia's Language**; a pop-up appears.
3. From the drop-down list, select the language that you want, and then click **Save**.

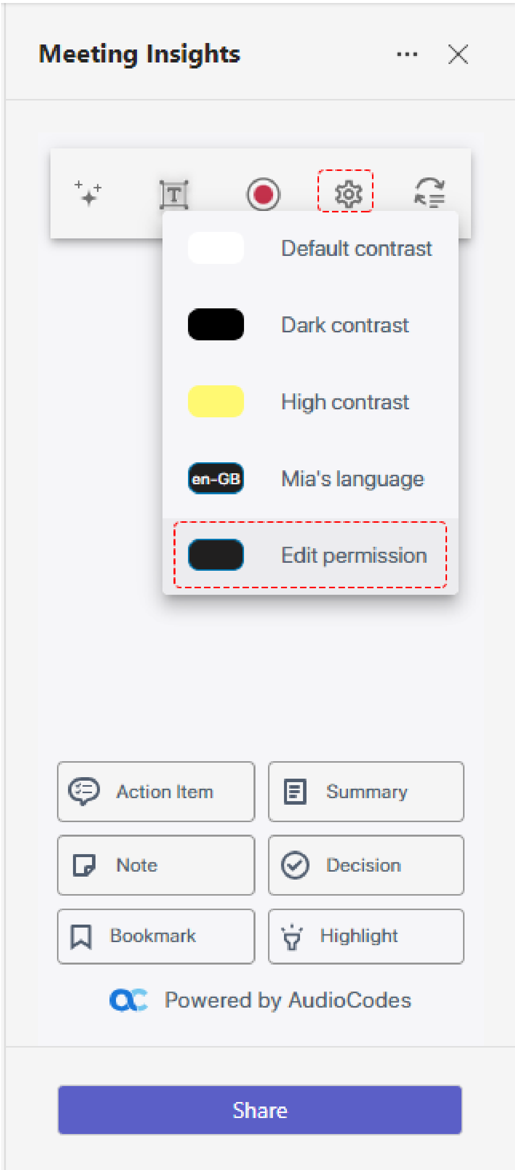
Changing Permission of Participants

By default, only the Owner (initiator) of the meeting has full read-write privileges to the meeting recording. All other participants have read-only (view) privileges. However, during the meeting recording, you can change a participant's privileges in your Teams meeting window.

> ⚠ You can also change a participant's privileges after the meeting recording, as described in Changing Permission of Participants above.

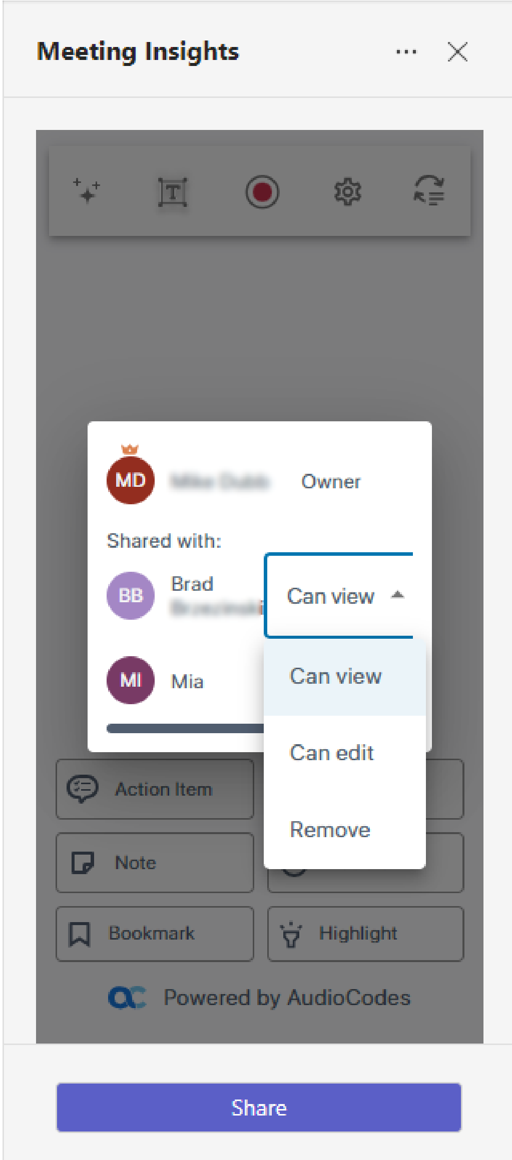
➢ To change participant's privileges:

1. On the toolbar of Meeting Insights side panel, click the **Settings** icon; a drop-down menu appears:



2. Choose **Edit Permissions**; a list of all the participants appears.

3. Click the arrow corresponding to the participant whose privileges you want to change, and then from the drop-down list, select one of the following:
   - **Can edit:** Assigns the participant only read privileges to the meeting recording.
   - **Can view:** Assigns the participant full read-write privileges to the meeting recording.



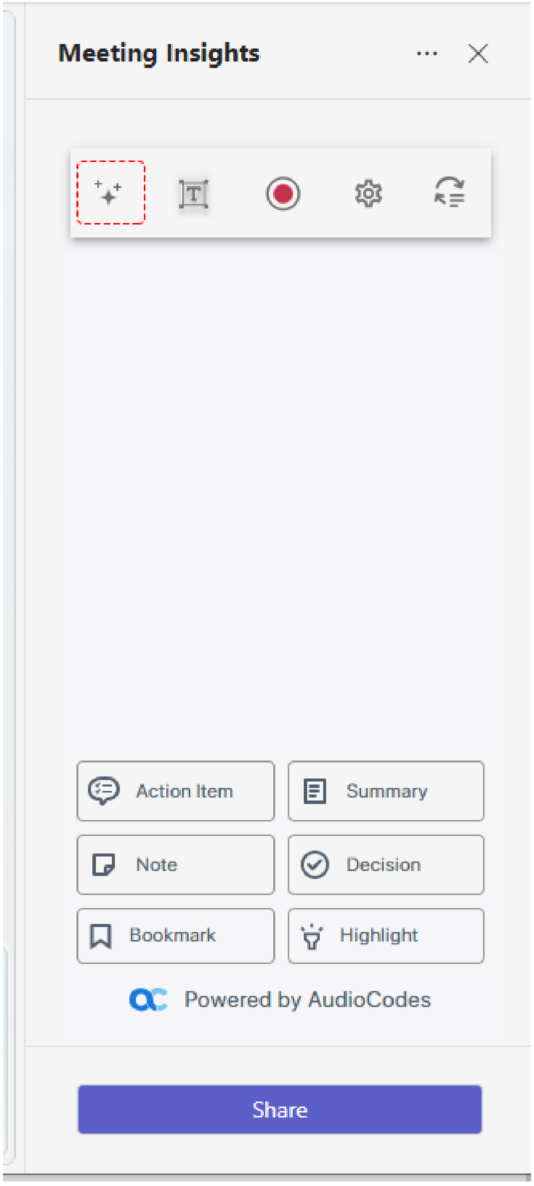
Running AI to Create Summary and Action Items

Meeting Insights offers you a quick and effective method for automatically creating a summary, outline, and action items for your meeting recording, using artificial intelligence (AI).

- The summary and action items are generated by an AI model, which may sometimes generate inaccurate information. Therefore, it's recommended that you review the summary and actions items, and edit them if required to ensure accuracy and relevance before sharing it with others.
- If you're the owner of the meeting recording, you can always trigger AI. However, participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
- It may take some minutes to generate the AI-powered summary and action items.
- When you activate AI, it always generates a summary, an outline, a transcription, and action items.

➢ To run AI to create summary and action items:

1. On the toolbar of the Meeting Insights side panel, click the **Activate AI** icon:



The icon (and icon) is displayed with a blue tick, indicating that AI has been activated.

2. To stop AI, click the icon again; the icon no longer appears with the blue tick and AI is deactivated.

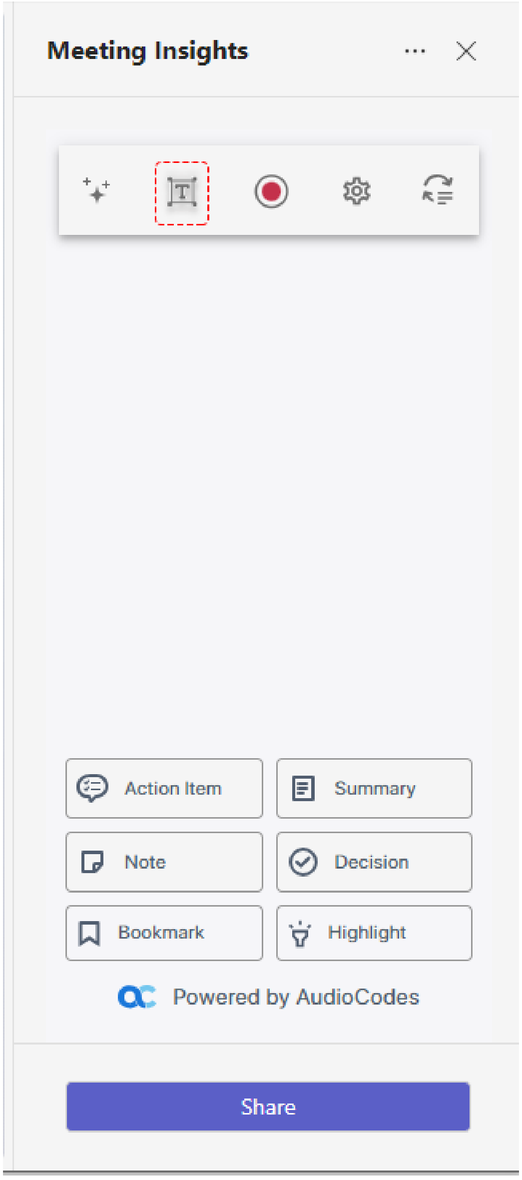
Activating Transcription in Teams Meeting Window

At any time during the meeting, you can enable Meeting Insights to transcribe all speech spoken by the participants into text.

- Only the Owner (or co-organizers) of the meeting recording can enable transcription.
- For managing the transcription after the meeting recording, see Managing Transcription on page 202.

➢ **To enable transcription:**

1. On the toolbar of Meeting Insights side panel, click the **Activate Transcription** icon:



The icon is displayed with a blue tick, indicating that transcription has been activated.

2. To stop transcription, click the icon again; the icon no longer appears with the blue tick and transcription is deactivated.

Adding Meeting Recap in Teams Meeting

Once you have added the Meeting Insights optimized-for-meetings app icon to your joined meeting, as described in Adding Meeting Insights Tab to Teams Meeting Window, you can start adding meeting recap items (summary, decisions, action items, and notes) in the Meeting Insights side panel of the Teams meeting window.

You can add recap items using any of the following methods:

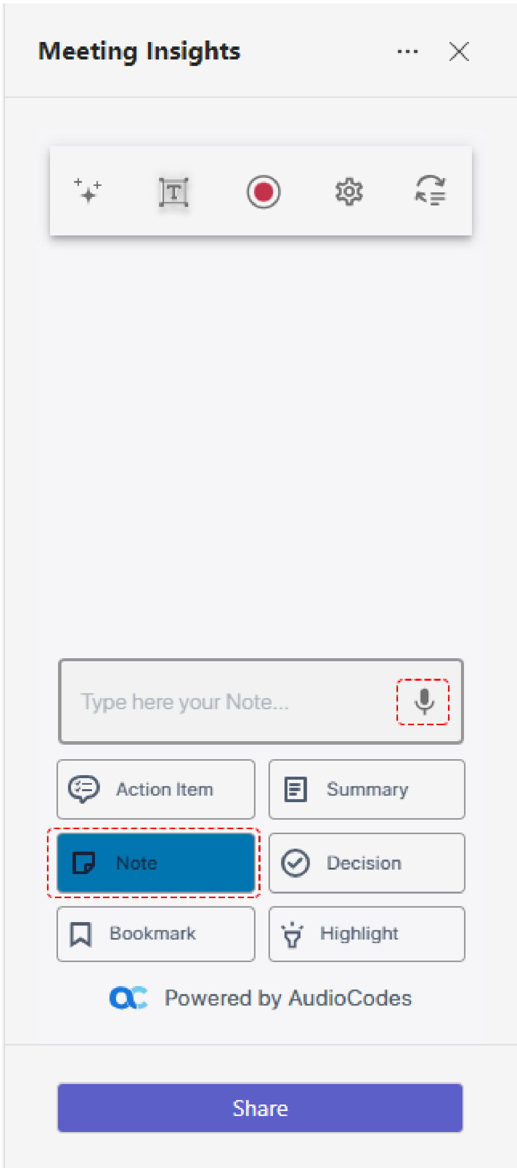
- Using the microphone to record your recap.
- Using the text box to type the recap text.

- The Owner of the meeting recording can add all recap types; participants can add only notes.
- Only one summary can be added per meeting recording.
- Action items, decisions and the summary are always public and therefore, visible to everyone that has access to the meeting recording. You can make notes private or public.

➢ To add a meeting recap:

1. To add a recap using microphone:

a. In the Meeting Insights side panel, click the required recap type button - **Action Item**, **Note**, **Summary**, or **Decision**:



b. Click the microphone icon, and then record your voice for the recap.

c. When you want to end your recap, click the stop recording icon.

2. **To type a recap:**

- **Summary:**

  i. In the Meeting Insights side panel, click the **Summary** button.

  ii. In the text box, type the summary, and then click .

- **Decisions:**

  i. In the Meeting Insights side panel, click the **Decision** button.

  ii. In the text box, type the decision, and then click .

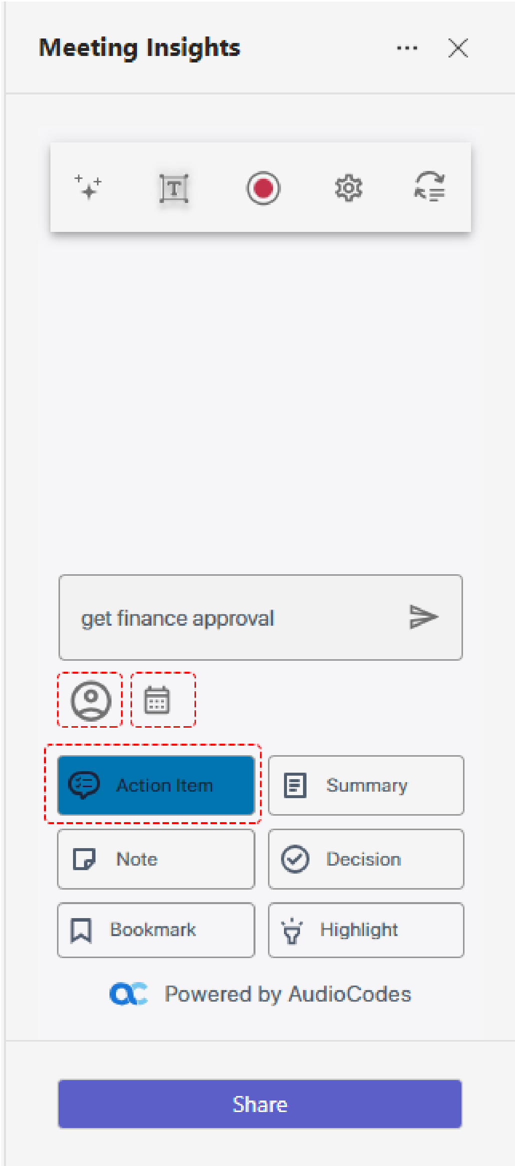
- **Action Items:**

  i. In the Meeting Insights side panel, click the **Action Item** button.

  ii. In the text box, type an action item / task.

  iii. To assign the action item to a specific participant, click , and then from the drop-down list, select the participant.

  iv. To define a due date for the action item, click , and then select the date from the displayed calendar.



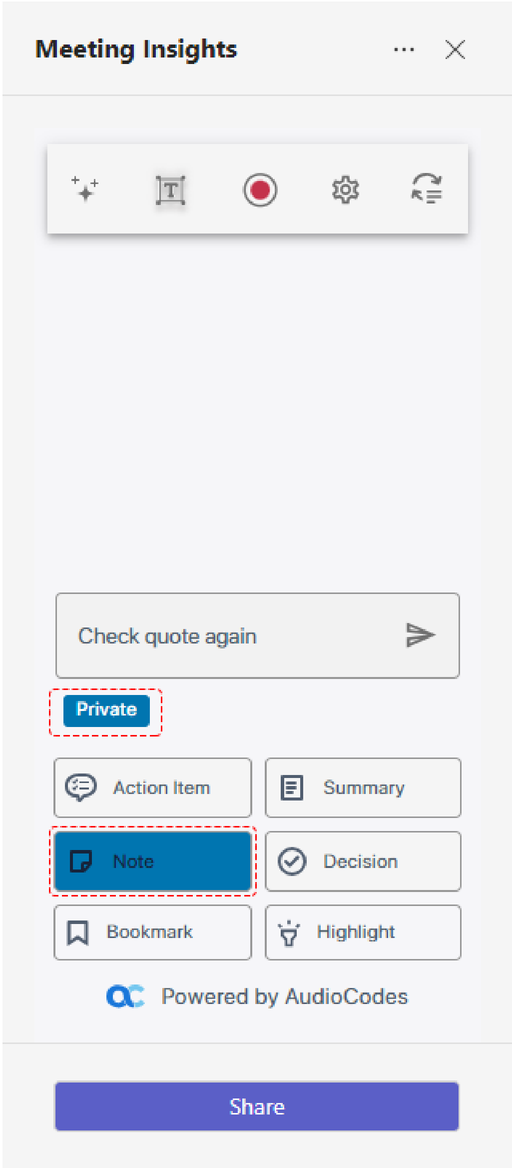
v. Click .

- **Notes:**

  i. In the Meeting Insights side panel, click the **Note** button.

  ii. In the text box, type your note.

  iii. To make the note visible only to you (private) or visible to everyone (public), toggle the **Private** / **Public** button.

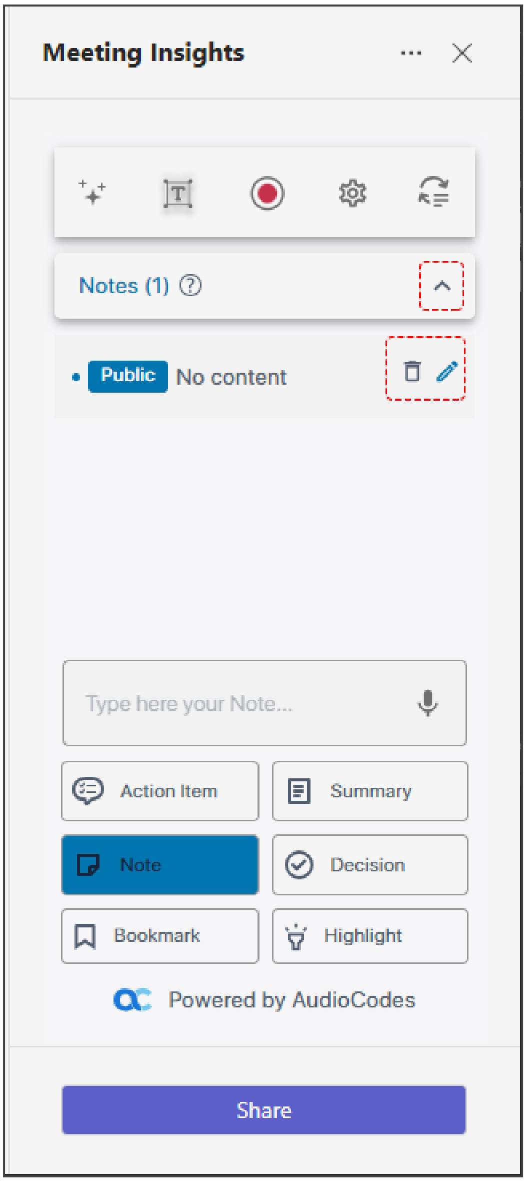


iv. Click .

You can edit or delete your recap items, as described in the following procedure:

➢ To edit or delete a recap:

1. In the Meeting Insights side panel, click the down-facing arrow to expand the recap.
2. Hover your mouse over the recap contents; the edit and delete icons appear on the right of the recap, as shown in the following example:



3. Do one of the following:
   - To edit the recap item, click , edit the recap item, and then click .
   - To delete the recap, click , and then in th epo-up message box, click **Delete** to confirm.

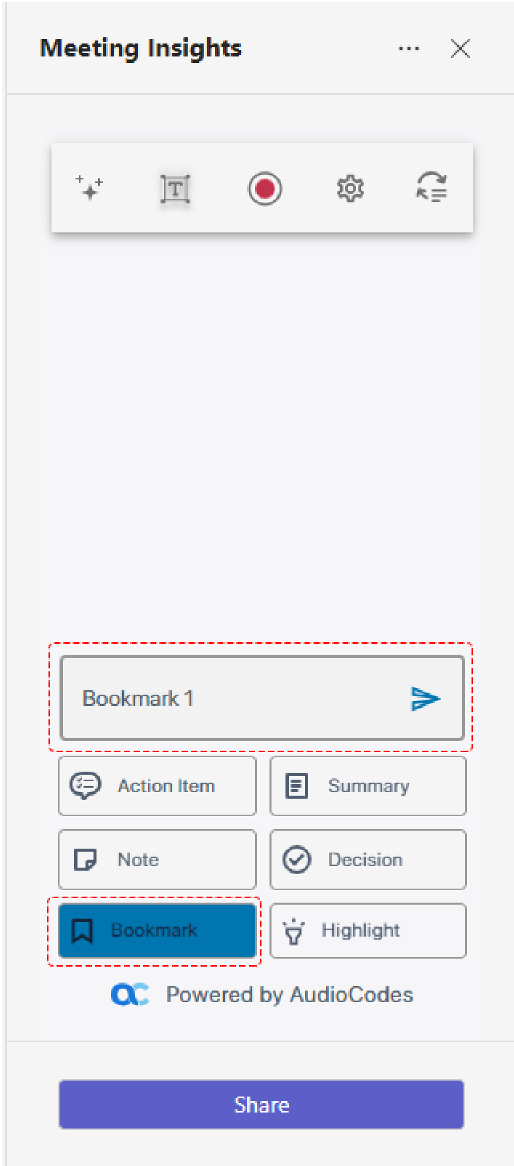
Adding Bookmarks in Teams Meeting Window

You and participants can add bookmarks during the meeting recording with a single click. A bookmark marks a specific place in the meeting recording, which you can return to at the end of the meeting recording (as described in Viewing Bookmarks on page 214).

Added bookmarks aren't displayed in the Meeting Insights side panel in Teams meeting window. You can view them after the meeting recording has ended, in the Player page, as described in Viewing Bookmarks on page 214.

➢ To add a bookmark:

1. In the Meeting Insights side panel, click the **Bookmark** button; a text box appears, allowing you to rename the bookmark.



2. In the text box, rename the bookmark or leave it at the default name. The default bookmark name is in the format "Bookmark <sequential bookmark number>" (e.g., Bookmark 1).
3. Click ➢ to add the bookmark.

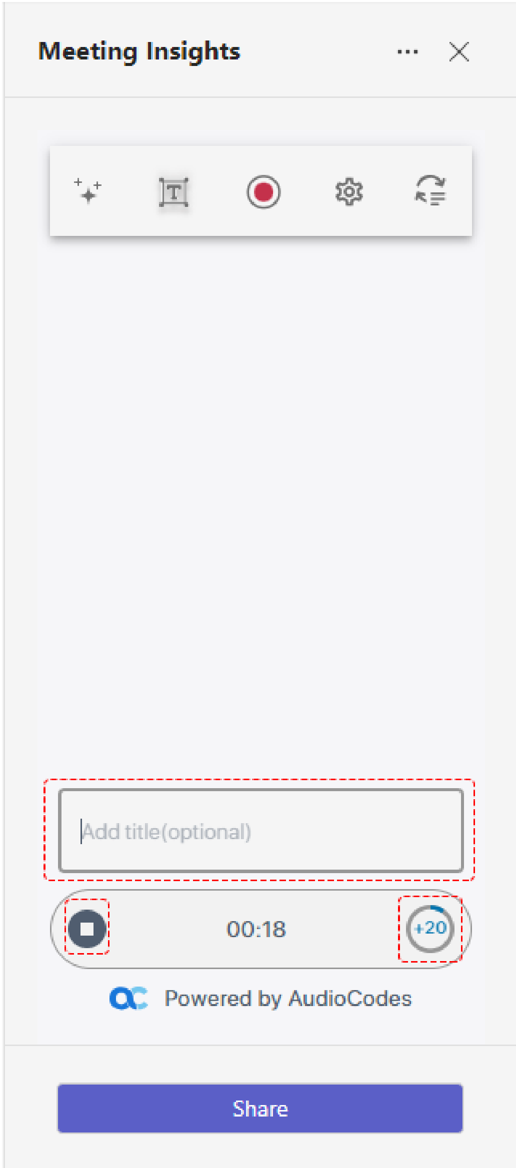
Adding Highlights in Teams Meeting Window

You and participants can highlight important parts of the meeting recording with a single click. The highlight not only tags the specific location of the meeting recording, but also provides a transcription of the audio where the highlight was added (by default, 20 seconds before and 20 seconds after). You can extend the transcription period by 20 seconds (before and after) or stop the transcription before the duration expires.

> Added highlights aren't displayed in the Meeting Insights side panel in Teams meeting window. You can view them after the meeting recording has ended, in the Player page, as described in Viewing Highlights on page 215.

➢ To add a highlight:

1. In the Meeting Insights side panel, click the **Highlight** button; the time remaining (e.g., 18 seconds) until Meeting Insights finishes transcribing the audio located 20 seconds before and 20 seconds after the highlight:



2. To add another 20 seconds of transcription, click **+20** (i.e., transcription is done for 40 seconds before and after highlight added).

3. To stop the transcription, click ; the highlight is added with the transcription of the duration that was displayed when you stopped it. For example, if you stopped the timer at 00:18, the highlight includes transcription of only 18 seconds before and after.

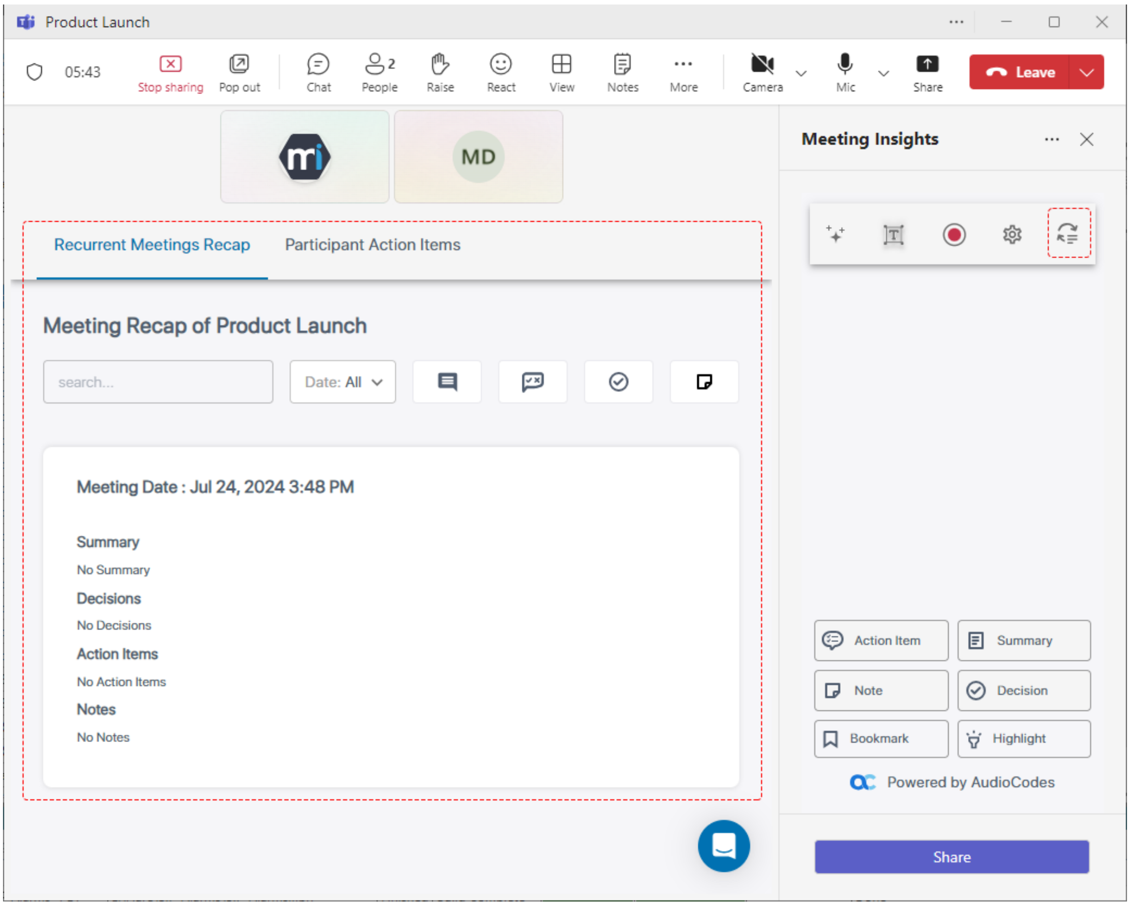
4. (Optional) In the text box, type a title for the highlight.

Viewing Recap and Action Items of Recurring Meetings

During a meeting recording that is a recurring meeting, you can display the recap and action items of all previous meetings in the series.

➢ To display recap and action items of recurring meeting:

1. In the Meeting Insights side panel, click the icon; the Teams window displays the meeting recap of all the meetings in the series:



2. To view the meeting recap, select the **Recurrent Meetings Recap** tab. You can filter the display by recap type and date.

3. To view action items, select the **Participant Action Items** tab.

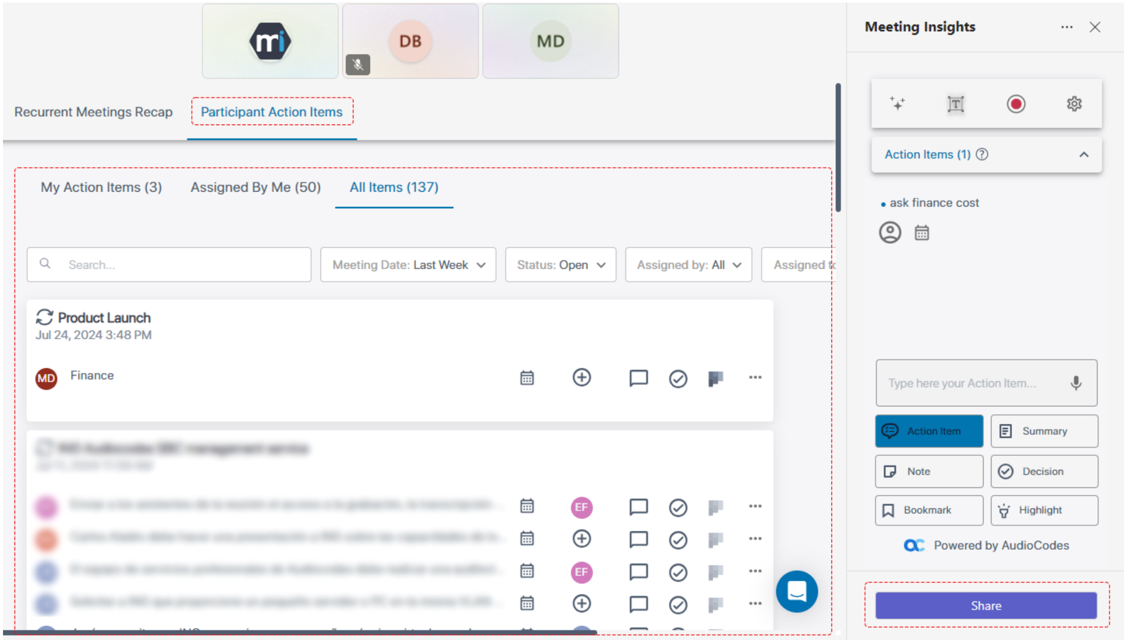
4. To stop the recurring meeting display, click the **Stop sharing** button, located on the Teams window toolbar.

Viewing Action Items during Meeting

During any meeting recording, you can view action items.

➢ To view action items during meeting:

1. In the Meeting Insights side panel, click the **Share** button; the Teams window displays the below:



2. Select the **Participant Action Items** tab.
3. Choose whose action items you want to view, by clicking **My Action Items**, **Assign By Me**, or **All Items**.
4. To quit the display, click the **Share** button again.

In-Meeting Experience using Web Interface

This section describes the actions you can do during the meeting recording, using Meeting Insights mobile app. The actions are done in the Live Panel of the active meeting.

The Live Panel displays the recap in real-time, updating its display as you and participants add recap items through the Live Panel or the Teams meeting window. It also reflects recap items added using the local microphone.

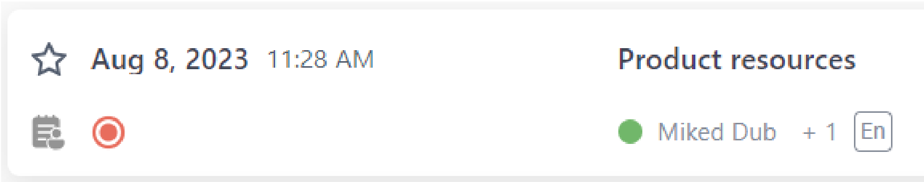
Accessing the Live Panel

You can access the Live Panel at any time during the meeting recording.

➢ To access Live Panel:

1. Open the **All Meetings** page.

2. Locate your ongoing meeting recording, which is indicated by the **Recording** icon, as shown in the following example:



3. Click the meeting recording's name; the Live Panel window opens.

- The Live Panel is accessible only during the meeting recording.
- Participants of the meeting recording can also access the Live Panel through their mobile phones by simply logging into their Meeting Insights account.
- Participants added during the meeting recording can't access the Live Panel and therefore, can't add meeting recaps during the meeting recording.

Adding Meeting Recap in Live Panel

During a meeting recording in the Live Panel, you can add meeting recap items.

- The Owner of the meeting recording can add all recap types; participants can add only notes.
- Only one summary can be added to the meeting recording.
- Action items, decisions and the summary are always public and therefore, visible to everyone that has access to the meeting recording. You can make notes private or public.

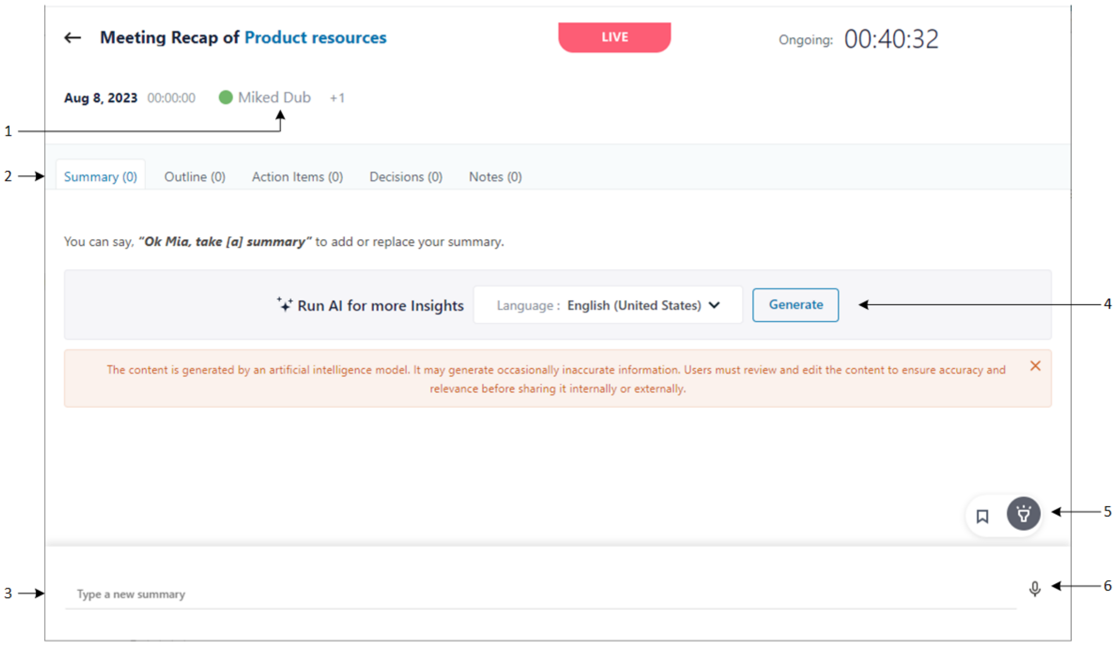
The Live Panel provides flexibility in how you want to add recap items:

- Using the microphone to record your recap (applicable only to Teams desktop client).
- Using the text box to type the recap text.

➢ To add meeting recap items in Live Panel:

1. Access the Live Panel (see Accessing the Live Panel on the previous page).

   The following shows an example of the Live Panel:



2. **Recording your recap with the microphone:**

   a. Select the type of recap (#2 in figure) that you want to add.

   b. Click the microphone icon (#6 in figure), and then say your recap; Meeting Insights records your voice (and the microphone icon is replaced by the recording in-progress and stop icon).

   c. When you want to end your recap, click the stop recording icon; Meeting Insights adds the transcription of your recorded voice to the relevant recap group (and the stop icon is replaced by the microphone icon).

3. **Typing your recap in the text box:**

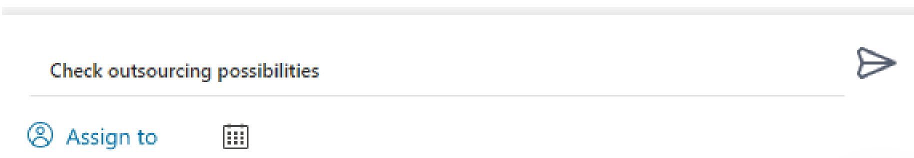
   a. Select the type of recap (#2 in figure) that you want to add.

   b. In the text box (#3 in figure), type the recap.

   c. (Action Items Only):

      i. If you want to assign the action item to a specific participant, click  , and then from the drop-down list, select the participant.

      ii. If you want to assign a due date to the action item, click  , and then select the date from the calendar.



   d. (Notes Only): To make the note visible only to you (private) or visible to everyone (public), toggle the **Private** / **Public** button.

   e. Click  .

Running AI to Generate Recap and Transcription

During a meeting recording in the Live Panel, you can activate AI to generate a transcription of your meeting and the following recap items:

- Summary
- Action Items
- Q&A
- Issues & Solutions
- Meeting Prep (for recurring meetings only)

- The summary and action items are generated by an AI model, which may sometimes generate inaccurate information. Therefore, it's recommended that you review the summary and actions items, and edit them if required to ensure accuracy and relevance before sharing it with others.
- If you're the owner of the meeting recording, you can always trigger AI. However, participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
- The AI process may take some minutes.

➢ **To run AI to create recap and transcription:**

1. Access the Live Panel (see Accessing the Live Panel on page 77).
2. Select the **Summary**, **Outline**, or **Action Items** recap tab.
3. From the 'Language' drop-down list, select the language of your meeting recording.
4. Click **Generate**; Meeting Insights begins the AI process. If you want to cancel the process (for whatever reason), click **Stop**.

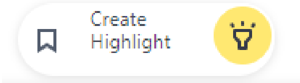
Adding Highlights in Live Panel

During a meeting recording in the Live Panel, you and participants can highlight important parts of the meeting with a single click. The highlight not only tags the specific location of the meeting recording, but also provides a transcription of the audio where the highlight is added (by default, 20 seconds before and 20 seconds after). You can extend the transcription period by 20 seconds (before and after) or stop the transcription before the duration expires.

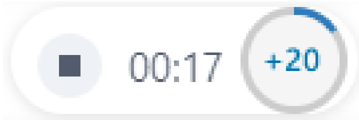
After the meeting, you can view the highlights in Meeting Insights' video player, as described in Viewing Highlights on Video on page 236.

➢ **To add a highlight:**

1. Click the  icon; the icon is replaced with the following:



2. Click **Create Highlight**; Meeting Insights starts creating the highlight, and the time remaining (e.g., 17 seconds) until Meeting Insights finishes transcribing the audio located 20 seconds before and after the highlight is displayed:



3. To add another 20 seconds of transcription (before and after), click **+20** (i.e, transcription is done for 40 seconds before and after highlight added).

4. To stop the transcription, click  ; the highlight is added with the transcription of the duration that was displayed when you stopped it. For example, if you stopped the timer at 00:18, the highlight will include transcription of only 18 seconds before and after.

When transcription ends, the highlight  icon appears again.

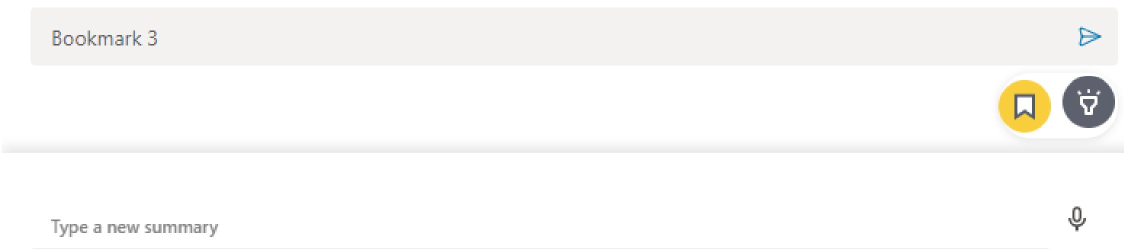
Adding Bookmarks in Live Panel

During a meeting recording in the Live Panel, you and participants can add bookmarks with a single click. A bookmark marks a specific place in the meeting recording, which you can return to at the end of the meeting recording (as described in Viewing Bookmarks on page 214).

➢ **To add a bookmark:**

1. Access the Live Panel (see Accessing the Live Panel on page 77).

2. Click the bookmark  icon, as shown below; a text box appears, allowing you to edit the default bookmark name ("Bookmark <sequential number>"):



3. Edit the bookmark name, if necessary; the bookmark is listed under the **Bookmarks** category and displayed with the time traversed in the meeting recording at which you added it.

Editing or Deleting Meeting Recap Items in Live Panel

During a meeting recording in the Live Panel, you can edit or delete recap items.

➢ **To edit or delete recap items:**

1. Select the type of recap that you want to edit or delete.
2. To edit a recap:
   a. Click the **Edit** icon.
   b. Make your changes.
   c. Click **Update**.
3. To delete a recap:
   a. Click the **Delete** icon; a confirmation box appears.
   b. Click **Delete**.

In-Meeting Experience using Mobile App

This section describes the actions you can do during the meeting recording, using Meeting Insights mobile app.

The actions are done in the Live Panel of the active meeting, and include the following:

- Defining general settings for Live Panel - see Defining General Settings of Mobile Live Panel on page 86
- Defining screen layout (grid or list) of Live Panel - Defining Screen Layout of Mobile Live Panel on page 89
- Adding recaps (action items, notes, decisions, and a summary) - see Adding Recap in Mobile Live Panel on page 90
- Adding highlights - see Adding Highlights in Mobile Live Panel on page 92
- Adding bookmarks - see Adding Bookmarks in Mobile Live Panel on page 93
- Pausing and resuming recording - see Pausing and Resuming Recording in Mobile Live Panel on page 93
- Running AI-powered recap and transcription - see Running AI-Powered Recap, Transcription and Meeting Prep in Mobile Live Panel on page 94

Opening Live Panel on Mobile App

This section describes how to open the Live Panel of the active meeting recording on your Meeting Insights mobile app.

The way to open the Live Panel depends on the type of Meeting Insights mobile app:

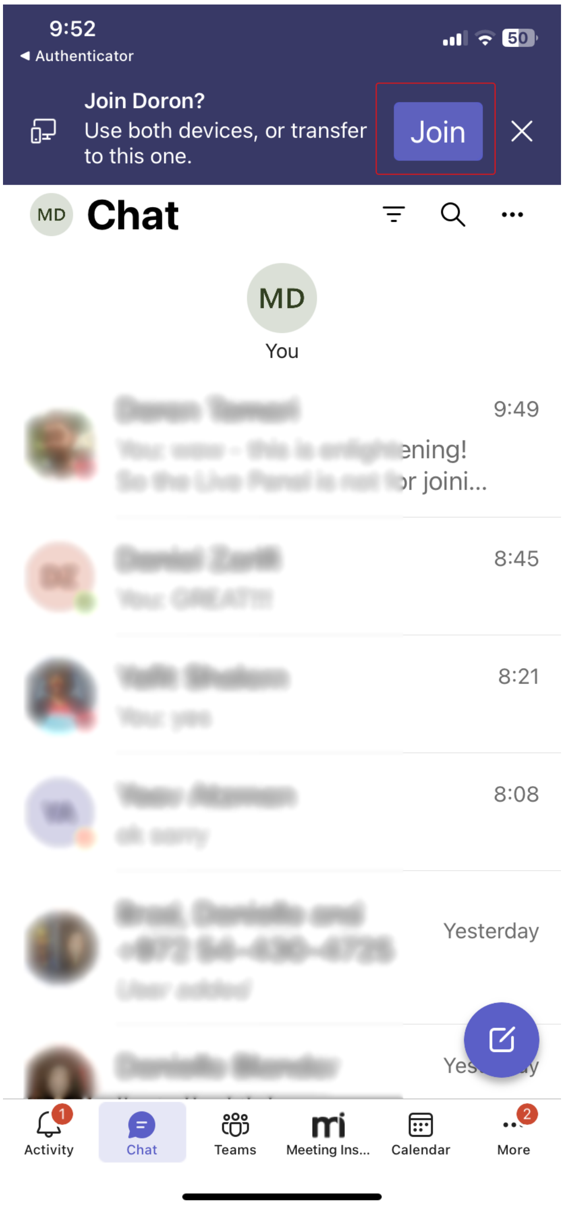
- Meeting Insights app for Teams mobile clients - see Opening Live Panel in Mobile App for Teams below
- Meeting Insights standalone mobile app - see Opening Live Panel in Standalone Mobile App on page 85

Opening Live Panel in Mobile App for Teams

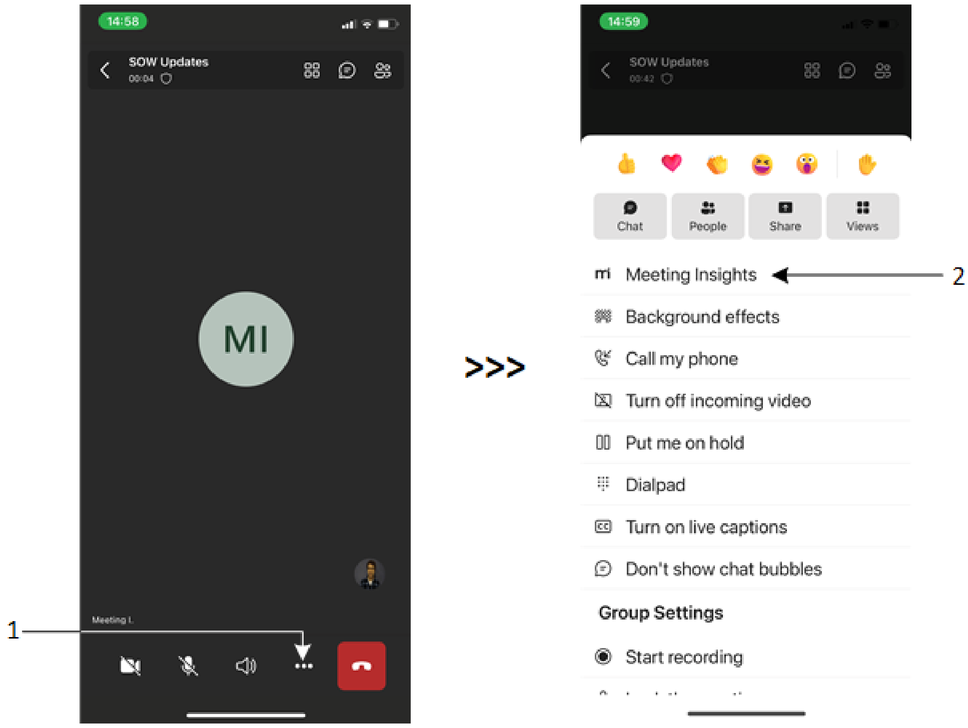
After you join a meeting recording (scheduled through Microsoft Outlook Calendar) through your Meeting Insights app for Teams mobile clients, you can add Meeting Insights Live Panel to the meeting recording.

➢ To access Live Panel from joined meeting:

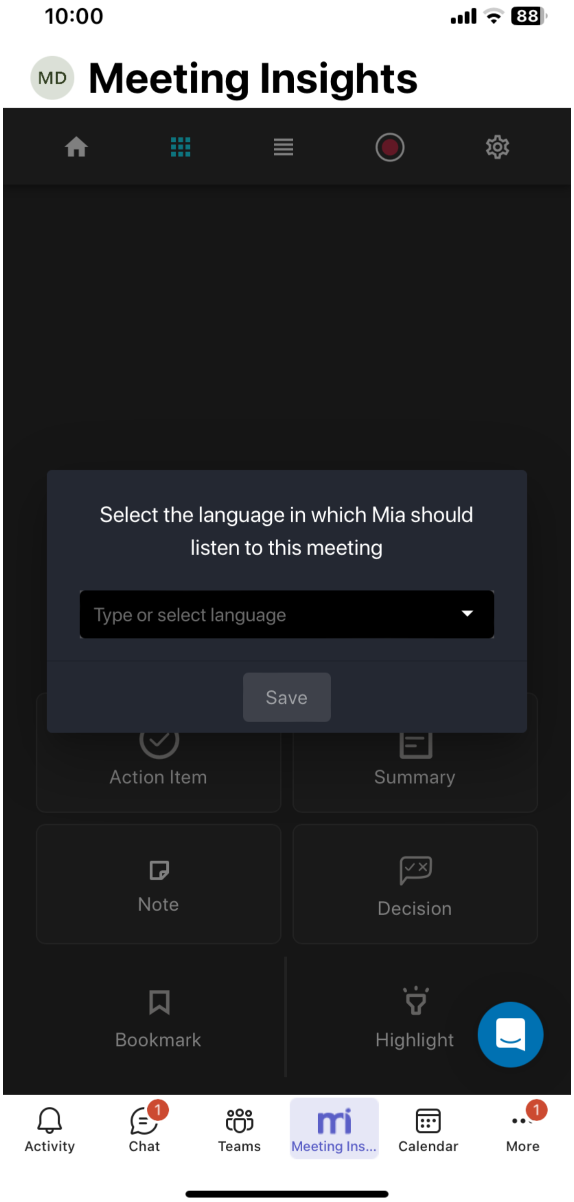
1. Join the meeting through your mobile Teams app, by tapping **Join**:



2. Tap the ellipsis button (#1 in figure), and then from the pop-up, tap **Meeting Insights**(#2 in figure):



The Meeting Insights Live Panel appears, prompting you to select the language spoken in your meeting:



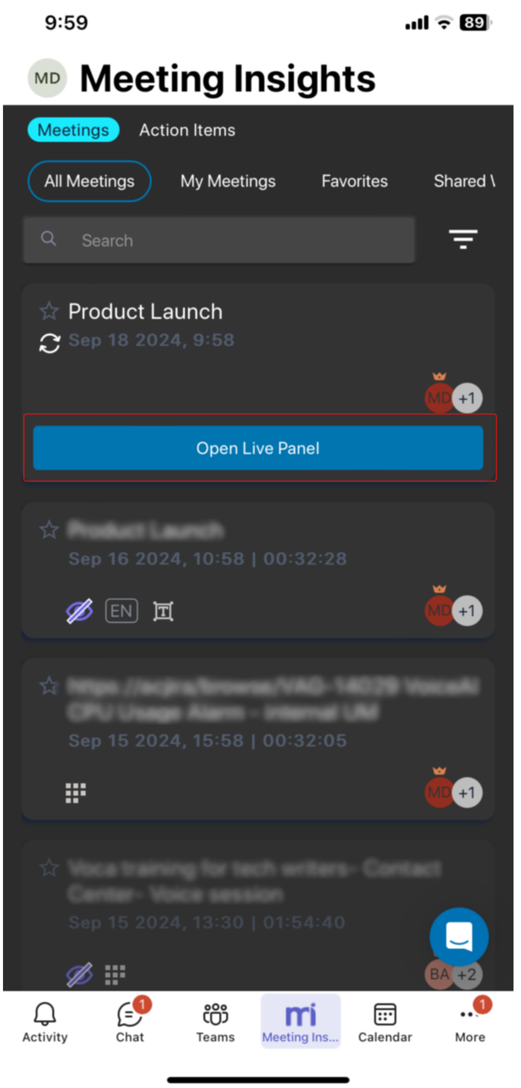
3. From the 'Select the language ...' drop-down list, select the language of your meeting, and then click **Save**.

Opening Live Panel in Standalone Mobile App

When the meeting recording of a meeting to which you were invited starts, you can easily access the Live Panel from the home screen of the Meeting Insights standalone mobile app.

➢ To access Live Panel of a meeting recording:

1. Open the Meeting Insights mobile app.
2. In the home screen, which displays the list of meeting recordings, tap the **Open Live Panel** button, as shown below:



If you didn't join the meeting, when you open the Live Panel you won't hear anyone in the meeting. However, you can view public recaps added by participants and you can add recaps by typing them. Only if you joined the meeting recording can you hear the participants, and add recaps by typing and by **voice**.

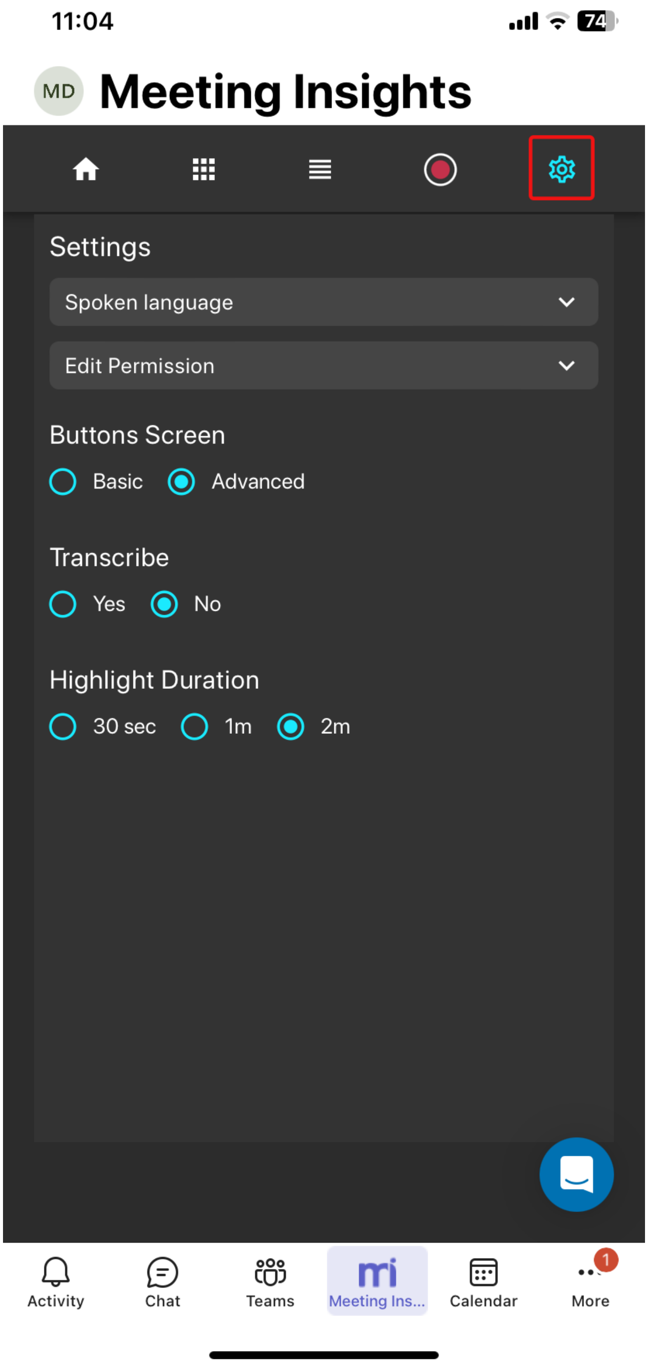
Defining General Settings of Mobile Live Panel

During the meeting recording in your Meeting Insights mobile app, you can configure the following general settings for the specific meeting recording:

- Select the language spoken during the meeting recording.
- Assign editing permissions to specific participants.
- Define the layout of buttons.
- Enable or disable transcription.
- Define the maximum duration of highlights.

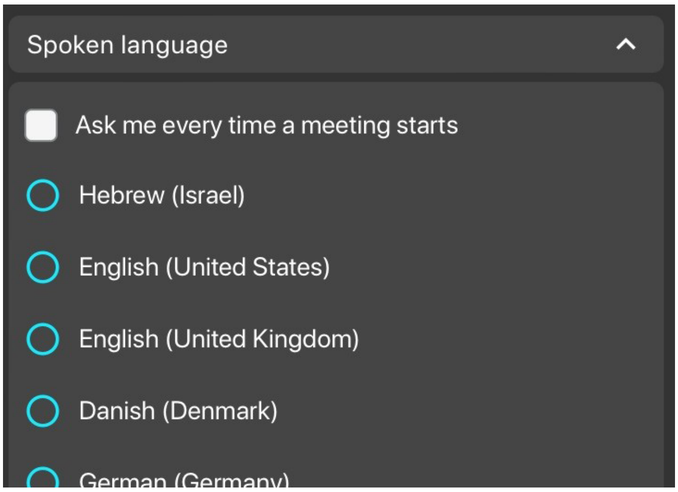
➢ **To configure general settings:**

1. On the toolbar, tap the ⚙ icon; the Settings screen appears:



2. To change the language of the meeting:

   a. Tap **Spoken language** to expand the group:

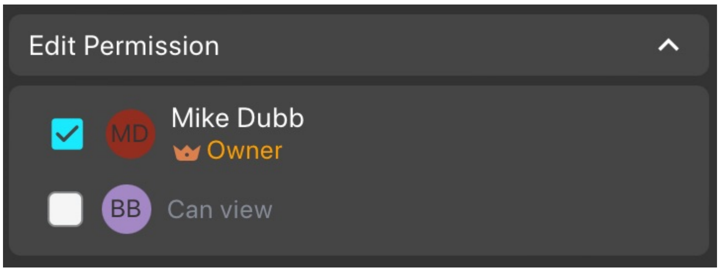


b. Select the 'Ask me every time a meeting starts' check box if you want to be prompted to select the language each time you add Meeting Insights to a meeting (default).

c. From the list, select the desired language.

3. To change permissions of a participant:

a. Tap **Edit Permission** to expand the group; a list of all the participants is displayed:



b. Tap the name of the participant(s) to whom you want to assign editing privileges (**Can edit**) or view-only (**Can view**). Participants with editing privileges are displayed with a tick in their corresponding check box.

4. Under the **Buttons Screen** group, select one of the following options: To display also the **Note** and **Decision** buttons in the grid layout, under the select one of the following options:

- **Basic:** The grid layout displays only the **Action Item**, **Summary**, **Bookmark**, and **Highlight** buttons.

- **Advanced:** The grid layout displays all the basic buttons (above) as well as the **Note** and **Decision** buttons.

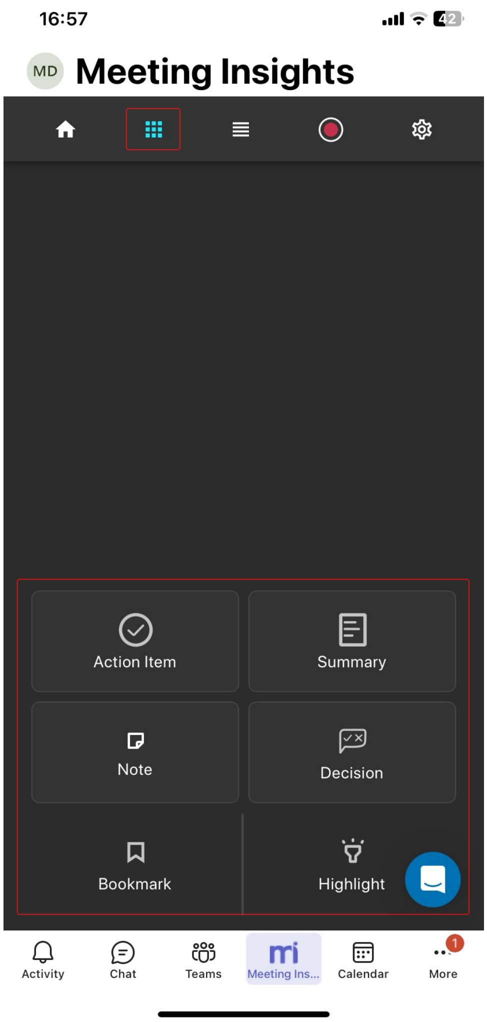
5. Under the **Transcribe** group, select **Yes** if you want Meeting Insights to create a transcription of the meeting recording (default is **No**).

6. Under the **Highlight Duration** group, define the maximum duration of a highlight, by selecting **30 sec**, **1m**, or **2m**.

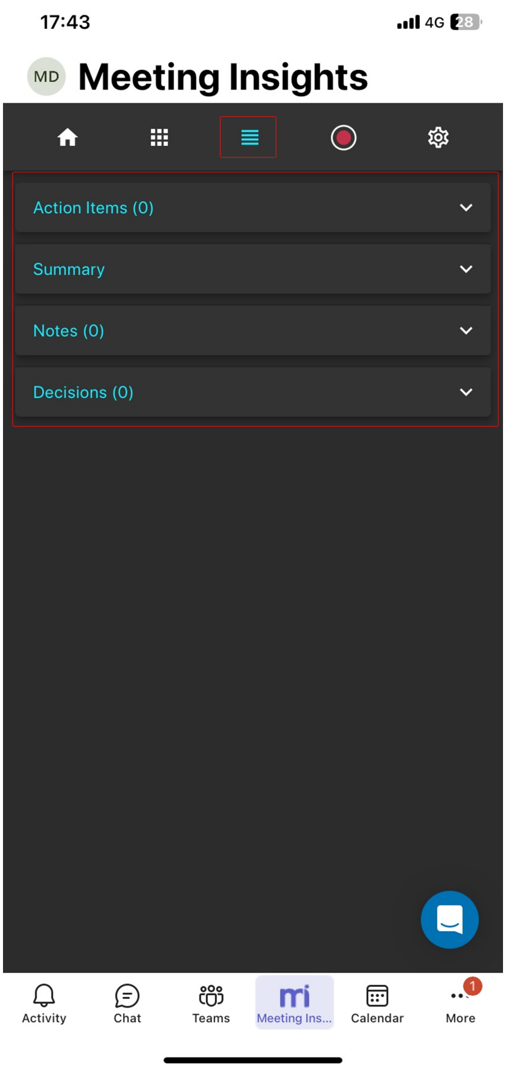
Defining Screen Layout of Mobile Live Panel

During the meeting recording, you can change the screen display between the following layouts:

- **Grid layout:** Displays the recap types, bookmark, and highlight options in grid layout (tiles). To view this layout, tap the icon on the toolbar, as shown in the following figure:



- **List layout:** Displays the recap types in expandable groups. In this layout, recaps are added by typing them. To view this layout, tap the icon on the toolbar, as shown in the following figure:



- The method for adding recaps depends on screen layout:
  - ✓ Grid layout: Recaps are added by saying them out loud so that Meeting Insights can record your voice.
  - ✓ List layout: Recaps are added by typing them.
- List layout doesn't provide options to add bookmarks or highlights.

Adding Recap in Mobile Live Panel

During a meeting recording, you can add the following recap types:

- Action Items
- Notes
- Decisions
- Summary

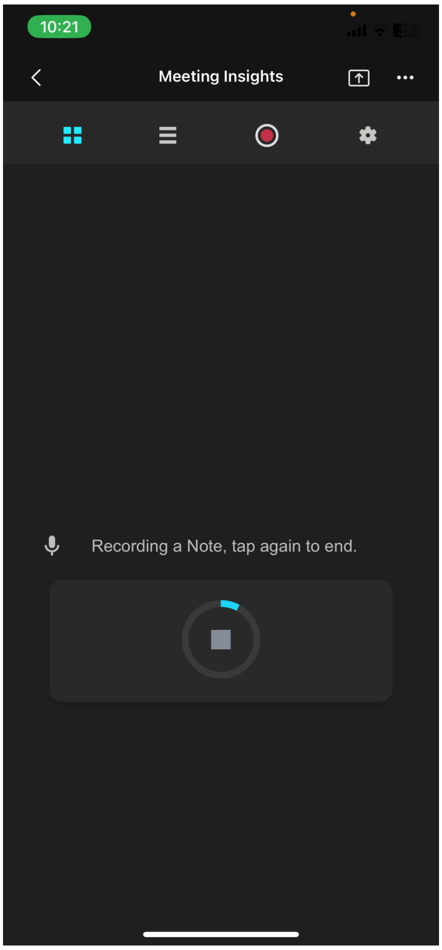
The method for adding a recap depends on the selected screen layout (see Defining Screen Layout of Mobile Live Panel on the previous page):

- **Grid layout:** A recap is added by saying it out load so that Meeting Insights can record your voice.
- **List layout:** A recap is added by typing it in a text box.

➢ To add a recap:

- **Grid layout:**

  i. Tap a recap tile; Meeting Insights starts recording whatever you say, as indicated by the following button surrounded by a progress bar:



  ii. Speak your recap.

  iii. Tap the button to end recording.

- **List layout:**

  i. Tap the recap name type to expand the group.

  ii. Click **New**, type your note in the text box, and then tap the arrow to apply.

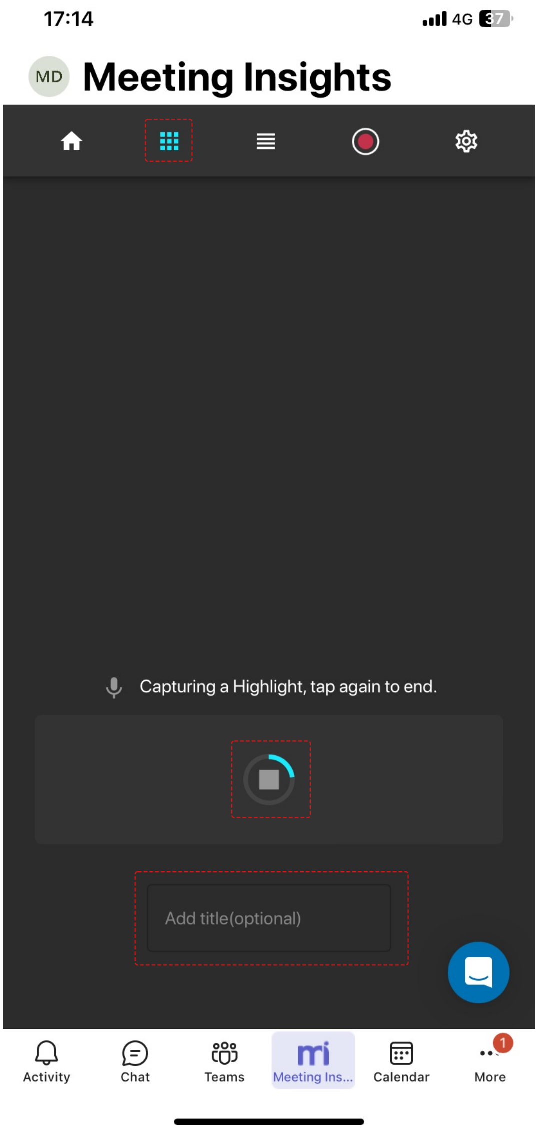
  iii. Tap the edit pencil icon, tap **private** or **public** to determine if only you can view or everyone, and then click the tick mark to apply.

Adding Highlights in Mobile Live Panel

During a meeting recording in your Meeting Insights mobile app, you can highlight important parts of the meeting recording with a single click. After the meeting, you can view the highlights in Meeting Insights video player (see Viewing Highlights on Video on page 236).

➢ **To add a highlight:**

1. Access the Grid layout.
2. Tap the **Highlight** button; Meeting insights begins adding the highlight, as shown below:



3. To add a name to the highlight, tap the text box "Add title" located below the button, and then type the name.
4. To end the highlight, tap the button again.

Adding Bookmarks in Mobile Live Panel

During a meeting recording in your Meeting Insights mobile app, you can add bookmarks with a single click. A bookmark marks a specific place in the meeting recording, which you can return to after the meeting recording has ended (see Viewing Bookmarks on page 214).

➢ **To add a bookmark:**

1. Access the Grid layout.
2. Tap the **Bookmark** tile; the current place in the meeting recording is bookmarked. The total number of bookmarks that have been added during the meeting recording is displayed in the top-right corner of the **Bookmark** tile.

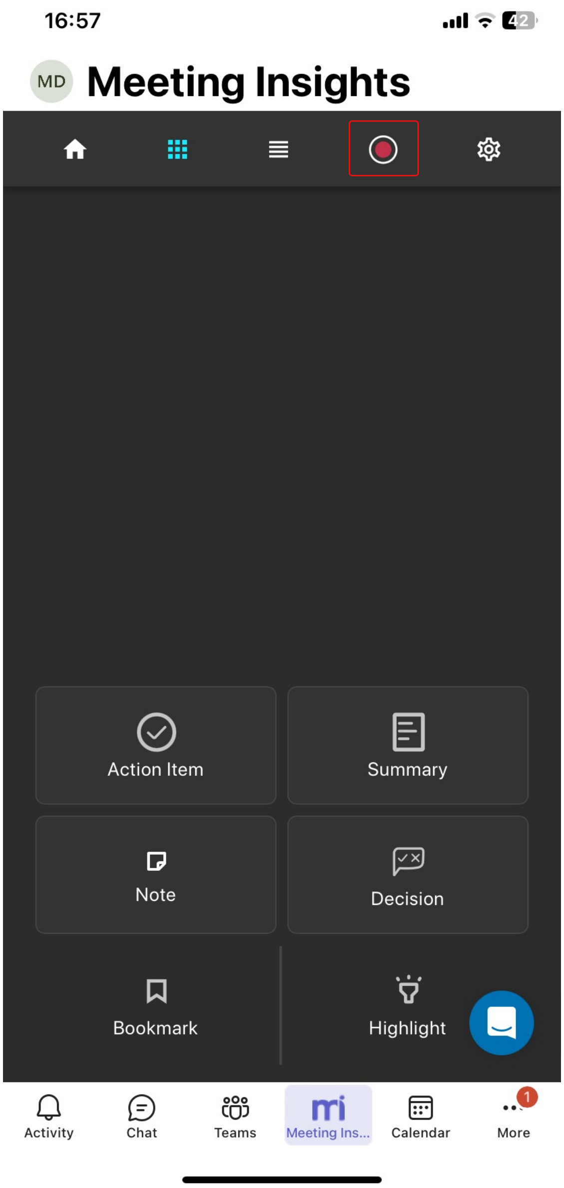
Pausing and Resuming Recording in Mobile Live Panel

During a meeting recording in your Meeting Insights mobile app, you can pause and resume recording. This feature may be useful, for example, if you don't want confidential information from being recorded.

- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can pause and resume recording.
- When you pause recording, all other functions in the Live Panel (e.g., adding recaps) are deactivated.

➢ **To pause and resume recording:**

1. On the toolbar, tap the record button; recording is paused:



2. To resume recording, tap the record button again.

Running AI-Powered Recap, Transcription and Meeting Prep in Mobile Live Panel

During a meeting recording in your Meeting Insights mobile app, you can activate AI to generate the following:

- Transcription
- Summary
- Action Items
- Q&A
- Issues & Solutions
- Meeting Prep (only for recurring meetings)

- The recap items are generated by an AI model, which may sometimes generate inaccurate information. Therefore, it's recommended that you review and edit them if necessary to ensure accuracy and relevance before sharing it with others.
- If you're the owner of the meeting recording, you can always trigger AI. Participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
- You can also activate AI after the meeting.
- It may take several minutes to generate the AI-powered recap.
- For more information on the AI-generated meeting prep, see Generating an AI-Powered Meeting Prep for Recurring Meetings on page 179.

➢ To run AI to create recap and transcription:

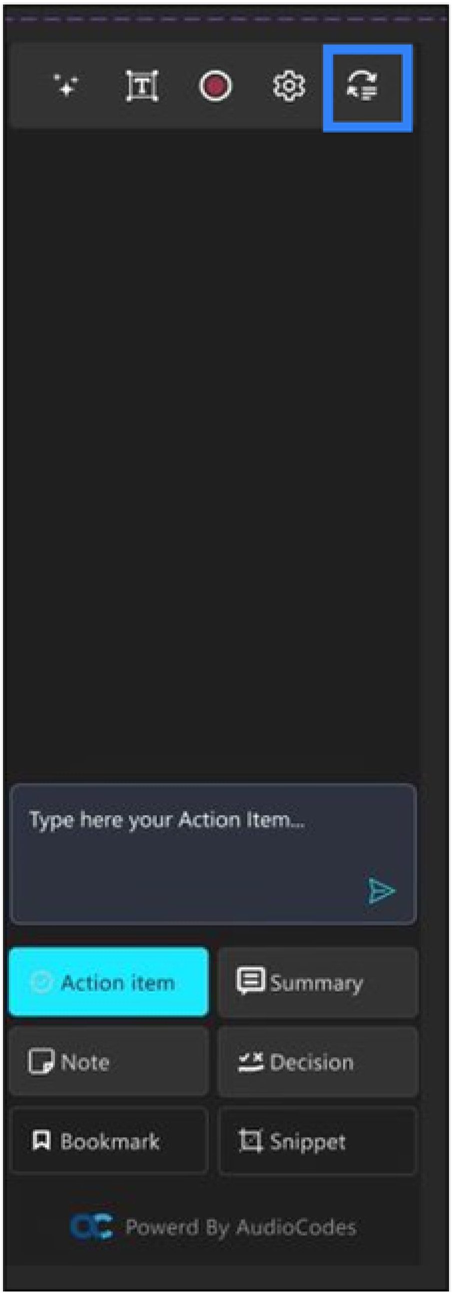
1. On the toolbar, click the icon.

Viewing AI-Powered Meeting Prep in Mobile Live Panel

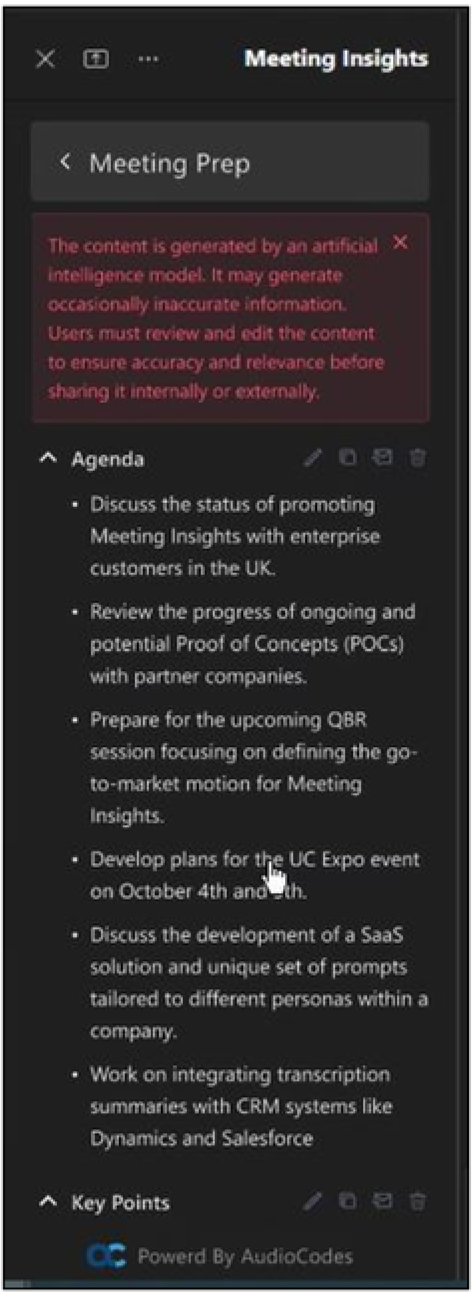
For recurring meetings, if you've generated a Meeting Prep using AI (see Generating an AI-Powered Meeting Prep for Recurring Meetings on page 179), you can view the Meeting Prep during the meeting recording.

➢ To view meeting prep:

1. On the toolbar, click the icon, as shown below:



The Meeting Prep screen appears, showing the meeting prep:



In-meeting Recording Actions

During a meeting, you can pause, resume, and stop recording:

- Schedule meetings:
    - Pausing and Resuming Scheduled Meeting Recordings on the next page
    - Stopping Recording during Scheduled Meeting on page 99
- Pausing and Resuming Ad Hoc Recording in Standalone Mobile App on page 100

Pausing and Resuming Scheduled Meeting Recordings

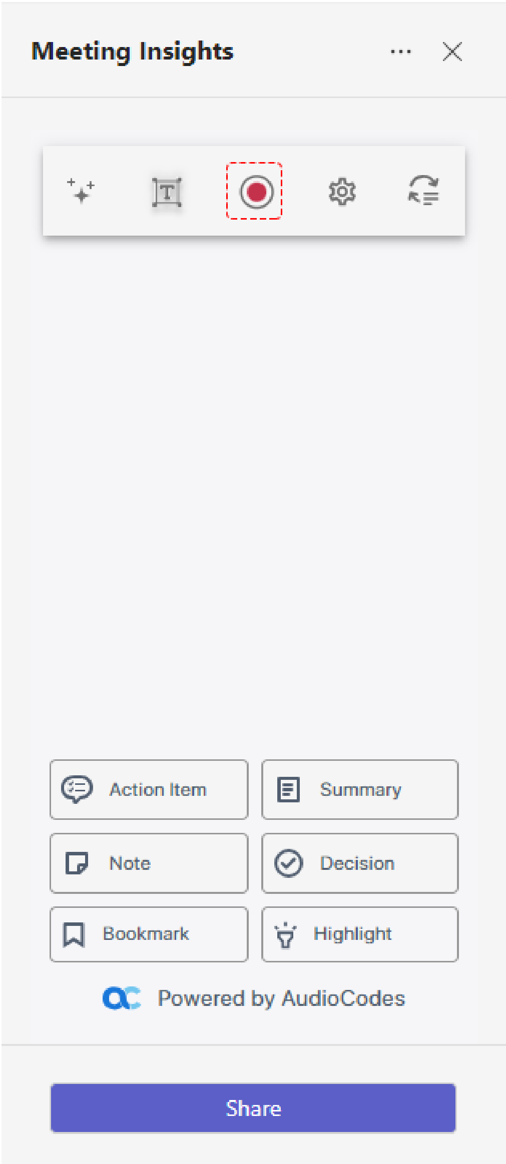
Meeting owners and co-organizers can pause a scheduled meeting recording (Mia) during the meeting and then resume recording when needed.

The feature allows you to exclude sensitive information from being recorded. For example, you may want to pause recording when suddenly talking about salaries, and then resume recording when you want to continue the subject of the meeting.

When you pause recording, the functions of the side panel are deactivated.

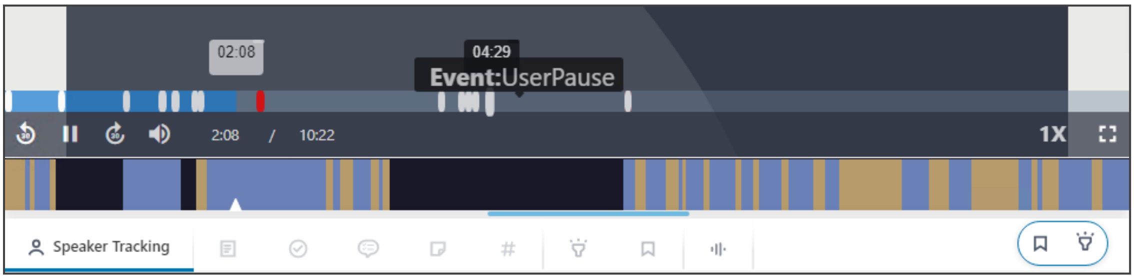
➢ **To pause and resume recording:**

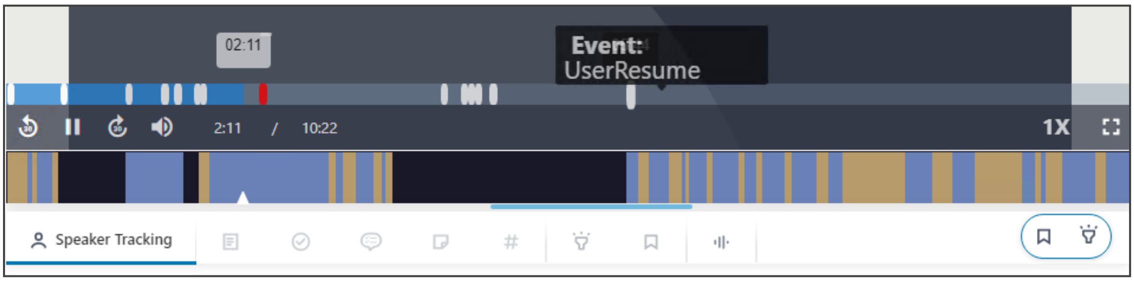
1. To pause recording, on the meeting side panel's toolbar, click the **Stop Recording** icon.



2. To resume recording, on the meeting side panel's toolbar, click the **Start Recording** icon:

When playing the meeting recoding video after the meeting, Meeting Insights skips over the stopped / paused part of the meeting, saving users from sitting through a period of silence, as shown here:



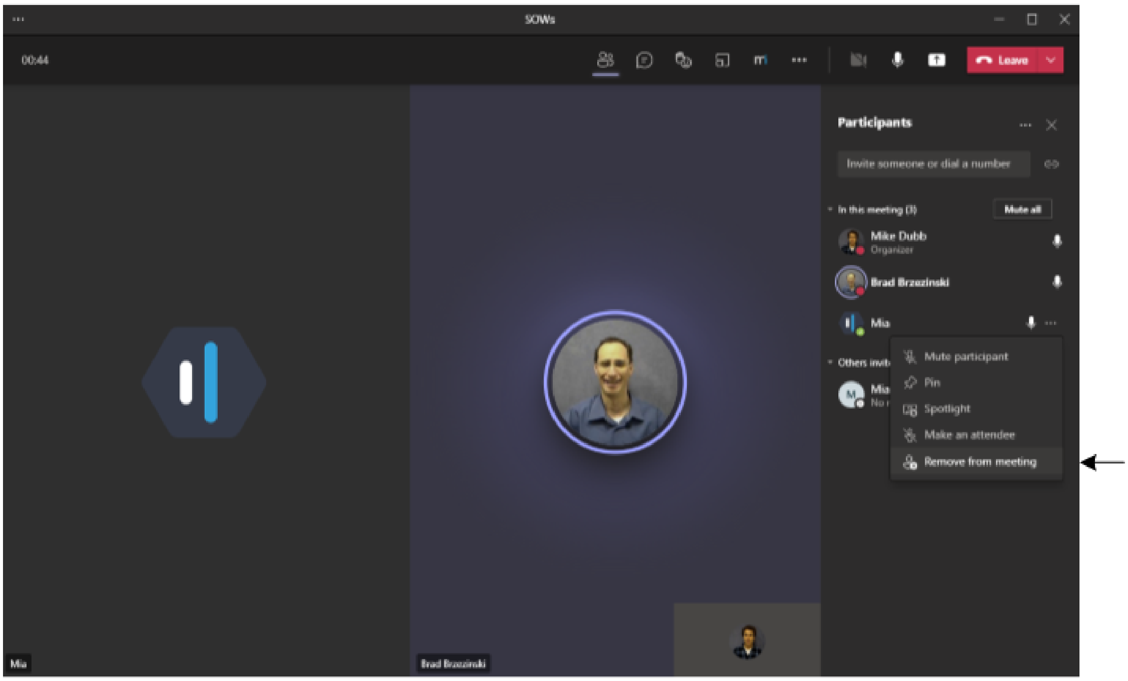


Stopping Recording during Scheduled Meeting

For whatever reason, you may want to stop recording during the scheduled meeting. This is done by removing Meeting Insights participant Mia from the meeting.

If you remove Mia from the meeting and you later want to resume recording, add Mia again as a participant to the meeting. In this scenario, Meeting Insights creates another recording for this meeting. At the end of the meeting, Meeting Insights displays **two** meeting recordings of this meeting in the list of meeting recordings.

The following shows an example of removing Mia from the Teams meeting window:



Pausing and Resuming Ad Hoc Recording in Standalone Mobile App

During an ad hoc recording using Meeting Insights standalone mobile app, where your mobile phone's microphone records surrounding audio, you can pause and resume recording whenever you want.

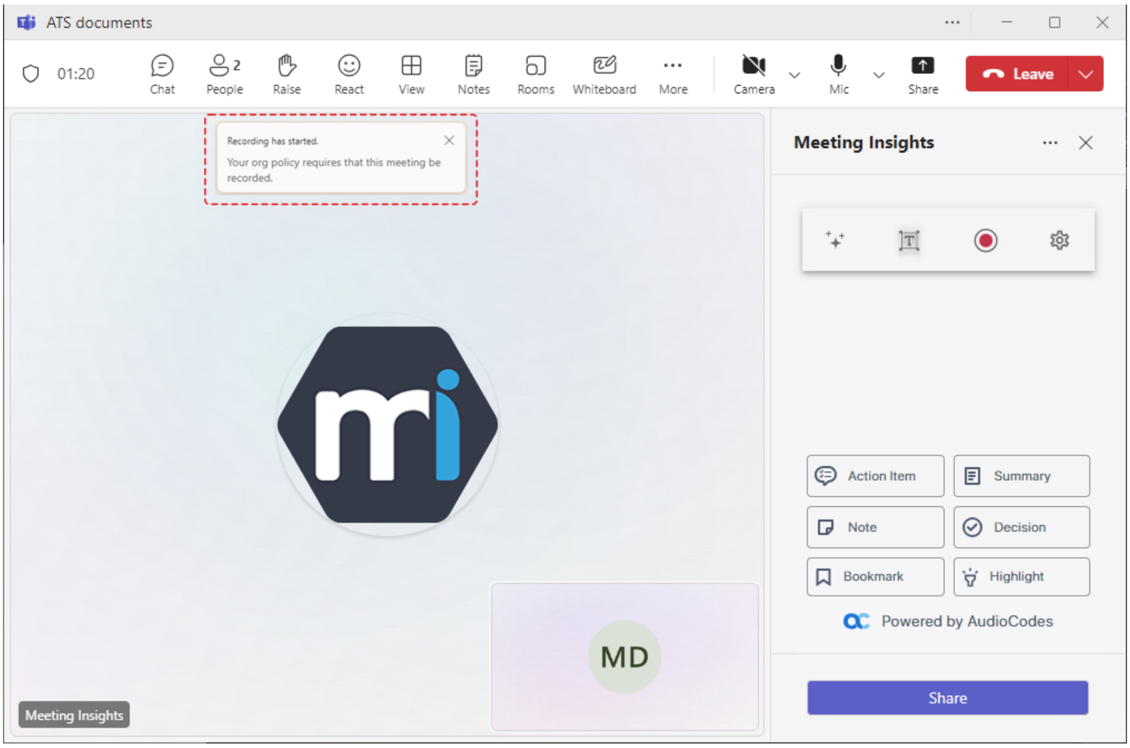
For more information, see Ad Hoc Recording using Meeting Insights Standalone Mobile App on page 39.

Recording Notifications during a Meeting

If your Meeting Insights administrator has enabled the recording notifications feature for your account (see Viewing Account Information on page 23), Meeting Insights triggers Microsoft recording notifications.

When you join a meeting that you've organized, you and all participants are notified that the meeting is being recorded. This notification is displayed as a pop-up message in the Teams meeting window ("Recording has started", as shown below) and audibly played so that participants without a Teams client can hear the notification. If you (the organizer) leave the meeting recording, recording pauses and you and all participants are notified visually and audibly. If you rejoin the meeting, recording resumes and you and all participants are notified visually and audibly.

If the recording notifications feature is disabled, recording occurs regardless of whether you've joined the meeting, left it, or re-joined it.



7 Post-Meeting Actions in Meeting Insights Mobile App

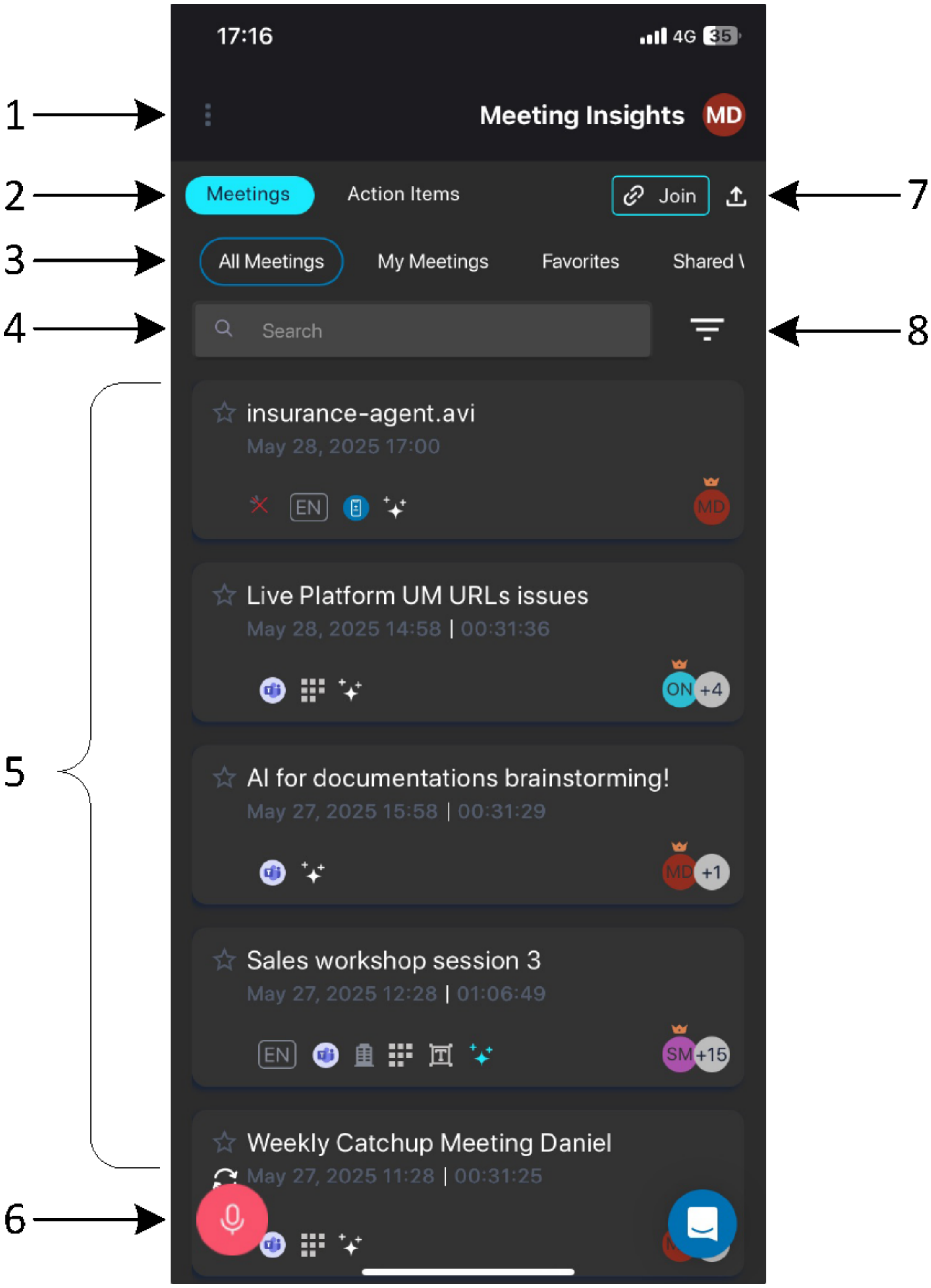
This section describes actions that you can do in Meeting Insights mobile app for meeting recordings that have ended.

> The Meeting Insights mobile app provides limited functionality compared to the Meeting Insights Web interface and Meeting Insights app for Teams desktop client, as described in Post-Meeting Actions in Meeting Insights Web Interface and Teams Desktop App on page 150.

Viewing Meeting Recordings List on Mobile App

The home screen of the Meeting Insights mobile app lists all your meeting recordings and those that have been shared with you.

You can always return to the home screen, by clicking the Home icon.

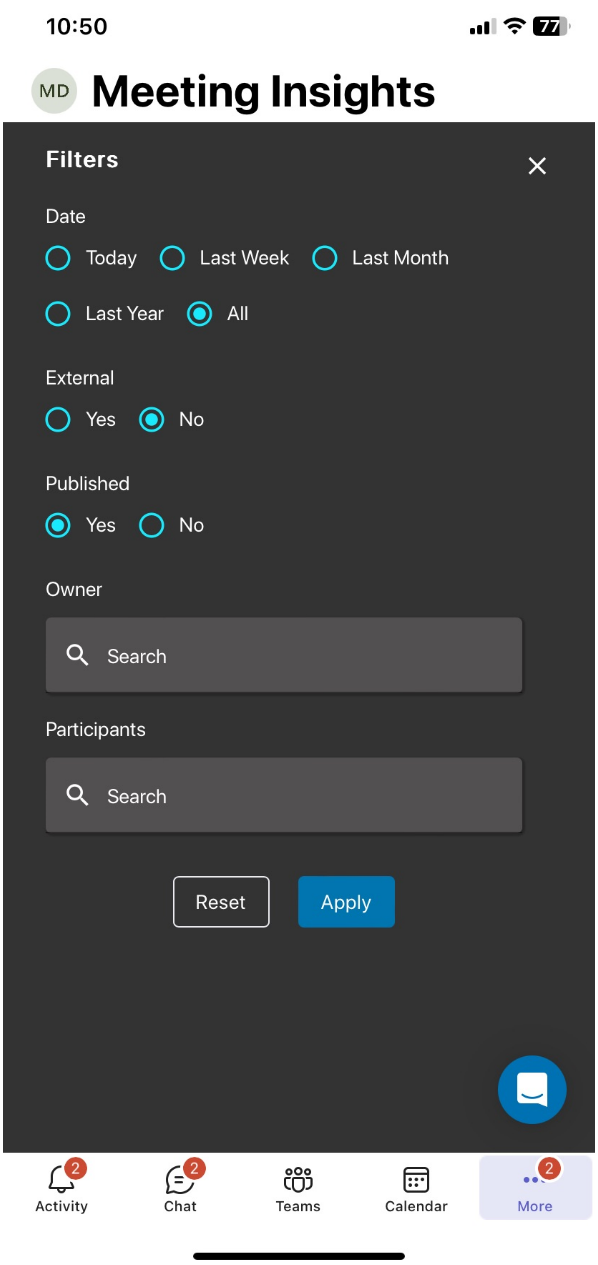


Item #	Description
1	Ellipsis button for logging out of Meeting Insights mobile app. For more information, see Logging Out of Standalone Mobile App on page 21. **Note:** This button is applicable only to Meeting Insights standalone mobile app.

Item #	Description
2	Top navigation menu: ■ **Meetings:** Displays the list of meeting recordings, which can be filtered as described in #2 below. ■ **Action Items:** Displays actions items assigned by you or assigned to you.
3	If you tap **Meetings** (#2), you can filter the meeting recordings list by tapping the following buttons: ■ **All Meetings:** Displays all meetings where you're the Owner or a participant, or meetings that were shared with you. ■ **My Meetings:** Displays all meetings where your are the Owner or a participant. ■ **Favorites:** Displays all meetings that you tagged as favorites. ■ **Shared with Me:** Displays all meetings that were shared with you. ■ **Events:** Displays all meetings in your organization that were shared with everyone in your organization.
4	Search field for searching meeting recordings by any string (e.g., meeting name, tag, or owner).
5	List of meeting recordings. Each meeting recording is displayed with the following: ■ ☆Indicates if the meeting recoding is tagged as one of your favorites. To tag it as a favorite, simply tap the star icon. ■ Meeting name. ■ Date and time of meeting. ■ Duration of meeting. ■ Avatar of Owner and participants. ■ (Optional) Icons indicating various information: ✓ Meeting recording is a recurring meeting. ✓ Meeting recording was a Microsoft Teams meeting. ✓ Meeting recording was an external (not within your organization) Microsoft Teams meeting.

Item #	Description
	✓ Meeting recording was a Zoom meeting. ✓ Meeting recording was an external (not within your organization) Zoom meeting. ✓ Meeting recording was an ad hoc recording using the mobile phone's microphone in Meeting insights standalone mobile app (see Ad Hoc Recording using Meeting Insights Standalone Mobile App on page 39). ✓ Meeting recording was created by a third-party recording tool and imported into Meeting Insights. ✓ Meeting recording was created by a third-party recording tool and imported into Meeting Insights through Meeting Insights standalone mobile app. For more information, see Uploading Recordings by Third-Party Tools on page 122. ✓ Meeting recording is not published. ✓ Meeting recording is shared with everyone in your organization. ✓ Meeting Insights created slides for the meeting recording (i.e., media was presented during the meeting). ✓ Summary recap was added to the meeting recording. ✓ Meeting recording has an attached file(s). ✓ Runs an AI-powered summary based on templates. ✓ Meeting recording has an AI-powered Summary, Action Items, Q&A, Issues & Solutions, and Transcription, Meeting Prep (recurring meetings only). ✓ Transcription (speech to text) was created for the meeting recording. ✓ Meeting Insights failed to process the meeting recording.
6	Recording icon that triggers ad hoc recording of surroundings by the mobile phone's microphone when using the Meeting insights standalone mobile app.

Item #	Description
	Note: This functionality is applicable only to Meeting Insights standalone mobile app. For more information, see Uploading Recordings by Third-Party Tools on page 122.
7	■ **Join** icon: Adds Meeting Insights Mia ad hoc during a Zoom meeting (pastes the Zoom meeting's URL). For more information, see Ad Hoc Recording of Zoom Meetings on page 52. ■ Upload icon: Uploads (imports) recordings created by third-party recording tools. **Note:** This functionality is applicable only to Meeting Insights standalone mobile app. For more information, see Uploading Recordings by Third-Party Tools on page 122.
8	If you tap the pyramid icon, the Filters screen appears, providing advanced filters for the meeting recordings list. You can filter by the following: ■ **Date:** Date of meeting recording. ■ **External:** Meetings recordings shared outside or within your organization. ■ **Published:** Published or not published meeting recordings. ■ **Owner:** Owner of meeting recordings. ■ **Participants:** Participants of meeting recordings.

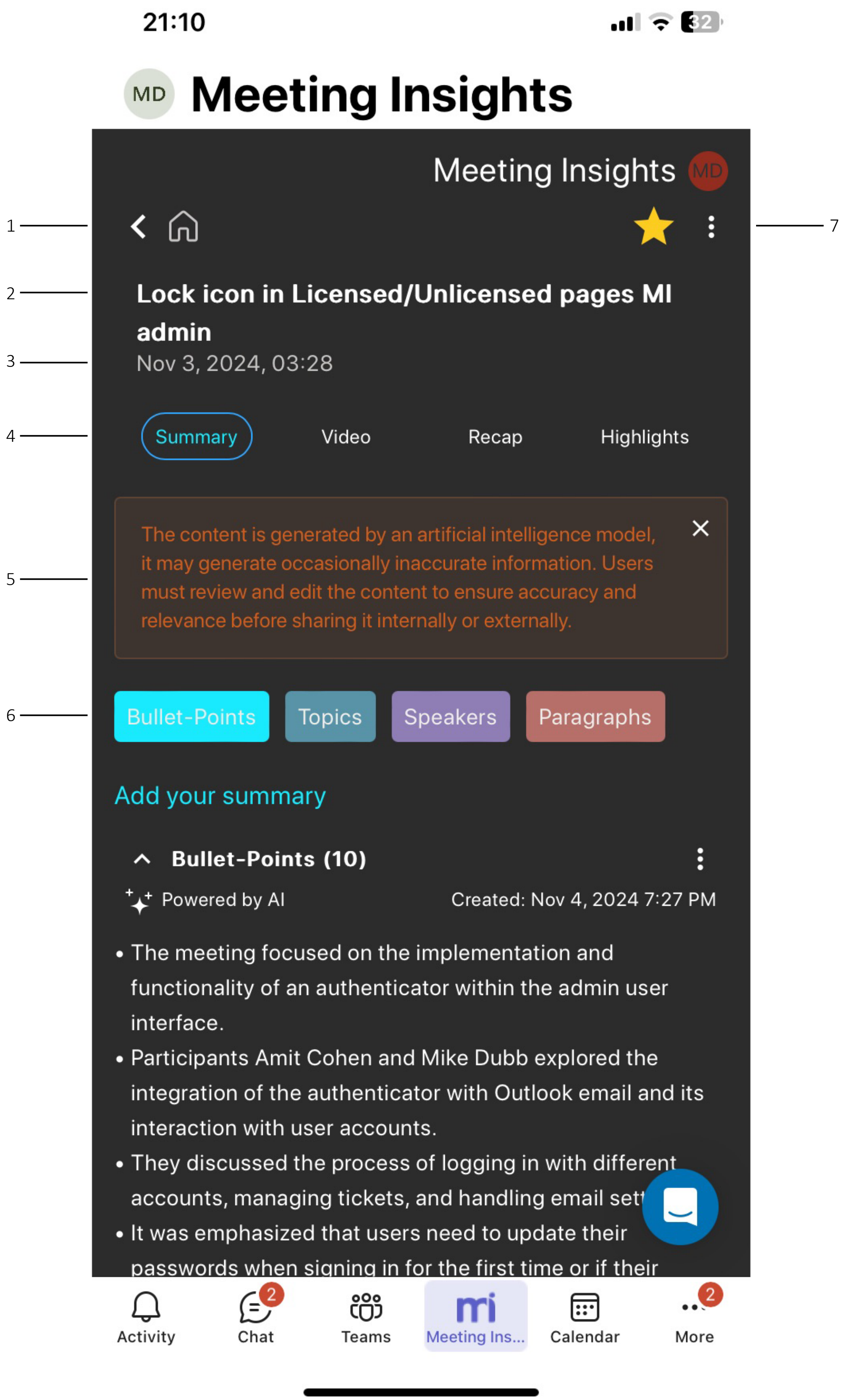
Item #	Description
	

Viewing a Meeting Recording in Mobile App

You can play the video of a recorded meeting and view its recap, highlights, and slides.

➢ **To view a meeting recording:**

1. Go to the home screen listing all the meeting recordings (see Viewing Meeting Recordings List on Mobile App on page 101).
2. Tap the meeting recording that you want; the Player screen appears:


1
2
3
4
5
6
7
21:10
MD
Meeting Insights
Meeting Insights
Lock icon in Licensed/Unlicensed pages MI admin
Nov 3, 2024, 03:28
Summary
Video
Recap
Highlights
The content is generated by an artificial intelligence model, it may generate occasionally inaccurate information. Users must review and edit the content to ensure accuracy and relevance before sharing it internally or externally.
Bullet-Points
Topics
Speakers
Paragraphs
Add your summary
Bullet-Points (10)
Powered by AI
Created: Nov 4, 2024 7:27 PM
• The meeting focused on the implementation and functionality of an authenticator within the admin user interface.
• Participants Amit Cohen and Mike Dubb explored the integration of the authenticator with Outlook email and its interaction with user accounts.
• They discussed the process of logging in with different accounts, managing tickets, and handling email sett
• It was emphasized that users need to update their passwords when signing in for the first time or if their
Activity
Chat
Teams
Meeting Ins...
Calendar
More

Item #	Description
1	Tap the home icon to return to the home screen listing all the meeting recordings.
2	Name of meeting recording.
3	Date and duration of meeting recording.
4	Tab bar: ■ **Summary:** Displays the summary of the meeting recording (selected by default). ■ **Video:** Displays the video of the meeting recording. For more information, see Playing a Meeting Recording Video on page 113. ■ **Recap:** Displays the meeting recap and allows you to add recap (Decisions, Action Items, Notes, Questions & Answers, Issues & Solutions, and Outline). For more information, see Viewing and Managing Recap of Meeting Recording below. ■ **Highlights:** Displays highlights added to the meeting recording.
5	If the insights were generated by AI, this warning message is displayed. For generating AI insights, see Running AI-Generated Insights on page 132.
6	AI-generated summary, grouped into **Bullet-Points**, **Topics**, **Speakers**, and **Paragraphs**. For generating AI insights, see Running AI-Generated Insights on page 132.
7	Three-dot vertical menu, which when tapped, displays a drop-down menu with the following commands: ■ **Copy Link** - see Copying a Meeting Recording's URL on page 139 ■ **Delete Meeting** - see Deleting a Meeting Recording on page 147 ■ **Unpublish** - see Unpublishing a Meeting Recording on page 142 ■ **Share** - see Sharing Meeting Recordings within Organization on page 145

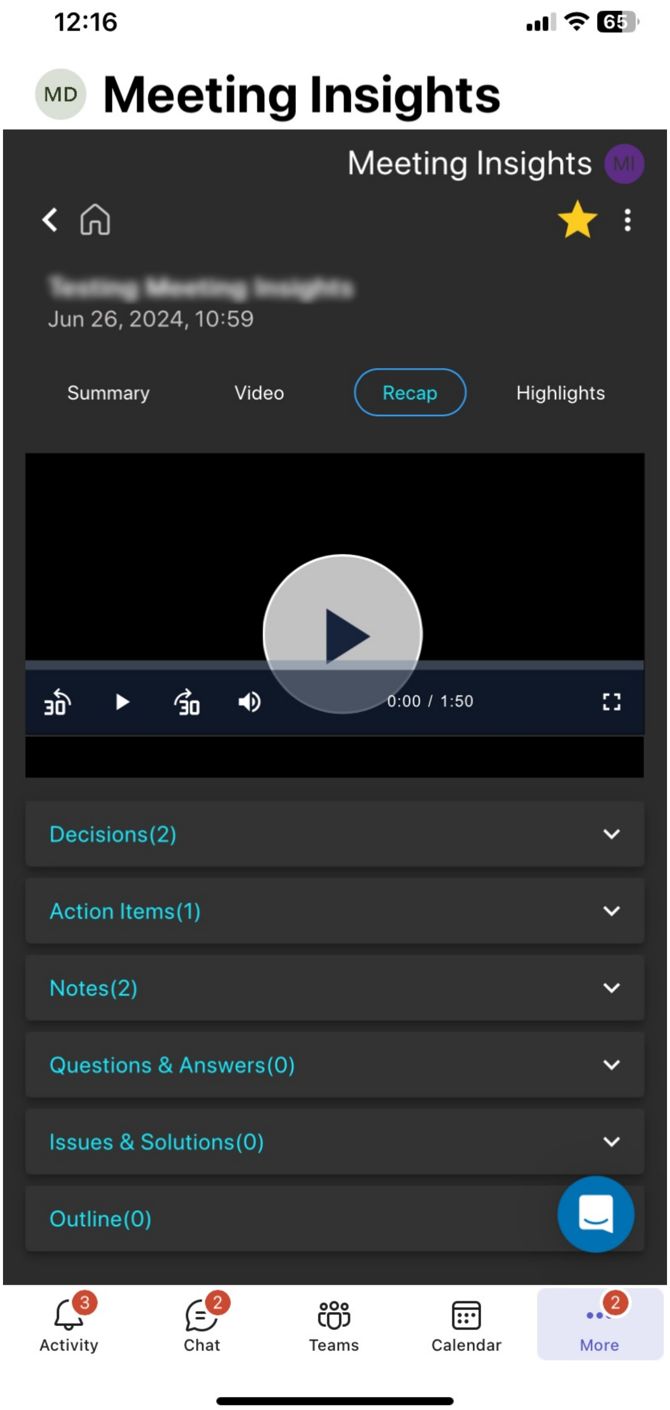
Viewing and Managing Recap of Meeting Recording

You can view the recap added during and after the meeting recording in Meeting Insights mobile app. You can also add, edit, or delete a recap. In addition, you can trigger AI to generate Questions & Answers, Issues & Solutions, Outline, and a transcription.

➢ **To view and manage meeting recap:**

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).

2. Tap the meeting recording that you want; the Player screen opens.
3. Tap **Recap**; the different recap types are displayed below the video player (if exists). Each recap tab name displays the number of added items.



4. **Decisions:**
   - To view decisions, tap the **Decisions** tab.
   - To add a decision:
     i. Tap **+New**.

ii. In the text box, type your decision, and then tap **Add Decision**.

- To edit a decision, tap , make your changes, and then tap **Update**.
- To delete a decision, tap , and then tap **Delete**.

5. **Action Items:**

- To view action items, tap the **Action Items** tab.
- To add an action item:

i. Tap **+New**.

ii. In the text box, type what needs to be done.

iii. Assign the action item to a person, by tapping **Assign to**, and then from the pop-up list, selecting the person's name.

iv. Define a date by which the action item should be done, by tapping **Due date**, and then using the pop-up calendar to select the date.

v. Tap **Add Action Item**.

- To edit an action item, click , make your changes, and then click **Update**.
- To delete an action item, click , and then click **Delete**.

6. **Notes:**

- To view notes, tap the **Notes** tab.
- To add a note:

i. Tap **+New**.

ii. In the text box, type your note.

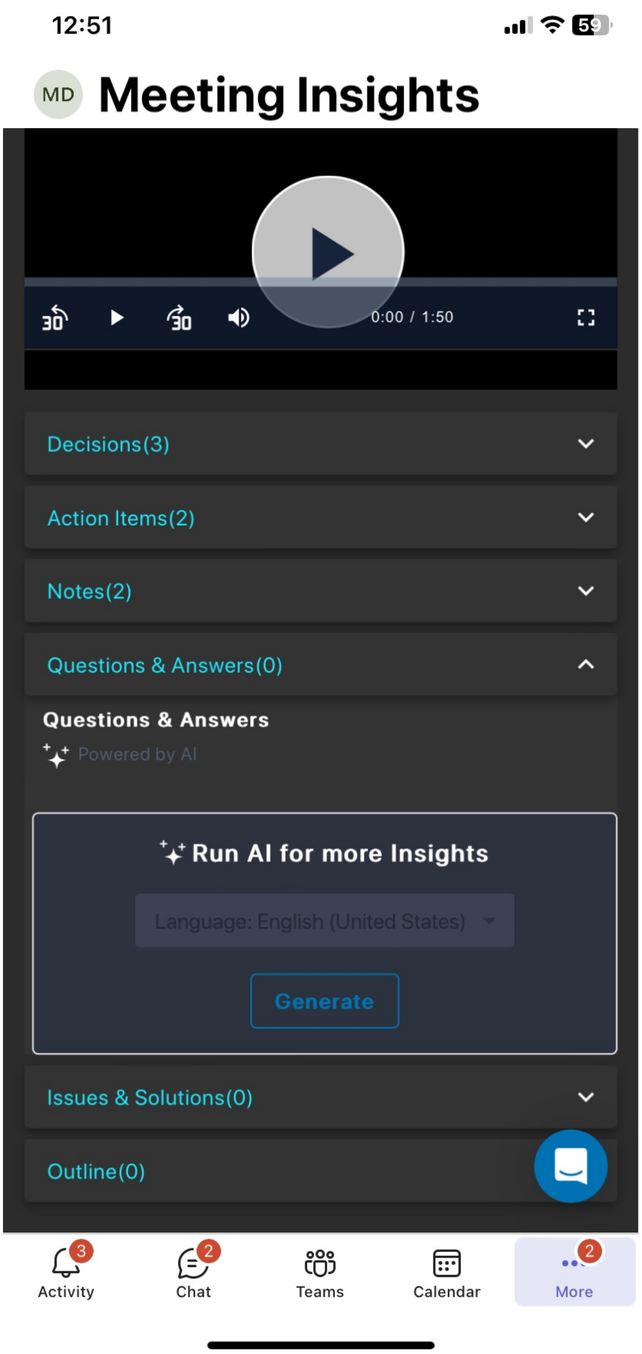
iii. Toggle the **Private** / **Public** button to make the note visible only to you or to everyone.

iv. Tap **Add Note**.

- To edit a note, click , make your changes, and then click **Update**.
- To delete a note, click , and then click **Delete**.

7. **Questions & Answers, Issues & Solutions, and Outline:**

- To view the recap, tap the **Questions & Answers**, **Issues & Solutions**, or **Outline** tab.
- To activate an AI-generated Questions & Answers, Issues & Solutions, and Outline, tap **Generate**:



- The AI also generates a transcription of the meeting recording.
- During the AI process, you can stop the generation by tapping **Stop**.

- To play the video from a specific AI-generated recap, tap the specific recap.
- To copy the AI-generated recap, tap located next to the respective **Questions & Answers**, **Issues & Solutions**, or **Outline** tab.
- To email the AI-generated recap to yourself, tap located next to the respective **Questions & Answers**, **Issues & Solutions**, or **Outline** tab, and then click **Send**.

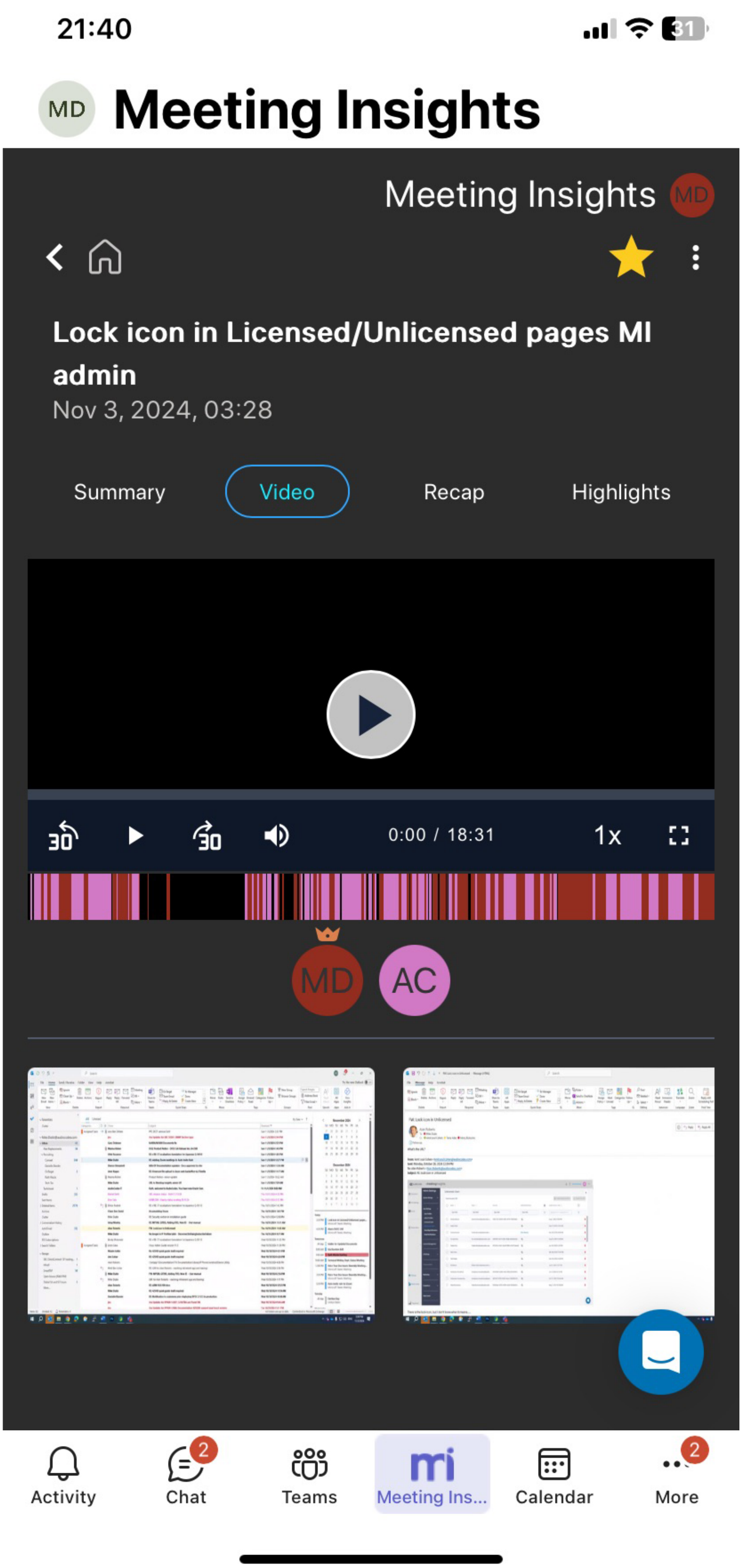
Playing a Meeting Recording Video

You can play the meeting recording video in Meeting Insights mobile app. If media was shared (e.g., presentation), the video will include the shared media.

➢ **To play meeting recording video:**

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).
2. Tap the meeting recording that you want; the Player screen appears.
3. Tap **Video**; the video player is displayed:

1
2
3
4
5


21:40
MD
Meeting Insights
Meeting Insights
MD
Lock icon in Licensed/Unlicensed pages MI admin
Nov 3, 2024, 03:28
Summary
Video
Recap
Highlights
30
30
0:00 / 18:31
1x
MD
AC
Activity
Chat
Teams
Meeting Ins...
Calendar
More

Item #	Description
1	Tap the play icon to play the video.
2	Video play controls: ■ Rewinds video by 30 seconds. ■ Plays the video. ■ Fast-forwards video by 30 seconds. ■ Mutes the audio. Tap again to unmute. ■ <elapsed time> / <total duration> Displays the elapsed playing time of the video over the total duration of the video. ■ Playback speed: ✓ **1x** plays video at normal recorded speed ✓ **1.5x** plays video at 1.5 times the normal speed ✓ **1.75x** plays video at 1.75 times the normal speed ✓ **2x** plays video at twice the normal speed ■ Displays video in full screen. To exit full screen mode, press the Escape key on your keyboard. **Note:** Full screen functionality may be unavailable for some file formats.
3	Speakers bar, displaying the location in the video where the participant spoke based on the participant's profile avatar color.
4	Profile color-coded avatar of each participant.
5	Slide navigator, displaying the slides created by Meeting Insights of the meeting recording. To scroll through the slides, swipe your finger left or right over the slide navigator. To play the video from a specific clide, navigate to the slide and then tap the slide to play.

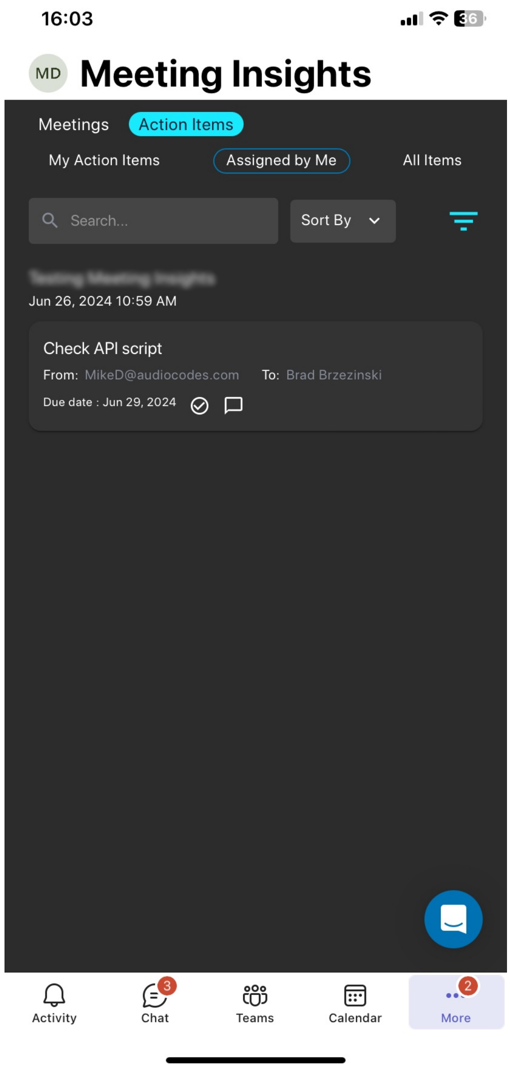
Viewing and Managing Action Items

You can view and manage action items that were assigned to you and that you assigned to others.

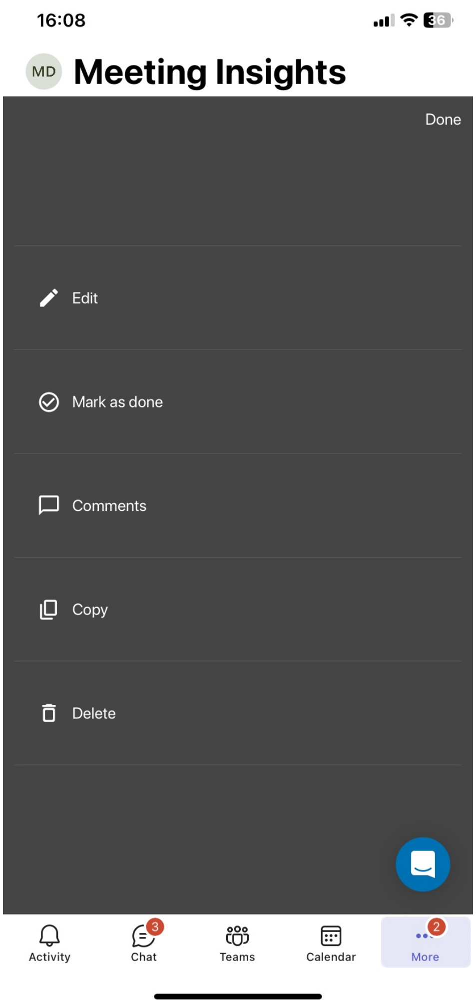
➢ **To view action items:**

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).

2. On the top bar, tap **Action Items**; the following screen appears:



3. Depending on which action items you want to view, tap one of the following tabs:
   - **My Action Items:** Displays action items that were assigned to you.
   - **Assigned by Me:** Displays actions items that you assigned to others.
   - **All Items:** Displays both action items that were assigned to you and that you assigned to others.
4. To edit an action item, tap the action item; the following appears:



5. You can perform the following on an action item:
   - To edit the action item (subject, assigned person, or due date), tap **Edit**, and then change as desired.
   - To mark the action item as completed, tap **Mark as done**.
   - To add comments to the action item, tap **Comments**, and then in the text box, type your comment.
   - To copy the action item, tap **Copy**, and then paste the comment, for example, in an email.
   - To delete the action item, tap **Delete**, and then in the confirmation message box, tap **Delete**.

Unique Actions in Standalone Mobile App

The Meeting Insights standalone mobile app also provides the following unique post-meeting actions:

- Uploading a saved ad hoc recording - see Uploading Saved Ad-Hoc Recordings on the next page

- Uploading a recording done by a third-party tool - see Uploading Recordings by Third-Party Tools on page 122

Uploading Saved Ad-Hoc Recordings

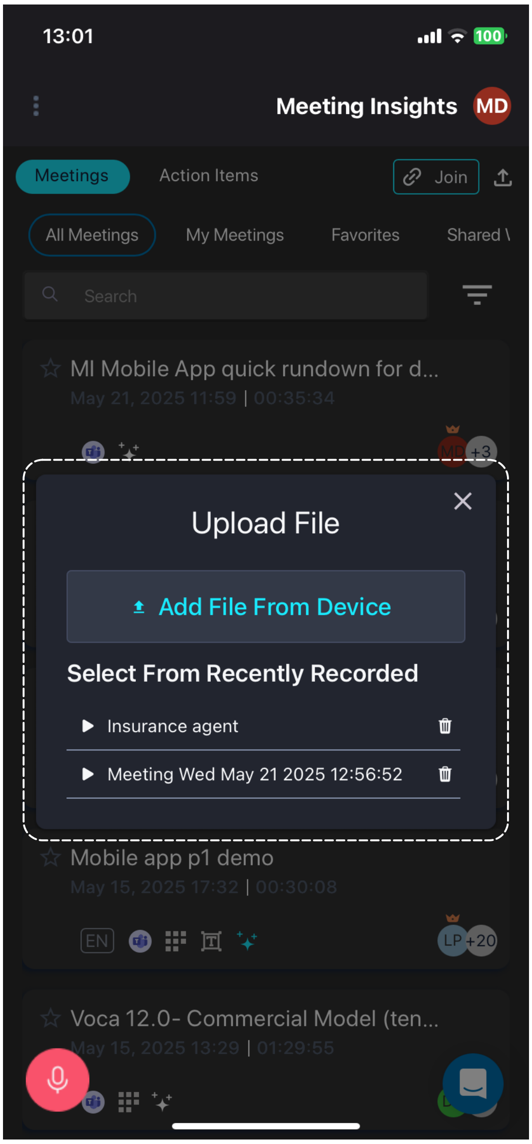
Ad-hoc meeting recordings that you saved on your mobile phone through the Meeting Insights standalone mobile app instead of uploading them immediately after the meeting (i.e., **Save and Upload Later** option used, as described in Ad Hoc Recording using Meeting Insights Standalone Mobile App on page 39), can easily be uploaded (imported) at a later stage.

The process of uploading a recorded meeting file also allows you to do the following:

- Listen to a recorded meeting.
- Delete a recorded meeting.

➢ **To upload saved ad-hoc meeting recordings:**

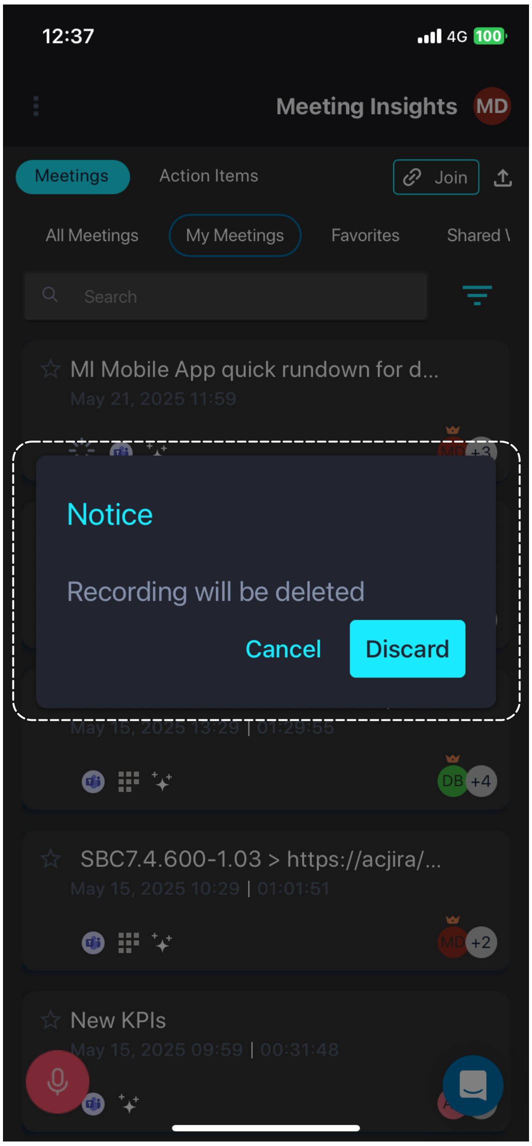
1. On your mobile phone, open the Meeting Insights standalone mobile app (see Logging into Meeting Insights Standalone Mobile App on page 19).
2. In Meeting Insights, tap the upload icon, located in the top-right corner (next to Join); the Upload File dialog box appears, listing all saved meeting recordings:



3. Before uploading a specific meeting recording, you can optionally do the following:

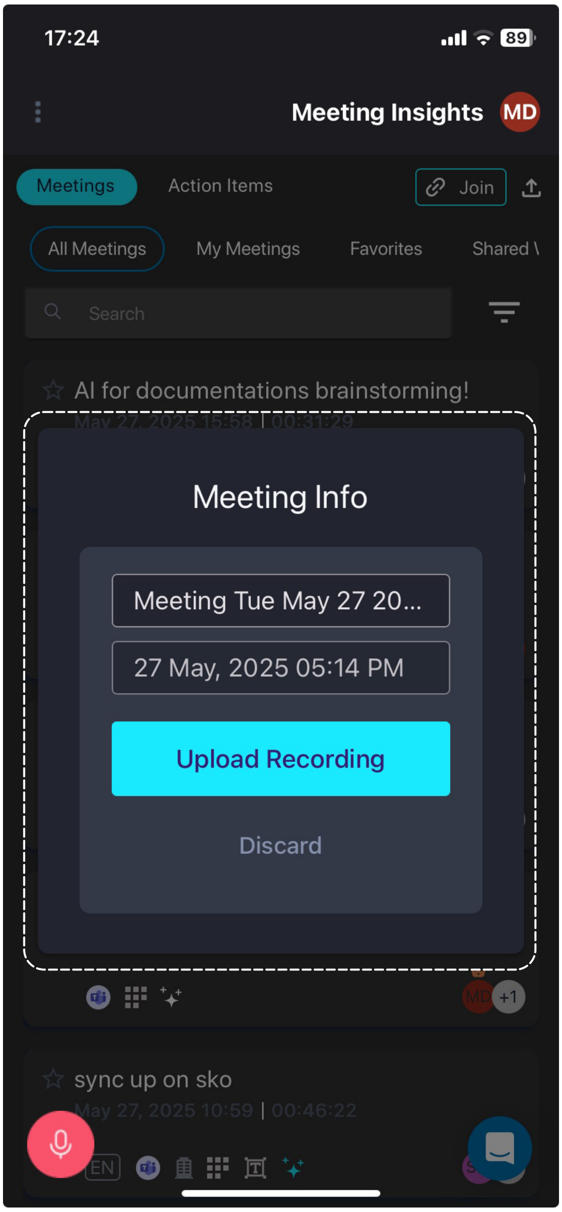
- Listen to a recorded meeting, by tapping the play icon.
- Delete a recorded meeting:

    i. Tap the delete icon; a confirmation message appears:

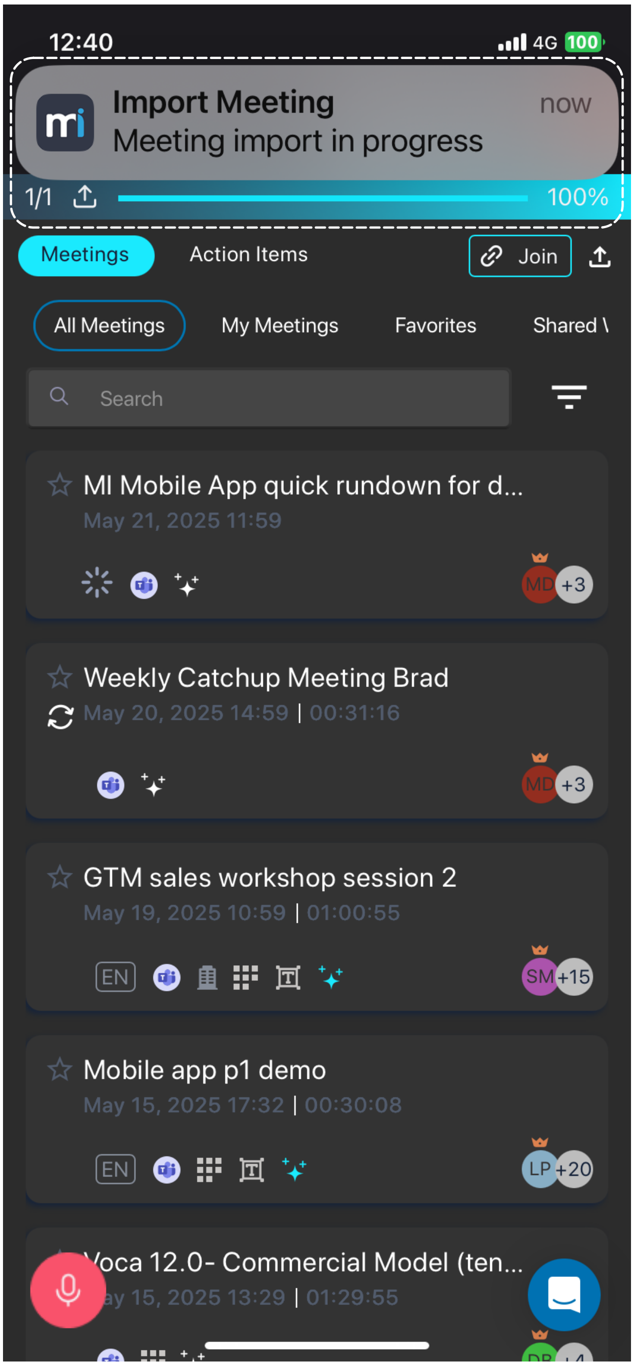


ii. Tap **Discard** to confirm.

4. From the list of saved recorded meetings, tap the recorded meeting that you want to upload; the Meeting Info dialog box appears:

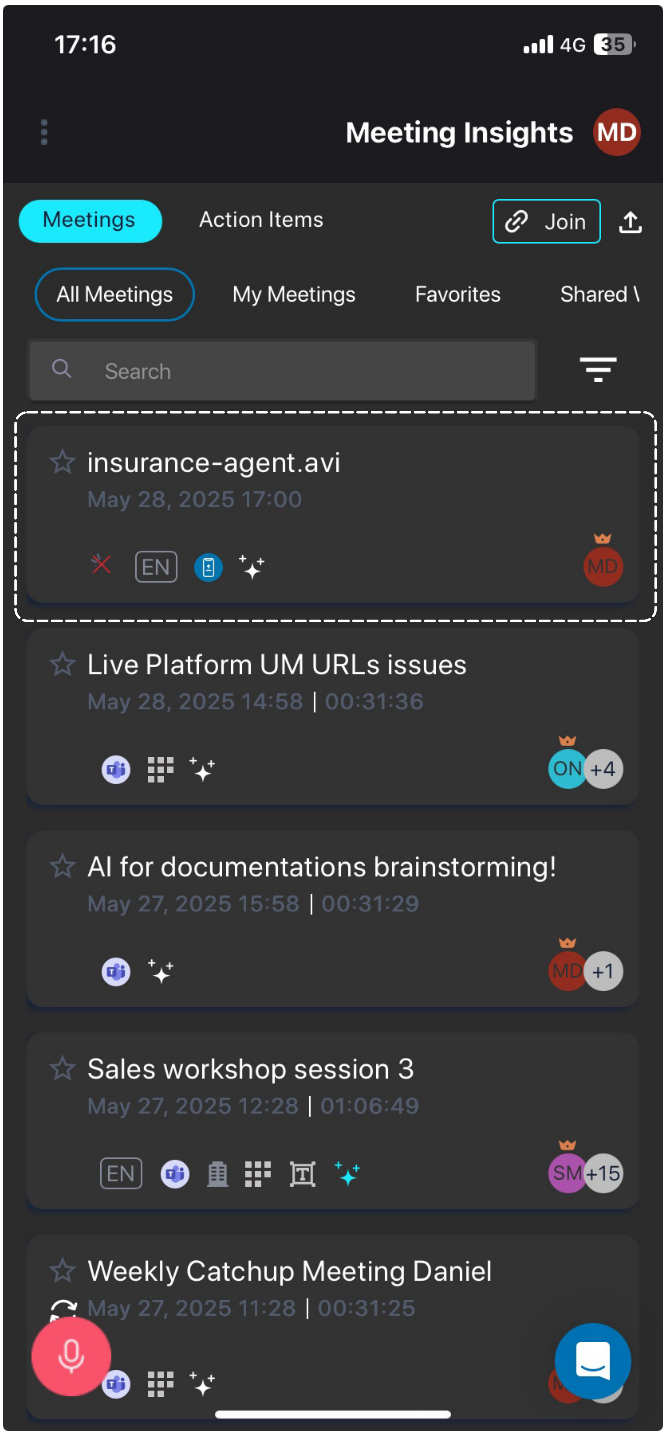


5. In the top field, type a name for the recorded meeting. By default, the name is "Meeting" followed by the date and time of the recording.
6. Tap **Upload Recording**; a message and progress bar are displayed at the top of the screen during the file upload:



Uploading Recordings by Third-Party Tools

Meeting Insights standalone mobile app allows you to upload (import) recordings stored on your mobile phone that were created by third-party recording tools (e.g., webinar). When uploaded, Meeting Insights lists them with the other meeting recordings created by Meeting Insights and displays them with the  icon, as shown below. You can manage these uploaded recordings like any other meeting recordings in Meeting Insights.



- The upload recording feature is available only if enabled by your organization's Meeting Insights administrator.
- You can upload only recorded files that are in the following file formats: .avi, .mp4, .wmv, .mpeg, .wav, .mov, .flv, .mpg, .aac, .flv, .flac, .wma, .mp3, .m4a, .webm, and .wmv.

You can upload a recorded file from your phone's storage to Meeting Insights using any of the following methods:

- Using Meeting Insights Add File From Device option to select the file from your phone's storage - Uploading Recorded File using Meeting Insights Add File From Device Option on page 128
- Using your mobile phone's file sharing feature to send the file to the Meeting Insights app - see Uploading Recorded File using Mobile Phone's File Share Feature below

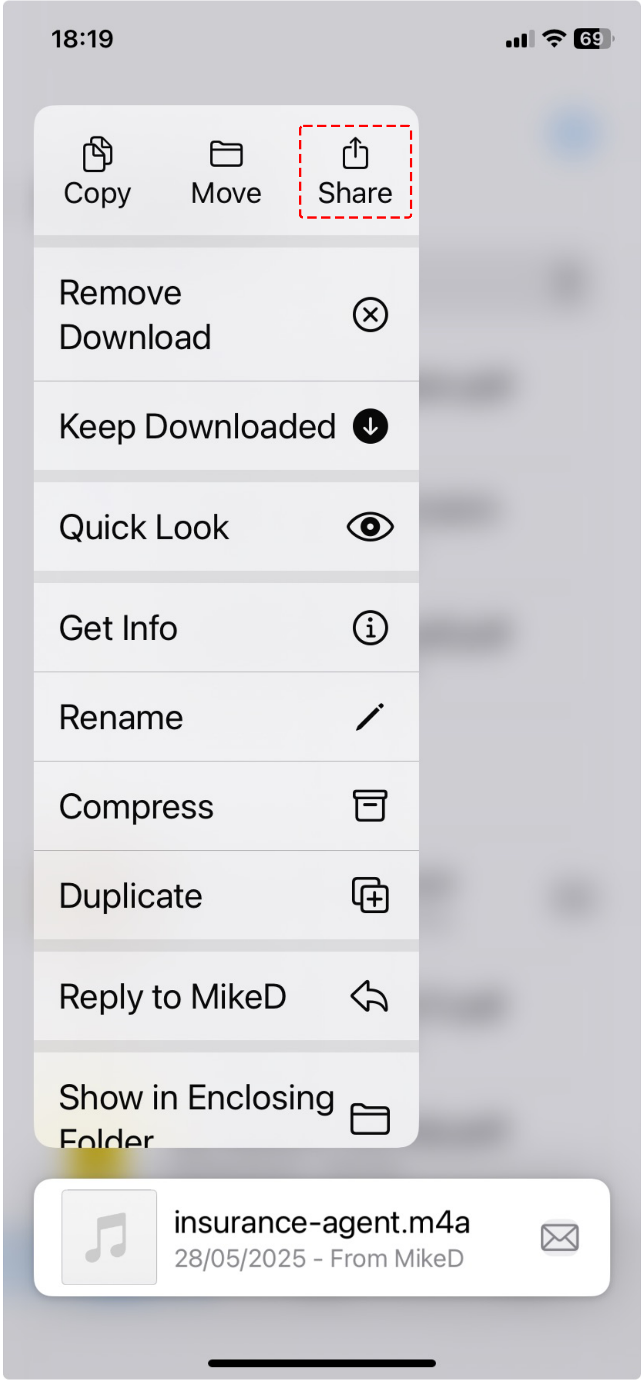
Uploading Recorded File using Mobile Phone's File Share Feature

You can upload a recorded file directly to the Meeting Insights standalone mobile app by using your mobile phone’s built-in file sharing functionality. This allows you to share files via compatible apps such as Meeting Insights without needing to navigate through the app's interface manually.

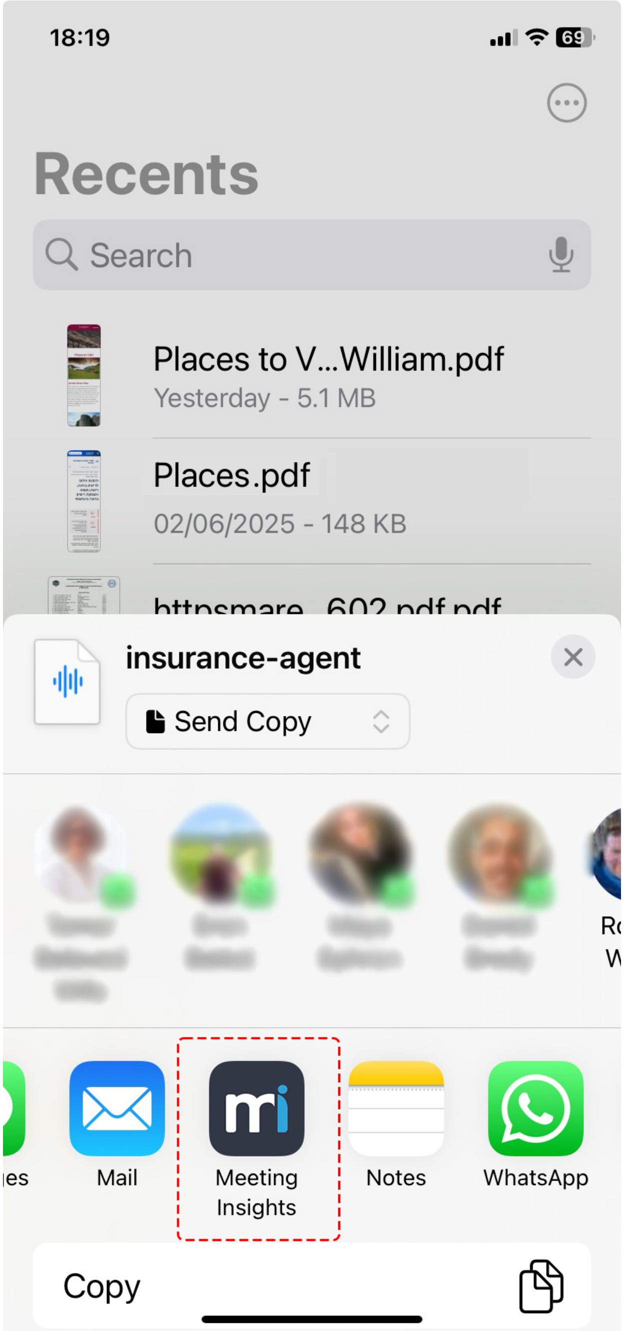
The steps below describe how to perform this task on an iOS device. Note that the procedure may vary slightly on Android devices.

➢ **To upload a recorded file using phone's file share feature:**

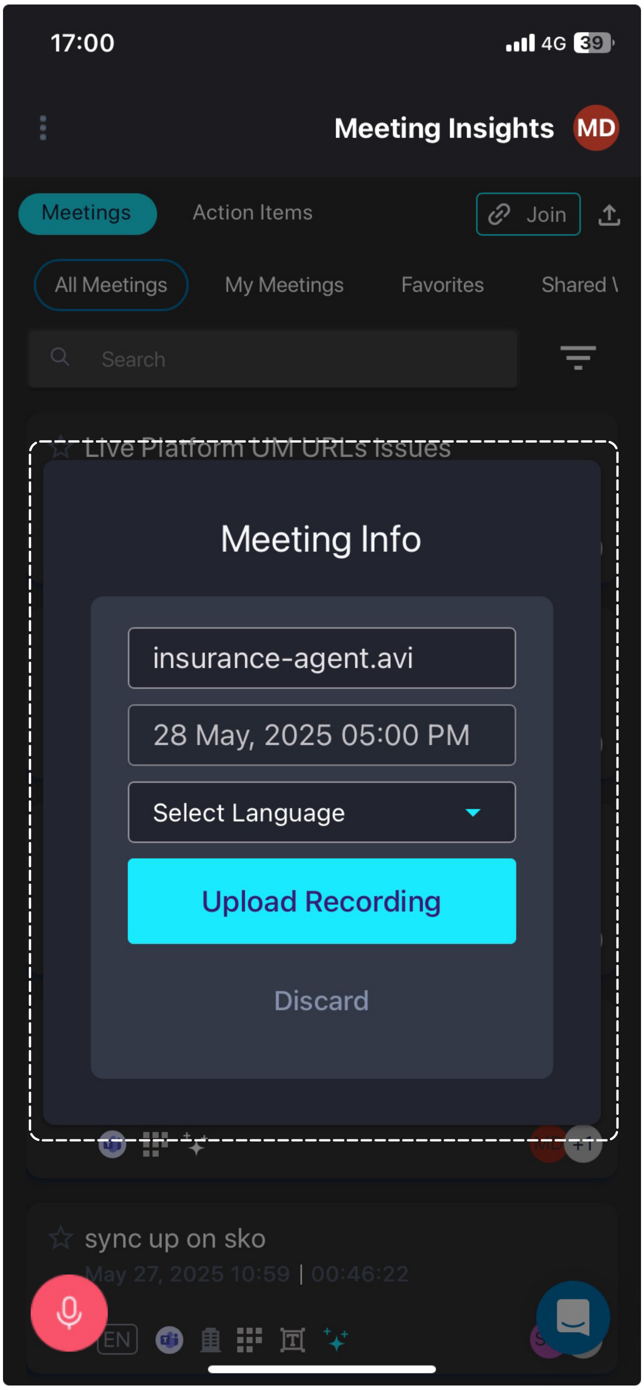
1. Open the Files app on your mobile phone.
2. Locate the file you want to upload, and then long tap the file until a pop-up menu appears.
3. Tap the **Share** icon as shown below to display a list of apps through which you can send the file.



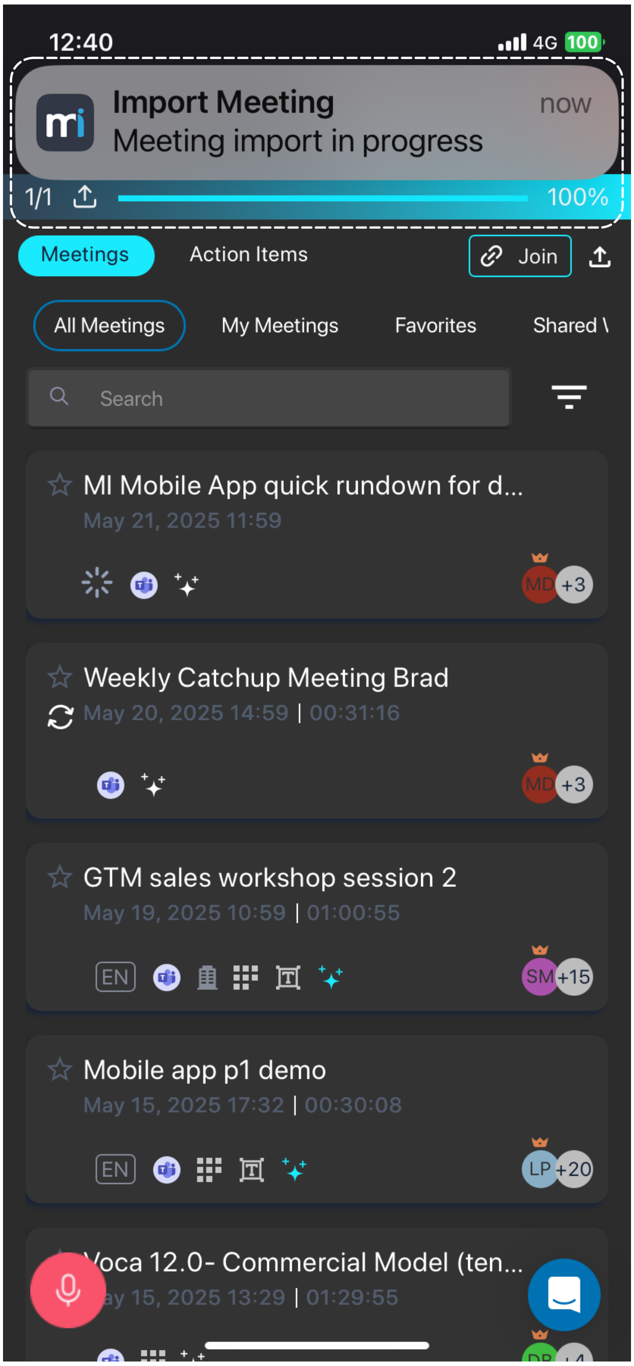
4. From the sharing options, choose the **Meeting Insights** app:



The Meeting Insights app opens, displaying the Meeting Info dialog box:



5. In the top field, type a name for the recorded meeting. By default, Meeting Insights assigns it the name of the uploaded file.
6. From the 'Select Language' drop-down list, select the language of the recorded meeting.
7. Tap **Upload Recording**; a message and progress bar are displayed at the top of the screen during the file upload:



When file upload completes, Meeting Insights adds it to the list of meeting recordings and starts processing the recorded meeting.

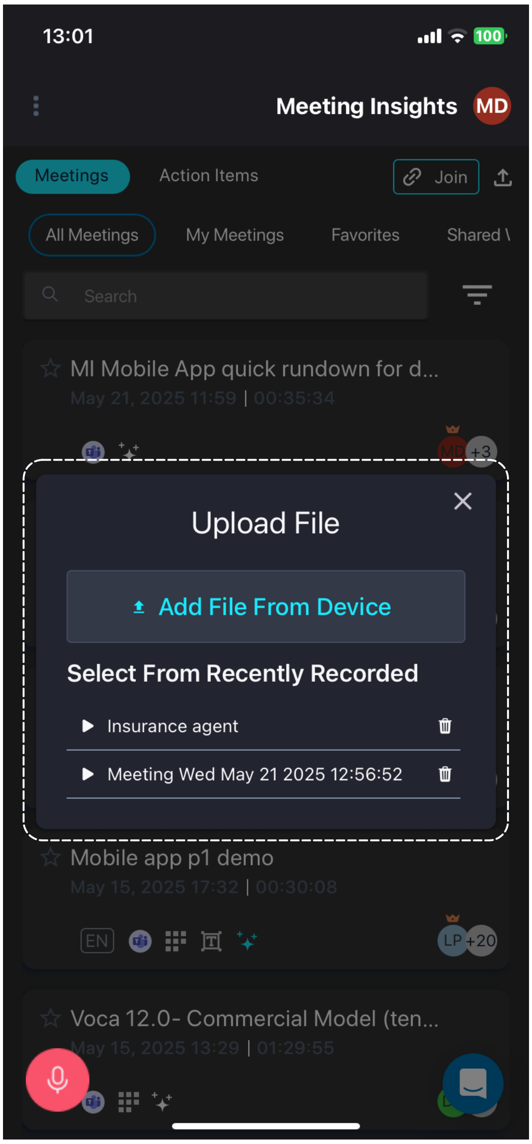
Uploading Recorded File using Meeting Insights Add File From Device Option

You can upload a recorded file stored on your mobile phone's using Meeting Insights Add File From Device option.

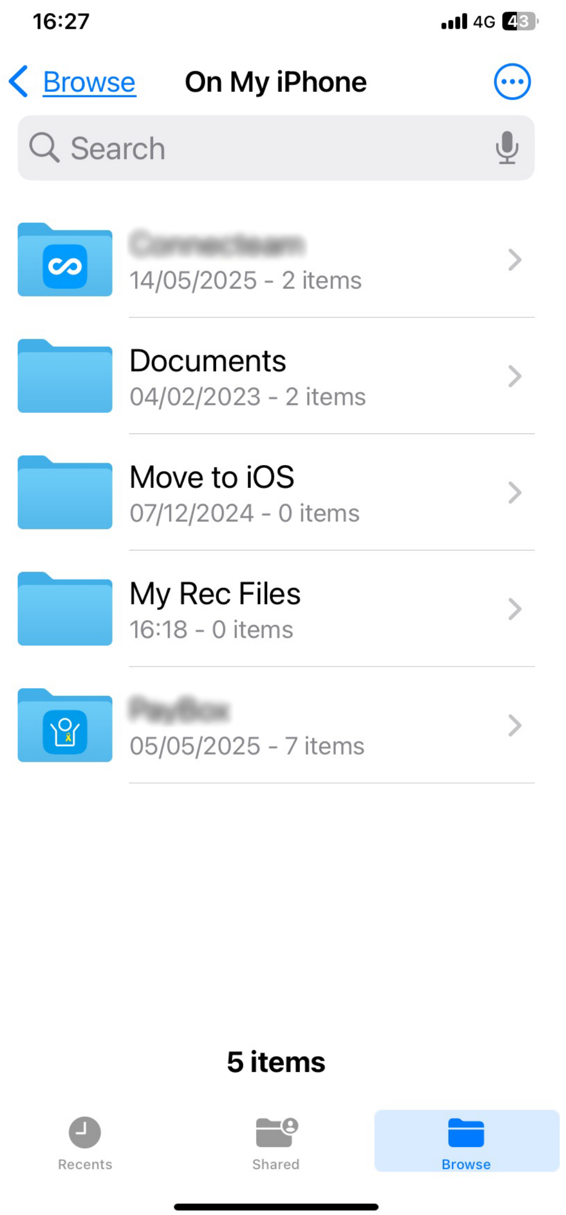
➢ **To uploaded recorded file using Meeting Insights Add File From Device option:**

1. On your mobile phone, open the Meeting Insights standalone mobile app (see Logging into Meeting Insights Standalone Mobile App on page 19).

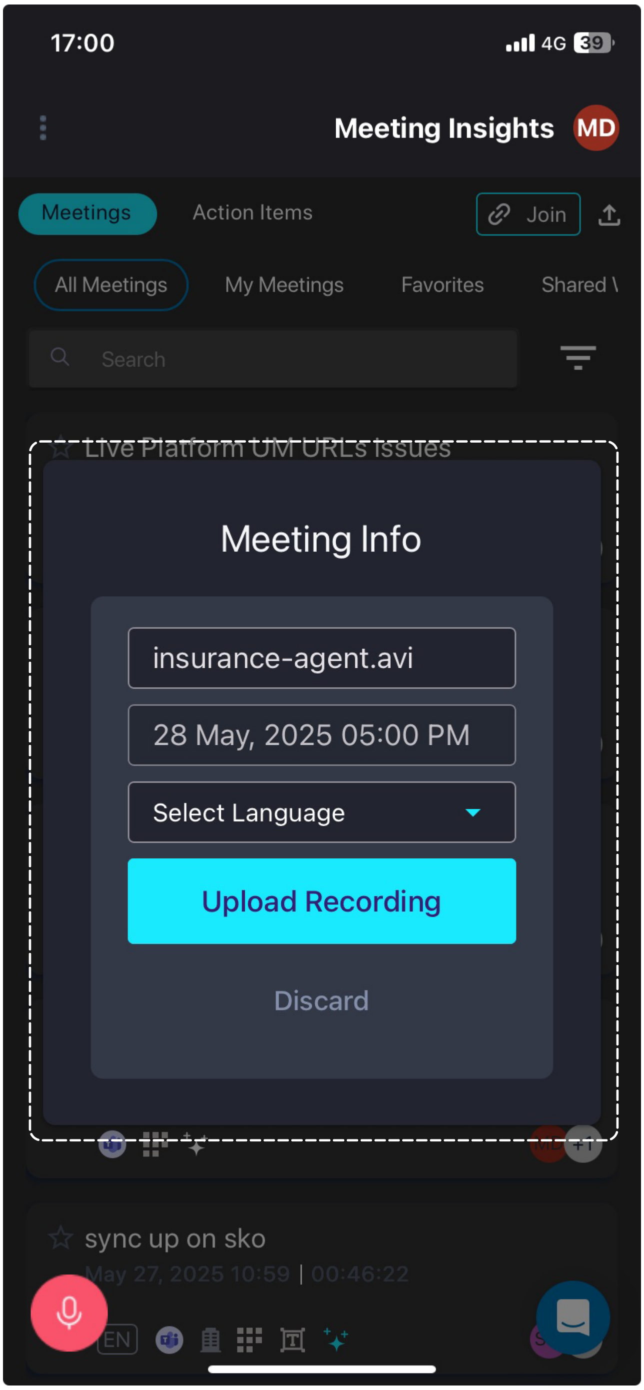
2. In Meeting Insights, tap the upload icon, located in the top-right corner (next to **Join**); the Upload File dialog box appears:



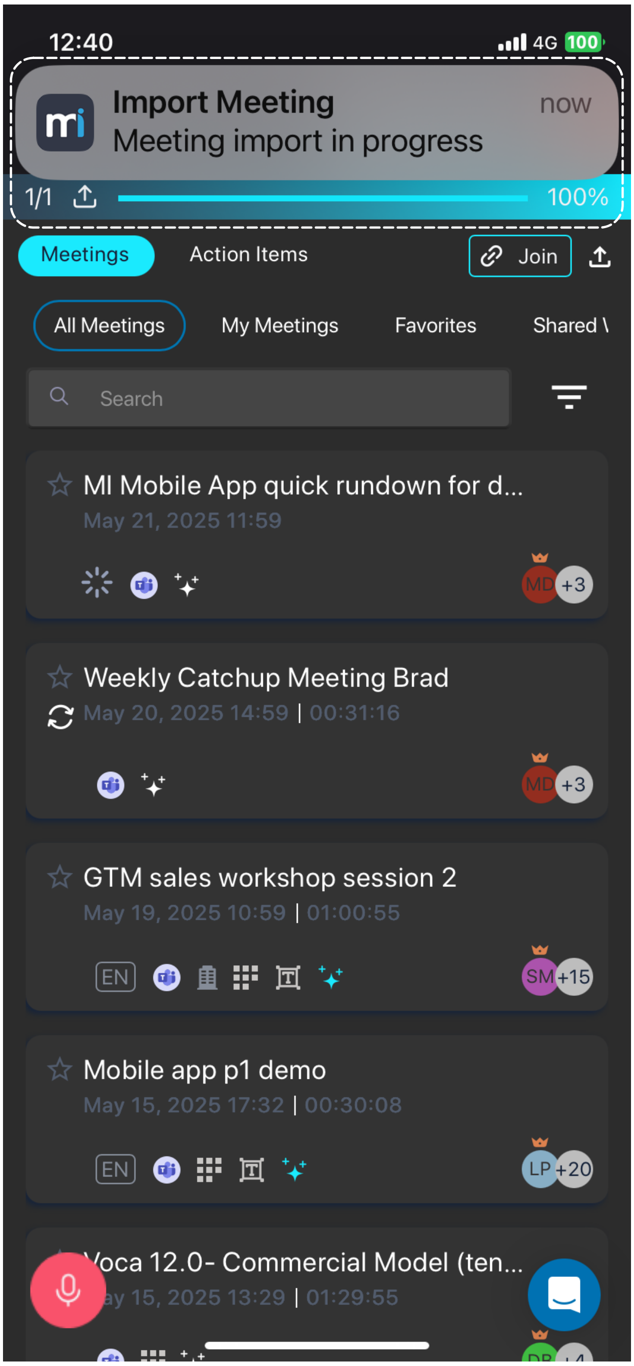
3. Tap **Add File From Device**; your phone's file storage app opens, for example, iPhone's File app:



4. Navigate to and select the required file; the Meeting Info dialog box appears:



5. In the top field, type a name for the recorded meeting. By default, Meeting Insights assigns it the name of the uploaded file.
6. From the 'Select Language' drop-down list, select the language of the recorded meeting.
7. Tap **Upload Recording**; a message and progress bar are displayed at the top of the screen during the file upload:



When file upload completes (progress bar displays 100%), Meeting Insights adds it to the list of meeting recordings and starts processing the recorded meeting.

Running AI-Generated Insights

Meeting Insights offers you a quick and effective method for automatically creating insights of your meeting recording using artificial intelligence (AI). AI-generated insights include the following:

- **Summary**, categorized into the following groups:

a. **Bullet-Points:** Bullet list of the main points of the meeting recording (in chronological order). This summary is displayed under 'Bullet-Point Summary - Powered by AI'.

b. **Topics:** Summary of the main issues of the meeting recording, grouped under meaningful topic headings. This summary is displayed under 'Summary - Powered by AI'.

c. **Speakers:** Summary of each spoken participant. The speaker can be an internal participant (i.e., from within your organization) or an external participant.

d. **Paragraphs:** Summary of main issues grouped in paragraphs.

> Summary by Speakers and Summary by Topics are generated only if your Meeting Insights application is enabled to generate them by the Service Provider.

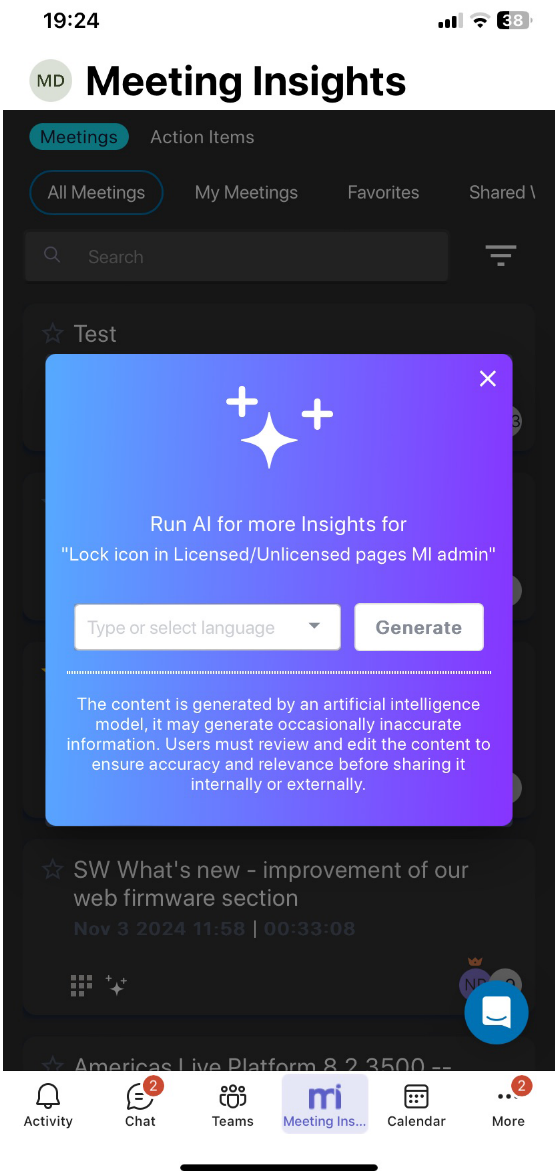
- **Action Items**
- **Questions & Answers**
- **Issues & Solutions**
- **Transcription** of meeting recording

> - The insights are generated by an AI model, which may sometimes generate inaccurate information. Therefore, it's recommended that you review the insights and edit it if required to ensure accuracy and relevance before sharing it with others.
> - If you're the owner of the meeting recording, you can always trigger AI to generate insights. Participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
> - It may take some minutes to generate the AI-powered insights.

You can run the AI-powered insights from the home screen or from the Player screen.

➢ To run AI-generated insights:

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).
2. Tap the icon corresponding to the meeting recording for which you want AI-generated insights; the following dialog box appears:



3. From the drop-down list, select the language of the meeting.

4. Tap **Generate**; the dialog box closes and the icon spins around, indicating that the AI-generated insights is in progress. When the icon stops rotating, the AI generated insight is ready.

Generating AI-Powered Summary Based on Templates

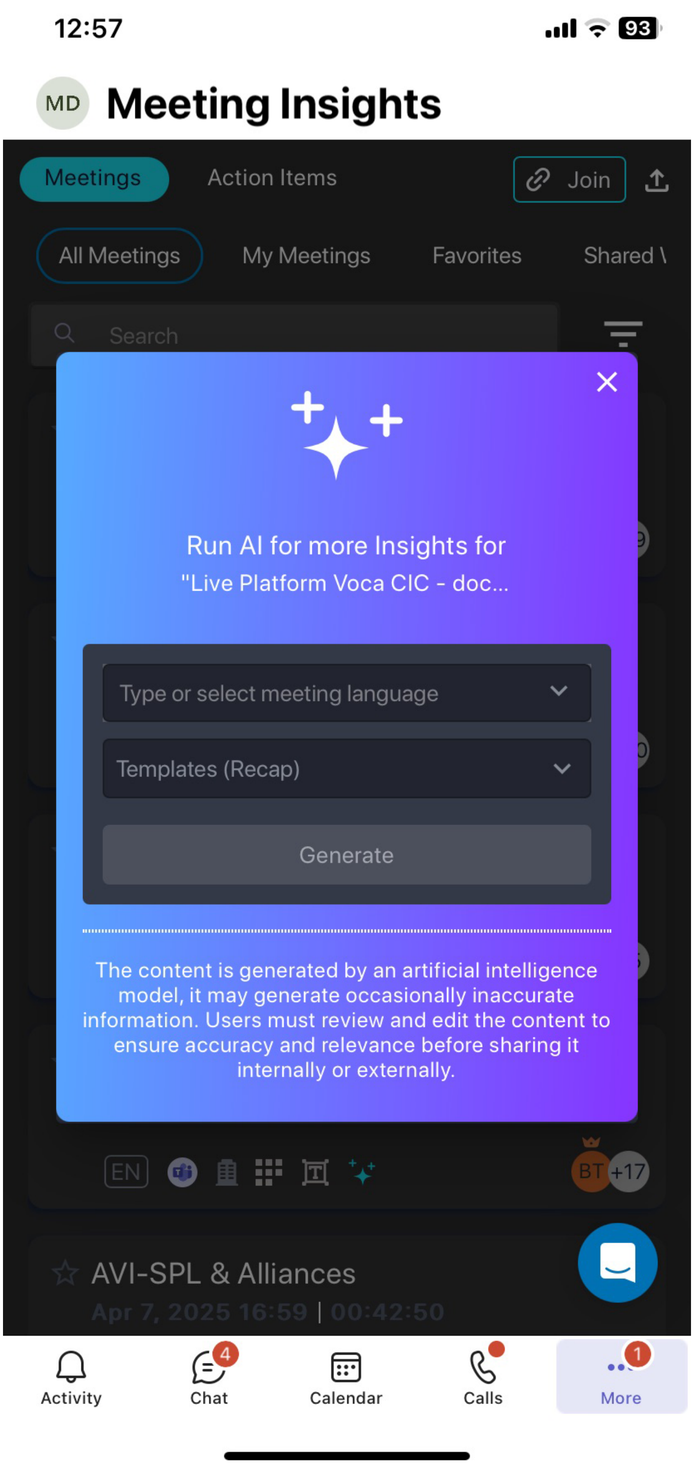
Meeting Insights allows you to generate AI-powered summaries that conform to predefined layout templates. This feature is particularly valuable for organizations that require meeting summaries to adhere to a specific structure. For example, your organization may want the summary to include the sections 'Meeting Agenda', 'Main Concerns', and 'Wishful Goal'.

The available template(s) are determined by your organization's Meeting Insights administrator. If multiple templates are available, you can select more than one for a single AI-generated summary. If you select multiple templates, Meeting Insights generates separate summaries for the same meeting recording, each formatted according to a different template.

- AI-powered summaries based on templates are available only if enabled by your organization's Meeting Insights administrator.
- The summary is generated by an AI model, which may sometimes generate inaccurate information. Therefore, it's recommended that you review the summary and edit it if required to ensure accuracy and relevance before sharing it with others.
- It may take some minutes to generate the AI-powered summary.
- If you're the owner of the meeting recording, you can always trigger AI to generate a summary. Participants of the meeting recording can also trigger it if your organization's administrator has enabled such functionality.
- When you activate AI, it generates a Summary, Action Items, Q&A, Issues & Solutions, and a transcription.

➢ To run AI-powered summary based on templates:

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).
2. You can run an AI-powered summary based on templates from the home screen or the Player screen:
   - **Home screen:**
     i. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).
     ii. Tap the icon corresponding to the meeting recording that you want; the 'Run AI for more Insights' dialog box appears:

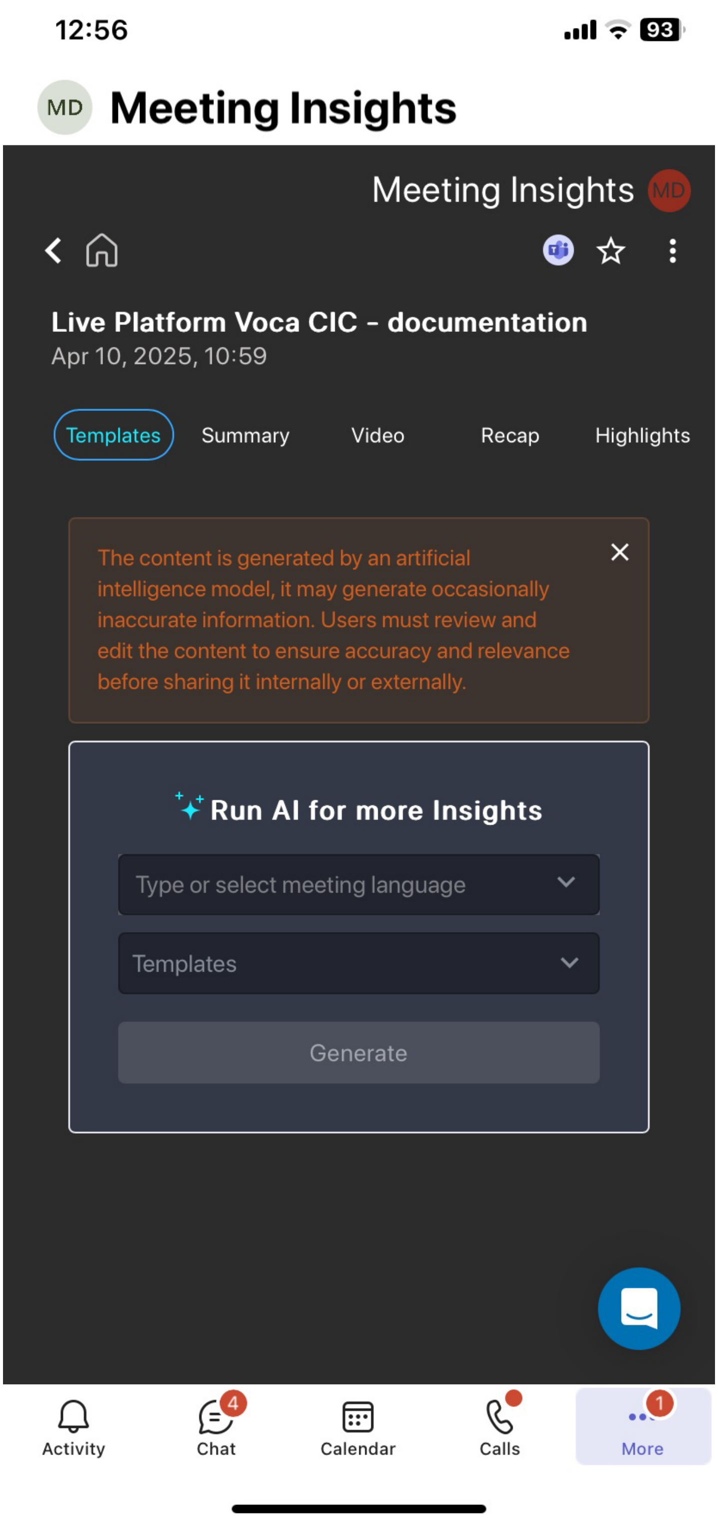


- **Player screen:**

  i. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).

  ii. Tap the meeting recording that you want; the Player screen opens.

  iii. Tap the **Templates** tab; the 'Run AI for more Insights' dialog box appears:



3. From the 'Type or select meeting language' drop-down list, select the language of the meeting.

4. From the 'Templates' drop-down list, select the desired template(s). You can select more than one template.

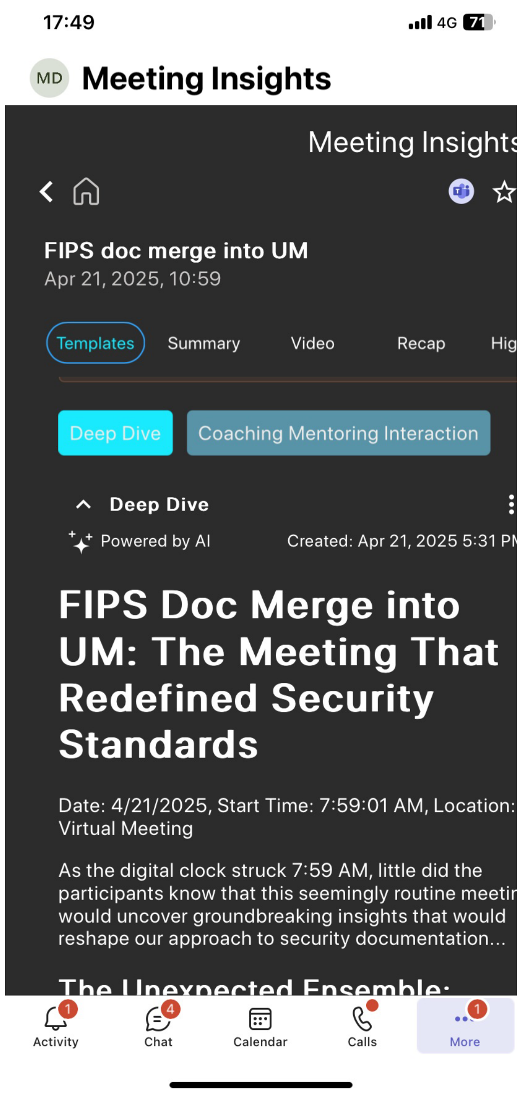
5. Tap **Generate**; the dialog box closes and the icon spins, indicating that the AI-generated summary is in progress. When the icon stops rotating, the AI-generated summary is ready.

Viewing AI-Powered Summary Based on Templates

If you've run an AI-powered summary based on templates (see Generating AI-Powered Summary Based on Templates on page 134), you can select the summary to view according to the template.

➢ To view AI-powered summary based on templates:

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).
2. Tap the meeting recording that you want; the Player screen opens.
3. Tap the **Templates** tab.
4. Tap the tab of the template name whose summary you want to view. Below shows an example of a generated summary based on two templates - 'Deep Dive' and 'Coaching Mentoring Interaction':

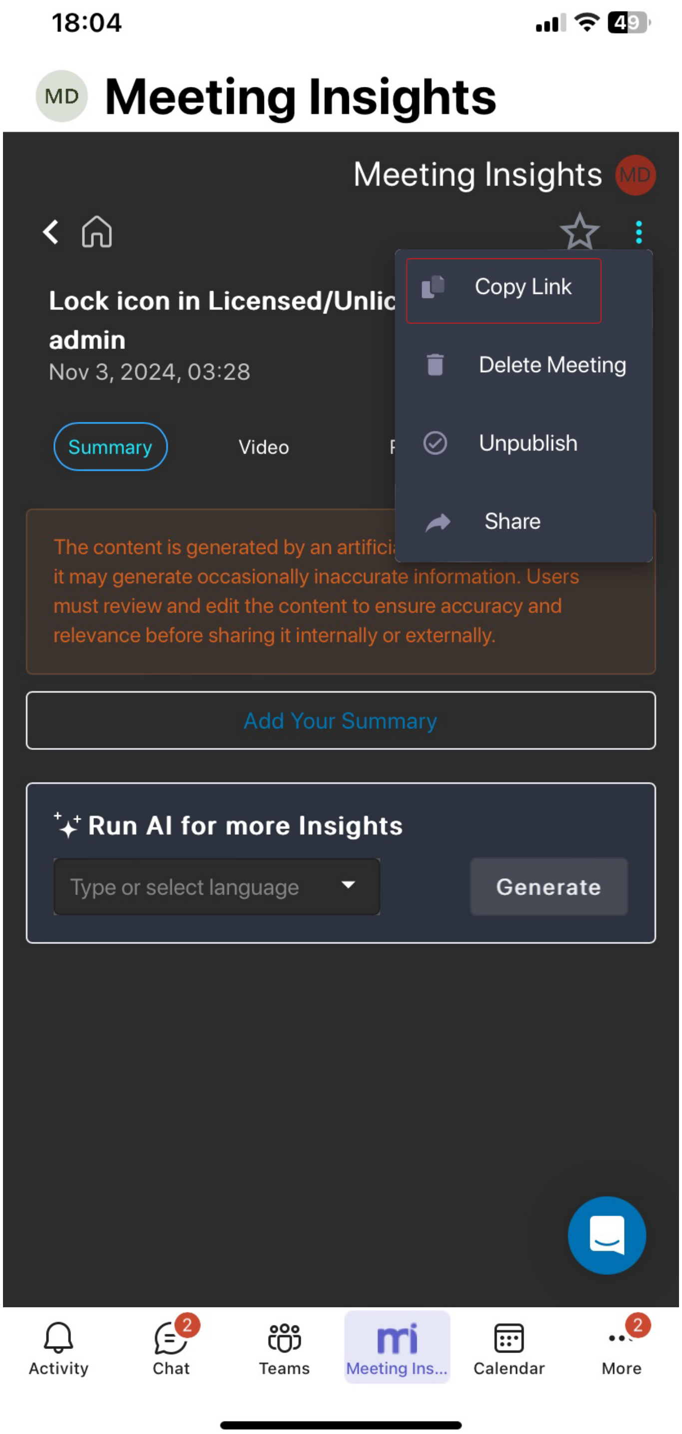


Copying a Meeting Recording's URL

You can copy the link of a meeting recording to your clipboard in Meeting Insights mobile app. Once copied, you can paste it, for example, in an email so that the recipient can click the link to view the meeting recording.

➢ **To copy meeting recording link:**

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).
2. Tap the meeting recording that you want; the Player screen appears.
3. Tap the three vertical ⋮ dots (located near the top-right corner), and then from the drop-down menu, tap **Copy Link:**



4. Paste the link, for example, in an email.

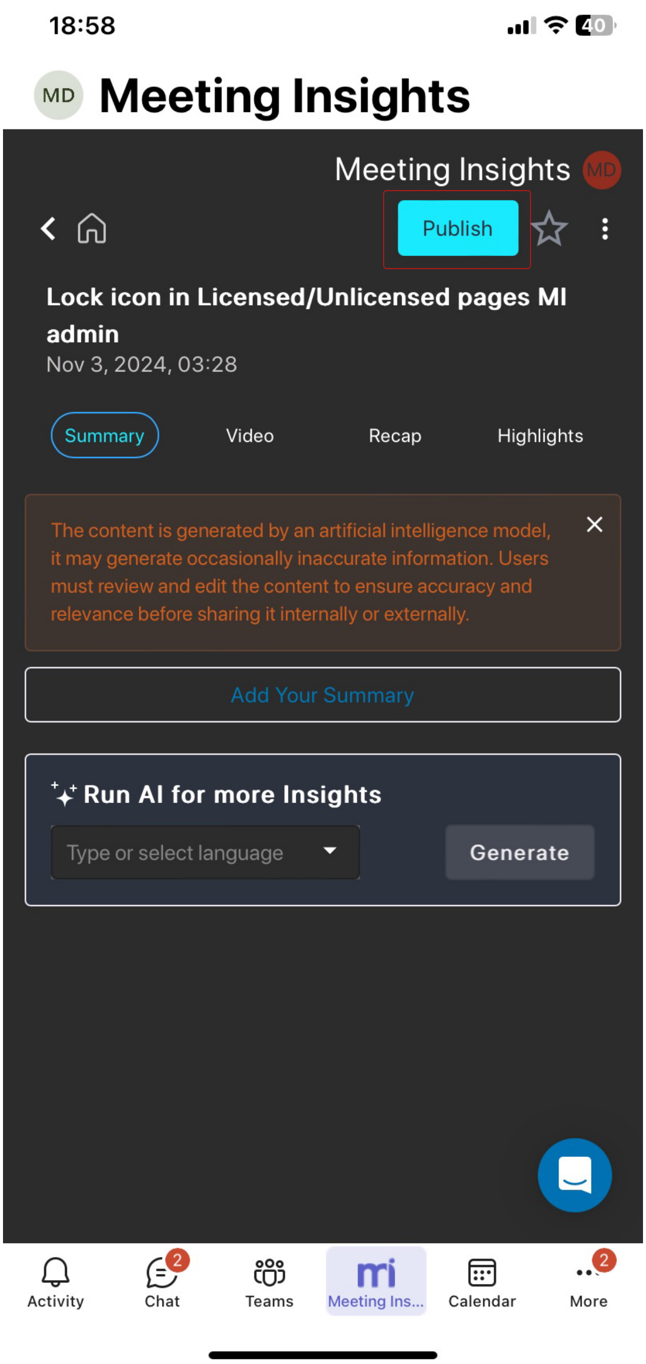
Publishing a Meeting Recording

Only when you publish a meeting recording can its participants view it in their Meeting Insights account. Meeting recordings that are not published are displayed in the list view with the  icon.

- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can publish the meeting recording.
- By default, Meeting Insights automatically publishes your meeting recordings when they end. You can change this to manually publish meeting recordings or to have Meeting Insights automatically publish your meeting recordings after three days (see Configuring Meeting Publishing Time and Integration Preferences on page 30).
- You can configure Meeting Insights to send you a weekly email that lists all your meeting recordings that haven't been published (see Subscribing to Email Notifications on page 28).

➢ To publish a meeting recording:

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).
2. Tap the meeting recording that you want; the Player screen appears.
3. Tap the **Publish** button:



The meeting recording is published and the **Publish** button no longer appears.

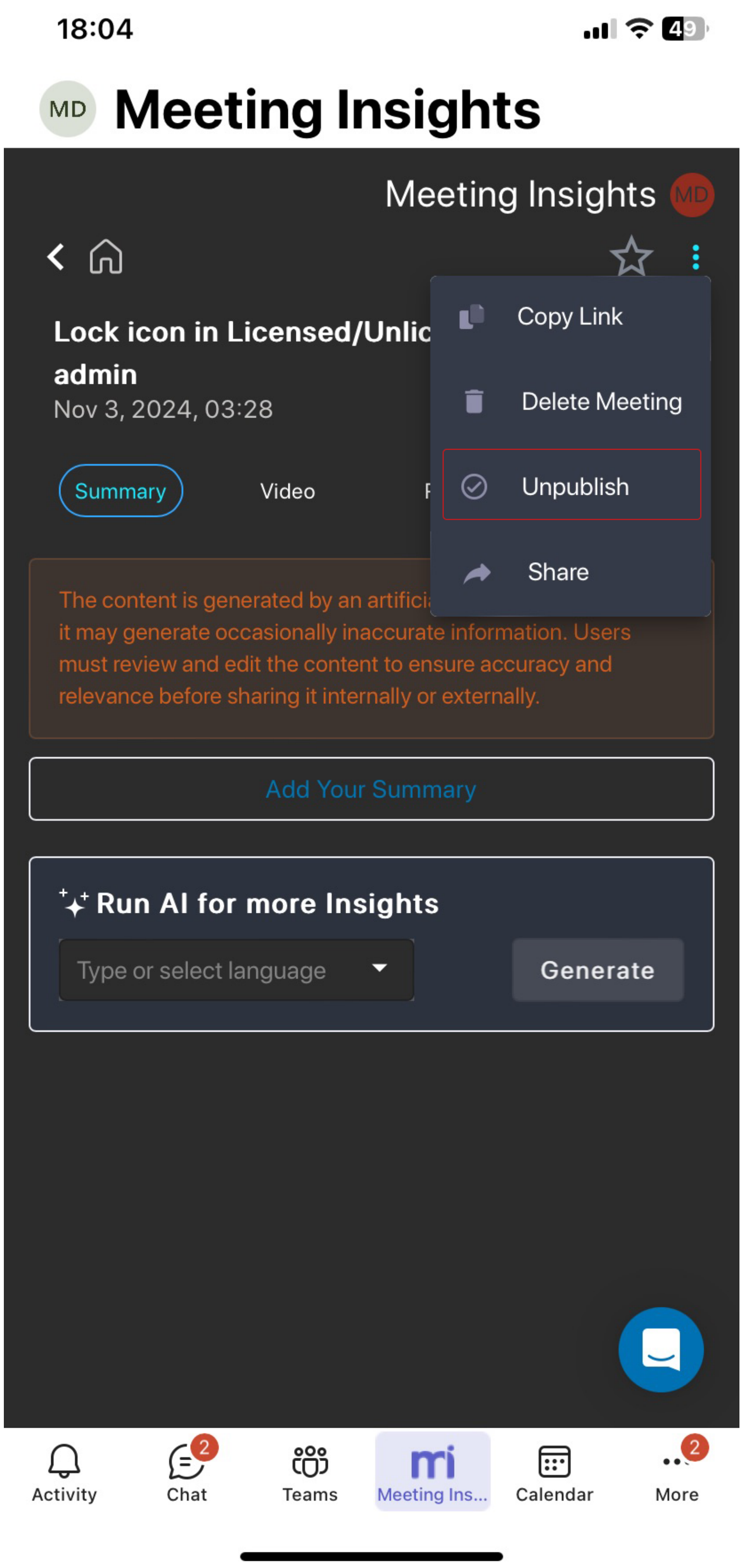
Unpublishing a Meeting Recording

You can unpublish a published meeting recording. When you unpublish a meeting recording, its participants will no longer be able to view it in their Meeting Insights account. After you unpublish a meeting recording, it's displayed in the meeting record list with the  icon.

Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can unpublish the meeting recording.

➢ **To unpublish a meeting recording:**

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).
2. Tap the meeting recording that you want; the Player screen appears.
3. Tap the three vertical ⋮ dots (located near the top-right corner), and then from the drop-down menu, tap **Unpublish**:


18:04
MD Meeting Insights
Meeting Insights
Copy Link
Lock icon in Licensed/Unlic
admin
Nov 3, 2024, 03:28
Delete Meeting
Summary
Video
Unpublish
Share
The content is generated by an artifici
it may generate occasionally inaccurate information. Users
must review and edit the content to ensure accuracy and
relevance before sharing it internally or externally.
Add Your Summary
Run AI for more Insights
Type or select language
Generate
Activity
Chat
Teams
Meeting Ins...
Calendar
More

The meeting recording is unpublished and the **Publish** button is displayed next to the favorite icon.

Sharing Meeting Recordings within Organization

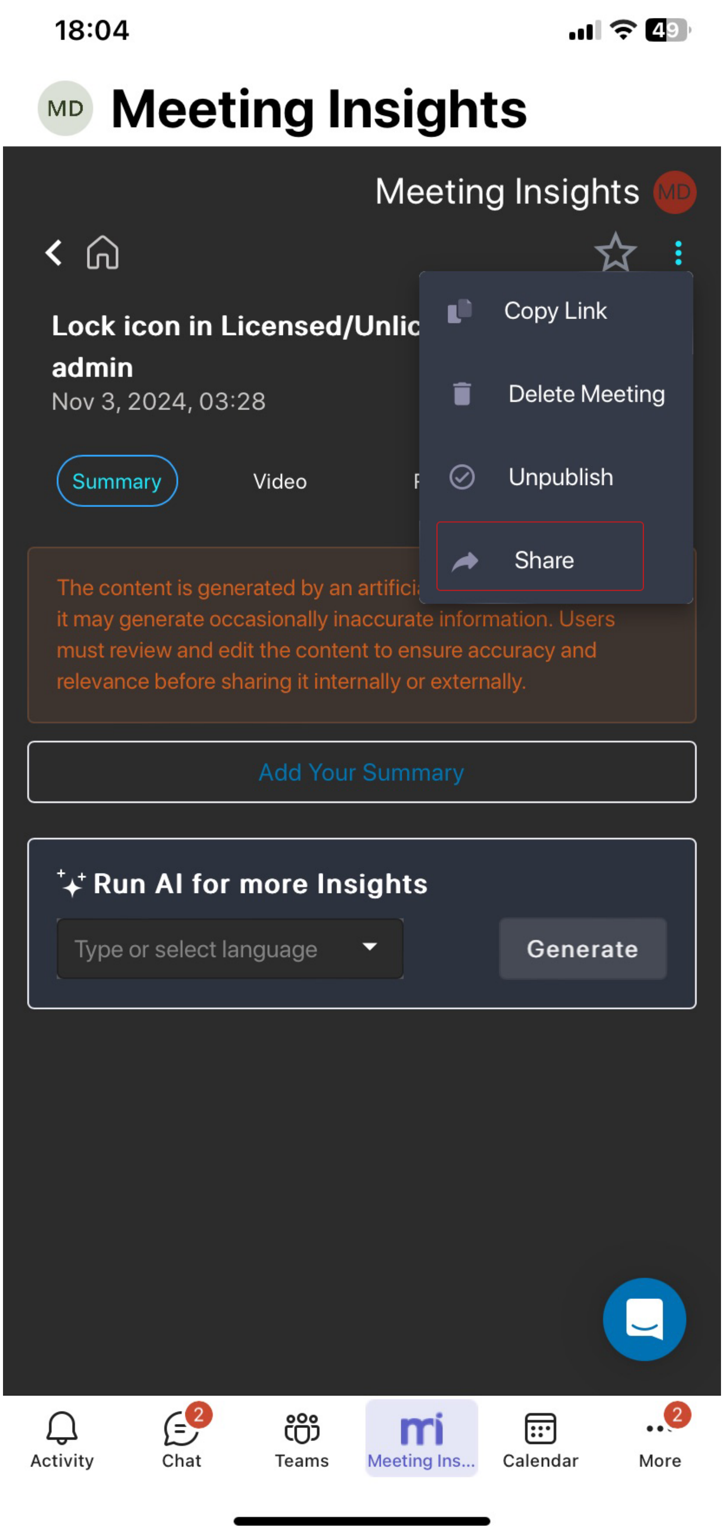
By default, when you publish a meeting recording, Meeting Insights automatically shares it only with participants within the organization. You can also share your meeting recording with other people within your organization who weren't invited:

- Share it with everyone in your organization.
- Share it with only specific people in your organization.

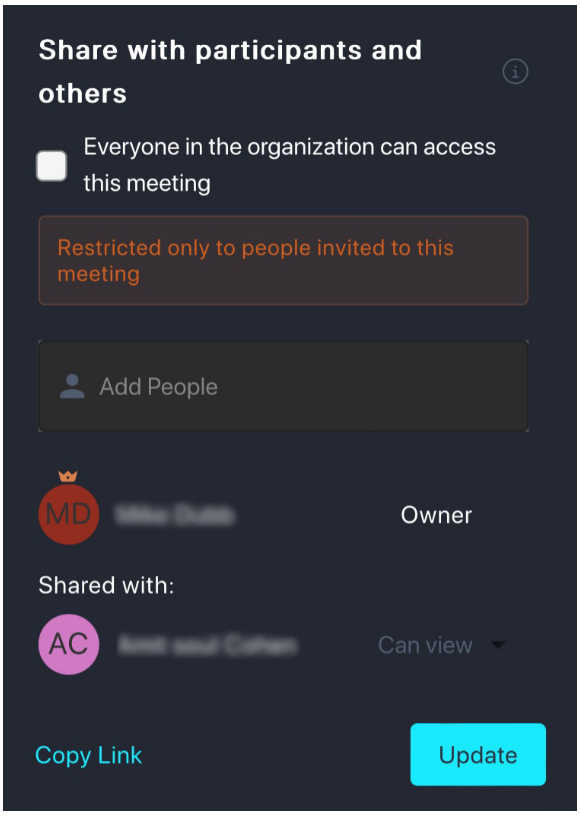
> ⚠
> - You can share only published meeting recordings.
> - Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can share meeting recordings.

➢ **To share a meeting recording within your organization:**

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).
2. Tap the meeting recording that you want; the Player screen appears.
3. Tap the three vertical ⋮ dots (located near the top-right corner), and then from the drop-down menu, tap **Share**:



The following dialog box appears:



4. To share the meeting recording with everyone in your organization:
   a. Select the 'Everyone in the organization can access this meeting' check box; a confirmation box appears.
   b. Tap **Confirm**.
5. To share the meeting recording with only specified people in your organization: In the 'Add People' text box, for each person, start typing the name and then tap the offered name from the list.
6. Tap **Update** or tap **Copy Link**.

Deleting a Meeting Recording

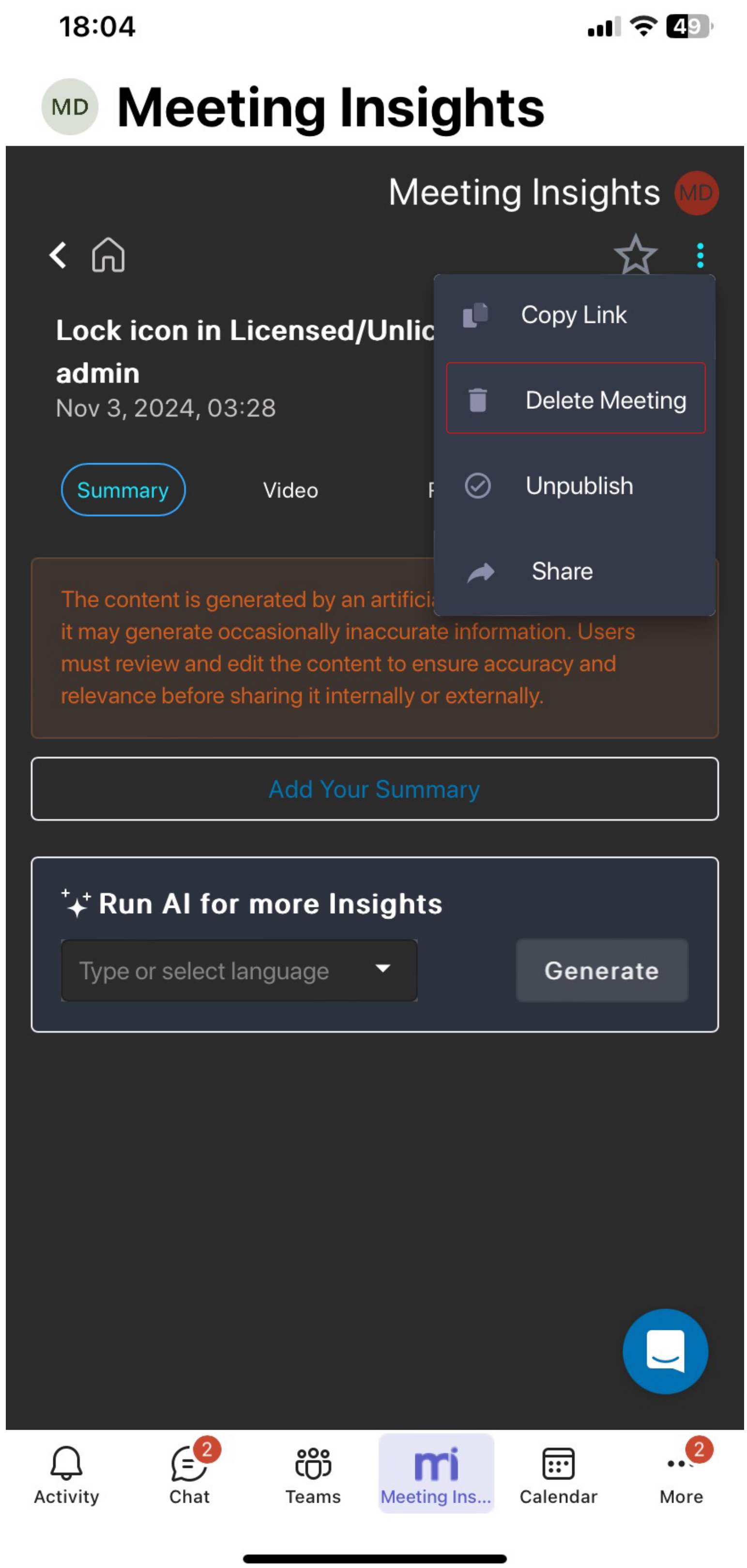
You can delete a meeting recording in Meeting Insights mobile app.

> ⚠ Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can delete a meeting recording.

➢ **To delete a meeting recording:**

1. Go to the home screen (see Viewing Meeting Recordings List on Mobile App on page 101).
2. Tap the meeting recording that you want; the Player screen appears.

3. Tap the three vertical ⋮ dots (located near the top-right corner), and then from the drop-down menu, tap **Delete Meeting**:



A confirmation message box appears.

4. Tap **Delete** to confirm.

8 Post-Meeting Actions in Meeting Insights Web Interface and Teams Desktop App

This section describes actions that you can do in Meeting Insights Web interface and Meeting Insights app for Teams desktop client for meeting recordings that have ended.

> The Meeting Insights Web interface and app for Teams desktop client provide almost identical functionality. Therefore, this section is applicable to both these management platforms.

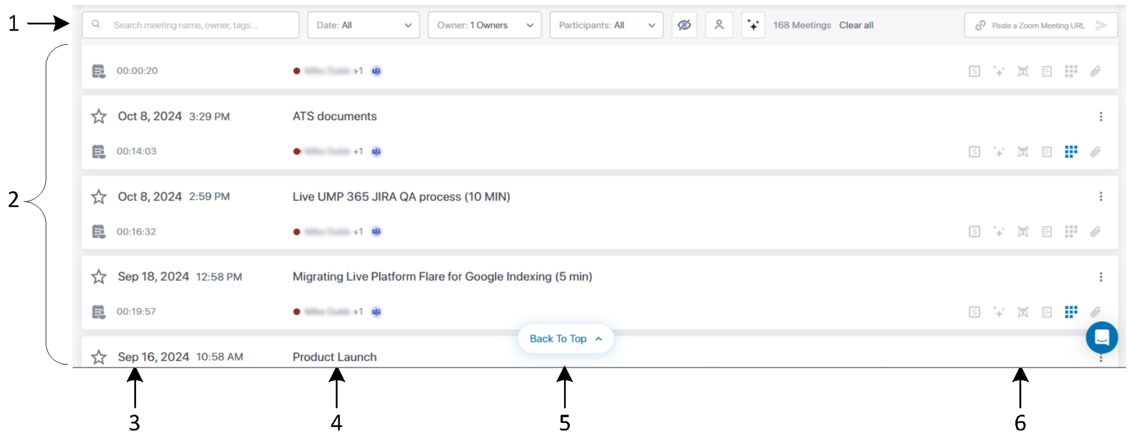
Viewing Meeting Recordings List

When you access Meeting Insights, the **All Meetings** page is displayed, which is a dashboard of all the meeting recordings where you're the Owner or a participant, as well as meeting recordings that were shared with you even if you were not a participant.

You can also view pages of pre-filtered meeting recordings, by clicking any of the following icons in the left navigation pane:

- **My Meetings:** Displays meeting recordings where you're the Owner or a participant.
- **Shared with Me:** Displays meeting recordings that you were not invited to, but that were shared with you.
- **Events:** Displays meeting recordings that were shared with everyone in your organization.
- **Favorites:** Displays meeting recordings that you have tagged as favorites.

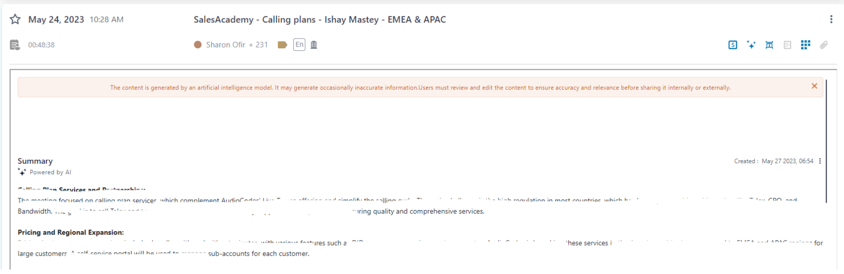
The following figure and subsequent table describes the meeting recording list functionality:



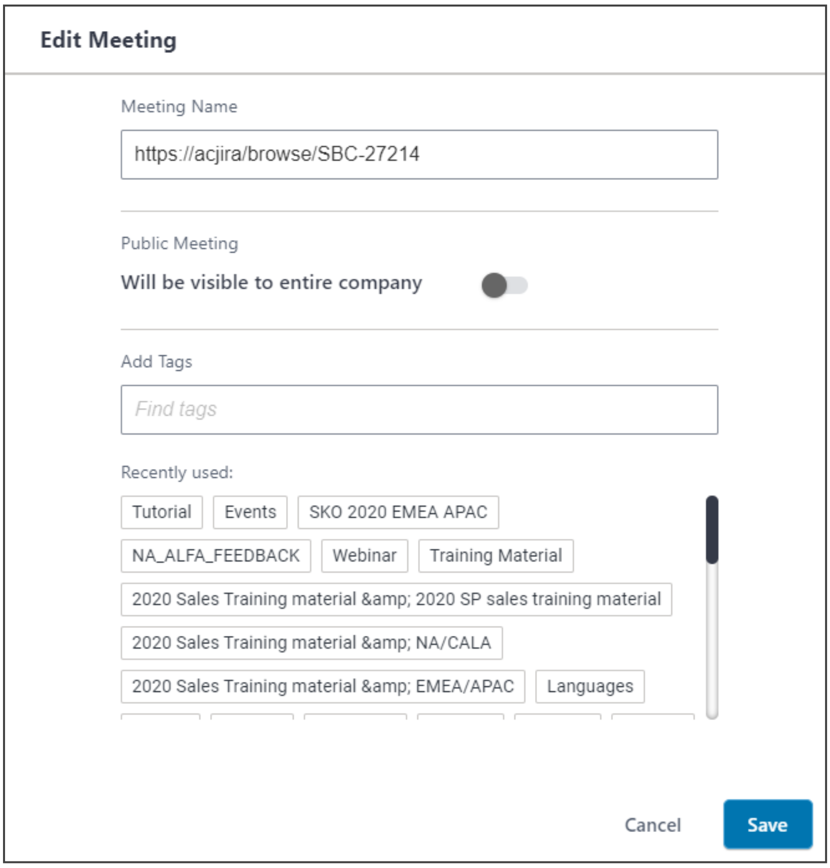
Item #	Description
1	Search field and filters.
2	List of meeting recordings.
3	
	Indicates if you have marked the meeting recording as a favorite. To mark it as a favorite, click the icon.
	Indicates if you added a memo (brief note) to the meeting recording. For more information, see Adding Memos to Meeting Recordings on page 162.
<Date>	Displays the starting date and time of the meeting recording.
<Duration or Status>	Displays the duration of the meeting recording if it's published. If the meeting recording isn't published, one of the following status icons is displayed instead of the duration: ■ The meeting recording is currently in progress and being recorded by Meeting Insights. ■ The meeting recording has ended and is currently being compiled (processing state). ■ The meeting recording has been processed, but not published. ■ No one attended the meeting recording. ■ The meeting recording failed (for whatever reason). Only the Administrator or the meeting owner can delete it. Contact your Administrator if necessary. A participant cannot interact with a failed meeting. The Administrator or the meeting owner can access the meeting but no video will be displayed in the player page; a message 'No compatible source was found for this media' will be displayed. ■ External (hosted by another organization) Teams or Zoom meetings: ✓ Meeting Insights bot is currently connecting (joining) to the external meeting (may take some time). ✓ Meeting Insights bot has connected (joined) to the external meeting and is waiting to be admitted. ✓ Meeting Insights bot has been rejected by the external

Item #	Description
	meeting to join.
4	
	Indicates that the meeting recording is a recurring meeting, scheduled in Microsoft Outlook or Teams Calendar. This icon is displayed next to the name of the meeting recording. To view recurring meetings, see Viewing Meeting Recordings of Recurring Meetings on page 164.
<meeting name>	Displays the name of the meeting recording. If you click the name, the Player page opens, providing you with advanced management capabilities over the meeting recording, for example, playing the presentation of the meeting recording, managing the meeting recap (see Managing Meeting Recap on page 169), managing highlights (see Managing Highlights on page 215), enabling transcription of speech (see Creating a Transcription on page 202), and managing participants (see Managing Participants on page 245).
<participants>	Displays the participants of the meeting recording. The first name is the owner, followed by the number of additional participants. To view the additional participants, click the number.
	Indicates that the recorded meeting was a Microsoft Teams meeting.
	Indicates that the recorded meeting was an external (not within your organization) Microsoft Teams meeting.
	Indicates that the recorded meeting was a Zoom meeting. For more information, see Zoom Meetings on page 50.
	Indicates that the recorded meeting was an external (not within your organization) Zoom meeting.
	Indicates that the meeting recording was created by a third-party recording tool and imported into Meeting Insights. For more information, see Importing Meeting Recordings Created by Third-Party Tools on page 260.
	Indicates that the meeting recording was created by a third-party recording tool and imported into Meeting Insights through Meeting Insights standalone mobile app. For more information, see Uploading Recordings by Third-Party Tools on page 122.

Item #	Description
	Indicates that the meeting recording was an ad hoc recording by a mobile phone's microphone, using Meeting Insights standalone mobile app. For more information, see Ad Hoc Recording using Meeting Insights Standalone Mobile App on page 39.
	Indicates the tags that were added to the meeting recording. If you hover your mouse over the tag, a pop-up displays the names of each tag. For more information on tags, see Managing Tags on page 224.
EN	Indicates the language that was selected for the meeting recording (e.g., "EN" for English or "DE" for German).
	Indicates that the meeting recording has been shared with everyone in your organization. For more information, see Making Meeting Recordings Public on page 255.
	Indicates that the meeting recording has also been shared with people outside of your organization (external). For more information, see Sharing Meeting Recordings Outside of Organization on page 250.
5	
Back To Top	When you scroll down the list, you can always go back to the top of the list by clicking the **Back To Top** button that appears at the bottom-center of the page.
6	
64 hours to publication	Indicates how many hours remaining until Meeting Insights automatically publishes the meeting recording. This is applicable only if delayed automatic publishing is enabled (see Configuring Meeting Publishing Time and Integration Preferences on page 30).
	Indicates that Meeting Insights is integrated with your organization's Microsoft Planner. If integrated, you can a meeting recording's Action Items to Planner by clicking the icon. For more information, see Integration with Microsoft Planner for Actions Items on page 188.
	Indicates that Meeting Insights is integrated with your organization's Salesforce platform. The icon has the following statuses: Meeting Insights is integrated with Salesforce. An AI-powered summary has been generated for the meeting recording, which you can optionally send to Salesforce.

Item #	Description
	The AI-powered summary has been sent to Salesforce. For more information, see Sending AI-Powered Summaries to Salesforce on page 172.
	Indicates if the meeting has a summary. If yes, the icon appears blue . If you hover over the icon, a pop-up displays the number of summaries. To view the summary, click .The summary is displayed below the meeting recording's name. To close the summary, click again. 
	Indicates if AI was triggered to create a summary, an outline, and suggested action items for the meeting recording. If yes, the icon appears blue . If a AI was run to create a summary, an outline, and suggested action items, click to view these recap items. If AI wasn't run, you can trigger AI, by clicking . For more information, see Running AI to Create Summary and Action Items from List View on page 157.
	Indicates if a transcription (speech to text) was created for the meeting recording. If yes, the icon appears blue . To view the transcript, click the icon. For more information, see Creating a Transcription on page 202.
	Indicates if the meeting recording has any meeting recap items (bookmarks, highlights, notes, action items, or decisions). If yes, the icon appears blue . If you hover over the icon, a pop-up displays the number of each recap item. To view recap items, click . For more information on meeting recap, see Managing Meeting Recap on page 169.
	Indicates if Meeting Insights created slides out of the meeting recording from the presented media. If yes, the icon appears blue . If you

Item #	Description
	hover over the icon, a pop-up displays the number of slides. To view the slides, click . For more information on slides, see Managing Video Slides on page 239.
	Indicates if the meeting recording has an attached file(s). If yes, the icon appears blue . If you hover your mouse over the icon, a pop-up displays the number of attached files. To download the attached file or attach more files, click . For more information, see Attaching Files to Meeting Recordings on page 256.
	When clicked, a drop-down menu with the following commands is displayed: ▪ **Publish:** (Available only if you're the Owner) Publishes your meeting recording. ▪ **Unpublish:** (Available only if you're the Owner) Unpublishes a published meeting recording. ▪ **Add Memo:** Adds or edits a memo (brief note) about the meeting recording. After you add a memo, the command is replaced by **Edit Memo**. ▪ **Add Subtitle:** Adds a subtitle to the meeting recording. After you add a subtitle, the command is replaced by **Edit Subtitle**. ▪ **Edit Meeting:** (Available only if you're the Owner) Allows you to change the name of the meeting, make the meeting recording accessible to all Meeting Insights users, and add tags to the meeting recording.

<table>
<tr><th>Item #</th><th>Description</th></tr>
<tr><td></td><td>


- **Run AI:** Activates AI to create a summary of the meeting recording.
- **Copy Link:** Copies the URL of the meeting recording, which you can then send (for example, by email) to someone to view the video of the meeting recording.
- **Delete:** (Available only if you're the Owner) Deletes your meeting recording.
</td></tr>
</table>

Searching for Meeting Recordings

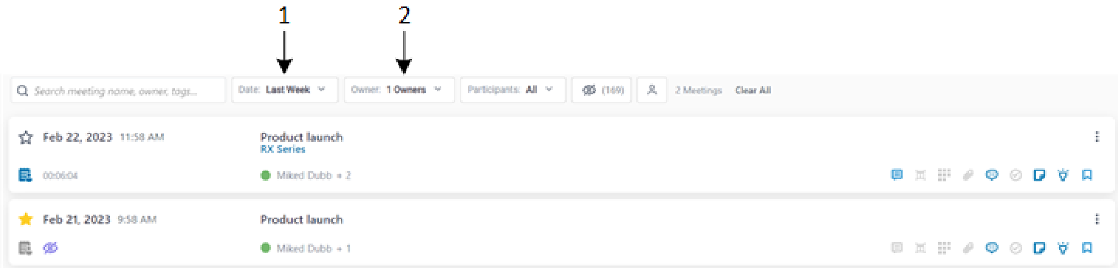
The meeting recordings list provides you with a powerful search feature, allowing you to easily search meeting recordings based on multiple search filter criteria. You can search meeting recordings based on multiple criteria, for example, all meeting recordings of a specific Owner that have yet to be published.

➢ **To search and filter meeting recordings:**

1. In the Navigation pane, click any of the following to view the required list of meeting recordings: **All Meetings**, **My Meetings**, **Shared with Me**, **Events**, or **Favorites**.
2. Use any of the following to define your search filter criteria:

- **Search field:** Start typing the name of the user, meeting name or tag that you want to use for your search criteria. As you type, the search field displays a drop-down list, offering you meeting recordings that match your currently typed letters. To search for an exact match of a string, enclose the string in quotation marks (e.g., "Finance review").
- **Date:** Filters the list of meeting recordings by most recent date (last week, last month, or last year).
- **Owner**: Filters the list of meeting recordings by Owners.
- **Participants:** Filters the list of meeting recordings by participants.
- : Filters the list by unpublished meeting recordings.
- : Filters the list by meeting recordings that were shared externally with contacts outside of your organization. For more information, see Sharing Meeting Recordings Outside of Organization on page 250.

The following example filters meetings recordings by date (#i in figure) and owner (#2 in figure):



3. To clear your search filter settings, click **Clear All**; all meeting recordings are now displayed.

Running AI to Create Summary and Action Items from List View

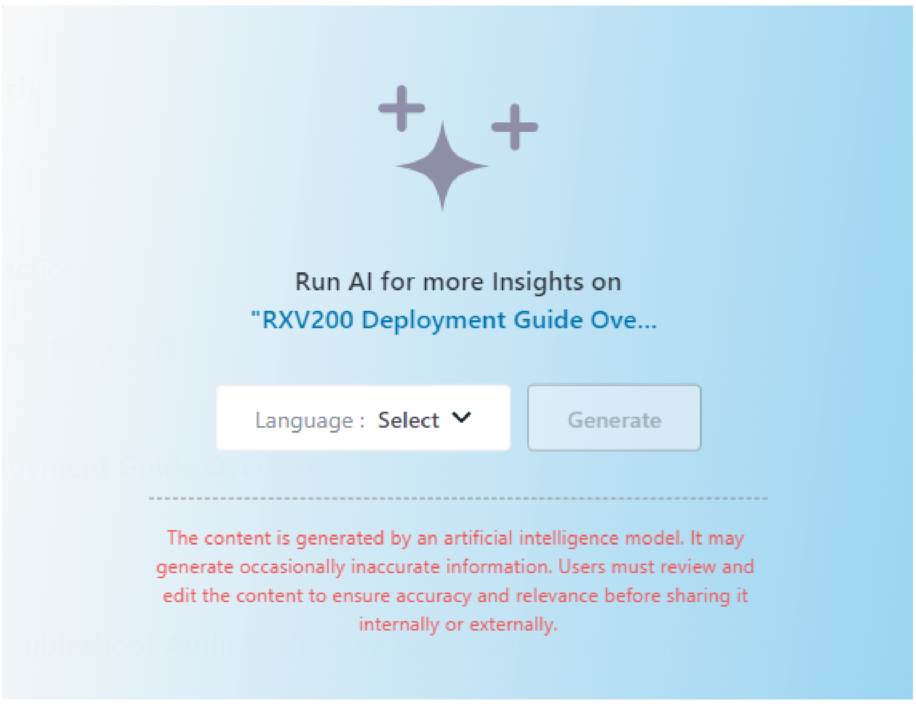
In the List View, you can trigger Meeting Insights to use artificial intelligence (AI) to create a summary, an outline and suggested action items.

- The AI module may sometimes generate inaccurate information. Therefore, it's recommended that you review the AI-generated recap and edit it if required to ensure accuracy and relevance before sharing it with others.
- If you're the owner of the meeting recording, you can always trigger AI. However, participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
- It may take some minutes to generate the AI-powered recap.
- When you activate AI, it always generates a summary, an outline, Q&A, Issues and Solutions, action items, and a transcription.
- When the AI-powered recap is successfully generated, Meeting Insights sends you an email containing the recap.
- You can also run AI from the Player page. For more information, see:

  - ✓ Generating AI-Powered Summary on page 170
  - ✓ Generating an AI-Powered Outline on page 182
  - ✓ Generating AI-Powered Suggested Action Items on page 184
  - ✓ Generating an AI-Powered Questions and Answers on page 191
  - ✓ Generating an AI-Powered Issues and Solutions on page 192

➢ **To run AI to create summary and action items from List View:**

1. In the Navigation pane, click **All Meetings**.
2. For the meeting recording that you want, click the corresponding **AI not active** icon, or click the ellipsis icon, and then from the drop-down menu, choose **Run AI**; the following dialog box appears:



3. From the 'Language' drop-down list, select the language of your meeting recording.

4. Click **Generate**; the AI processes begins, indicated by the rotating icon, which displays "Processing" when you hover your mouse over it. When the process completes, the icon displays "AI active" when you hover your mouse over it.

5. To view the AI-powered recap, click . For more information, see Viewing Meeting Recap in List View below.

Viewing Meeting Recap in List View

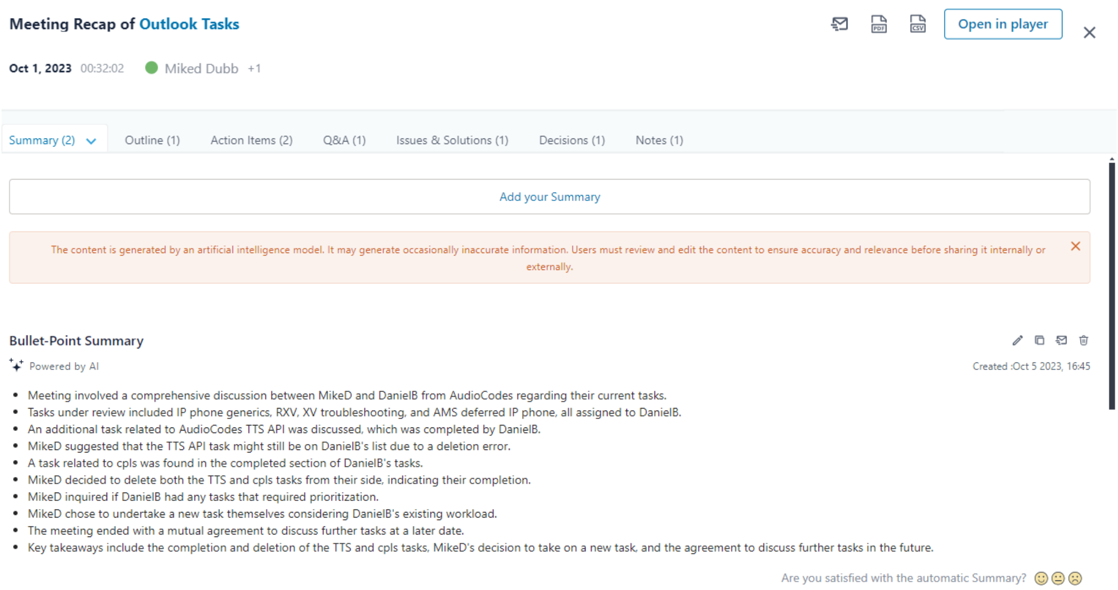
You can view the meeting recap of meeting recordings directly from the meeting recordings list view.

> ⚠ If you choose to send a recap by email to participants, Meeting Insights **only** sends it to internal participants (i.e., members of your organization).

➢ To view recap from list view:

1. In the Navigation pane, click **All Meetings**.

2. Click either the icon (if you have run AI) or icon, corresponding to the meeting recording that you want; the Meeting Recap dialog box appears:



3. To perform global operations for the meeting recap:

   - To send meeting recap to all participants by email: On the top of the dialog box, click .

   - To download meeting recap to your computer as a PDF or CSV file: On the top of the dialog box, click PDF or CSV, respectively.

- To view meeting recap on Player page: On the top of the dialog box, click **Open in player**. For more information on managing recap on the Player page, see Managing Meeting Recap on page 169.

4. To view the Summary, select the **Summary** tab:

   - To send summery by email: Click the down-pointing arrow on the tab, choose **Send**, add the people to send it to, and then click **Send**.
   - To copy summery to your clipboard: Click the down-pointing arrow on the tab, and then choose **Copy**.
   - To add a summary: Click **Add your Summary**, type your summary, and then click **Add Summary**.
   - To manage AI-generated summary (Bullet-Point Summary or Summary):
     - To edit summery: Click , edit the text as desired, and then click **Update**.
     - To delete summery: Click , and then in the confirmation box, click **Delete**.
     - To copy summery to clipboard: Click , and then paste wherever (e.g., in a Word document).
     - To send summery to email: Click , add the people to send it to, and then click **Send**.
     - To provide feedback on your satisfaction with the AI-generated summary: Click , , or .

5. To view the Outline, select the **Outline** tab:

   - To copy outline to your clipboard: Click the down-pointing arrow on the tab, and then choose **Copy**.
   - To manage AI-generated Outline:
     - To edit outline: Click , edit the text as desired, and then click **Update**.
     - To delete outline: Click , and then in the confirmation box, click **Delete**.
     - To copy outline to clipboard: Click , and then paste wherever (e.g., in a Word document).
     - To provide feedback on your satisfaction with the AI-generated outline: Click , , or .

6. To view Action Items, select the **Action Items** tab:

   - To add an action item: Click **New**, type the action, assign it to a participant (optional), assign it a due date (optional), and then click **Add Action Items**.
   - To manage AI-generated summary (Bullet-Point Summary or Summary):
     - To approve action items: To approve all AI-generated Action Items, click **Approve All**. To approve individual Action Items, click the corresponding **Approve** button.

- To play action item in video: Click the button that displays the time in the video that relates to the action item.
- To edit action item: Click , edit the action item as desired, and then click **Update**.
- To delete action item: Click , and then in the confirmation box, click **Delete**.
- To provide feedback on your satisfaction with the AI-generated summary: Click , , or .

7. To view the Q&A, select the **Q&A** tab:
   - To send Q&A by email: Click the down-pointing arrow on the tab, choose **Send**, add the people to send it to, and then click **Send**.
   - To copy Q&A to your clipboard: Click the down-pointing arrow on the tab, and then choose **Copy**.
   - To manage AI-generated Q&A:
     - To edit Q&A: Click , edit the text as desired, and then click **Update**.
     - To delete Q&A: Click , and then in the confirmation box, click **Delete**.
     - To copy Q&A to clipboard: Click , and then paste wherever (e.g., in a Word document).
     - To send Q&A to email: Click , add the people to send it to, and then click **Send**.
     - To provide feedback on your satisfaction with the AI-generated Q&A: Click , , or .
8. To view the Issues & Solutions, select the **Issues & Solutions** tab:
   - To send Issues & Solutions by email: Click the down-pointing arrow on the tab, choose **Send**, add the people to send it to, and then click **Send**.
   - To copy Issues & Solutions to your clipboard: Click the down-pointing arrow on the tab, and then choose **Copy**.
   - To manage AI-generated Issues & Solutions:
     - To edit: Click , edit the text as desired, and then click **Update**.
     - To delete: Click , and then in the confirmation box, click **Delete**.
     - To copy to clipboard: Click , and then paste wherever (e.g., in a Word document).
     - To send to email: Click , add the people to send it to, and then click **Send**.
     - To provide feedback on your satisfaction with the AI-generated Q&A: Click , , or .
9. To view Decisions, select the **Decisions** tab:

- To add a decision: Click **New**, type your Decision, and then click **Add decision**.
- To edit a decision: Click , edit the text as desired, and then click **Update**.
- To play decision in video: Click the button that displays the time in the video when the decision was added.
- To delete decision: Click , and then in the confirmation box, click **Delete**.

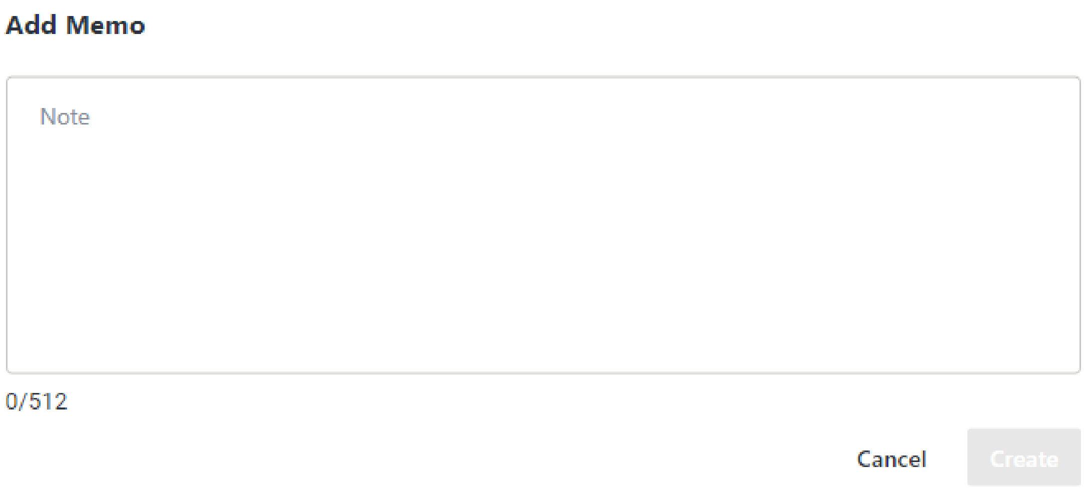
10. To view Notes, select the **Notes** tab:
    - To add a note: Click **New**, type your Note, and then click **Add note**.
    - To edit a note: Click , edit the text as desired, and then click **Update**.
    - To play note in video: Click the button that displays the time in the video when the note was added.
    - To make a note private or public: Click the **Private** or **Public** button, respectively.
    - To delete a note: Click , and then in the confirmation box, click **Delete**.

Adding Memos to Meeting Recordings

You can add a memo to any meeting recording, even if you're not the owner. The memo is private and (i.e., only you can see it).

To add a memo:

1. In the Navigation pane, click **All Meetings**.
1. Click the icon corresponding to the meeting recording that you want; the following dialog box appears:



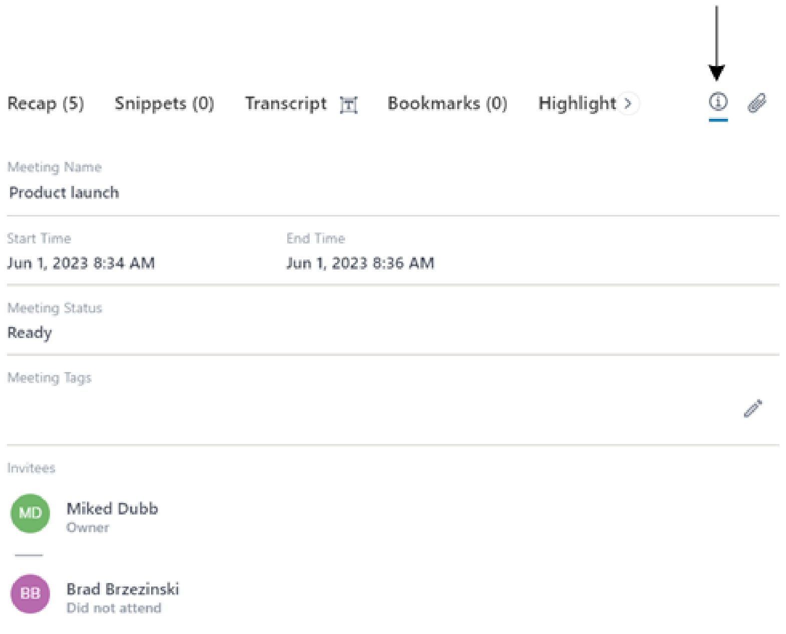
2. Type a brief note, and then click **Create** ; the icon changes to .

Viewing General Information of Meeting Recordings

You can view general information about a meeting recording.

➢ **To view general information of a meeting recording:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Click the icon:



'Meeting Name'	Displays the name of the meeting recording. To change the name (if you're the owner), click in the field, edit the text, and then click anywhere outside of the field to save your changes.
'Start Time' / 'End Time'	Displays the date and time that the meeting recording started and ended.
'Meeting Status'	Displays the status of the meeting recording: ■ "Edit": The meeting recording has been processed, but not published. ■ "Ready": The meeting recording has been published.
'Meeting	Displays tags assigned to the meeting recording.

Tags'	
'Invitees'	Displays a list of all the users that were invited to the meeting recording and users with which the meeting was shared after it was published.

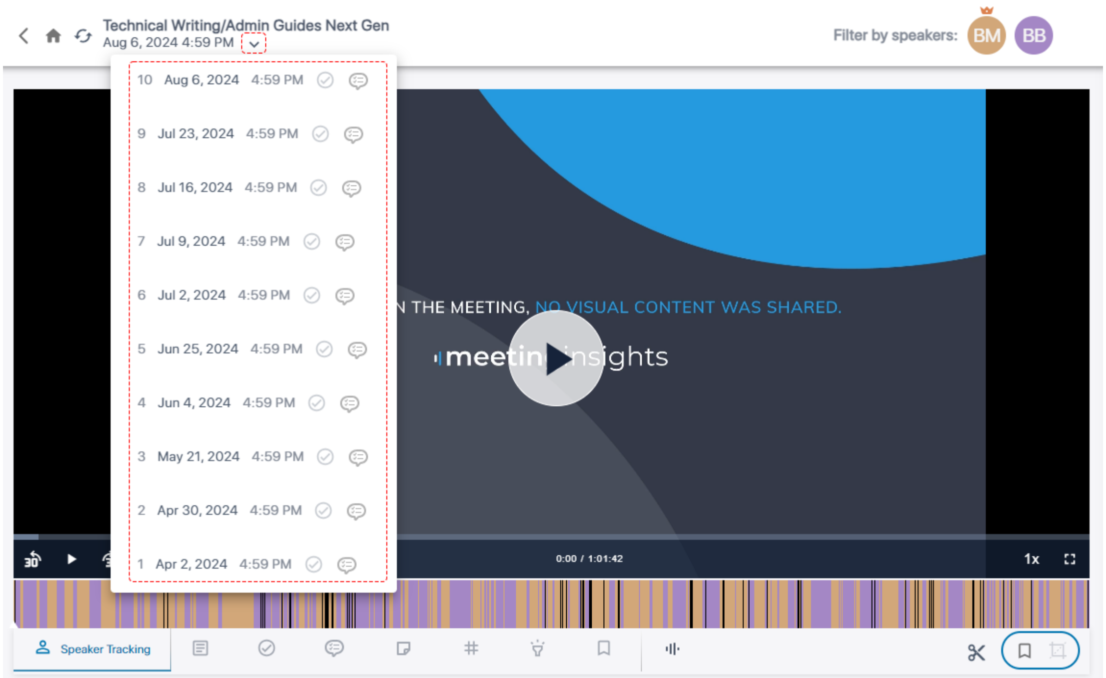
Viewing Meeting Recordings of Recurring Meetings

You can view the meeting recordings of meetings that have been scheduled through Microsoft Calendar as recurring meetings.

To trigger an AI-generated meeting preparation for recurring meetings, see Generating an AI-Powered Meeting Prep for Recurring Meetings on page 179.

➢ To view all meeting recordings of a recurring meeting:

1. In the Navigation pane, click **All Meetings**.
2. Meeting recordings of recurring meetings are displayed with the icon. Click the name of the meeting recording that you want; the Player page opens.
3. Click the down-pointing arrow located above the video player, and then from the drop-down list, select the required meeting recording. The meetings are numbered sequentially, where 1 is the first meeting in the series.



Modifying Name of Meeting Recordings

You can modify the name of your meeting recordings.

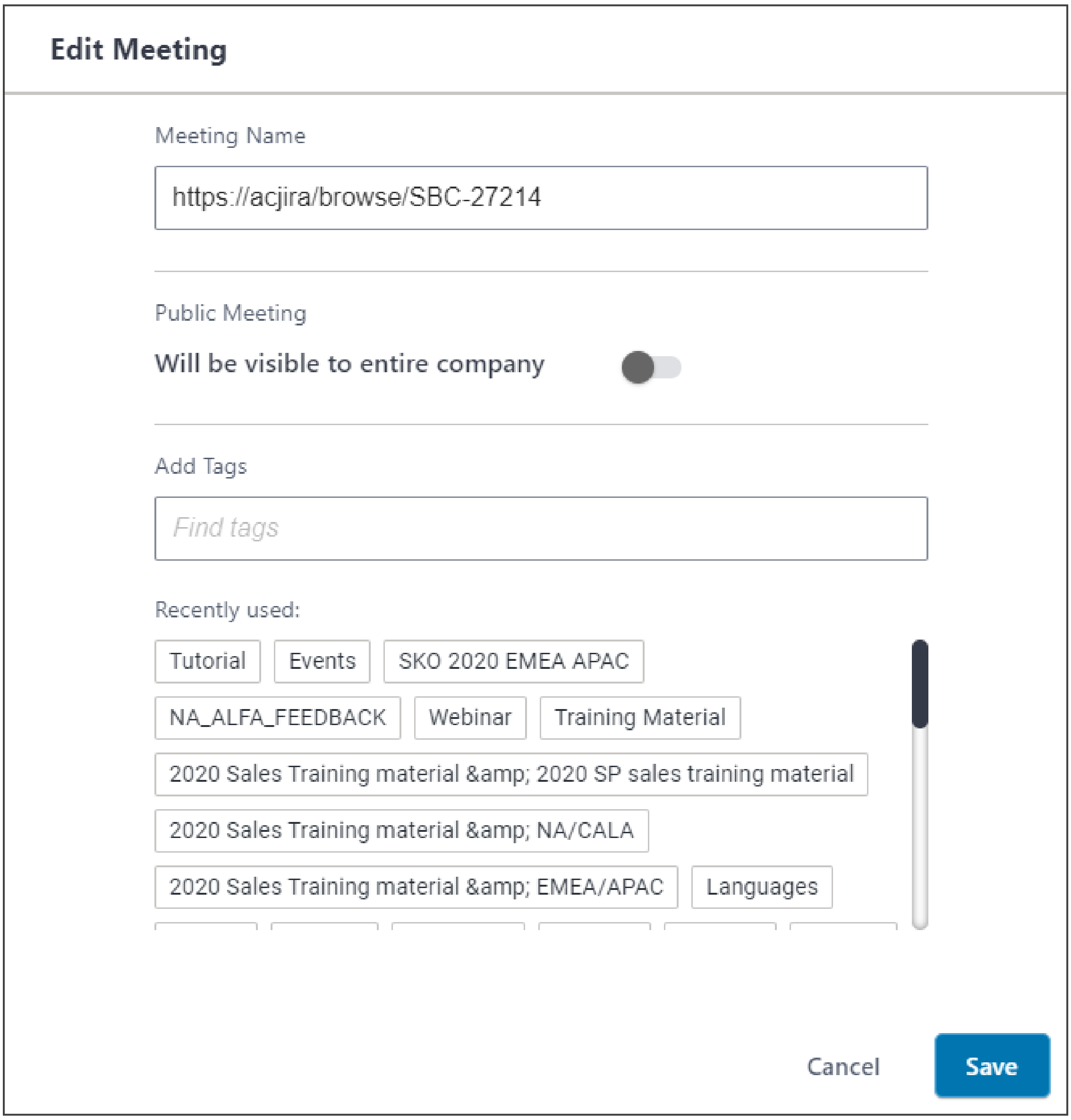
> ⚠ Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can modify the name.

➢ **To modify the meeting recording name:**

- **All Meetings page:**

  a. In the Navigation pane, click **All Meetings**.

  b. Click the ellipsis icon corresponding to the meeting recording that you want, and then from the drop-down menu, choose **Edit Meeting**.



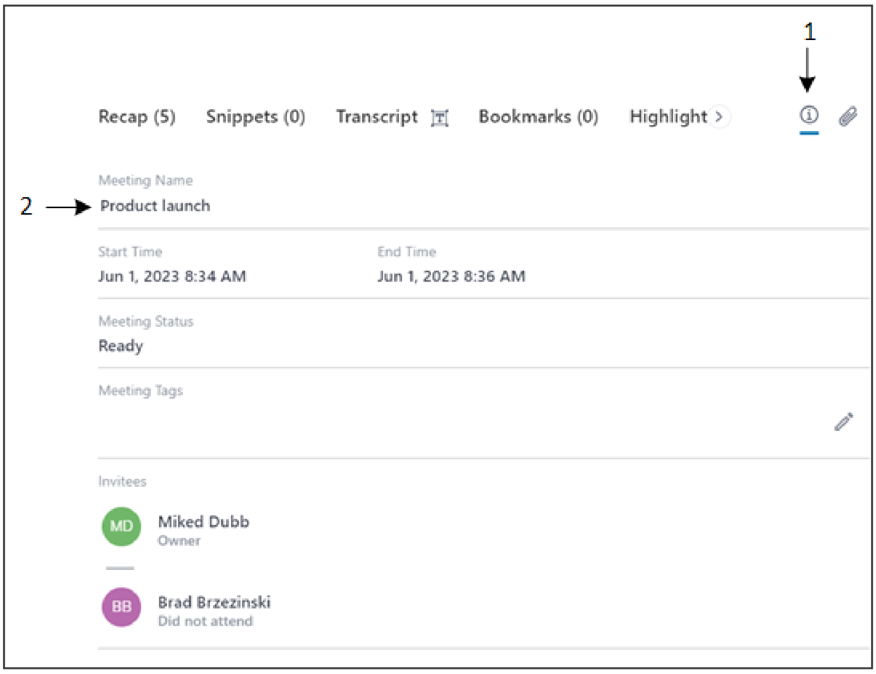
  c. In the 'Meeting Name' field, type a new name, and then click **Save**.

- **Player page:**

  a. In the Navigation pane, click **All Meetings**.

  b. Click the name of the meeting recording that you want; the Player page appears.

  c. Click the ⓘ icon (#1 in figure), and then in the 'Meeting Name' field (#2 in figure), modify the name:



Publishing Meeting Recordings

Only when you publish a meeting recording can its participants view it in their Meeting Insights account.

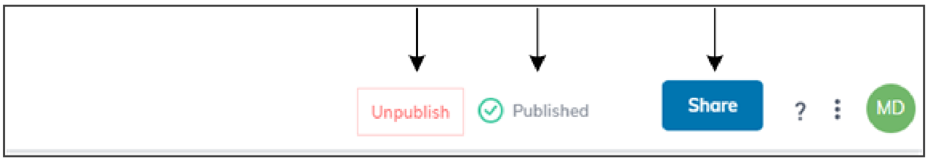
When you publish a meeting recording, Meeting Insights notifies the participants by email. The email also includes the meeting recap (meeting summary, decisions, action items, notes, and tags).

- By default, Meeting Insights automatically publishes your meeting recording when it ends. You can change this to manually publish meeting recordings or to have Meeting Insights automatically publish your meeting recordings after three days (see Configuring Meeting Publishing Time and Integration Preferences on page 30).
- You can configure Meeting Insights to send you a weekly email listing all your meeting recordings that you haven't published (see Subscribing to Email Notifications on page 28).
- The procedure below is applicable only if your account profile is "Meeting Insights". If your account profile is "Insights", publishing a meeting recording is done through the Meeting Recap page.
- When you publish a meeting recording, Meeting Insights notifies via email **only** internal participants (i.e., members of your organization).

➢ To manually publish a meeting recording:

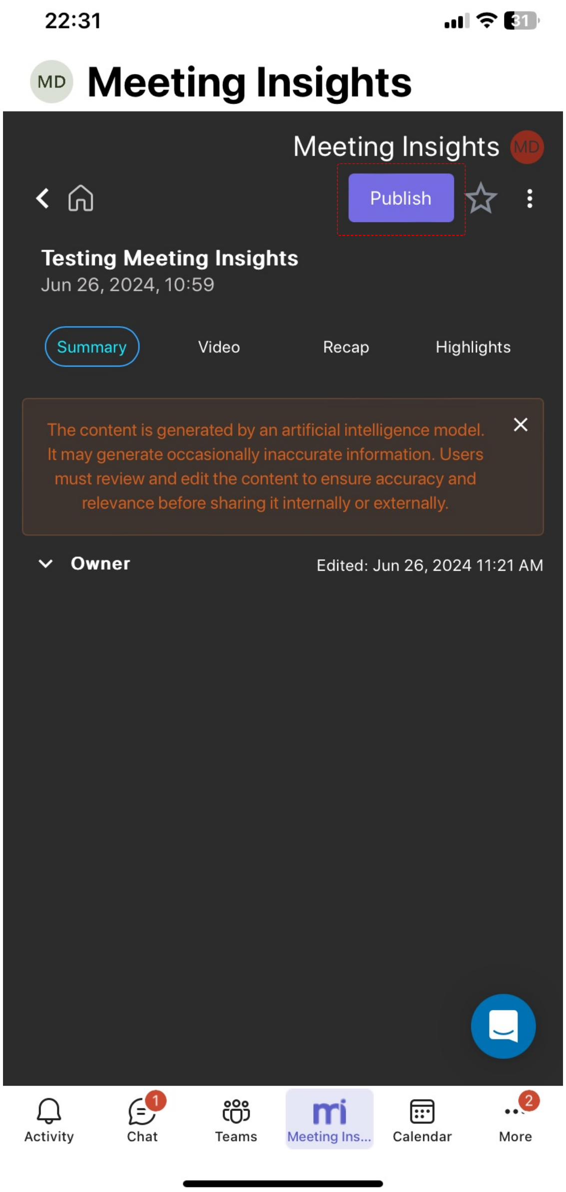
1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. On the toolbar, click the **Publish** button:

Instead of the **Publish** button, the **Unpublish** button, "Published" message, and **Share** button are displayed:



If you're using Meeting Insights on your mobile phone, do the following to publish a meeting recording:

1. On the home screen, tap the meeting recording that you want.
2. Tap the **Publish** button:



Unpublishing Meeting Recordings

You can unpublish a published meeting recording meeting recording. After you unpublish the meeting recording, only the Owner can view it.

> ⚠ Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can unpublish the meeting recording.

➢ To unpublish a meeting recording:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Do one of the following:

- **All Meetings page:** Click the ⋮ icon corresponding to the meeting recording that you want, and then from the drop-down menu, choose **Unpublish**.
- **Player page:**
  i. In the All Meetings page, click the name of the meeting recording that you want; the Player page appears.
  ii. On the toolbar, click **Unpublish**:

Speaker Identification

Speaker Identification (SI) in Meeting Insights helps distinguish who is speaking during meetings, including cases where speakers are using external devices or are located in conference rooms. This feature improves transcript readability and post-meeting analysis by tagging each speaker throughout the meeting.

How It Works

- For internal participants joining online, Meeting Insights automatically labels speakers by the user's Display Name.
- For external speakers or internal users speaking through shared devices (e.g., from a conference room or another participant's mic), Meeting Insights assigns generic speaker tags (e.g., "S1", "S2", "S3", and so on).

Customizing Speaker Names

The owner of the meeting recording can replace any speaker tag / label (e.g., change "S1" to "John Smith") across all its occurrences in the meeting content. For more information, see Replacing a Speaker on page 235.

Managing Meeting Recap

The meeting recording can include the following types of recap items:

- Summary - see Summary on the next page
- AI-powered Meeting Preparation - see Generating an AI-Powered Meeting Prep for Recurring Meetings on page 179
- Outline - see Generating an AI-Powered Outline on page 182
- Action Items - see Action Items on page 182
- Questions and Answers - see Generating an AI-Powered Questions and Answers on page 191
- Issues and Solutions - see Generating an AI-Powered Issues and Solutions on page 192
- Decisions - see Adding Decisions on page 194

- Notes - see Adding Notes on page 195

Summary

A summary is a brief description of the meeting recording and its outcome. A summary is useful in that it can remind you of what the meeting was about and its resolution.

You can add a summary of your meeting recording manually (see Adding a Summary Manually on page 174) or use the AI-powered technology to automatically create one for you (see Generating AI-Powered Summary below).

- Only the Owner of the meeting recording can add a summary.
- Only one summary can be added per meeting recording.
- The summary is public and therefore, visible to all users that have access to the meeting recording.

Generating AI-Powered Summary

Meeting Insights offers you a quick and effective method for automatically creating a summary of your meeting recording, using artificial intelligence (AI). A summary powered by AI creates an accurate summary, saving you time and helping you find crucial information faster.

The AI-generated summary includes the following:

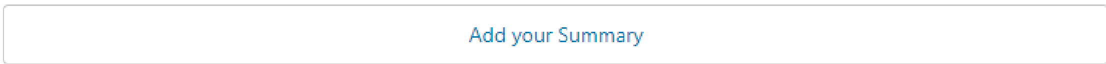
- **Bullet-Points:** Bullet list of the main points of the meeting recording (in chronological order). This summary is displayed under 'Bullet-Point Summary - Powered by AI'.
- **Topics:** Summary of the main issues of the meeting recording, grouped under meaningful topic headings. This summary is displayed under 'Summary - Powered by AI'.
- **Speakers:** Summary of each spoken participant. The speaker can be an internal participant (i.e., from within your organization) or an external participant.
- **Paragraphs:** Summary of main issues grouped in paragraphs.

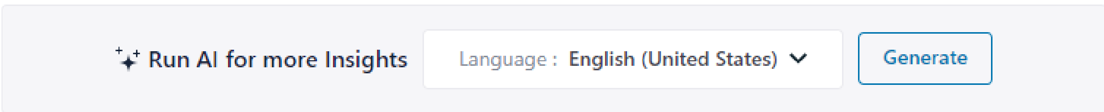
When the AI-powered summary is successfully generated, Meeting Insights sends you an email containing the summary.

- The summary by speakers and summary by topics are generated only if your Meeting Insights application is enabled to generate them by the Service Provider.
- The summary is generated by an AI model, which may sometimes generate inaccurate information. Therefore, it's recommended that you review the summary and edit it if required to ensure accuracy and relevance before sharing it with others.
- If you're the owner of the meeting recording, you can always trigger AI to generate a summary. Participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
- It may take some minutes to generate the AI-powered summary.
- When you activate AI, it always generates a Summary, Action Items, Q&A, Issues & Solutions, and a transcription.
- You can generate AI-powered summaries based on templates (see Generating AI-Powered Summary-Based Templates on page 177).

➢ To run AI-powered summary:

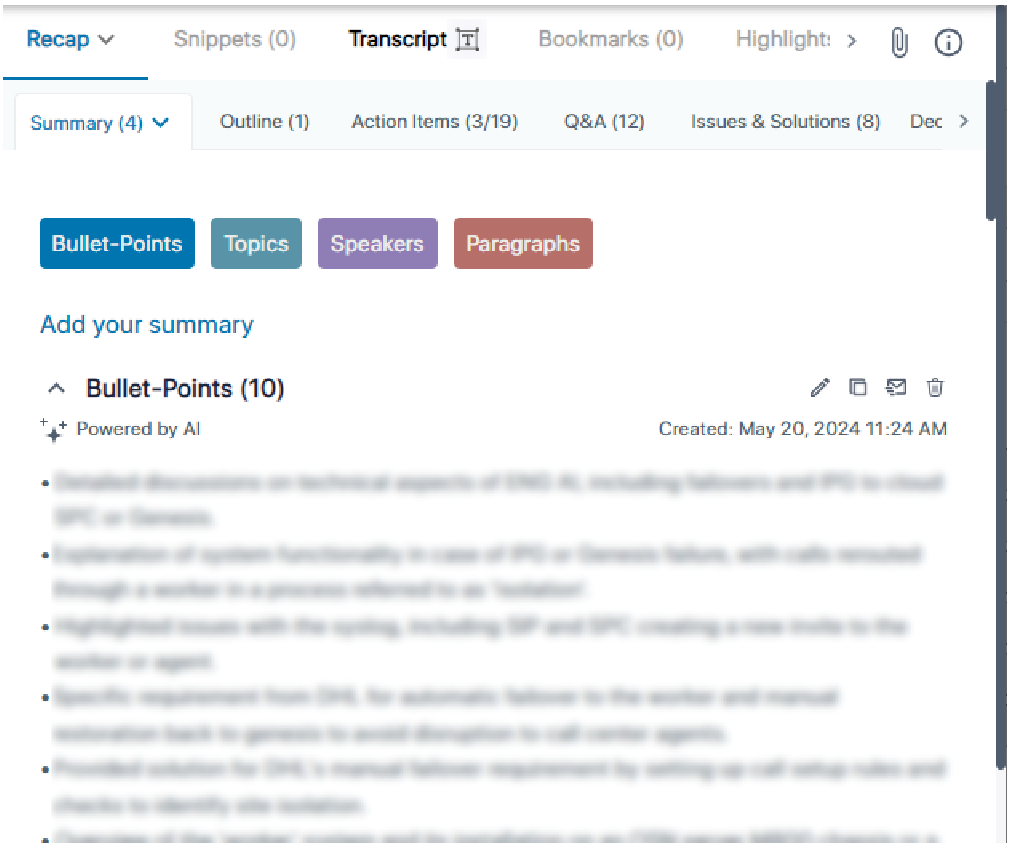
1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click **Summary**:





3. From the 'Language' drop-down list, select the language of your meeting recording.
4. Click **Generate**; AI processes the summary and when finished, the summary appears. If you want to cancel the process (for whatever reason), click **Stop**.

The following figure shows an example of an AI-generated summary. To view the different, summary types, click their respective tabs - **Bullet-Points**, **Topics**, **Speakers**, and **Paragraphs**:



Sending AI-Powered Summaries to Salesforce

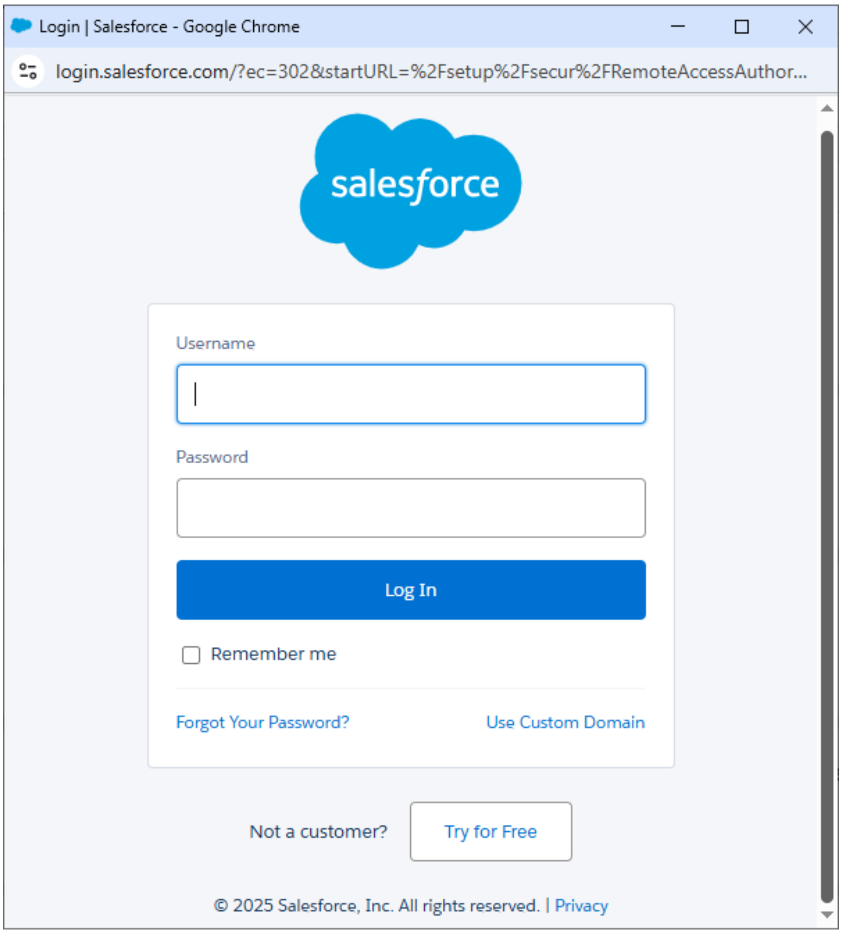
Meeting Insights allows you to send a meeting recording's AI-powered summary to your organization's Salesforce platform. This ensures key discussion points from your sales meetings are readily accessible within Salesforce, and opportunities or leads are kept up-to-date. You can select the Salesforce objects and corresponding fields that you want updated with the summary.

- This feature is available only if your Meeting Insights administrator has enabled it.
- Only the AI-powered **bullet**-summaries are sent to Salesforce.
- Currently, only the following Salesforce objects are supported:
  - ✓ Account
  - ✓ Opportunity
- The available fields per object are determined by your Meeting Insights administrator.
- The procedure for sending the summary to Salesforce includes logging in to your organization's Salesforce. This connection remains active for 24 hours. Therefore, you're not prompted to log in for all subsequent meeting recordings' summaries that you want to send to Salesforce within this period.
- For the different statuses of the Salesforce icon, see Viewing Meeting Recordings List on page 150.
- Only the Owner, Co-owner, or users assigned editing privileges to the meeting recording can send the summary to Salesforce.

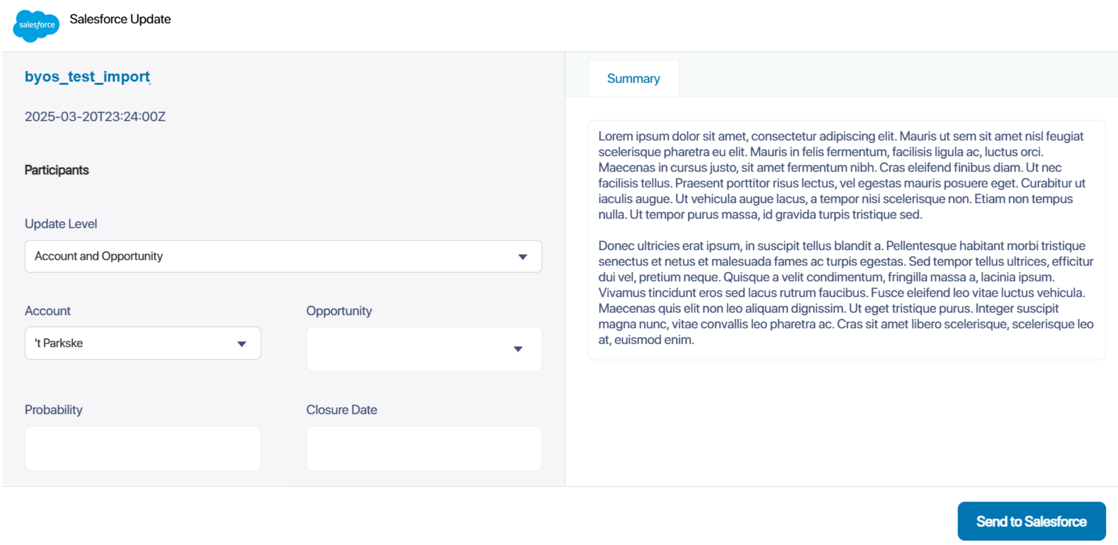
➢ To send AI-powered summary to Salesforce:

1. Generate an AI-powered summary for the meting recording (see Generating AI-Powered Summary on page 170).
2. Do one of the following:
   - **List View:** In the Navigation pane, click **All Meetings**, and then click the Salesforce icon corresponding to the meeting recording you want.
   - **Player Page:** In the Navigation pane, click **All Meetings**, and then click the meeting recording you want; the Player page opens. Click the Salesforce icon (located near top-right corner).

   The following Salesforce login screen appears:



3. In the 'Username' and 'Password' fields, enter your Salesforce credentials, and then click **Log In**; you're successfully connected to Salesforce and Meeting Insights displays the following dialog box:



4. (Optional) Edit the summary before sending it to Salesforce.
5. From the 'Update Level' drop-down list, select the Salesforce object(s) that you want to update (e.g., **Account and Opportunity**).
6. From the 'Account' drop-down list, select the Account object's field that you want updated with the summary.
7. From the 'Opportunity' drop-down list, select the Opportunity object's field that you want updated with the summary.

> The 'Probability' (to close the deal) and 'Closure Date' fields are read-only and displayed only if the 'Update Level' includes **Opportunity**. Their values are retrieved from Salesforce.

8. Click **Send to Salesforce**; the summary is sent to Salesforce and added to the selected object fields. The Salesforce icon in the List View and Players page changes to .

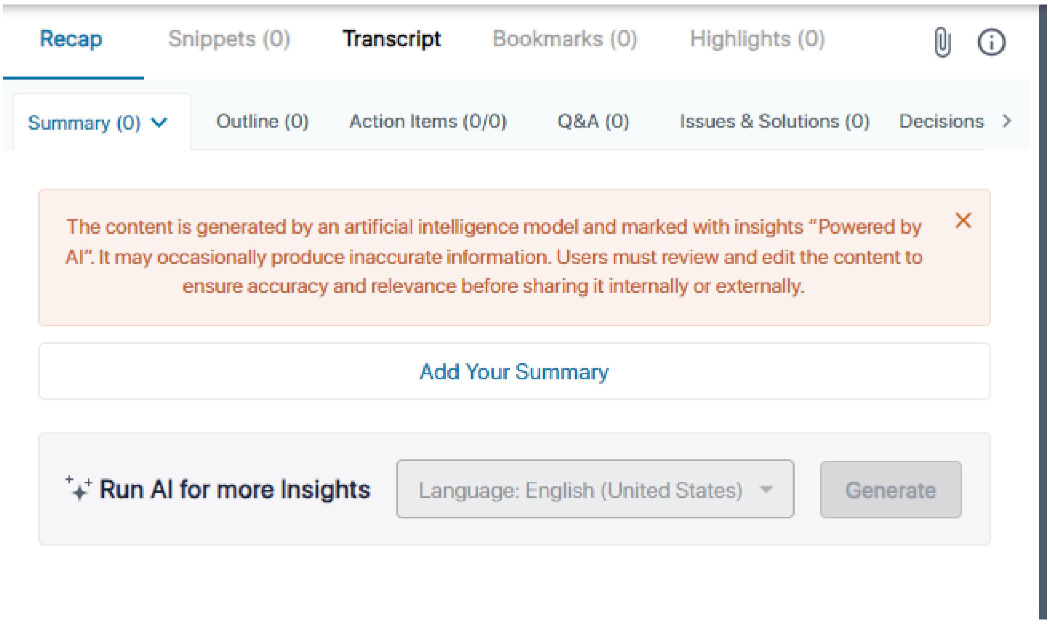
Adding a Summary Manually

You can manually write a single summary.

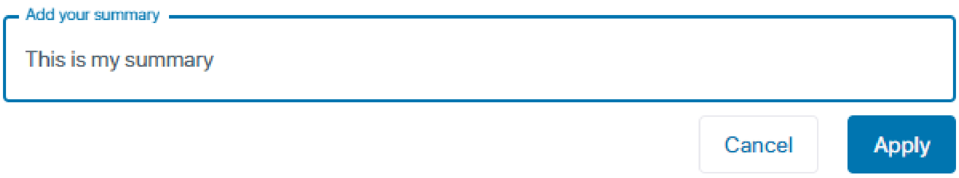
> You can have both a manually written summary and an AI-generated summary (as described in Generating AI-Powered Summary on page 170).

➢ To add a summary:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click **Summary**.



3. Click **Add Your Summary**; a text box appears:



4. In the text box, type your summary, and then click **Apply**; your summary is displayed under the 'Owner' section.

Reassigning Speakers in Summary

If you've generated an AI-powered summary of your meeting recording (see Generating AI-Powered Summary on page 170), you can modify the individuals associated with the summary under the **Speakers** section. You have the option to assign a specific summary to one of the following:

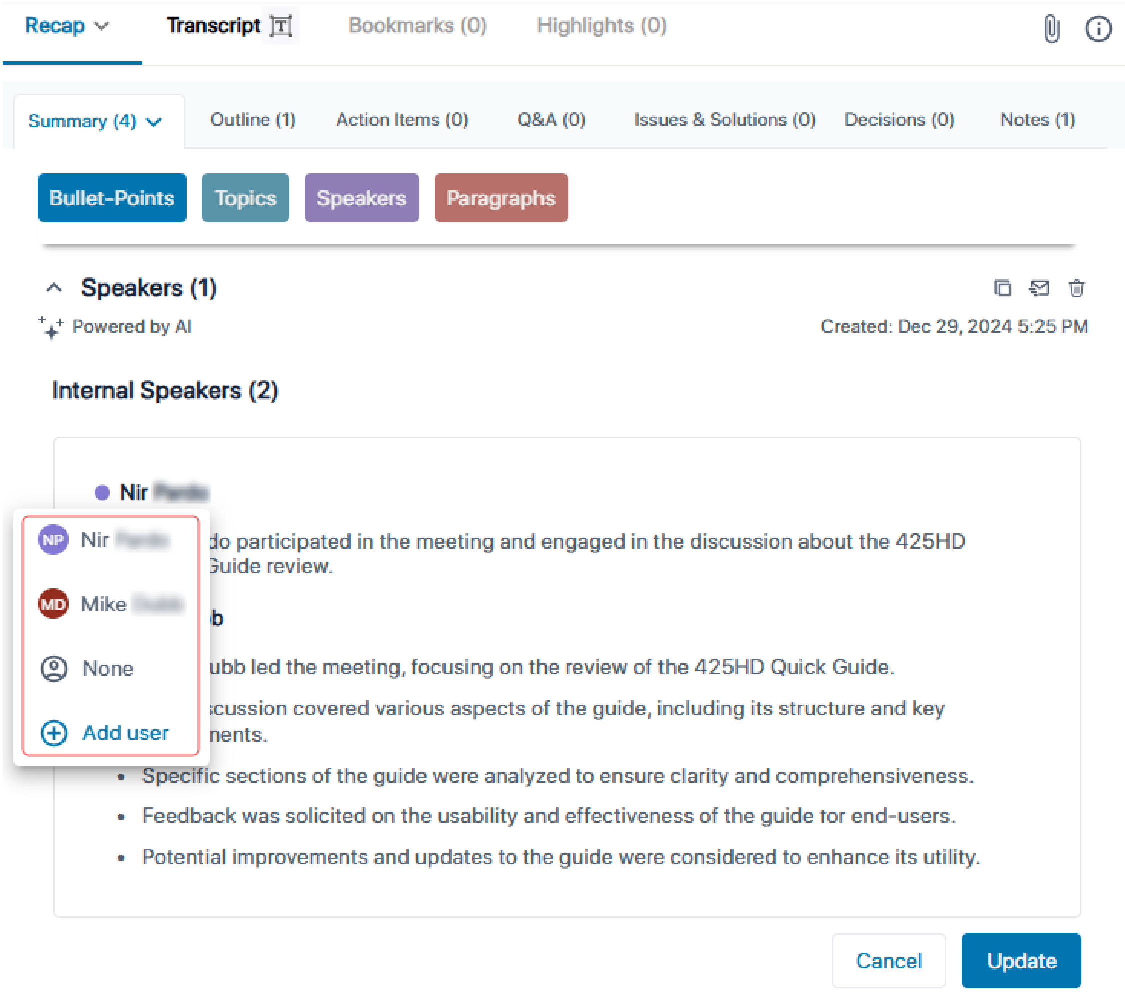
- A different meeting invitee
- A user who was not invited to the meeting
- No one at all

➢ **To reassign speakers in summary:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Recap** tab, and then click **Summary** (default); the AI-generated summary is displayed.
4. Click the **Speakers** button to navigate to the Speakers section in the summary.

5. Click the Edit icon under the Internal Speakers or External Speakers group; the speakers summary becomes editable.

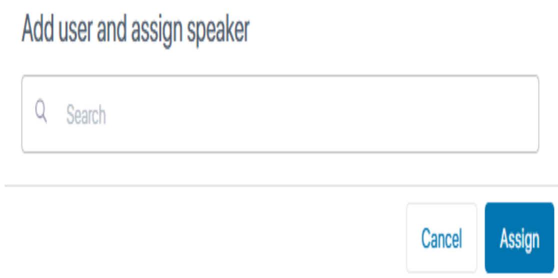
6. Click the speakers name that you want to replace; a drop-down list appears, as shown below:



7. From the drop-down list, do one of the following:

- **To assign the specific summary to a different invitee:** Click the desired person; the name of the selected invitee is displayed next to the specific summary.
- **To assign the specific summary to nobody:** Click **None**; "Assign to" is displayed next to the specific summary.
- **To assign the specific summary to a user that wasn't invited to the meeting:**

  i. Click **Add user**; the following appears:



ii. Use the 'Search' field to find and select the user, and then click **Assign**; a confirmation message box appears.

iii. Click **Continue**; the name of the user is displayed next to the specific summary.

8. Click **Update** to apply your settings.

Generating AI-Powered Summary-Based Templates

Meeting Insights allows you to generate AI-powered summaries that conform to predefined layout templates. This feature is particularly valuable for organizations that require meeting summaries to adhere to a specific structure. For example, your organization may want the summary to include the sections 'Meeting Agenda', 'Main Concerns', and 'Wishful Goal'.

The available template(s) are determined by your organization's Meeting Insights administrator. If multiple templates are available, you can select more than one for a single AI-generated summary. If you select multiple templates, Meeting Insights generates separate summaries for the same meeting recording, each formatted according to a different template.

- AI-powered summaries based on templates are available only if enabled by your organization's Meeting Insights administrator.
- The summary is generated by an AI model, which may sometimes generate inaccurate information. Therefore, it's recommended that you review the summary and edit it if required to ensure accuracy and relevance before sharing it with others.
- It may take some minutes to generate the AI-powered summary.
- If you're the owner of the meeting recording, you can always trigger AI to generate a summary. Participants of the meeting recording can also trigger it if your organization's administrator has enabled such functionality.
- When you activate AI, it generates a Summary, Action Items, Q&A, Issues & Solutions, and a transcription.

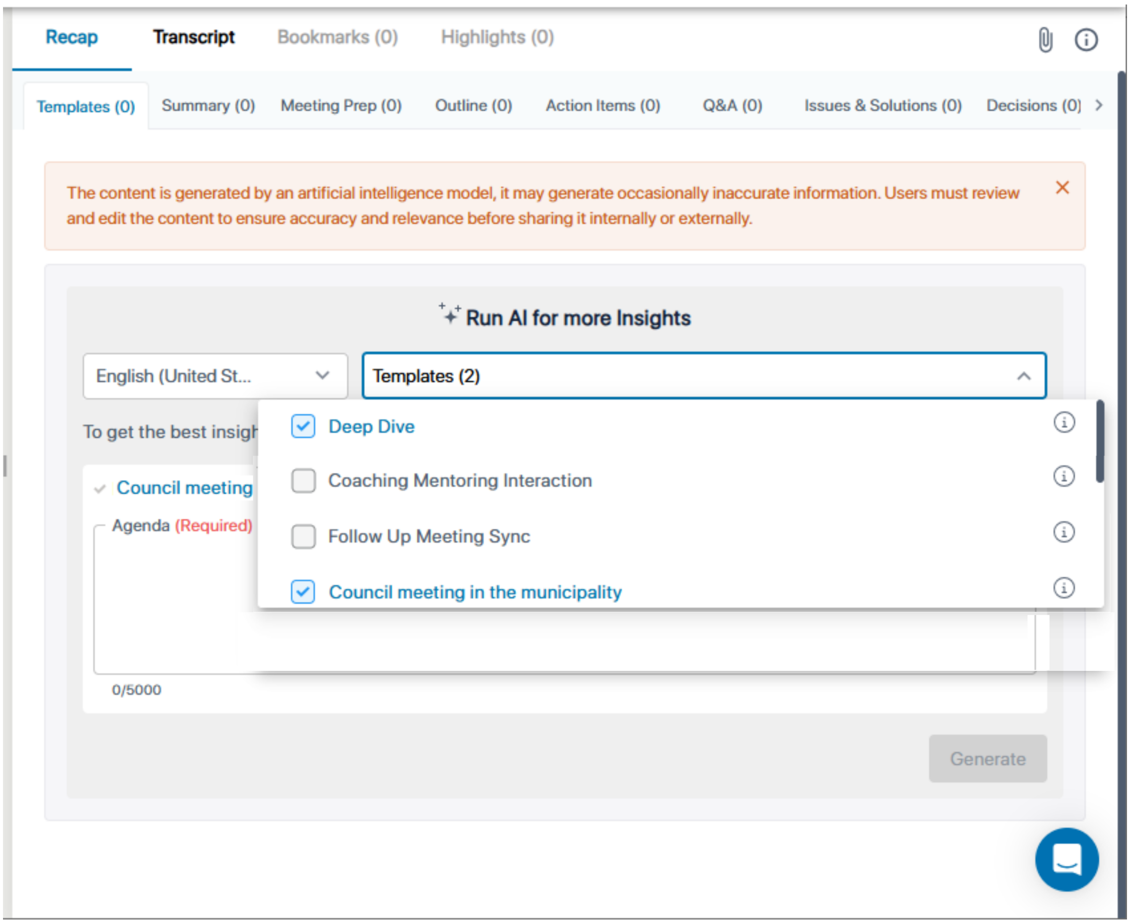
➢ **To run AI-powered summary based on templates:**

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.

2. Select the **Recap** tab, and then click **Templates**.

3. From the 'Language' drop-down list, select the language of your meeting recording.

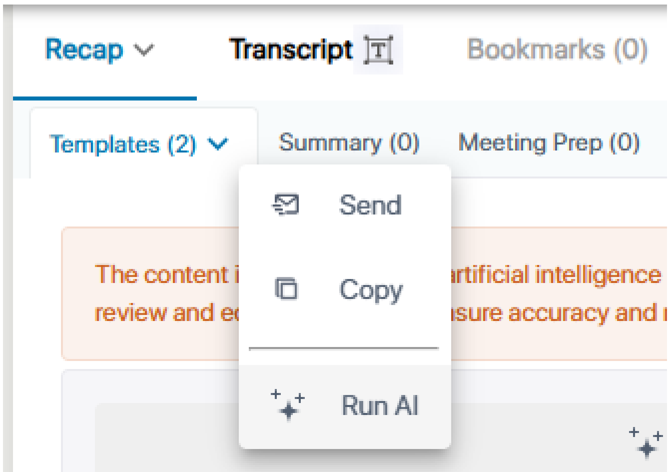
4. From the 'Templates' drop-down list, select one or more templates:



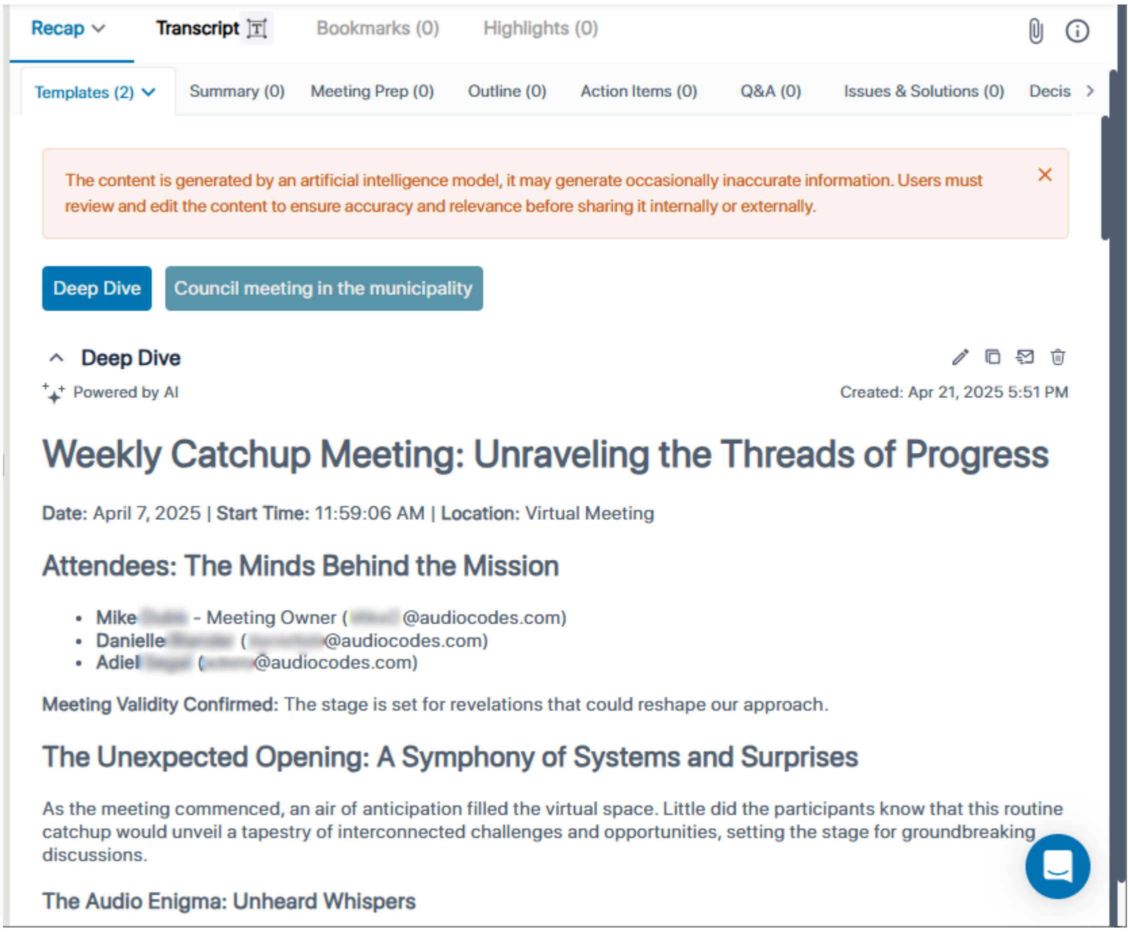
5. If you selected a template that contains user-input fields, they appear as text boxes, as shown in the figure above. Some fields are mandatory ('Required') and you must enter information into them before generating the summary. You can leave optional fields blank if you want. For example, the **Council meeting in the municipality** template (above) includes the 'Agenda' required field.

6. Click **Generate**; AI processes the summary and when finished, the summary appears.

You can run the AI-powered summary again for the same template, or for additional or different templates. Simply click the down arrow on **Templates**, and then from the drop-down list, choose **Run AI**:



To view the generated summary, select the **Recap** tab, and then click **Templates**. If you generated a summary based on multiple templates, a tab is displayed for each template, as shown in the example below for the 'Deep Dive' and 'Council meeting in the municipality' templates. Simply click the tab of the summary-based template that you want to view.



Generating an AI-Powered Meeting Prep for Recurring Meetings

When you activate AI during or after a recurring meeting, Meeting Insights automatically generates an AI-powered Meeting Preparation (*Meeting Prep*). The Meeting Prep provides information from the current meeting to help you prepare for the next meeting in the recurring meeting series.

The Meeting Prep includes the following information for the upcoming meeting:

- Agenda of the meeting
- Action Items (assigned to participants)
- Meeting summary

Twenty four (24) hours before the next meeting in the recurring meeting series, Meeting Insights sends an email with the Meeting Prep to the Owner of the meeting and to all participants that were assigned Action Items. This enhances preparedness for the meeting, eliminating the need to listen to the previous meeting for gathering information.

> Meeting Insights sends the Meeting Prep via email only to internal participants (i.e., within your organization).

The Meeting Prep is displayed on the Players page under the **Meeting Prep** tab, which is available only if you have triggered AI for the recurring meeting.

You can trigger AI during or after the meeting.

The AI-generated meeting prep includes the following groups of information:

- **Agenda** - matters to be discussed in the next upcoming meeting
- **Action Items** - action items that were assigned to participants
- **Meeting Summary** - summary of the current meeting

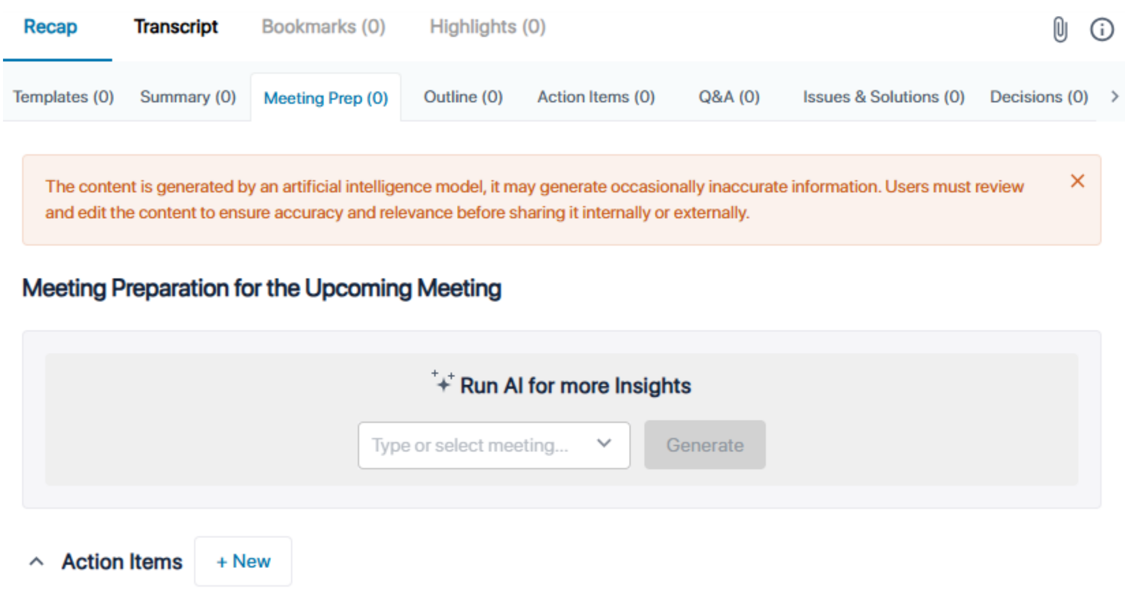
You can copy and send the meeting prep by email. The Owner of the meeting can also edit the content of the meeting prep.

> - The Meeting Prep is generated by an AI model, which may sometimes generate inaccurate information. Therefore, it's recommended that you review and edit it if necessary to ensure accuracy and relevance before sharing it with others.
> - If you're the owner of the meeting recording, you can always trigger AI to generate a Meeting Prep. Participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
> - You can also activate AI from the meetings list view (**All Meetings**), by clicking the icon (see Viewing Meeting Recordings List on page 150).
> - It may take several minutes to generate the AI-powered Meeting Prep.
> - When you activate AI, it also generates the Summary, Action Items, Q&A, Issues & Solutions, and Transcription.

➢ To run AI to create Meeting Prep:

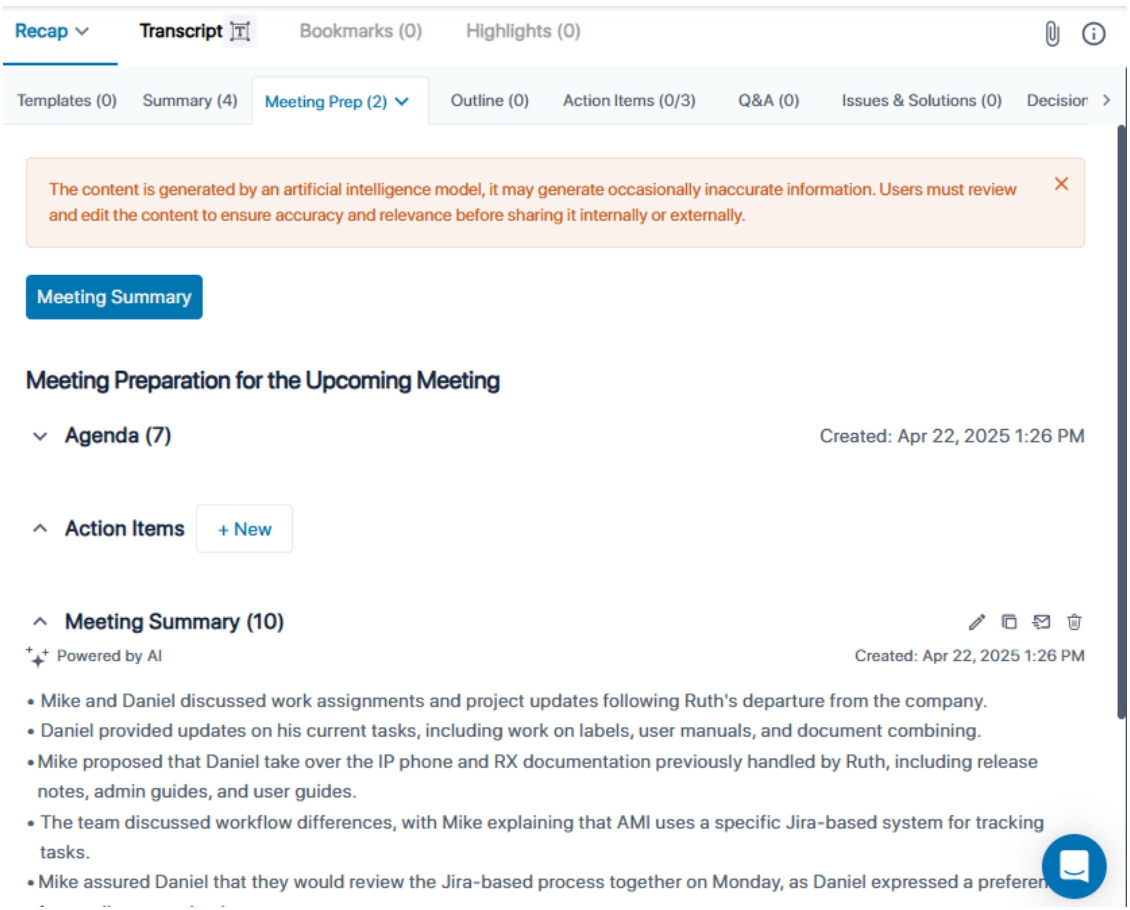
1. In the Navigation pane, click **All Meetings**, and then click the name of the recurring meeting (indicated by icon) that you want; the Player page appears.

2. Select the **Recap** tab, and then click **Meeting Prep**:



3. From the drop-down list, select the language of your meeting recording.

4. Click **Generate**; AI begins processing the Meeting Prep. If you want to cancel the process, click **Stop**. When the process has finished, the meeting prep is displayed under the **Meeting Prep** tab, as shown in the following example. To view the different meeting prep sections, expand the **Agenda**, **Action Items**, or **Meeting Summary** groups.



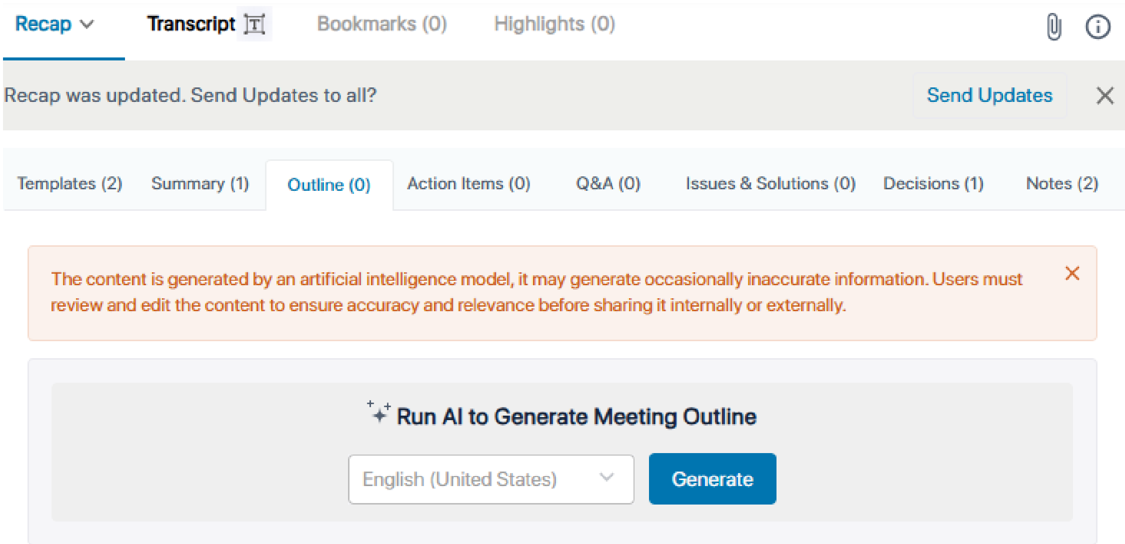
Generating an AI-Powered Outline

When the outline is successfully generated, Meeting Insights also sends you an email with the outline.

- The outline is generated by an AI model, which may sometimes generate inaccurate information. Therefore, it's recommended that you review the outline and edit it if required to ensure accuracy and relevance before sharing it with others.
- If you're the owner of the meeting recording, you can always trigger AI to generate an outline. However, participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
- It may take several minutes to generate the AI-powered outline.

➢ To run AI to create outline:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click **Outline**:



3. From the drop-down list, select the language of your meeting recording.
4. Click **Generate**; AI processes the summary and when finished, the outline appears. If you want to cancel the process (for whatever reason), click **Stop**.

Action Items

An action item is a task or activity that needs to be done. You can optionally specify a date by which the action item needs to be done, and optionally assign it to a participant.

Instead of adding action items manually, you can trigger Meeting insights to automatically generate action items using the Artificial Intelligence (AI) technology.

- Only the Owner of the meeting recording can add action items.
- Action items are public and therefore, visible to all users that have access to the meeting recording.

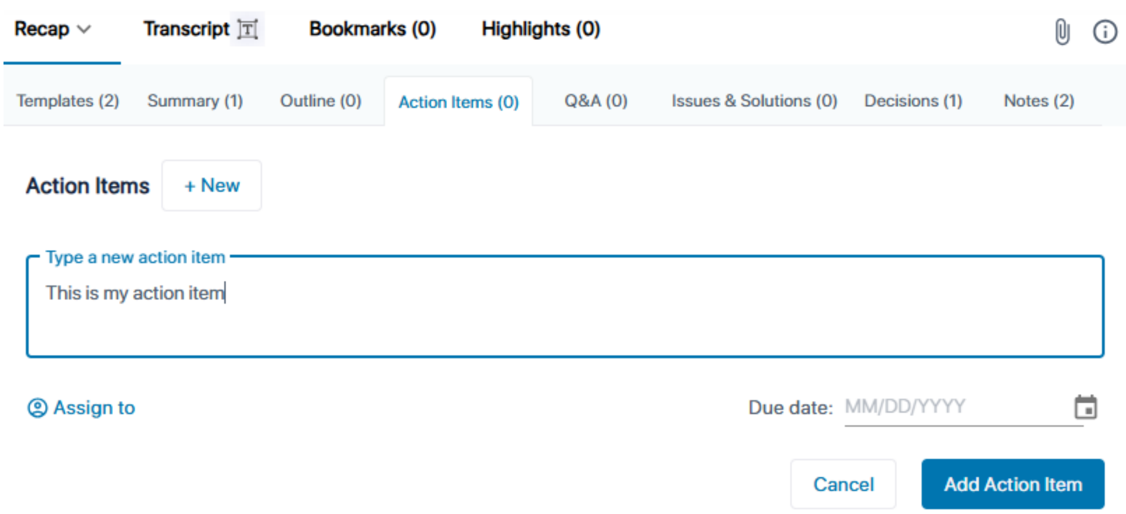
Adding Action Items Manually

You can add action items per meeting recording.

In addition to manually adding action items, you can use AI to generate suggested action items, as described in Generating AI-Powered Suggested Action Items on the next page.

➢ **To add an action item:**

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click **Action items**.
3. Click the **New** button, and then in the text box, type the task that needs to be done:



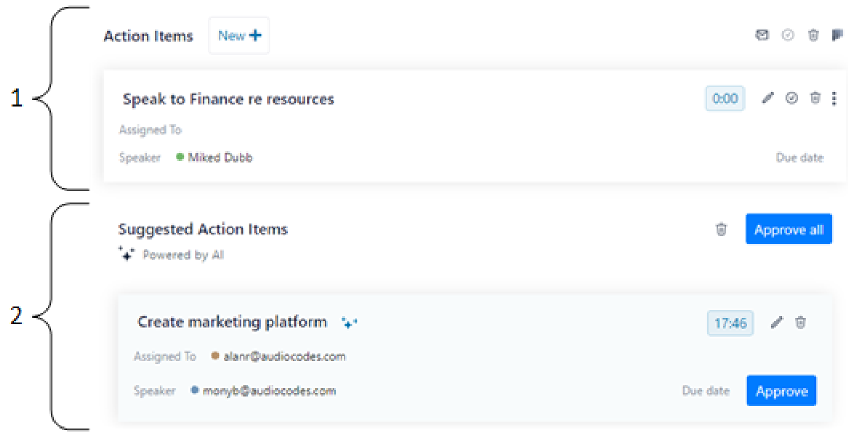
4. If you want to assign the task to someone, click **Assign to**, and then from the drop-down list, choose the listed participant (or click **Add user**to choose a non-participant, and then click **Assign**).
5. If you want to assign the task a due date, click , and then select the date from the displayed calendar.
6. Click **Add Action Item**.

Generating AI-Powered Suggested Action Items

Meeting Insights offers you a quick and effective method for automatically creating action items from your meeting recording, using artificial intelligence (AI). AI-powered action items include the action to take, the speaker who requested the action, the person assigned to the action, and its due date.

AI-generated action items are only suggested actions items and therefore, Meeting Insights allows you to approve (and edit) or delete each one accordingly. If you don't approve an action item (and don't delete it), it remains under the Suggested Action Items group and only the owner (or representative) of the meeting recording can view it. Participants can view only approved action items.

The following figure displays AI-generated action items. Those that have yet to be approved are listed under the Suggested Action Items group (#2 in figure). Those that were approved (or manually created) are listed under the Action Items group (#1 in figure).

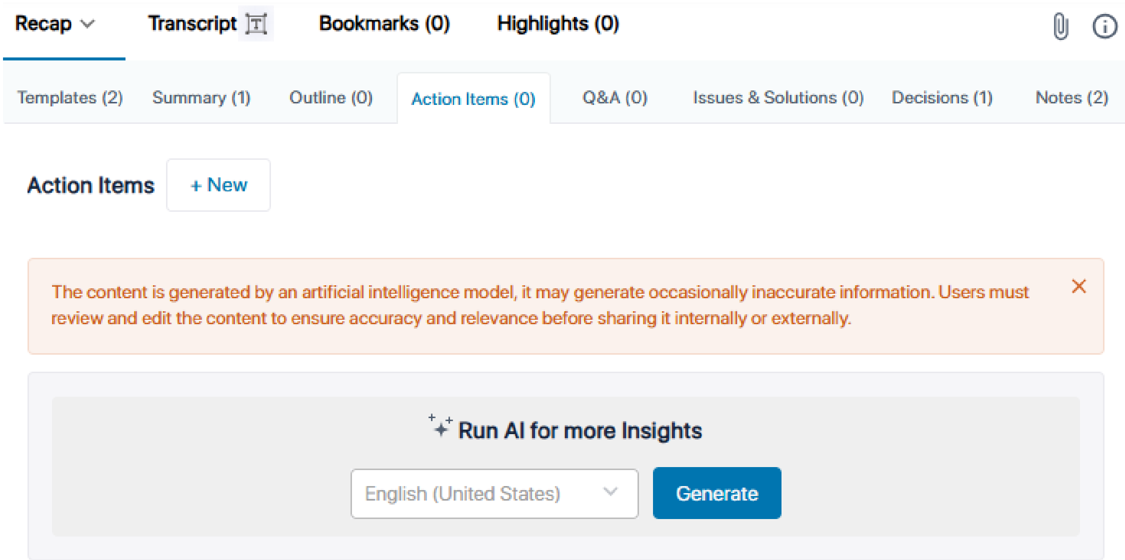


When the AI-powered action items are successfully generated, Meeting Insights sends you an email containing the actions items.

- The action items are generated by an AI model, which may sometimes generate unnecessary action items. Therefore, it's strongly recommended that you review the action items and edit them if required before sharing with others.
- If you're the owner of the meeting recording, you can always trigger AI to generate action items. However, participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
- It may take several minutes to generate the AI-powered action items.
- You can also use activate AI to generate action items during a meeting recording.
- When you activate AI, it always generates a Summary, Action Items, Q&A, Issues & Solutions, and a transcription.
- In addition to generating suggested action items using AI, you can manually add action items, as described in Adding Action Items Manually on the previous page.

➢ To run AI for action items:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click **Action Items**:



3. From the drop-down list, select the language of your meeting recording.
4. Click **Generate**; Meeting Insights begins the AI process to generate action items. If you want to cancel the process (for whatever reason), click **Stop**.

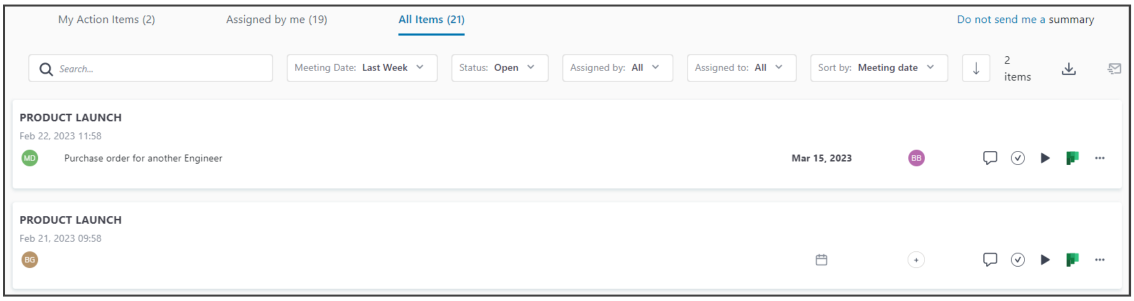
Managing Action Items

Meeting Insights provides a dedicated page which is accessed from the Navigation pane that allows you to easily manage action items of all meeting recordings. This includes action items that were assigned to you or that you assigned to others.

- For exporting an action item to Microsoft Planner, see Integration with Microsoft Planner.
- You can assign a different user to all related action items, using the video player's 'Filter by speakers' feature, as described in Replacing a Speaker on page 235.

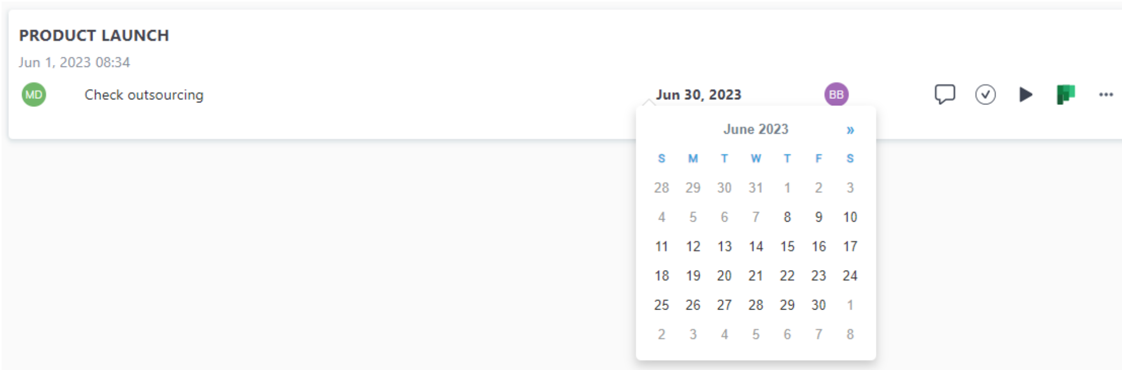
➢ To manage action items:

1. In the Navigation pane, click **Action items**:



When you access the Action Items page, it lists the action items according to your previous filter settings.

2. Select any of the following action item tabs:
   - **My Action Items:** Displays all action items assigned to you that are still open.
   - **Assigned by Me:** Displays all action items that you assigned to other users (including to yourself).
   - **All Items:** Displays all action items assigned to you and that you assigned to other users (including to yourself).
3. To search and filter the list of action items, use the following search filtering criteria:
   - **Search:** Use this field to search for an action item containing specific text.
   - **Meeting Date:** Filters the list of action items by date of meeting recording (last week, last month, or last year).
   - **Status**: Filters the list of action items by status (open or done).
   - **Assigned by:** Filters the list of action items by users that assigned them.
   - **Assigned to:** Filters the list of action items by users to whom they are assigned.
   - **Sort by:** Filters the list by **Meeting Date** or **Due Date** of the action item.
   - Orders the list by ascending or descending order, latest meeting on top or oldest meeting on top, i.e., from the most recent date descending to the oldest date, or from the oldest date descending to the most recent date (Date of meeting -or- Due date of Action Item).
4. To change the due date of the action item, click the displayed date, and then use the calendar to select a new date:



5. To add a comment to the action item, click , and then type your comment in the displayed text box. After you add a comment, the icon changes to . To view or close the comment, click the icon.

6. To mark an action item as done, click (#1 in figure); the icon changes to (#2 in figure) and "Done" is displayed (#3 in figure):

7. To play the meeting recording (in the Player page), click .

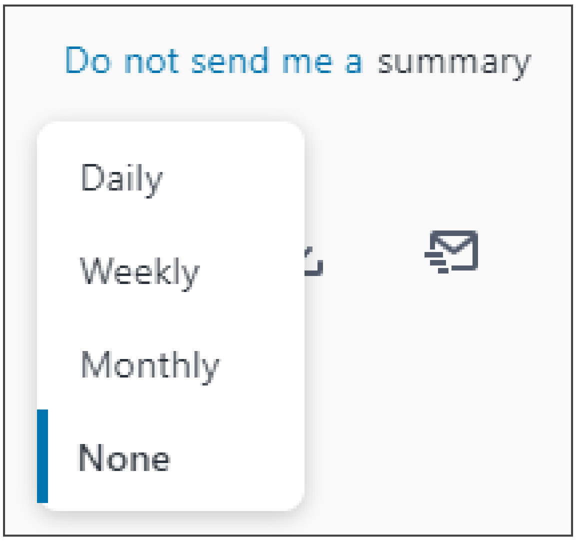
8. To send the action item to Microsoft Planner, click , select a plan and bucket, and then click **Send to Planner**.

9. To download the filtered list of action items to your computer as a PDF file, click .

10. To email the filtered list of action items to the participants, click .

> Meeting Insights sends the action items via email only to internal participants (i.e., members of your organization).

11. To define how often you want Meeting Insights to email you all the open action items of the last 30 days, click the **Do not send me a summary** link, and then choose **Daily**, **Weekly**, **Monthly** or **None** (if you don't want to receive it - default):



12. To view the meeting recap of the meeting recording to which the action item belongs, click ••• , and then from the drop-down menu, choose **Meeting Recap**.

13. To delete an action item, click ••• , from the drop-down menu, choose **Delete Item**, and then in the confirmation message box, click **Delete**.

Integration with Microsoft Planner for Actions Items

Meeting Insights provides seamless integration with Microsoft Planner for managing action items instead of Meeting Insights. When sending an action item to Planner, you need to choose the Planner's plan and bucket.

Once you've sent an action item to Planner, all its subsequent management (editing or deleting) can only be done through Planner (not Meeting Insights). Access to Planner is through the same corporate credentials that you use to access Meeting Insights.

- By default, integration with Planner is enabled. You can disable it, as described in Configuring Meeting Publishing Time and Integration Preferences on page 30.
- Editing or deleting an action item in Planner is **not** reflected in Meeting Insights.
- Only the owner

This section includes the following related sections:

- Sending Action Items to Planner below
- Accessing Action Items in Planner on page 190

Sending Action Items to Planner

You can send an action item from Meeting Insights to Planner and then use Planner to manage the action item instead of Meeting Insights. Once exported, all subsequent management of that action item (editing and deleting) can only be done through Planner.

- By default, integration with Planner is enabled. You can disable it, as described in Configuring Meeting Publishing Time and Integration Preferences on page 30.
- Modifying or deleting the action item in Planner is not reflected in Meeting Insights.

➢ To export an action item to Microsoft Planner:

■ **Player page:**

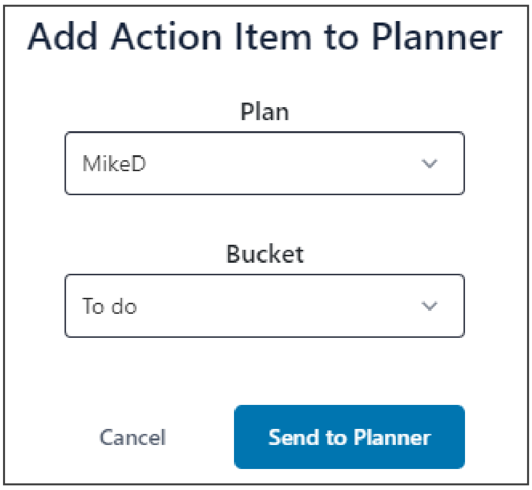
a. In the Navigation pane, click **All Meetings**.

b. Click the name of the meeting recording that you want; the Player page appears.

c. Select the **Recap** tab, and then click **Action Items**.

d. Click the ellipsis icon corresponding to the action item, and then from the drop-down menu, choose **Send to Planner**:

The following dialog box appears:



e. From the 'Plan' drop-down list, select a plan.

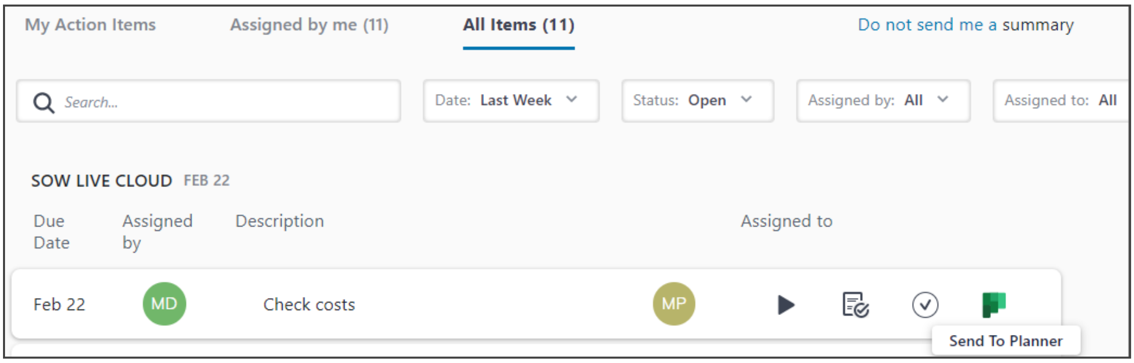
f. From the 'Bucket' drop-down list, select a bucket.

g. Click **Send To Planner**; the action item is added to Planner and the icon is now displayed with a lock .

■ **Action Items page:**

a. In the Navigation pane, click **Action items**.

b. Click the icon corresponding to the action item:



c. Follow the instructions from Step **e** above for the Player page.

Accessing Action Items in Planner

Action items that you have exported to your Microsoft Planner can only be managed (edited or deleted) through Planner. You can easily access these action items in Planner from Meeting Insights.

> ⚠ Modifying or deleting the action item in Planner is not reflected in Meeting Insights.

➢ To access an action item in Microsoft Planner:

- **Player page - Web GUI:**

  a. Open the All Meetings (see Viewing Meeting Recordings List on page 150).

  b. Click the name of the meeting recording that you want; the Player page appears.

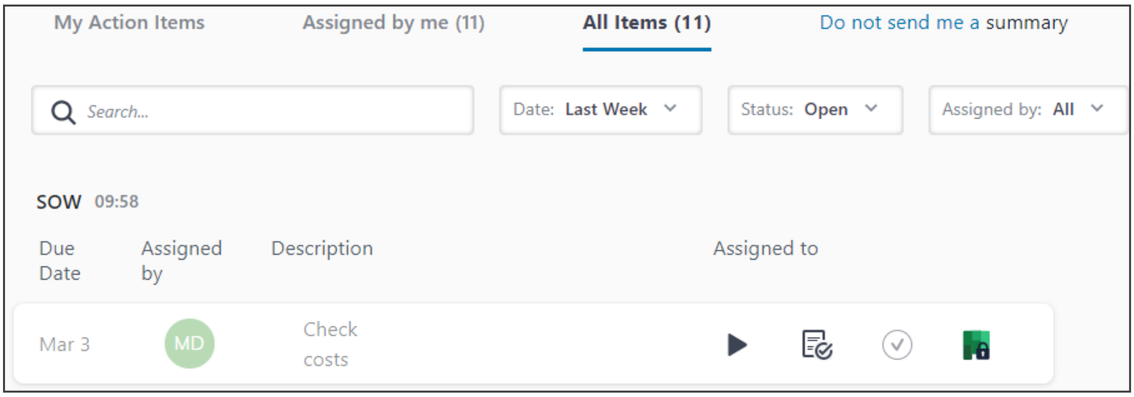
  c. Select the **Recap** tab.

  d. Click the ellipsis icon corresponding to the action item, and then from the drop-down menu, choose **See in Planner**:

- **Action Items page - Web GUI and Teams:**

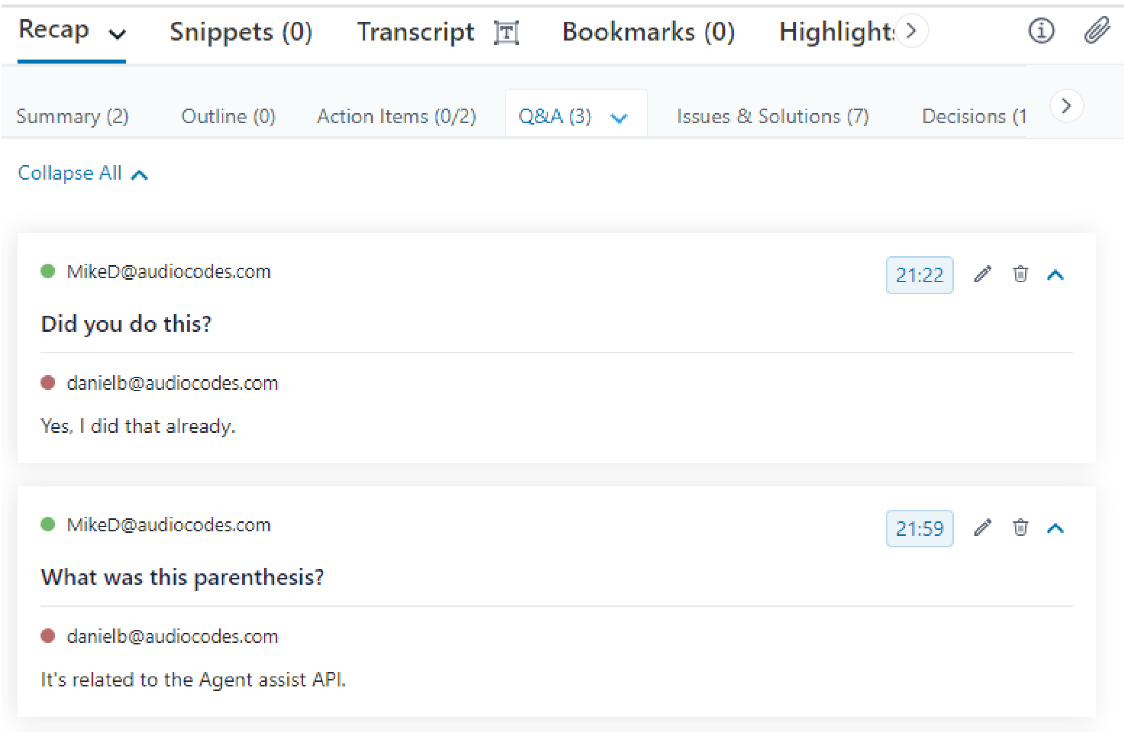
  a. Open the Access Items page, by clicking **Action items** in the Navigation menu pane.

b. Click the **See in Planner** icon corresponding to the action item:



Generating an AI-Powered Questions and Answers

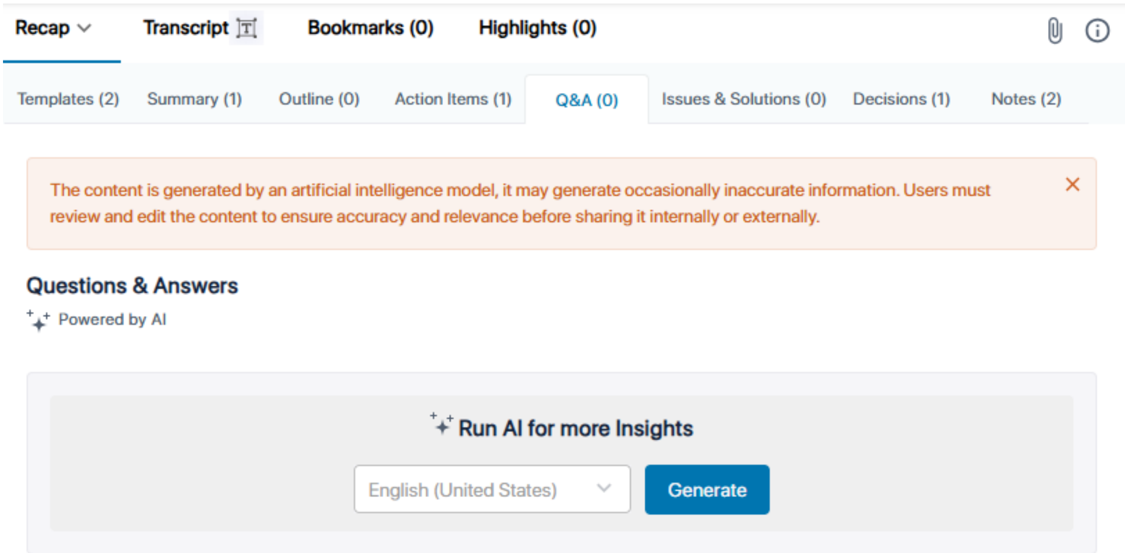
Meeting Insights offers you a quick and effective method for automatically creating Question and Answers (Q&A) from your meeting recording, using artificial intelligence (AI). AI identifies the questions that were asked around discussed subjects during the meeting recording and the answers to the questions. Meeting Insights displays the question with the person that asked it and displays the identified answer below it with the person that answered it, as shown in the following example:



- The Q&A is generated by an AI model, which may sometimes generate unnecessary Q&A. Therefore, it's recommended that you review the Q&A and edit or delete them if required before sharing with others.
- If you're the owner of the meeting recording, you can always trigger AI to generate Q&A. However, participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
- It may take several minutes to generate the AI-powered Q&A.
- You can also use activate AI to generate Q&A during a meeting recording.
- When you activate AI, it always generates a Summary, Action Items, Issues & Solutions, and a transcription.
- When the AI-powered Q&A is successfully generated, Meeting Insights sends you an email with the Q&A.

➢ **To run AI for Q&A:**

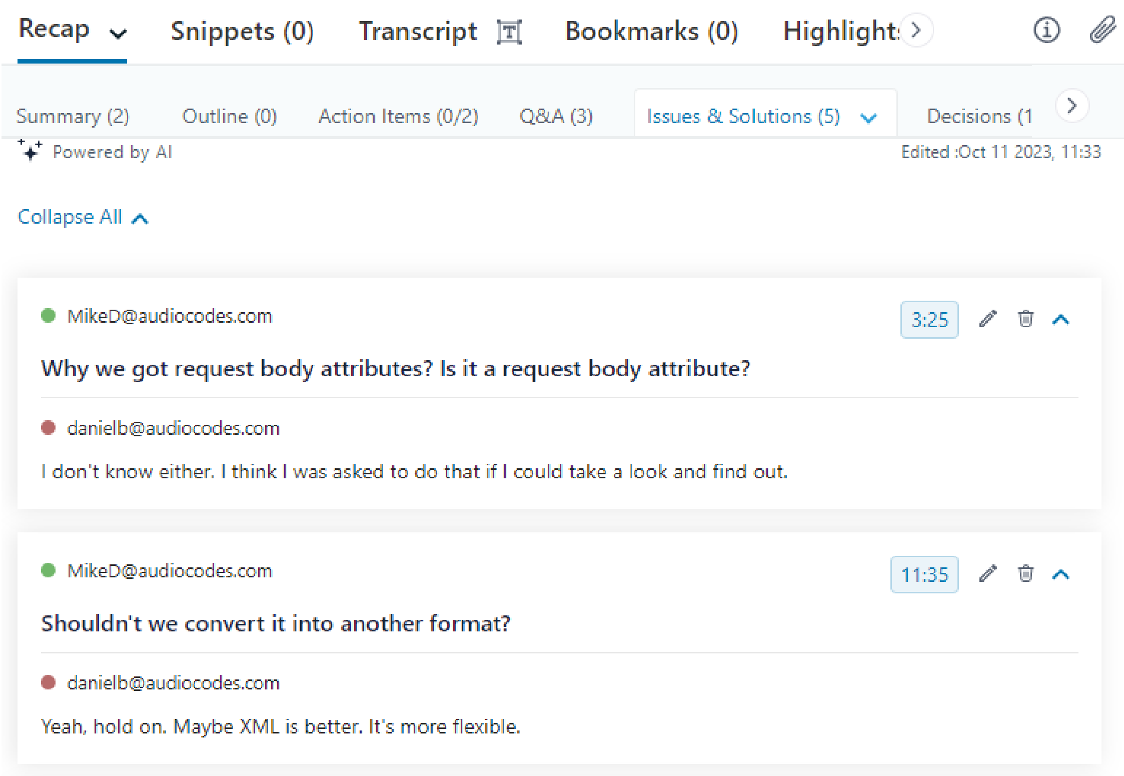
1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click **Q&A**:



3. From the drop-down list, select the language of your meeting recording.
4. Click **Generate**; Meeting Insights begins the AI process to generate the Q&A. If you want to cancel the process (for whatever reason), click **Stop**.

Generating an AI-Powered Issues and Solutions

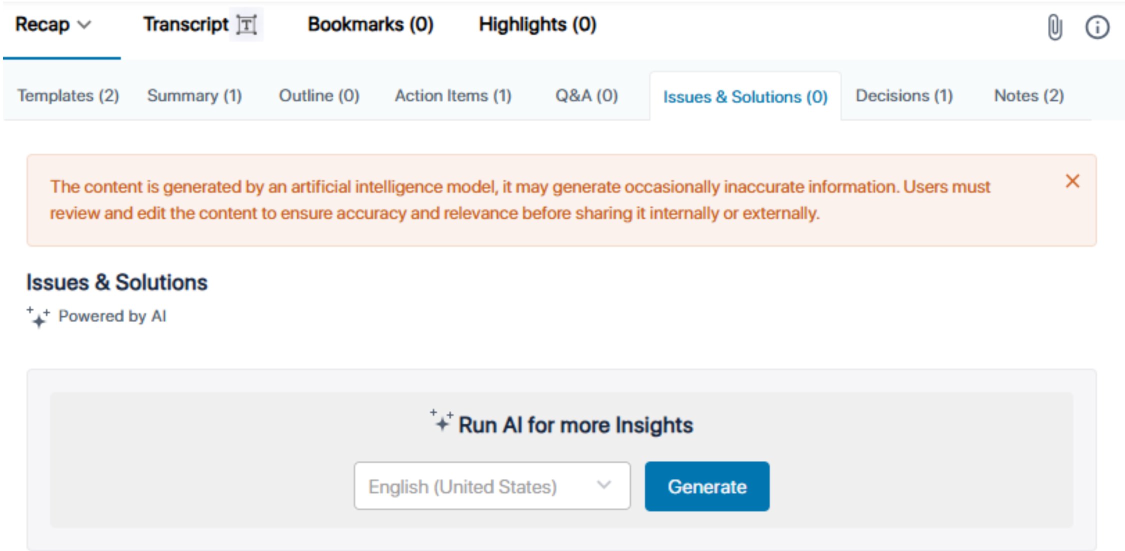
Meeting Insights can create Issues and Solutions from your meeting recording, using artificial intelligence (AI). AI identifies issues that were raised during the meeting recording and their solutions if provided. Meeting Insights displays the identified issue with the person that raised the issue and displays the identified solution below it with the person that offered the solution, as shown in the following example:



- The Issues and Solutions is generated by an AI model, which may sometimes generate unnecessary Issues and Solutions. Therefore, it's strongly recommended that you review the Issues and Solutions and edit or delete them if required before sharing with others.
- If you're the owner of the meeting recording, you can always trigger AI to generate Issues and Solutions. However, participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
- It may take several minutes to generate the AI-powered Issues and Solutions.
- You can also use activate AI to generate Issues and Solutions during a meeting recording.
- When you activate AI, it always generates a Summary, Action Items, Q&A, Issues & Solutions, and a transcription.
- When the AI-powered Issues and Solutions is successfully generated, Meeting Insights sends you an email with the Issues and Solutions.

➢ To run AI for Issues and Solutions:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click **Issues and Solutions**:



3. From the drop-down list, select the language of your meeting recording.
4. Click **Generate**; Meeting Insights begins the AI process to generate Issues and Solutions. If you want to cancel the process (for whatever reason), click **Stop**.

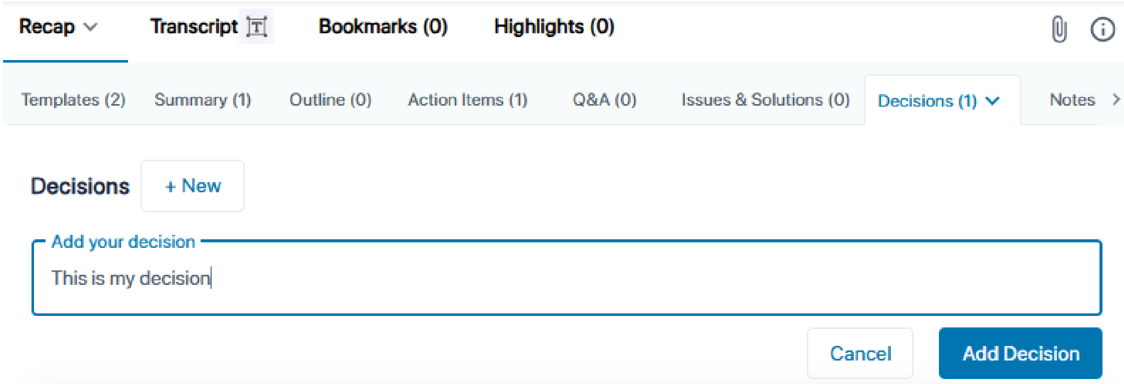
Adding Decisions

A decision is typically an agreed upon resolution or agreement that was made during the meeting recording. Adding a decision is useful in that it helps to remind you of what was agreed upon.

- Only the Owner of the meeting recording can add decisions.
- Decisions are public and therefore, visible to all users that have access to the meeting recording.

➢ **To add a decision:**

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click **Decisions**.
3. Click the **New** button, and then in the text box, type the decision.



4. Click **Add Decision**.

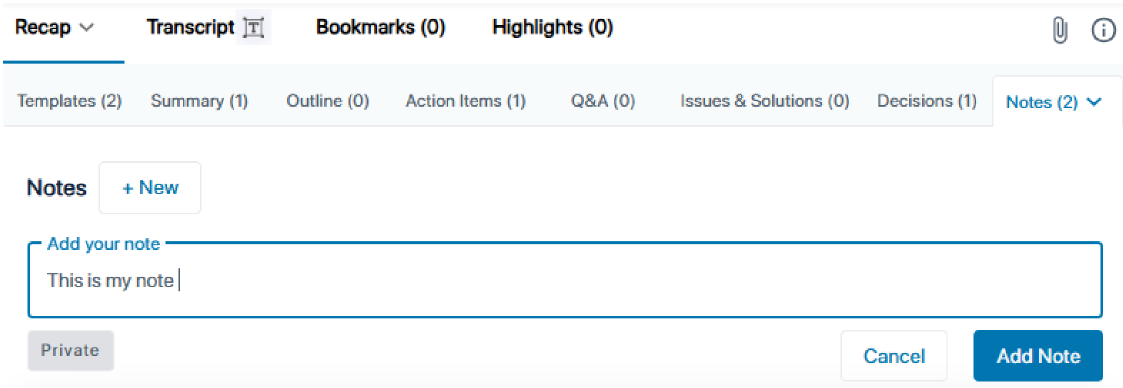
Adding Notes

You can add notes to your meeting recording. Notes can be either private (default)—visible only to you—or public, where everyone with access to the meeting recording can view them.

- Everyone with access to the meeting recording can add notes.
- By default, your notes are private. You can make a note public so that its visible to everyone that has access to the meeting recording.

➢ To add a note:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click **Notes**.
3. Click the **New** button, and then in the text box, type the note:



4. If you want to make the note public, click the **Private** button to change it to **Public** (toggles between **Private** and **Public**).
5. Click **Add Note**.

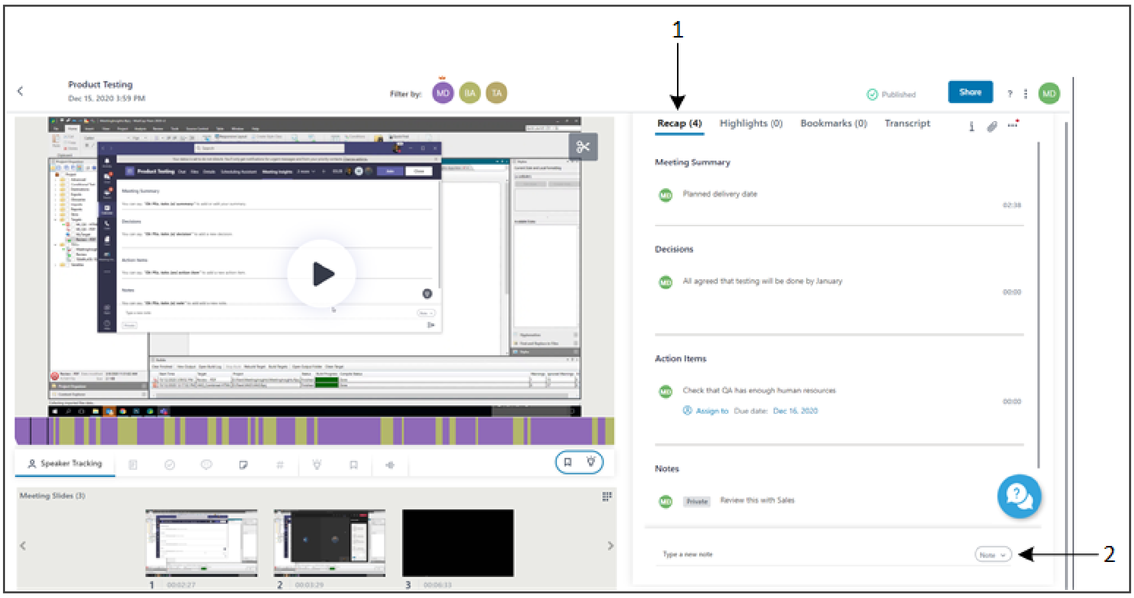
Viewing the Meeting Recap

To view the meeting recap of a meeting recording, follow the procedure below.

- You can also view meeting recap items added by other participants, if made public.
- All users that have access to the meeting recording can view the summary, decisions, and action items. Notes can be seen by all users only if they were added as "Public".
- The listed meeting recap items also display the location (time) in the video where they were added, except recap items that were added at the beginning of the video (i.e., 00:00).
- You can also view the recap, using the RECAP (12) icon in the All Meetings.

➢ To view the meeting recap:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab (#1 in figure below); the meeting recap is displayed, as shown below:



Playing Video from Added Recap Location

You can play the video from the location (timestamp) where a specific meeting recap was added to the Meeting Recording.

The timestamp (mm:ss) is displayed next to each recap. If the recap was added at the beginning of the meeting recording, the timestamp is "0:00".

➢ To play video from location of recap:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab.
3. Click the corresponding timestamp of the recap (e.g., a note); the video starts playing from the location where the recap item was added.

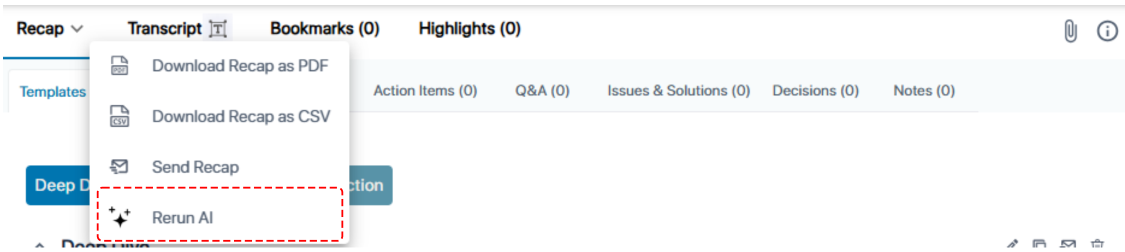
Rerunning the AI-Powered Recap

You can rerun artificial intelligence (AI) to create the Summary, Outline, Action Items, Q&A, and Issues and Solutions recap types. Rerunning AI may be useful, for example, to improve the previously generated recap. The new AI-powered recap replaces the previous AI-generated recap.

- Re-running the AI-powered insights overwrites all previous AI-generated insights.
- The recap is generated by an AI model, which may sometimes generate inaccurate information. Therefore, it's recommended that you review the AI-generated recap and edit them if required to ensure accuracy and relevance before sharing it with others.
- If you're the owner of the meeting recording, you can always trigger AI. However, participants of the meeting recording can also trigger AI if your organization's administrator has enabled such functionality.
- It may take some minutes to generate the AI-powered recap.
- When you activate AI, it also generates a transcription.

➢ To rerun AI to create summary and action items:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Click the arrow on the **Recap** tab, and then from the drop-down menu, choose **Rerun AI**:



   A confirmation message box appears.

3. Click **Continue**; AI regenerates the recap types.

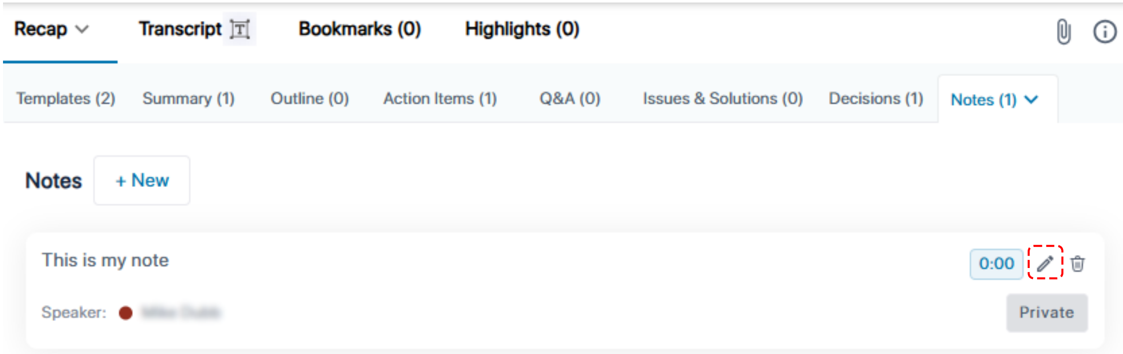
Editing a Recap

You can edit your meeting recap items.

> Only the Owner or Co-owner of the meeting recording, or users assigned editing privileges to the meeting recording can edit all recap types. The other participants can edit only their notes.

➢ To edit a meeting recap item:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click the type of recap.
3. Click the edit icon corresponding to the recap item that you want to modify:



4. Modify the recap as desired, and then click **Apply** or **Update** (depending on the recap you are modifying).

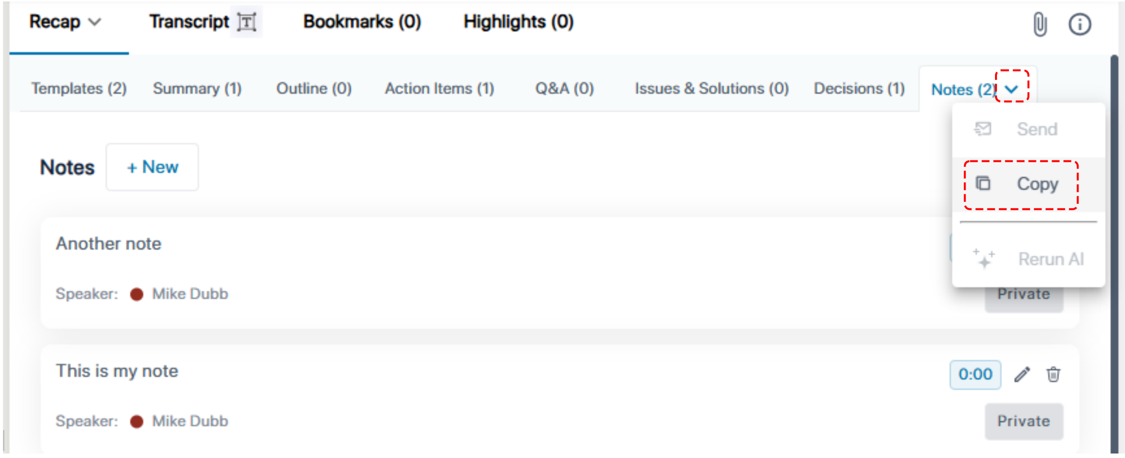
Copying a Recap to Your Clipboard

You can copy a recap to your computer's clipboard and then paste it wherever you want (e.g., in an email or a document).

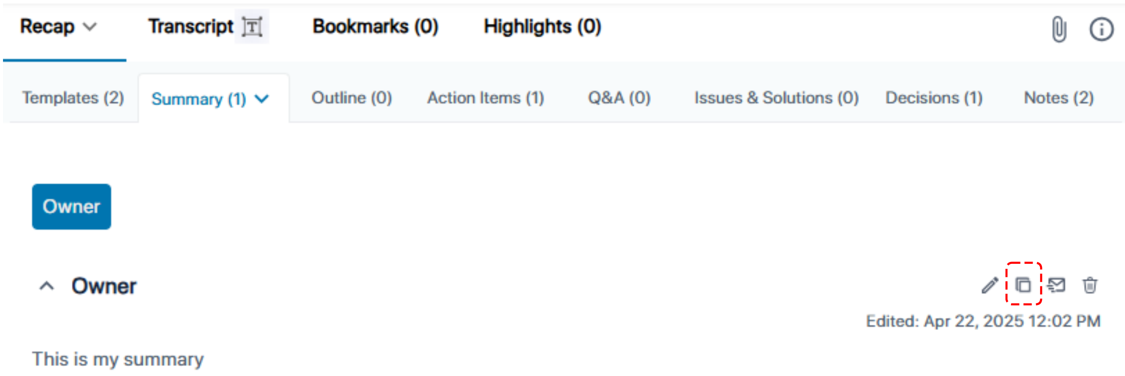
> Only the recap types Summary, Outline, Q&A, and Issues & Solutions allow you to copy a **specific** recap item. All recap types support copying **all** their recap items.

➢ To copy recap to clipboard:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click the required recap type.
3. To copy **all** items of a specific recap type (e.g., all notes), from the recap type's tab (e.g., **Notes**) drop-down menu, choose **Copy**:



4. To copy a **specific** recap item, click the item's copy icon:



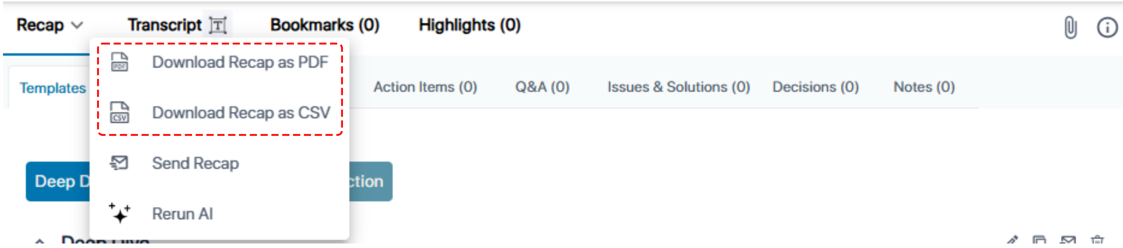
5. Paste the copied recap wherever you want (e.g., email or document).

Downloading All Recaps as PDF or CSV File

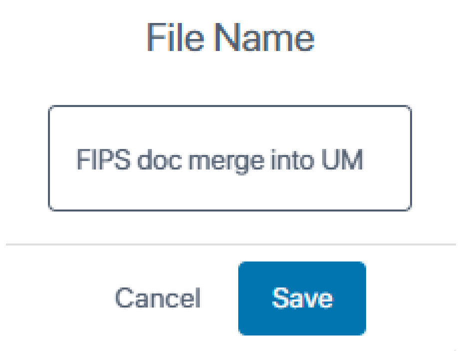
You can download all the recap items of a meeting recording to your computer as a PDF file (.pdf) or as a comma-separated values file (.csv). By default, Meeting Insights assigns the downloaded file with the same name as the subject of the meeting recording. However, you can define a different name for the file.

➢ To download all recap:

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Click the arrow on the **Recap** tab, and then from the drop-down menu, choose one of the following:
   - **Download Recap as PDF** to download the recap to your computer as a PDF file.
   - **Download Recap as CSV** to download the recap to your computer as a CSV file.



The following dialog box appears:



4. In the text box, type a name for the downloaded file, and then click **Save**.

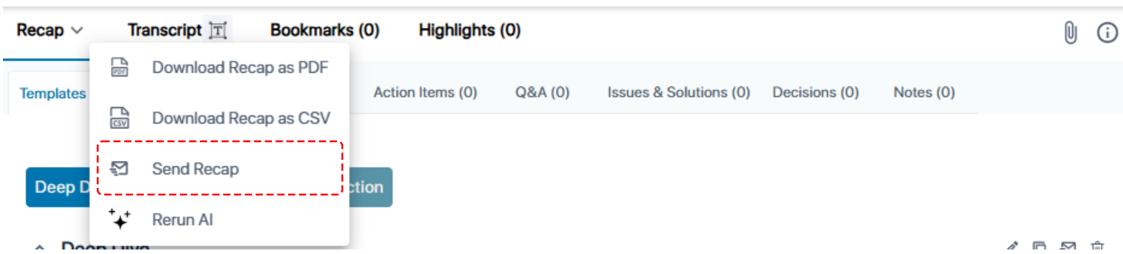
Sending All Recaps by Email

You can send all the recap types by email to all participants of the meeting recording.

- Meeting Insights sends the recap via email **only** to internal participants (i.e., members of your organization).
- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can send the recap by email.
- For the Summary recap, you can send an email with only the 'Owner Summary', or 'Bullet-Point Summary' done by AI, or 'Summary' done by AI (see procedure at end of section).

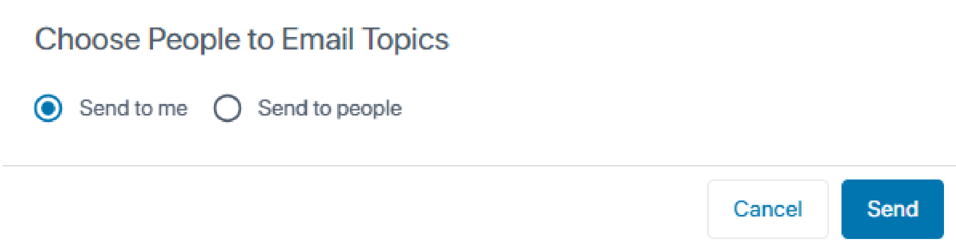
➢ To send recap by email:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Click the arrow on the **Recap** tab (#1 in figure), and then from the drop-down menu, choose **Send Recap** (#2 in figure):



If you want to send an email for a specific summary item under the **Summary** tab:

1. Click the corresponding icon; the following dialog box appears:

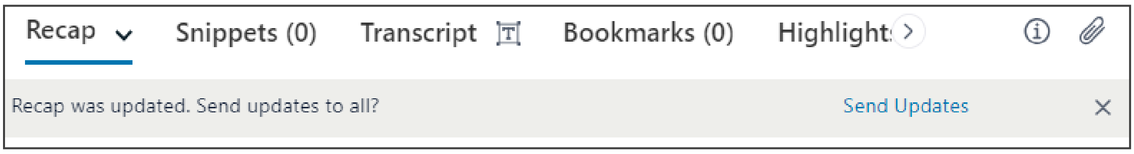


2. Choose one of the following options:
   - **Send to me**: Sends the recap to your email.
   - **Send to people**: If you want to send the email to all participants, click **Add All Participants**. If you want to specify the people (participants or non-participants), then in the 'Add People' field, start typing the names of the people and then select their full names from the offered drop-down list.
3. Click **Send**.

Sending the Updated Recap by Email

Each time the recap is updated, for example, if you add or edit a note, you can inform the meeting's participants by email of this update.

When a recap is updated, Meeting Insights displays the below message on the Players page. If you click **Send Updates**, the updated recap is sent by email to the participants.



- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can send the updated recap by email.
- Meeting Insights sends the recap via email only to internal participants (i.e., members of your organization).

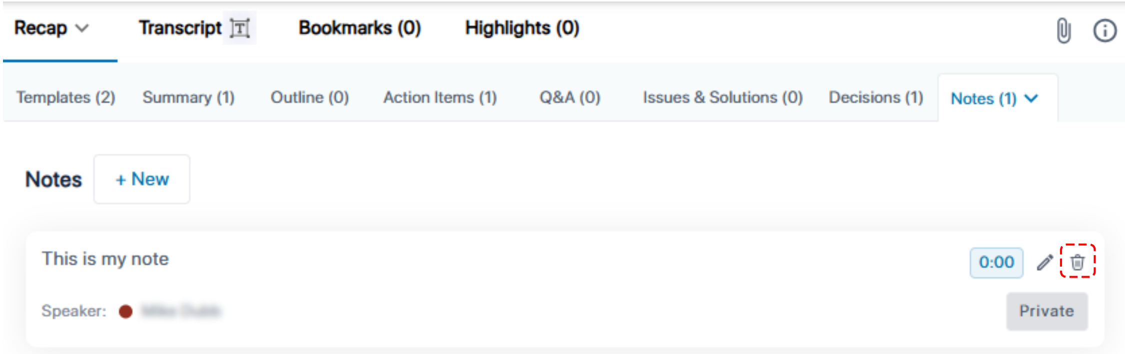
Deleting a Recap

You can delete a meeting recap item.

Only the Owner or Co-owner pf the meeting recording, or users assigned editing privileges to the meeting recording can delete all recap types. The other participants can delete only their notes.

➢ To delete a meeting recap item:

1. In the Navigation pane, click **All Meetings**, and then click the name of the meeting recording that you want; the Player page appears.
2. Select the **Recap** tab, and then click the type of recap.
3. Click the delete icon corresponding to the recap that you want to delete:



A confirmation message box appears.

4. Click **Delete** to confirm.

Managing Transcription

You can activate Meeting Insights to create a transcription (speech-to-text version) of your meeting recording, as described in Creating a Transcription below. Once transcribed, you can edit or delete transcribed words and sentences, as described in Editing Transcription on page 206.

Only Meeting Insights users with account profile "Meeting Insights" can enable transcription (see Viewing Account Information on page 23).

Creating a Transcription

If enabled by your organization's Administrator, you can trigger Meeting Insights to create a transcription of the meeting recording, by converting the speech spoken by the participants into text.

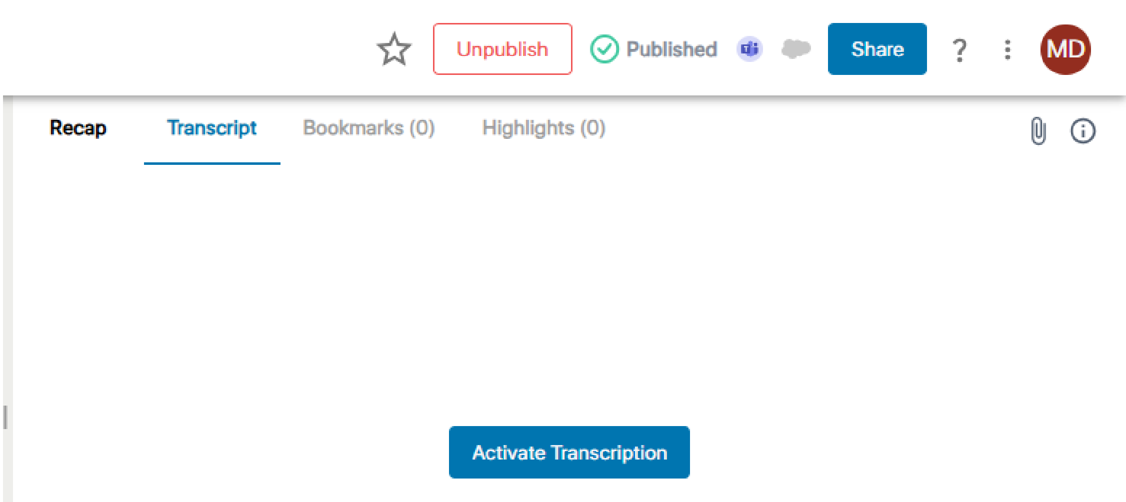
Meeting Insights automatically assigns each transcribed word or text to the dominant speaker at the given time during the meeting recording. When the meeting recording is played, the transcription of each sentence is displayed as a caption on the video and on the presentation slide as the participant speaks.

Meeting recordings that have been transcribed are displayed with the icon in the meeting recordings list (see Viewing Meeting Recordings List on page 150) and next to the **Transcript** tab on the Player page (below).

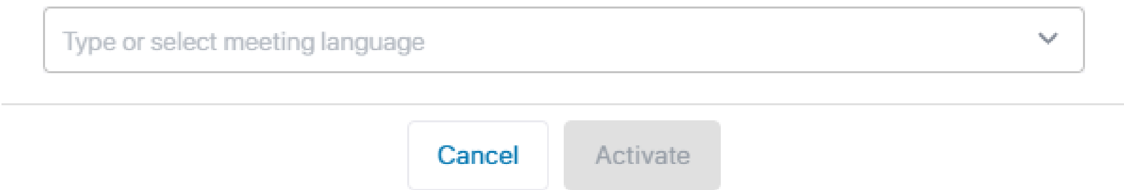
- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can activate transcription.
- If Meeting Insights can't identify the speaker, it displays "AN" (anonymous) next to the transcribed paragraph.

➢ To activate speech-to-text transcription of a meeting recording:

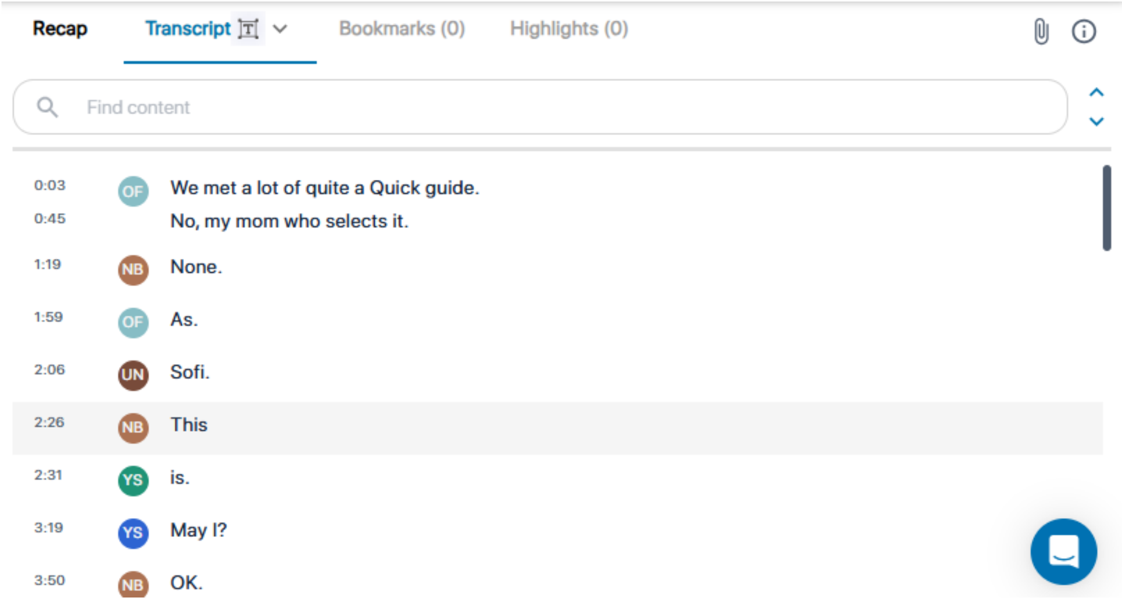
1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Transcript** tab, and then click **Activate Transcription**:



The following dialog box appears:



4. From the drop-down list, select the language spoken in the meeting, and then click **Activate**; the transcription process begins and "Processing" is displayed. When the transcription is done, it's displayed under the **Transcript** tab, as shown in the following example. Each transcription line displays the time (timestamp) in the meeting recording at which it was spoken and the person (speaker) that spoke the line of text. If you click a line, the video starts playing from where that line was spoken.



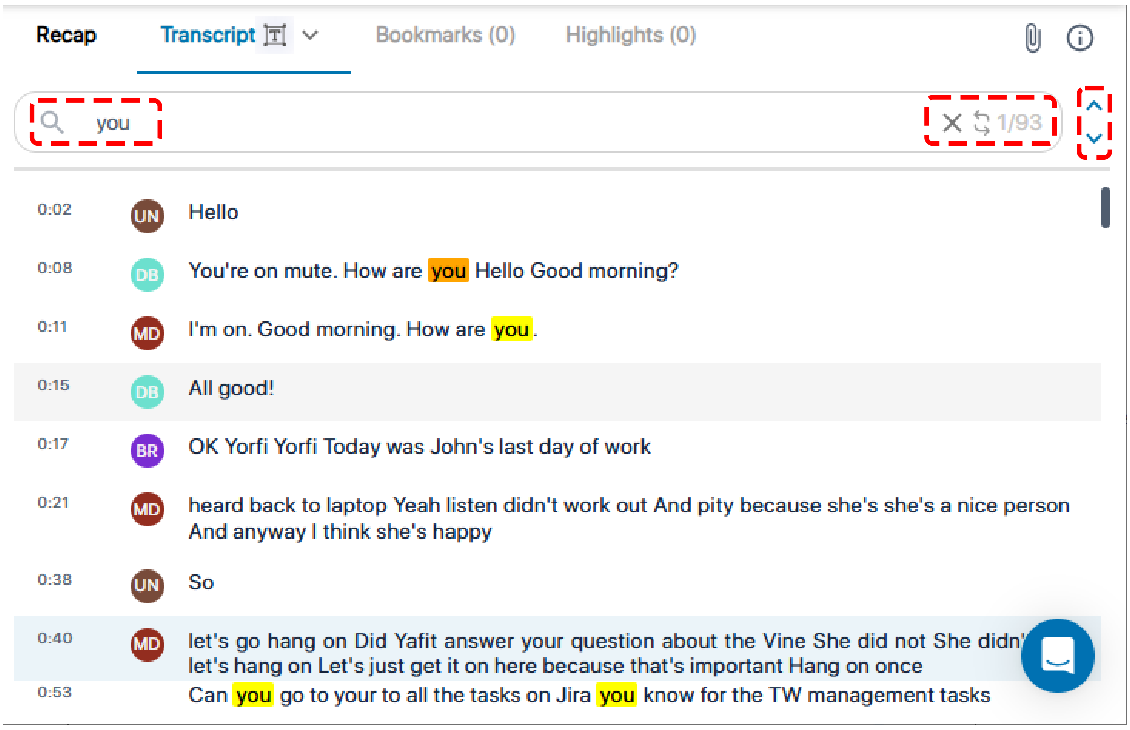
Searching and Replacing Words in Transcription

You can search for words in the transcription of the meeting recording. You can also replace words with other words in the transcription (and optionally, wherever it appears in the entire meeting recording).

⚠ The search words are case sensitive.

➢ **To search text in transcription:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Transcript** tab.
4. In the search field, type the word(s) that you want to search for; the first occurrence of the searched word is highlighted in amber; all other occurrences are highlighted in yellow. The number of occurrences found is displayed on the right of the search field.

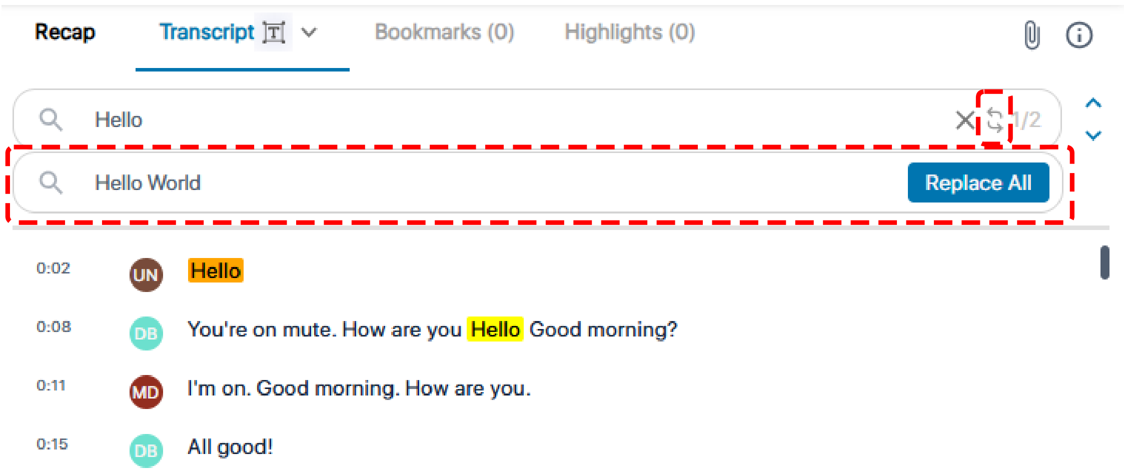


5. To jump to the next or previous occurrence of the searched word, use the down arrow and up arrow , respectively. Your current location is highlighted in amber.

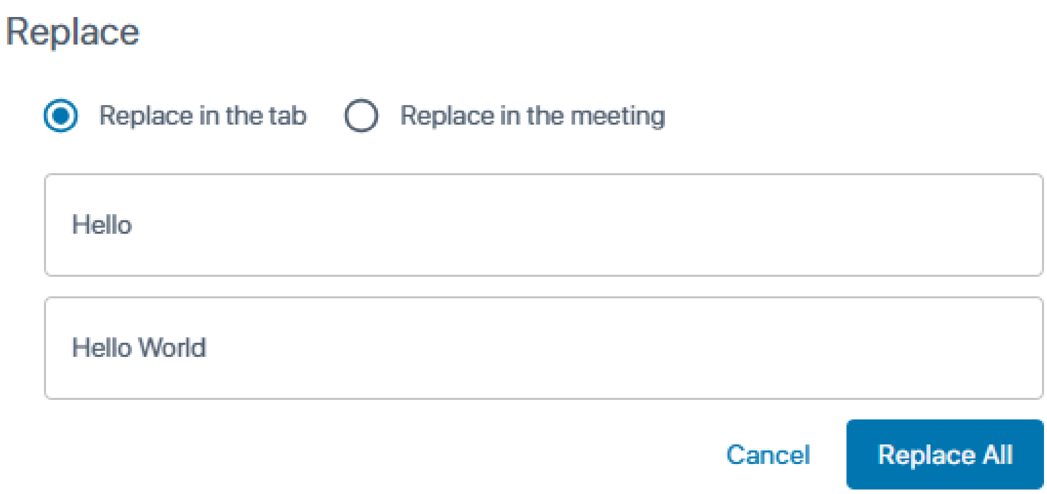
6. To replace a searched word(s):

   a. Click the icon located to the right of the search field; a text box appears below the search field.

   b. In the new text box, type the word(s) that you want the searched word(s) to be replaced with:



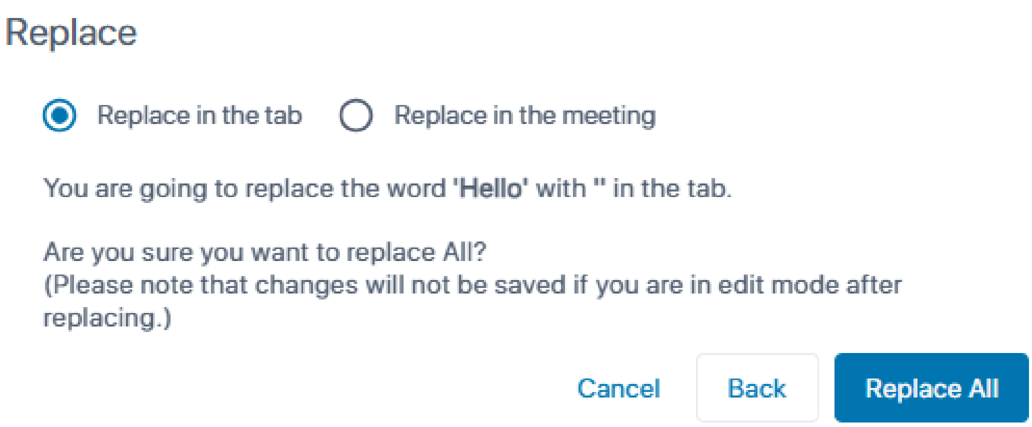
   c. Click **Replace All**; the following dialog box appears:



d. Select one of the following replace options:

- **Replace in the tab:** Replaces the word only in the transcription.
- **Replace in the meeting:** Replaces the word wherever it appears in the meeting recording (e.g., in transcription, notes, and summary).

e. Click **Replace All**; the following confirmation box appears:



f. Click **Replace All** to confirm.

7. To clear your search, click ✖ .

Editing Transcription

You can edit the transcription of your meeting recording, which includes the following:

- Editing text.
- Hiding the following punctuation:
  - Commas (,)
  - Periods (.)
  - Question marks (?)

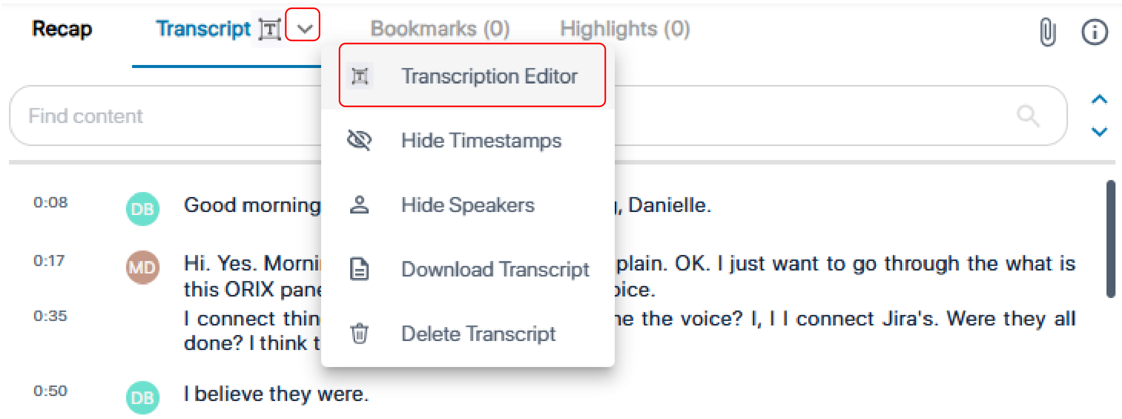
- Exclamation marks (!)

- Assigning a transcribed line of text of a specific user to a different user (an invitee, a user that wasn't invited, or to no user). You can also enable the Replace All Speakers feature to replace **all** transcription of a specific user with a different user.

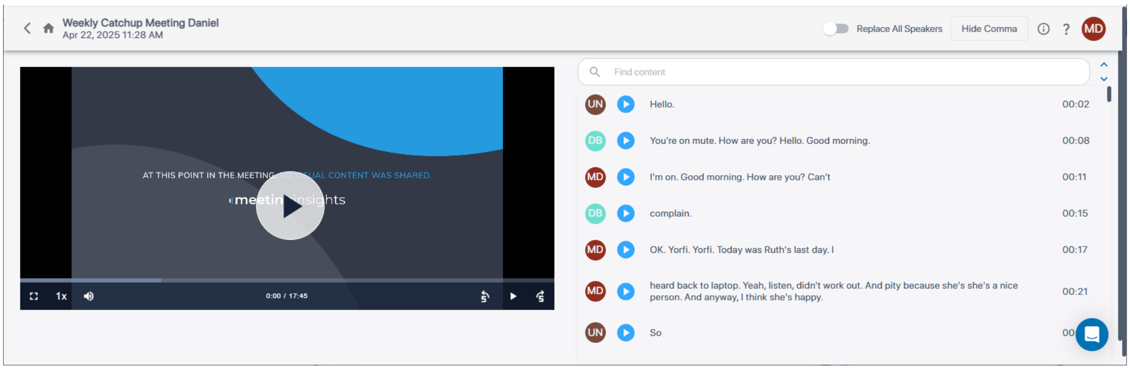
> - Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can edit the transcription.
> - You can also assign a different user to a transcription using the video player's 'Filter by speakers' feature, as described in Replacing a Speaker on page 235.

➢ To edit transcription:

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Transcript** tab, and then from the drop-down list, choose **Transcription Editor**:



The following page opens, displaying editable transcription rows. The profile avatar displayed next to each transcription row indicates the participant that spoke the transcribed text.



4. To edit text:
   a. Click the transcription line that you want to edit; the line changes into a text box.
   b. Make your changes (add, edit or delete text).

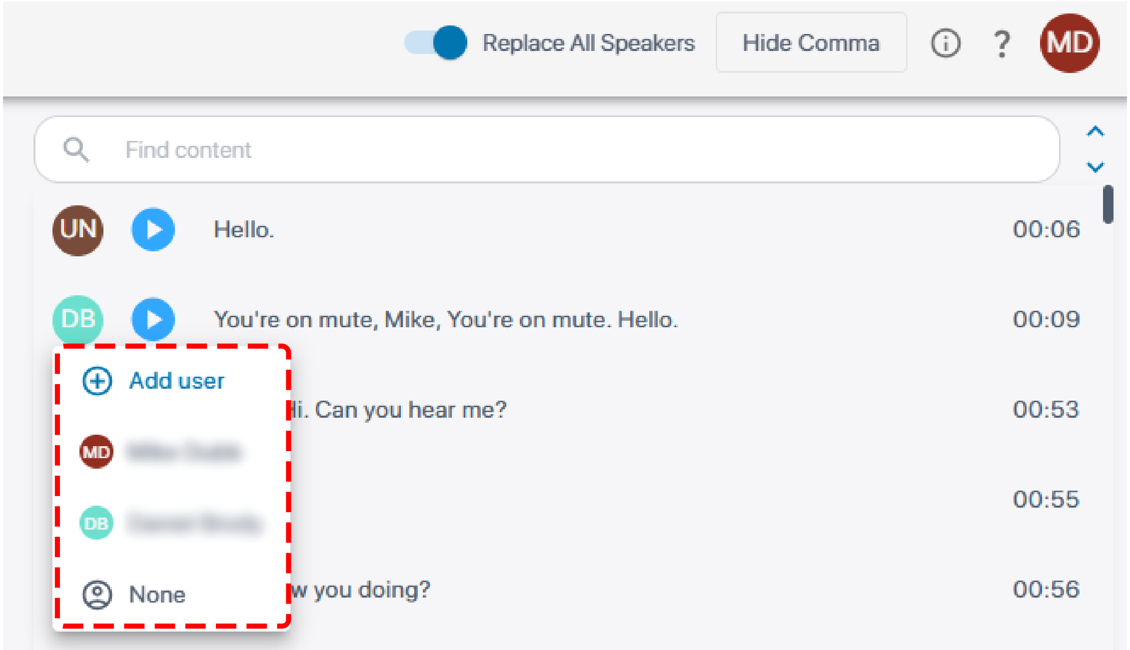
c. Click anywhere out of the text box to save your changes.

5. To hide punctuation (see beginning of section for punctuation list):
   - Click the **Hide Comma** button located above the transcription.

6. You can assign a single transcription row or all transcription rows of a specific user to a different user.

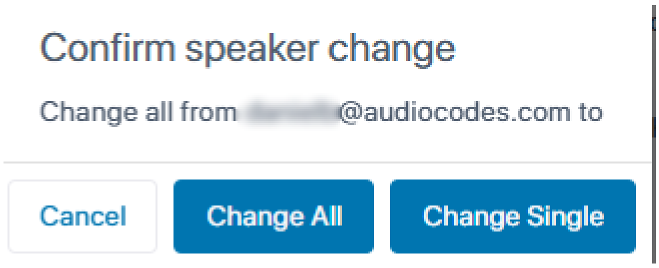
   a. To enable reassigning **all** transcription rows of a specific user to a different user, click the **Replace All Speakers** toggle button (located above the transcription) to turn it on. If you turn it off, you can only reassign a user of a specific transcription row.

   b. Click the profile avatar of the transcription row; a drop-down list appears:



   c. **To reassign transcription row to nobody:** Select **None**; the profile avatar of the transcription row displays "UN" (i.e., unknown). This is useful if you're not sure which participant spoke the line.

   If you enabled the **Replace All Speakers** feature (see Step 6.a above), the following dialog box appears:



      i. Click one of the following buttons:

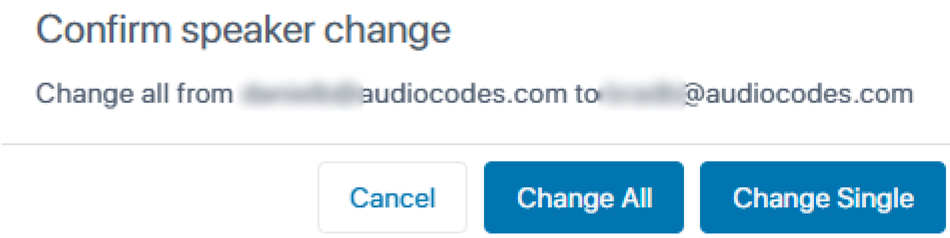
      Change All - reassigns all transcription rows of the specific profile avatar to no user.

      Change Single - reassigns only the specific transcription row to no user.

d. **To reassign transcription row to a different invitee:**

i. Select the invitee from the list.

If you enabled the **Replace All Speakers** feature (see Step 6.a above), the following dialog box appears, the following confirmation message appears:

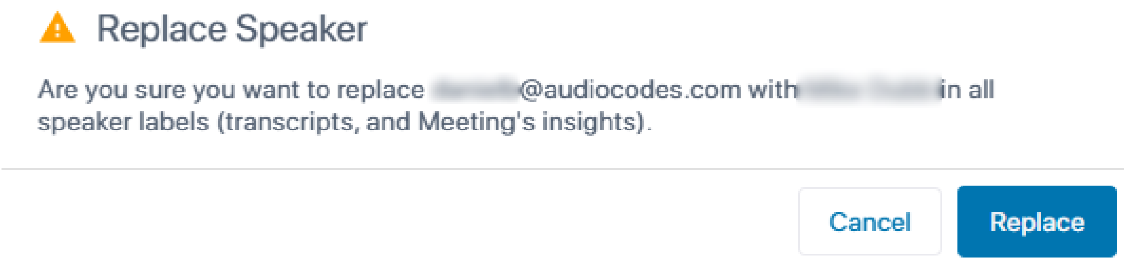


ii. Click one of the following buttons:

Change All - reassigns all transcription rows of the specific profile avatar to the selected invitee.

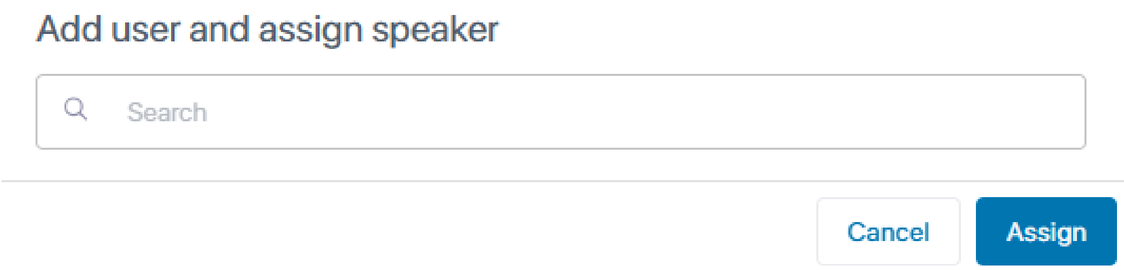
Change Single - reassigns only the specific transcription row to the selected invitee.

iii. If you clicked **Change All** in the previous step, the following dialog box appears:



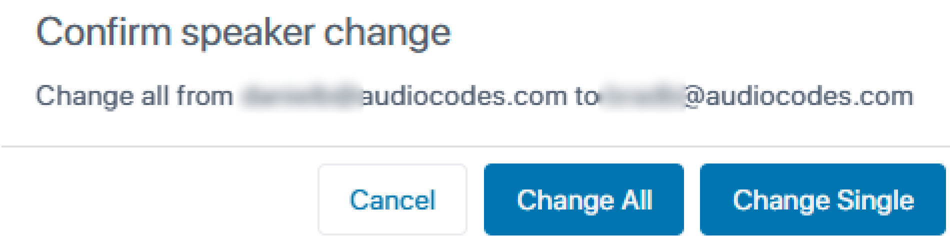
e. **To reassign transcription row to user that wasn't invited to the meeting:**

i. Click **Add User**; the following dialog box appears:



ii. Use the 'Search' field to find and select the user, and then click **Assign**.

If you enabled the **Replace All Speakers** feature (see Step 6.a above), the following dialog box appears, the following confirmation message appears:

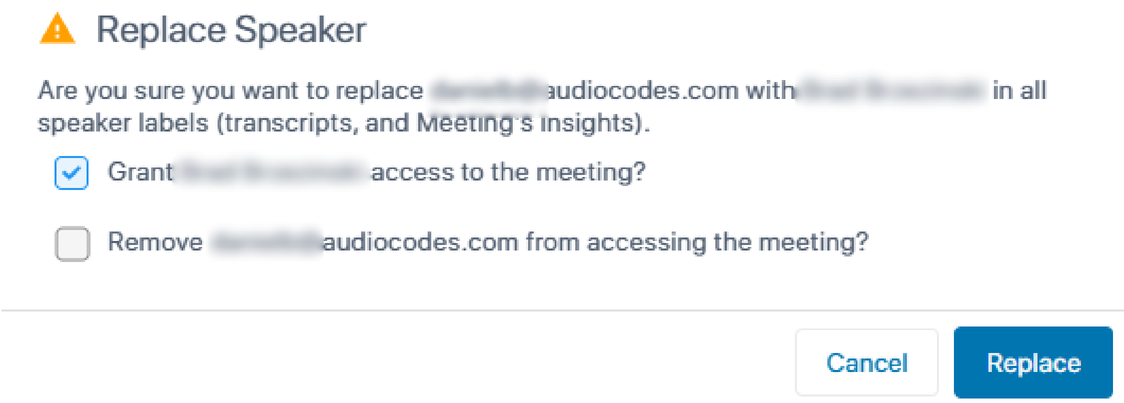


iii. Click one of the following buttons:

Change All - reassigns all transcription rows of the specific profile avatar that you want to change, to the selected invitee.

Change Single - reassigns only this specific transcription row to the selected invitee.

iv. If you clicked **Change All** in the previous step, the following dialog box appears:



v. Select one of the following options:

Grant <new user> access to the meeting: Allows the new user to access the meeting recording.

Remove <existing user> from accessing the meeting: Blocks the previously assigned user from accessing the meeting recording.

vi. Click **Replace**.

7. To play the video (displayed in the left pane) from a specific transcription, click its corresponding icon. To pause the video, click the icon.

Showing and Hiding Timestamps in Transcription

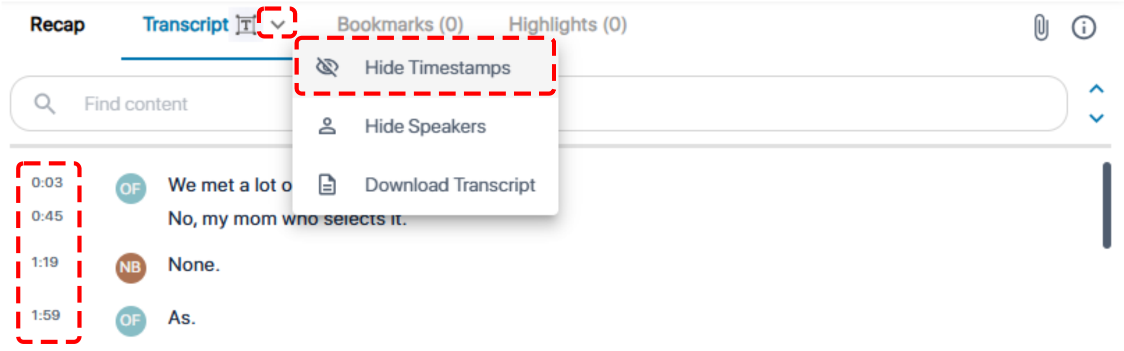
By default, each transcription line displays the time (timestamp) in the meeting recording at which it was spoken. To avoid clutter, you can hide the timestamps.

➢ **To hide or show timestamps in transcription:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.

3. Select the **Transcript** tab.

4. Click the arrow on the **Transcript** tab, and then from the drop-down menu, choose **Hide Timestamps**to hide timestamps or **Show Timestamps** to display them:



Showing and Hiding Speakers in Transcription

By default, the transcription shows who spoke each transcribed line of text. To avoid clutter, you can hide the speakers profile avatars.

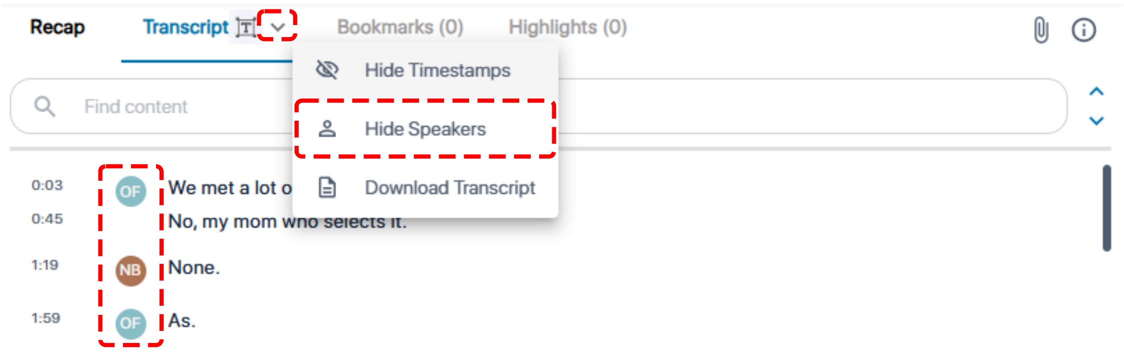
➢ **To hide or show speakers in transcription:**

1. In the Navigation pane, click **All Meetings**.

2. Click the name of the meeting recording that you want; the Player page appears.

3. Select the **Transcript** tab.

4. Click the arrow on the **Transcript** tab, and then from the drop-down menu, choose **Hide Speakers**to hide speakers or **Show Speakers** to display them:



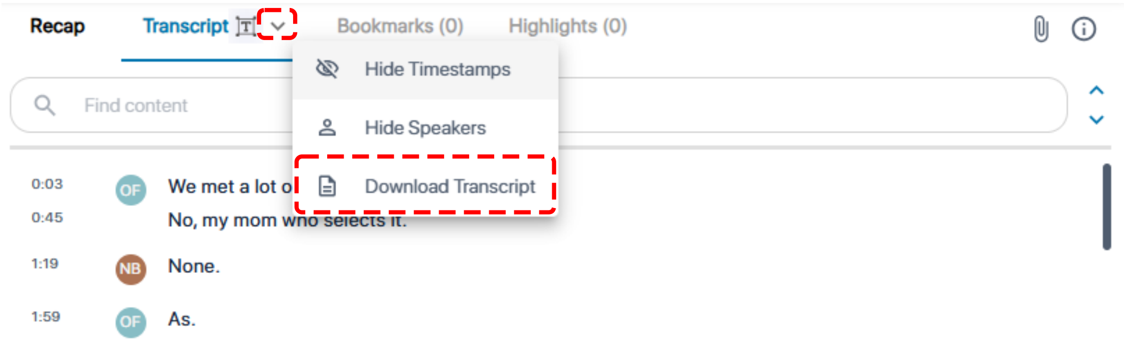
Downloading Transcription

You can download the transcription of a meeting recording to your computer as a Microsoft Word document (.docx).

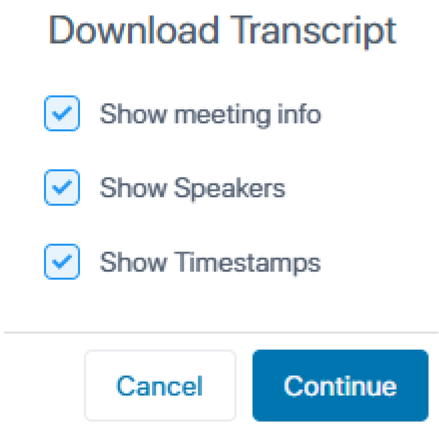
➢ **To download a meeting recording's transcription:**

1. In the Navigation pane, click **All Meetings**.

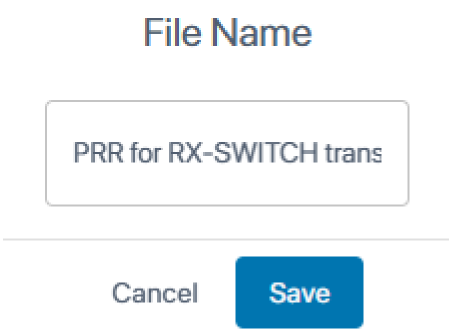
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Transcript** tab.
4. Click the arrow on the **Transcript** tab, and then from the drop-down menu, choose **Download Transcript**:



The following dialog box apperas:



5. Select or clear the check boxes of the following options:
   - **Show meeting info:** Includes the meeting info (meeting name, date, organizer and participants) in the downloaded transcription file.
   - **Show Speakers:** Includes the speakers in the downloaded transcription file.
   - **Show Timestamps:** Includes the timestamps in the downloaded transcription file.
6. Click **Continue**; the following dialog box appears:



7. Type a name for the transcription file or use the default name, which is the name of the meeting recording.

8. Click **Save**.

Deleting Transcription

You can delete the transcription of your meeting recording.

> Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can delete the transcription.

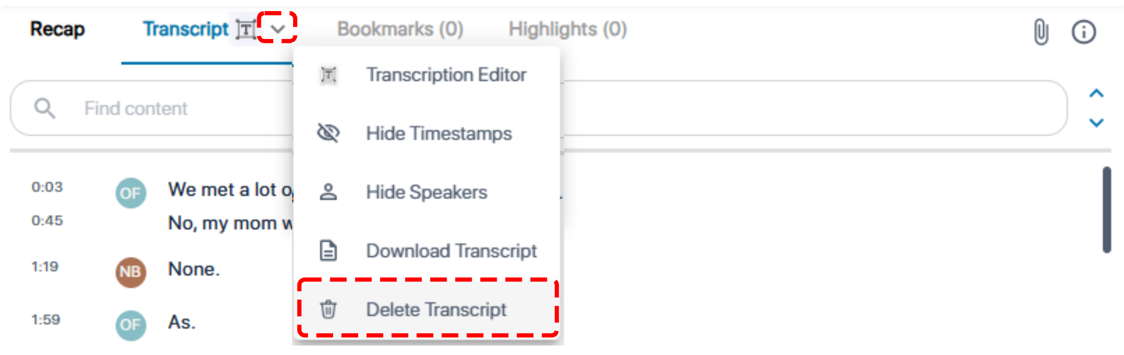
➢ **To delete meeting recording's transcription:**

1. In the Navigation pane, click **All Meetings**.

2. Click the name of the meeting recording that you want; the Player page appears.

3. Select the **Transcript** tab.

4. Click the arrow on the **Transcript** tab, and then from the drop-down menu, choose **Delete Transcript**:



A confirmation message box appears.

5. Click **Continue** to confirm; the transcription of the meeting recording is deleted.

Managing Bookmarks

Meeting Insights enables participants of a meeting recording to bookmark specific parts of the meeting recording with a single click. After the meeting, you can easily navigate to your bookmarks in the video. You can add bookmarks during the meeting recording or after it has ended.

> To add bookmarks at the end of the meeting recording on the video player, see Adding and Viewing Bookmarks on page 237. To add bookmarks during a meeting recording through Teams window, see Adding Bookmarks in Teams Meeting Window on page 73.

Viewing Bookmarks

You can view a list of all your bookmarks that were added to a meeting recording.

➢ **To view bookmarks:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Bookmarks** tab; a list of bookmarks is displayed with their names and the time during the meeting recording at which they were added, as shown in the following example:

4. To play the video from where the bookmark was added, simply click the bookmark.

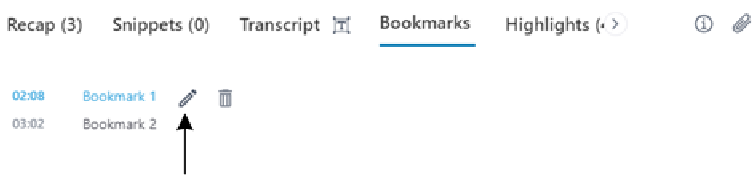
Renaming Bookmarks

By default, Meeting Insights assigns each bookmark the name "Bookmark <consecutive number>" (e.g., "Bookmark 1", "Bookmark 2", and so on). However, you can rename a bookmark.

Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can rename bookmarks.

➢ **To rename a bookmark:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Bookmarks** tab; a list of bookmarks is displayed.
4. Hover your mouse over the bookmark, and then click to enter editing mode:



5. Click the bookmark name and then type a new name:

6. Click to save your bookmark name.

Deleting Bookmarks

You can delete bookmarks of a meeting recording.

> Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can delete bookmarks.

➢ **To delete a bookmark:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Hover your mouse over the bookmark, and then click ; a confirmation message box appears.
4. Click **Remove** to delete the bookmark.

Managing Highlights

Meeting Insights enables participants of a meeting recording to highlight important parts of the meeting recording with a single click. By default, when you add a highlight during a meeting recording, it includes 20 seconds before and 20 seconds after. You can extend this time range by 20 seconds (before and after).

The highlight not only tags the specific location of the meeting recording, but also provides a transcription of the audio where the highlight was added.

After the meeting, you can easily navigate to the highlights.

> You can only add highlights during a meeting recording (see In-Meeting Experience on page 61).

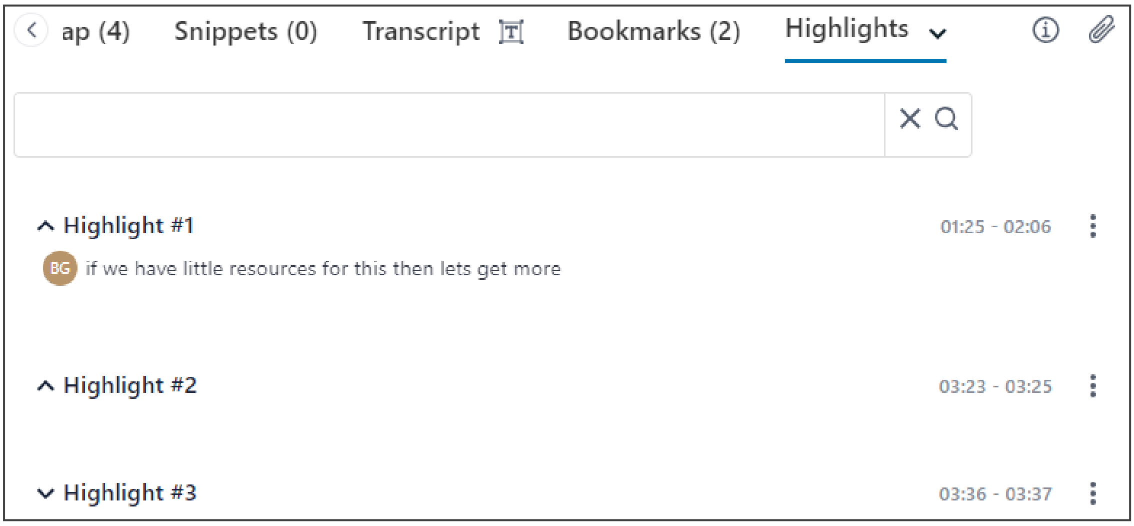
Viewing Highlights

You can view the highlights that were added during the meeting recording.

➢ **To view highlights:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.

3. Select the **Highlights** tab; the titles of all the highlights are displayed.
4. To view the transcription of a highlight, click the highlight's title:

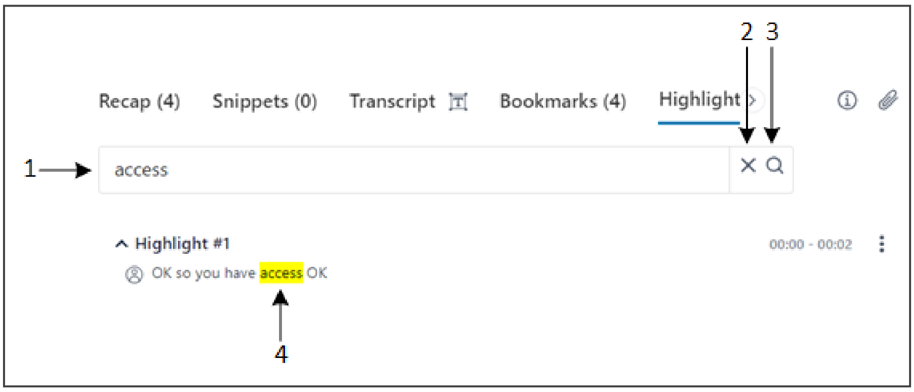


Searching for Text in Highlights

You can search for specific text strings in highlights of a meeting recording.

➢ **To search for text in highlights:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Highlights** tab.
4. In the search field (#1 in figure), type the text string that you want to search, and then click (#3 in figure); only the highlights containing the searched string are shown (all others are hidden). In addition, if you open the highlight, the searched string is highlighted in yellow, as shown in the following example:



Legend:

1 = Search field

2 = Clear search

3 = Apply search

4 = Highlighted occurrences of searched string

5. To clear your search, click ✖ (#2 in figure).

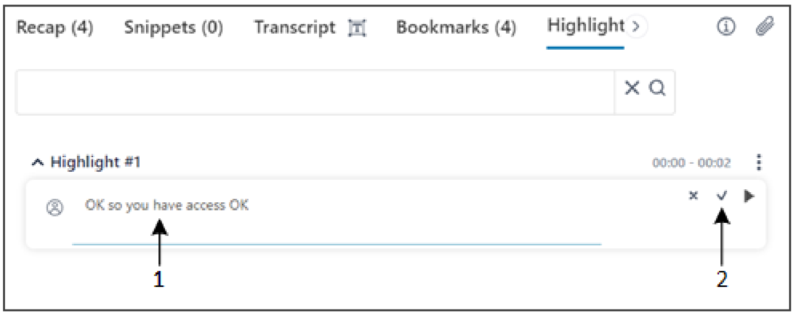
Editing Transcription of Highlights

You can edit the transcription of highlights. This may be necessary if the transcription has some errors such as typos or grammar mistakes.

> ⚠ Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can edit a highlight's transcription.

➢ **To edit transcription of a highlight:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Highlights** tab; the list of highlights are displayed.
4. Click the title of the highlight that you want; the highlight's transcription is displayed.
5. Right-click the transcription (#1 in figure) to enter the edit mode, and then edit the transcription as desired:



6. Click ✓ (#2 in figure) to apply your changes.

Changing Speaker of Highlights

Meeting Insights shows the participant that spoke during the highlight. However, sometimes more than one participant speaks during a highlight. In such a scenario, you may want to assign a different participant to the highlight. Typically, you would assign the participant who was the main speaker during the highlight.

➢ **To assign a speaker to a highlight:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.

3. Select the **Highlights** tab; the list of highlights are displayed.
4. Click the title of the highlight that you want; the highlight's transcription is displayed. Users can add titles to highlights to expedite access to specific meeting content.
5. Right-click the transcription to enter the edit mode, and then click the currently assigned user profile icon (#1 in figure), as shown in the following example; a drop-down list appears (#2 in figure), displaying all the meeting recording's participants:

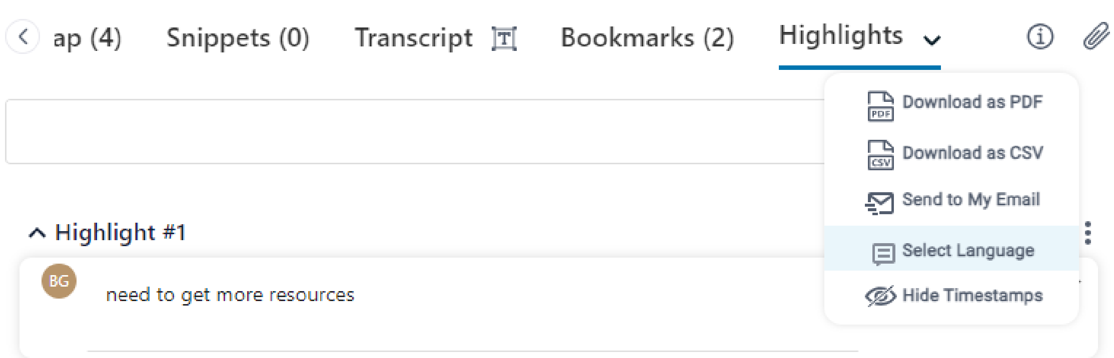
6. Select the participant that you want to assign to the highlight, and then click to apply your changes.

Changing Language of Highlights

You can change the language of highlights (i.e., transcribed text). By default, Meeting Insights transcribes highlights in English.

➢ **To change language of highlights:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Highlights** tab.
4. Click the arrow (#1 in figure) on the **Highlights** tab, and then from the drop-down menu (#2 in figure), choose **Select Language**:



5. In the dialog box, select the language, and then click **Save**.

Renaming Highlights

By default, Meeting Insights names highlights as "Highlight #<consecutive number>" (e.g., "Highlight #1", "Highlight #2", and so on). However, you can rename a highlight if you want.

Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can rename highlights.

➢ **To rename a highlight:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Highlights** tab; the list of highlights are displayed.
4. Hover over the highlight you want, and then click :

5. Type a new title for the highlight, and then click **Rename**.

Making a Recap from a Highlight

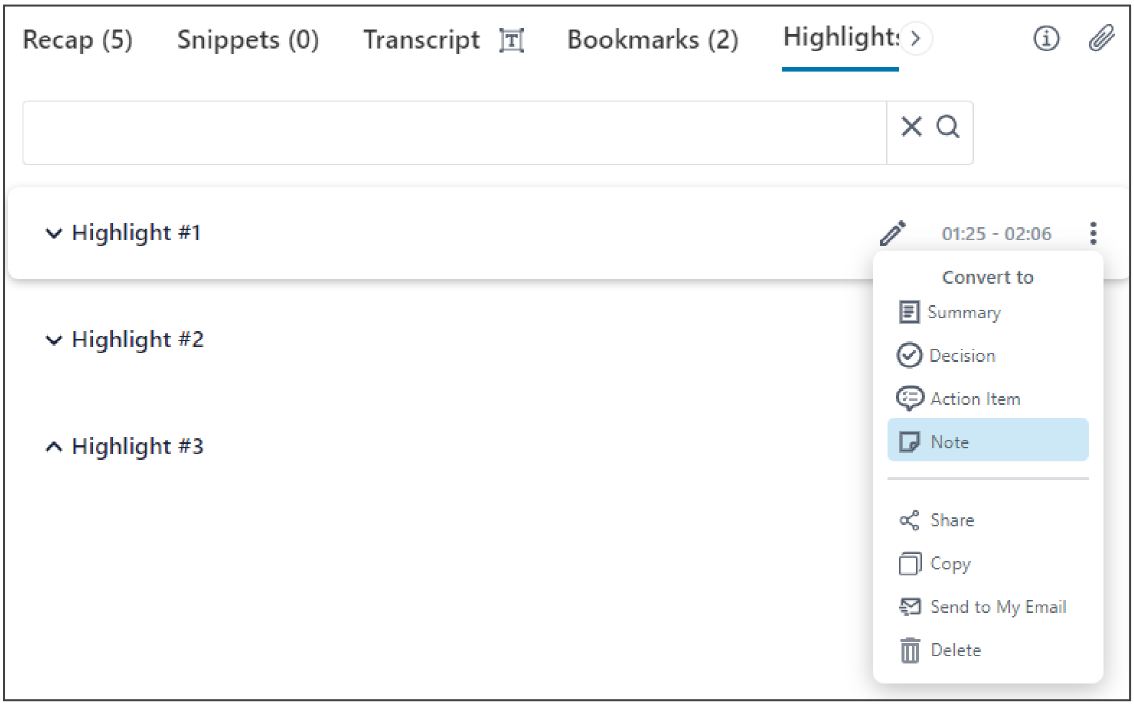
You can create a recap item from the transcription of a highlight.

- The Owner of the meeting recording can add all recap types; participants can add only notes.
- Only one summary can be added to the meeting recording. If you already have a summary, it will be replaced by the new summary.
- Action items, decisions and the summary are always public and therefore, visible to everyone that has access to the meeting recording. By default, your notes are private.

➢ **To make a recap from a highlight:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Highlights** tab; the list of highlights are displayed.

4. Click the icon corresponding to the highlight you want, and then from the drop-down menu, choose the desired recap (e.g., **Note**) under the **Convert to** group:



A dialog box relating to the chosen recap type appears, displaying the transcription of the highlight.

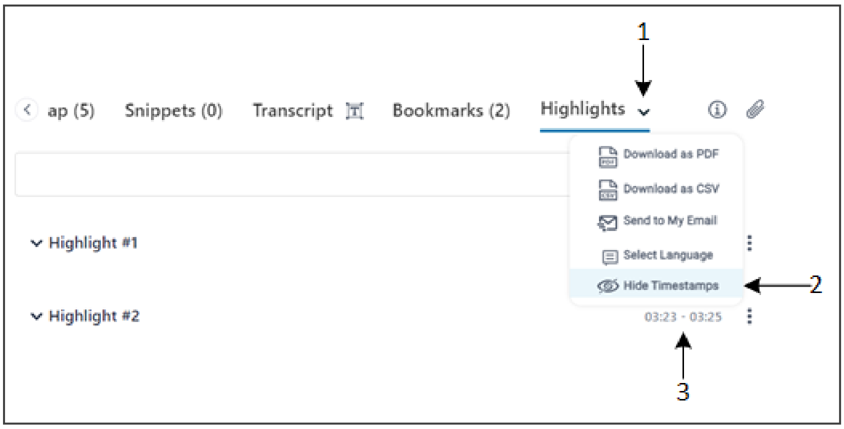
5. Define the recap item as desired (including modifying the text), and then click **Create**; your recap item is added.

Hiding Timestamps of Highlights

By default, each highlight displays the time (*timestamp*) in the video where it was added (see #3 in figure). To avoid clutter, you can hide these timestamps.

➢ **To hide or show timestamps of highlights:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Highlights** tab.
4. Click the arrow (#1 in figure) on the **Highlights** tab, and then from the drop-down menu, choose **Hide Timestamps** (#2 in figure) to hide timestamps (#3 in figure), or **Show Timestamps** to display them:



Downloading Highlights

You can download all the highlights of a meeting recording to your computer as a comma-separated values (.csv) file or a PDF file (.pdf). By default, Meeting Insights assigns the downloaded file with the same name as the subject of the meeting recording. However, you can assign a different name for the downloaded file.

➢ **To download highlights:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Highlights** tab.
4. Click the arrow (#1 in figure) on the **Highlights** tab, and then from the drop-down menu (#2 in figure), choose one of the following:
   - **Download as PDF** - downloads highlights as a PDF file
   - **Download as CSV** - downloads highlights as a CSV file

5. In the dialog box, keep the default file name or type a new name, and then click **Yes**; the file is downloaded to your computer.

Sending Highlights by Email

You can send all highlights to your email (as defined for your Meeting Insights account).

Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can send highlights by email.

➢ To send highlights by email:

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Click the arrow (#1 in figure) on the **Highlights** tab, and then from the drop-down menu, choose **Send to My Email** (#2 in figure):

A message box appears, notifying you that the email has been successfully sent. Click **OK** to close the message box.

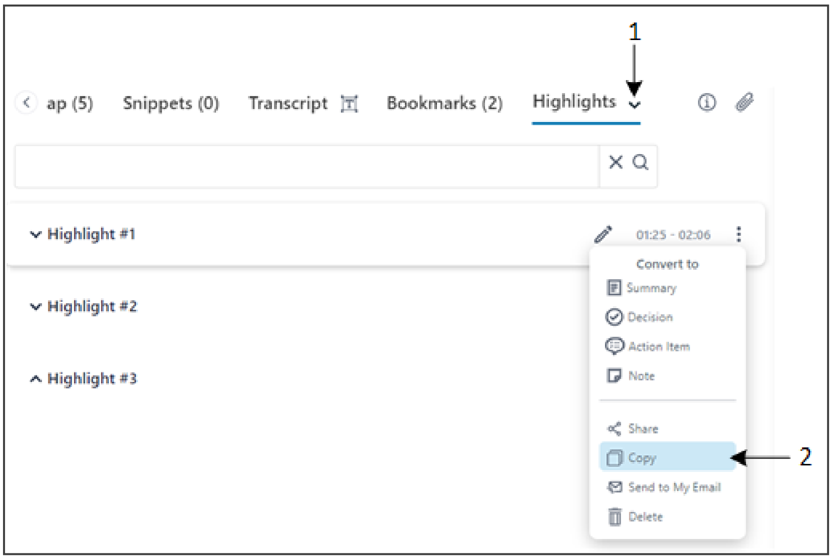
Copying Highlights to Clipboard

You can copy the transcription of a highlight to your computer's clipboard and then paste it wherever you want (for example, in an email).

Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can copy highlights.

➢ To copy a highlight to clipboard:

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Highlights** tab; the list of highlights are displayed.
4. Click the ellipsis icon corresponding to the highlight (#1 in figure), and then from the drop-down menu, choose **Copy** (#2 in figure):



The highlight is copied to the clipboard.

5. Paste the highlight in the desired application.

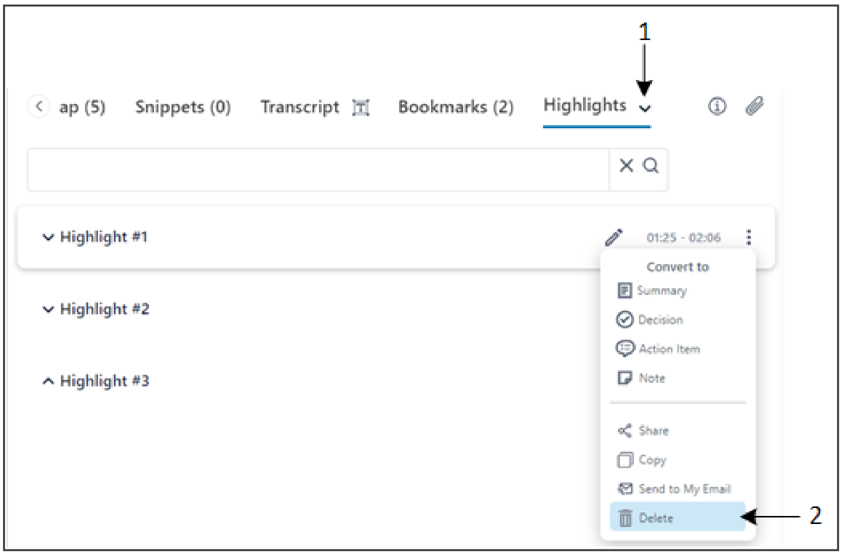
Deleting Highlights

You can delete a highlight of a meeting recording.

> ⚠ Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can delete highlights.

➢ **To delete a highlight:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Select the **Highlights** tab; the list of highlights are displayed.
4. Click the ellipsis icon corresponding to the highlight (#1 in figure), and then from the drop-down menu, choose **Delete** (#2 in figure):



A confirmation message box appears.

5. Click **Delete** to confirm deletion; the highlight is removed from the list.

Managing Tags

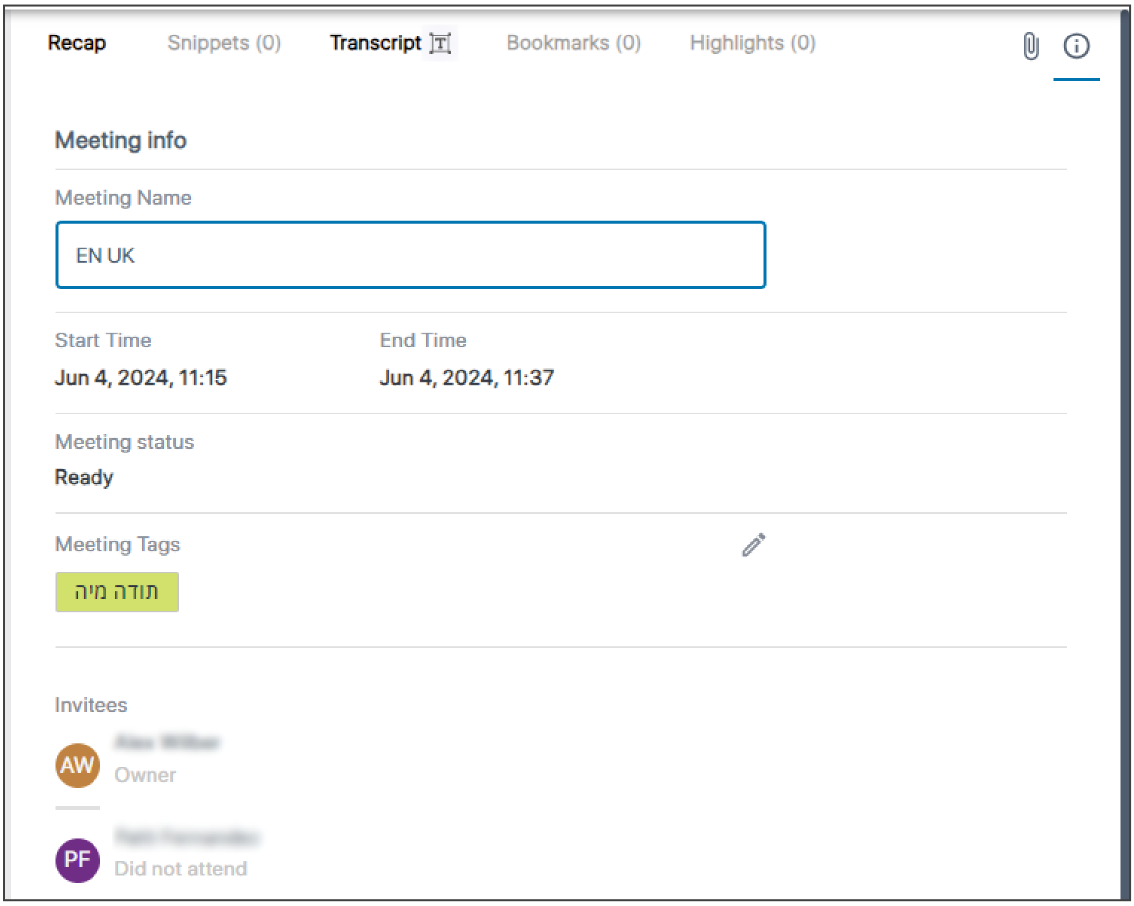
Tags are useful for identifying and searching for meeting recordings. For example, you may want to tag all meeting recordings that concern employee salaries with a tag named "SBC". Once tagged, you can easily search for these meeting recordings in the list of meeting recordings, by using the tag name "SBC" as the search filter ("tag: SBC"). you can also assign multiple tags to a meeting recording.

The meeting recordings list displays the tag's color-coded icon. If you hover over the tag, the name of the tag is shown.

To tag meeting recordings, you can use your own user-defined tags (see Section Defining a Tag) or Meeting Insights default tags. In addition,.

➢ To add or remove a tag to / from a meeting recording:

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Click the icon; the Meeting info pane is displayed:



4. Under the Meeting Tags group, click .
5. In the 'Add Tags' field, type the name of the tag and then choose the tag from the offered list of matching tags. You can also select a tag under the **Recently Used** group.
6. To remove an assigned tag, click the **X** corresponding to the tag.
7. Click **Save**; the tag is added to the meeting recording and displayed under Meeting Tags.

Managing Videos

Meeting Insights provides a sophisticated and feature-rich embedded video player for viewing meeting recordings.

This section describes the video functionality:

- Using the video playback controls and navigating through the video (see Playing and Navigating Video of Meeting Recordings on the next page)
- Using the video's Insights timeline (see Using the Video Player's Speakers and Recap Bar on page 229):
  - Tracking speakers on Insights timeline
  - Tracking meeting recap items on Insights timeline
  - Tracking highlights on Insights timeline

- Filtering the Insights timeline by speaker or meeting recap type
- Viewing and adding highlights

- Trimming the video (see Trimming a Meeting Recording's Video on page 238)

Playing and Navigating Video of Meeting Recordings

Meeting Insights Player page provides an embedded video player that allows you to play the meeting recording. The player offers playback controls to perform various functions such as play, pause, mute, rewind, fast-forward, playback speed, and full screen viewing.

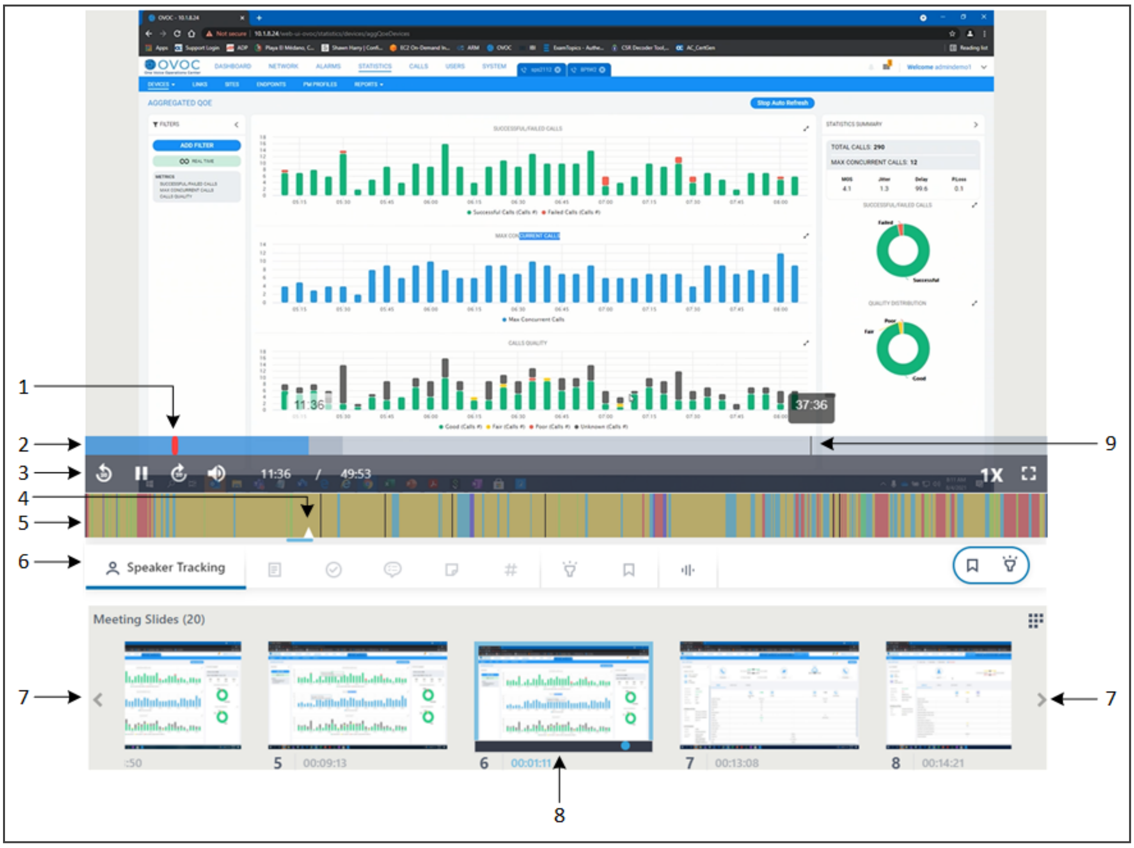
Thumbnails of the slides generated for the video content are displayed below the video player on the Slide Navigator. You can use the Slide Navigator to easily navigate through the slides and then play the video from a specific place in the meeting recording. For editing slides, see Editing Presentation Slides.

As the Player page also displays the meeting recap and transcription (if done) of the meeting recording, you can play the video from a selected recap item or transcribed text.

- This section is applicable only to Meeting Insights users whose account profile is "Meeting Insights".
- You can play a meeting recording only if you're the Owner, Co-owner, or users assigned editing privileges, or the meeting recording has been published and shared with you.
- For viewing and filtering speakers and meeting recap items on the video player, see Using the Video Player's Speakers and Recap Bar on page 229.
- For adding meeting recap items, see Managing Meeting Recap on page 169.
- For activating transcription to convert speech to text, see Creating a Transcription on page 202.
- For adding participants, see Managing Participants on page 245.

➢ To play a meeting recording:

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears. The following shows the main areas of the video player:



Legend:

1 = Start of media presentation

2 = Video timeline

3 = Video play controls

4 = Video playhead

5 - Speakers & Recap display bar

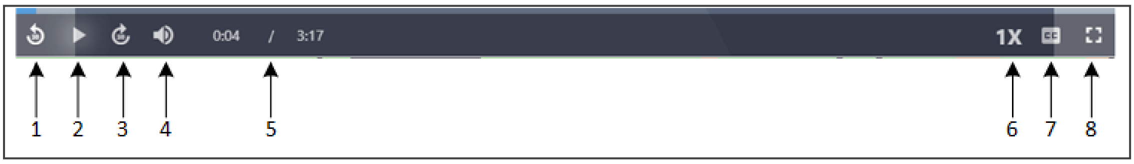
6 - Speakers & Recap toolbar

7 = Left and right arrow of Slide Navigator

8 = Currently played slide in video (slide displayed with blue border)

9 = Playhead dragged on video timeline and displaying location (timestamp) in video

3. To play the video, click the **Play Video** icon that is displayed in the center of the video player. You can use the following playback controls:



Item #	Label	Description
1	**Seek back 30 seconds**	Rewinds the video by 30 seconds.

Item #	Label	Description
2	**Play**	Plays the video. You can also play the video by clicking the **Play Video** ▶ icon that is displayed in the center of the video.
3	**Seek forward 30 seconds**	Fast-forwards the video by 30 seconds.
4	**Mute**	Mutes the audio. Click again to unmute.
5	-	Displays the elapsed playing time of the video over the total duration of the video (<elapsed time> / <total duration>).
6	-	Defines the playback speed. If you click the icon, a pop-up menu appears displaying the possible speed options: ■ **2x:** Plays the video at twice the normal speed ■ **1.75x:** Plays the video at 1.75 times the normal speed ■ **1.5x:** Plays the video at 1.5 times the normal speed ■ **1x:** Plays the video at normal recorded speed
7	**Captions**	If the meeting recording was transcribed (see Creating a Transcription on page 202), the transcription is displayed as closed captions during the video. If you click the Captions icon, a pop-up menu appears with the following options: ■ **Captions Off:** Hides the closed captions. ■ **Captions On:** Displays the closed captions.

Item #	Label	Description
8	**Fullscreen**	Displays the video in full screen. To exit full screen mode, press the Escape key on your keyboard.

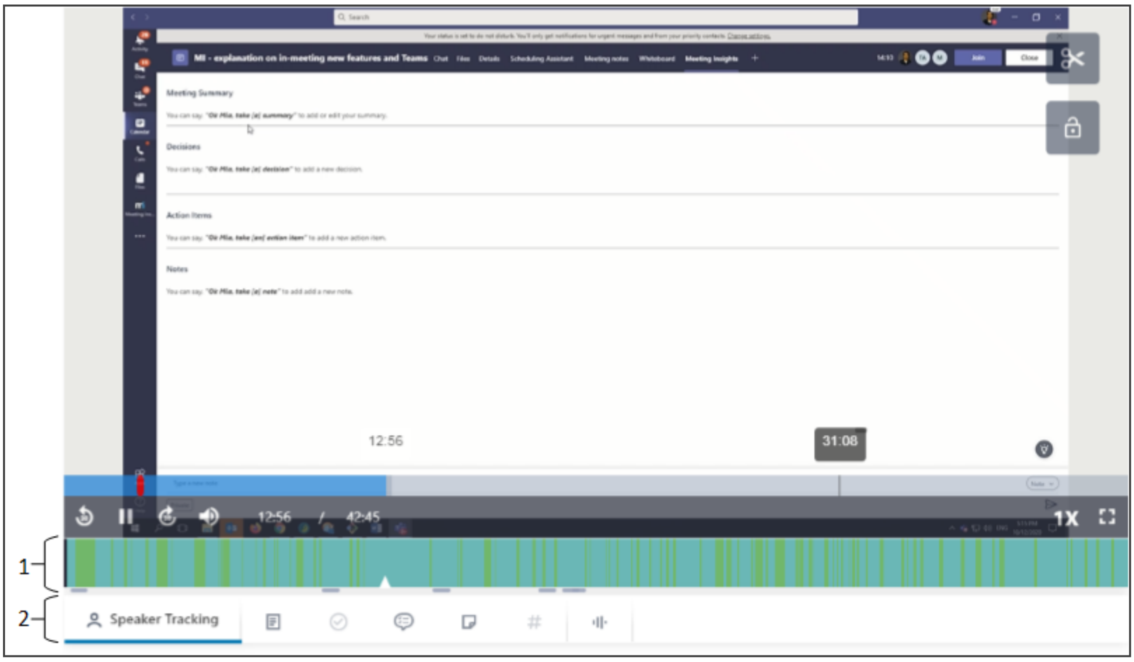
4. **To jump to a specific place in video:** Hover your mouse over the video to show the playback controls, and then click the timeline at the required location or drag the playhead on the timeline to the required location.
5. **To play video from a specific slide:** Use the Slide Navigator's left and right arrows to locate the slide, and then hover over the slide and click its play icon.
6. **To play video from a specific recap item, highlight, bookmark, or transcription (if done):** On the right pane, select the **Recap**, **Highlights** , **Bookmarks** or **Transcript** tab, and then click the specific item.

Using the Video Player's Speakers and Recap Bar

The video player on the Player page provides the Speakers and Recap bar, which you can configure to display the following:

- (Default) Location in meeting where participants spoke during the meeting recording, using color-coded bars.
- Location in meeting recording where meeting recap items, bookmarks, highlights or tags were added by you and participants.
- Filtered display of all above by participant (for more information, see Filtering Video Speakers and Recap Bar by Speakers on page 234).

The Speakers & Recap bar is located below the video's timeline and consists of two areas, as shown below:



Legend:

1 = Display bar on which the speakers bars or recap items are displayed.

2 = Toolbar providing icons to show or hide speakers bars and recap items on the display bar. These icons are described in the following table:

Icon	Name	Description
	Speaker Tracking	Displays where each participant spoke during the meeting recording, using color-coded bars. For more information, see Tracking Speakers in Video Player on the next page.
	Summary	Displays the location in the meeting recording where the summary was added. For more information, see Viewing Meeting Recap on Video on page 232.
	Decisions	Displays the location in the meeting recording where decisions were added. For more information, see Viewing Meeting Recap on Video on page 232.
	Action Items	Displays the location in the meeting recording where action items were added. For more information, see Viewing Meeting Recap on Video on page 232.
	Notes	Displays the location in the meeting recording

Icon	Name	Description
		where notes were added. For more information, see Viewing Meeting Recap on Video on the next page.
#	**Tags**	Displays the location in the meeting recording where the tags were added. For more information, see Viewing Meeting Recap on Video on the next page.

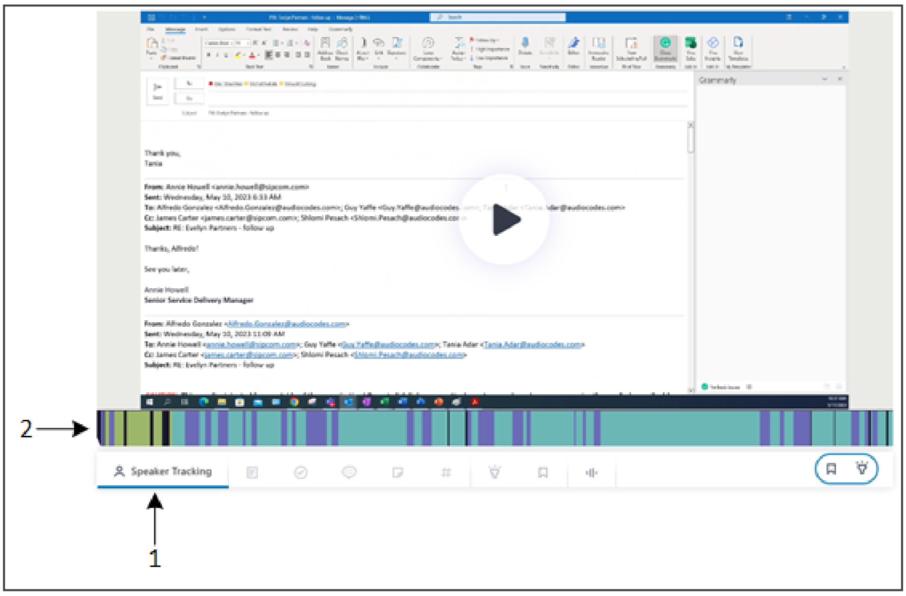
Tracking Speakers in Video Player

Meeting Insights randomly assigns the speech of each participant (dominant speaker) in the meeting recording with a unique color. It knows the dominant speaker from information received from the participant's Teams client. Using these color codes (and optionally, Meeting Insights filter feature), you can easily track and listen to specific participants on the video player.

> You can also filter the Speakers & Recap bar by participant so that it only displays the places in the meeting recording where a specific participant spoke (see Filtering Video Speakers and Recap Bar by Speakers on page 234).

➢ **To track speakers in a meeting recording:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. On the Speakers & Recap toolbar, click the icon; the icon changes to **Speaker Tracking** and the Speaker & Recap bar shows color-coded lines (bars), where each color represents audio spoken by a specific participant during the meeting recording. The following displays an example of a meeting recording consisting of two main speakers:



Legend:

1 = **Speaker Tracking** icon.

2 = Speakers and Recap bar displaying where each speaker spoke.

4. To view which color represents which participant, hover your mouse over the color bars; a pop-up displays the participant that is associated with the color.

5. To listen to a specific participant, click its assigned color in the desired location; the video player starts playing the presentation from the **beginning** of the clicked color-coded segment, and the voice of the specific participant is heard. For example, if a participant spoke between minutes 2:00 and 2:15 and you clicked the color bar at minute 2:10, the player starts playing from minute 2:00.

Viewing Meeting Recap on Video

You can view where meeting recap items were added in the meeting recording. The recap is displayed on the video player's Speakers & Recap bar. The display is filtered according to the selected meeting recap type (i.e., summary, decisions, action items, notes, or tags).

> You can also filter the Speakers & Recap bar by participant so that only recap items added by a specific participant are displayed (see Filtering Video Speakers and Recap Bar by Speakers on page 234).

➢ To view meeting recap on video:

1. In the Navigation pane, click **All Meetings**.

2. Click the name of the meeting recording that you want; the Player page appears.

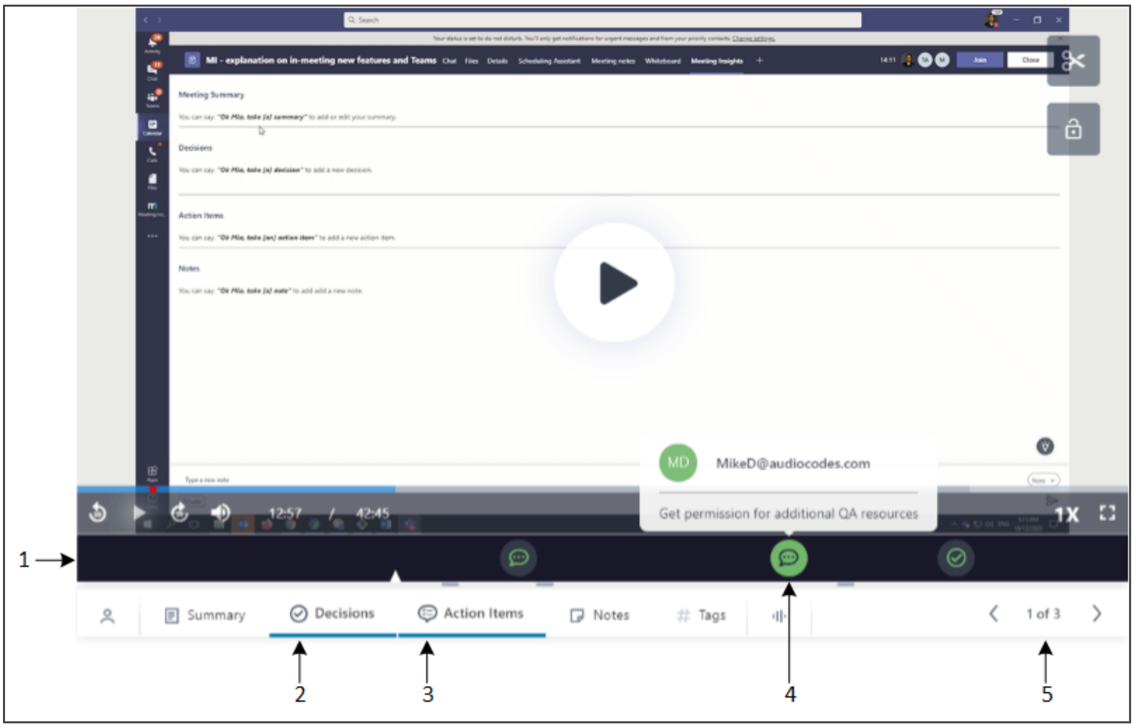
3. On the Speakers & Recap toolbar, click any of the below recap icons.

   - **Summary** icon: Displays the summary.

- **Decisions** icon: Displays decisions.
- **Action Items** icon: Displays action items.
- **Notes** icon: Displays notes.
- **Tags** icon: Displays tags.

> - You can select and display multiple recap types, if desired.
> - A grayed out (unavailable) recap icon means that no items of that specific recap type were added in the meeting recording.

When you click a recap icon, the Speakers & Recap display bar shows the location in the meeting recording where each of its recap items were added, as shown in the following example for decisions and action items:



Legend:

1 = Speakers & Recap display bar, showing location where each recap item of selected recap type was added in the meeting recording.

2 = Decisions selected for display.

3 = Action items selected for display.

4 = Pop-up displaying the details of a specific recap item when you hover your mouse over it.

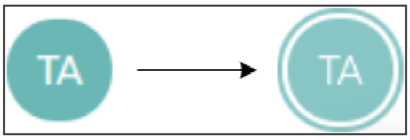
5 = Left and right navigation arrows to play the video from the next or previous recap item on the display bar.

Filtering Video Speakers and Recap Bar by Speakers

You can filter the video player's Speakers & Recap bar to display tracked speakers and recap items of specific participants (speakers) only. This is useful, for example, if you want to listen to what a specific participant said during the meeting or you want to locate the notes that you added.

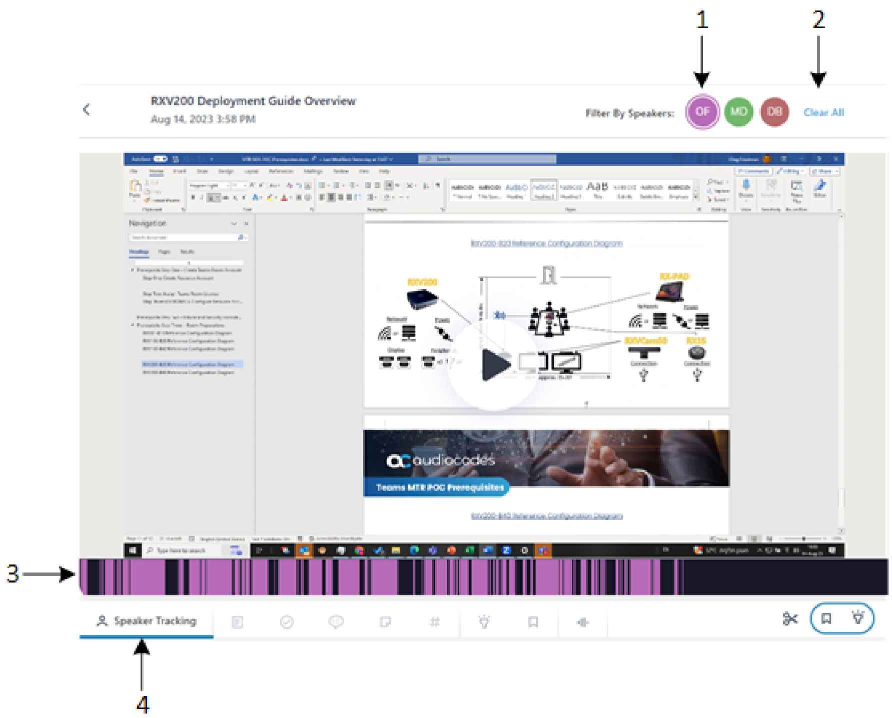
➢ **To filter tracked speakers and recap by speaker:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. In the 'Filter by Speakers' area (#1 in figure), located above the video player, click the profile icons of participants for which you want to filter tracked speakers and recap.
   - Selected profile icons are displayed with an outer ring, as shown in the following example:



   - To deselect a filtered participant, click its profile icon again (outer ring is removed).
   - To clear the filter, click the **Clear All** button (#2 in figure below).

The Speakers & Recap bar (#3 in figure) now only displays tracked speakers and recap items of your filtered participants (e.g., of participant "OF", who is indicated in purple):



Replacing a Speaker

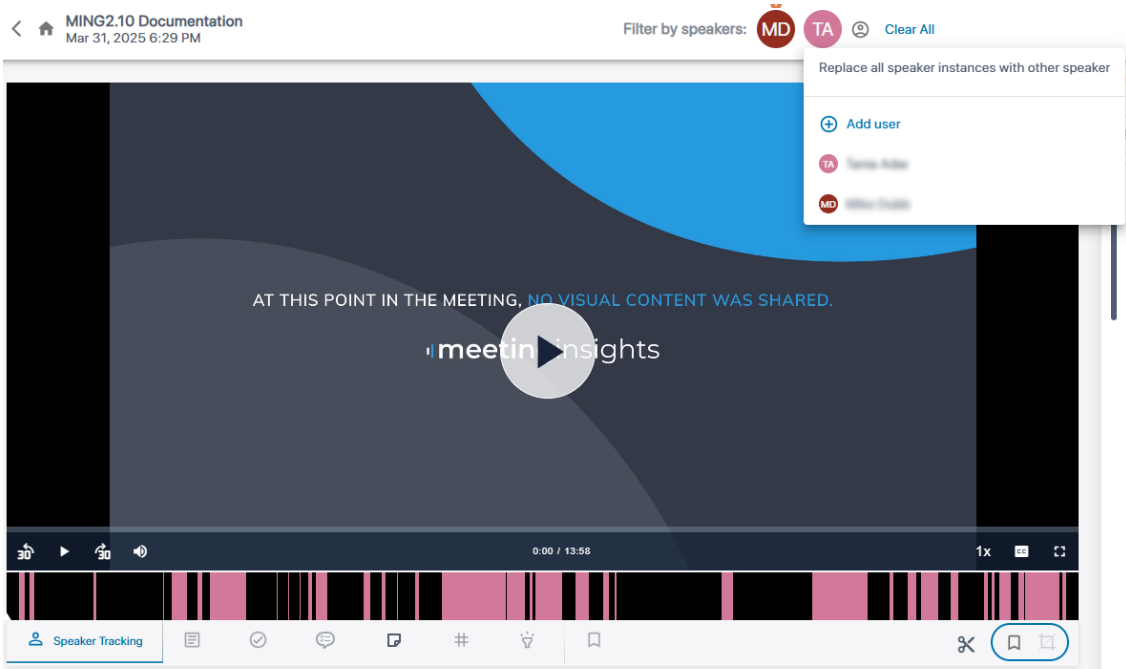
You can replace a speaker identified by Meeting Insights in a meeting recording with another user from your organization, whether they were invited to the meeting or not.

The speaker is replaced in the following areas:

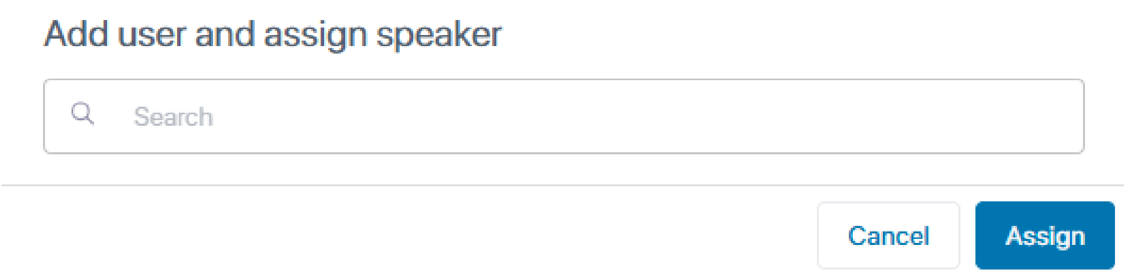
- Speaker Tracking of video player
- Transcript

➢ To replace a speaker:

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. In the 'Filter by Speakers' area (located above the video player), right-click the speaker that you want to replace; a drop-down list appears:



4. Do one of the following:
   - **To replace speaker with a user that was invited to meeting:**
     i. Select the participant from the list of participants; a message appears, requesting you to confirm replacing the speaker with the selected user.
     ii. Click **Replace**.
   - **To replace speaker with a user that wasn't invited to meeting:**
     i. Click **Add user**; the following dialog box appears:



ii. Start typing the name of the user, and then select the user from the offered list of users.

iii. Click **Assign**; a message appears informing you that the user will now be granted access to the meeting recording.

iv. Click **Continue**; a message appears, requesting you to confirm replacing the speaker with the selected user.

v. Click **Replace**.

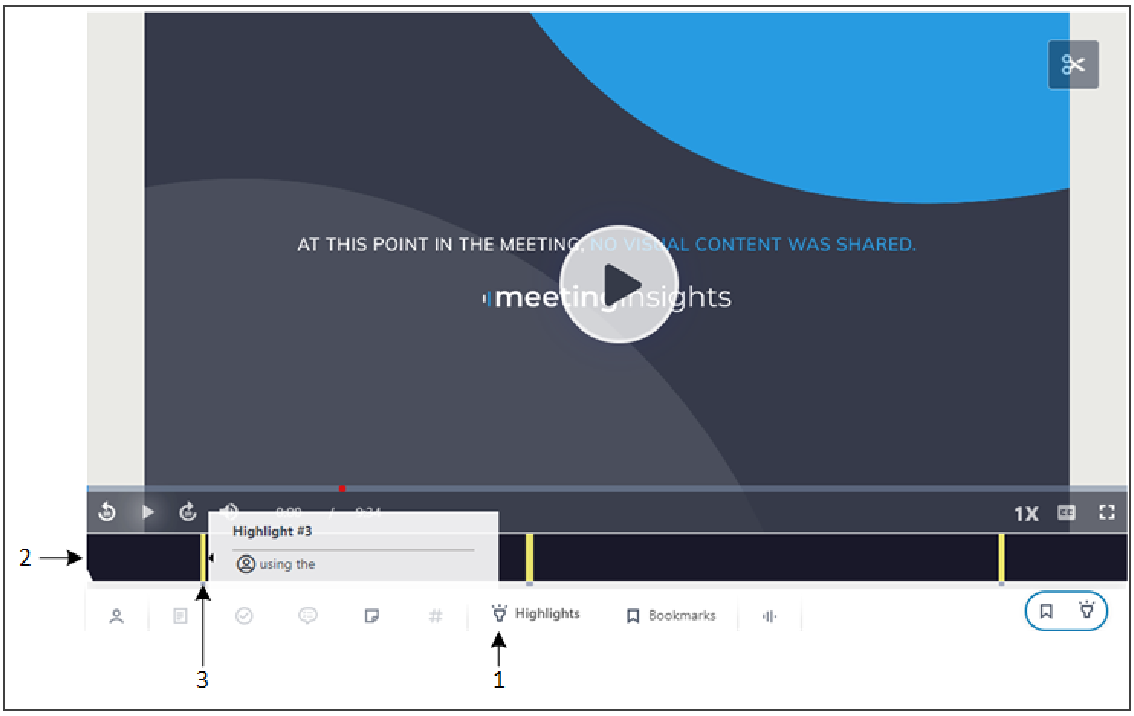
Viewing Highlights on Video

Highlights tag important parts of the meeting recording. The highlight also provides a transcription of the audio where the highlight was added.

> You can only add highlights during a meeting recording (see In-Meeting Experience on page 61).

➢ **To view highlights in a meeting recording:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. On the Speakers & Recap toolbar, click the **Highlights** icon (#1 in figure). The Speakers & Recap bar displays the location in the meeting recording of your highlights as yellow bars (#2 in figure), as shown in the following example:



4. To view the transcription of a highlight, hover your mouse over the highlight's yellow bar (#3 in figure).
5. To play the video from a highlight, click the highlight's yellow bar.

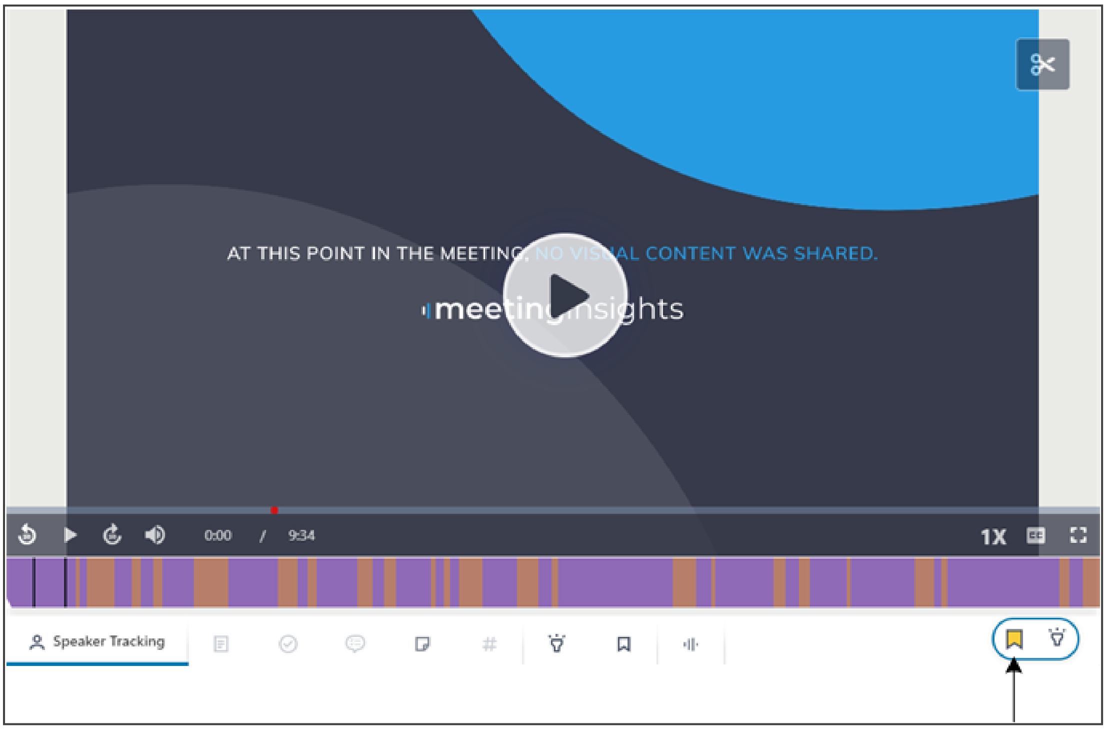
Adding and Viewing Bookmarks

Bookmarks are used to tag important parts (locations) of the meeting recording. You can add bookmarks and view them on the video player's Speakers & Recap bar.

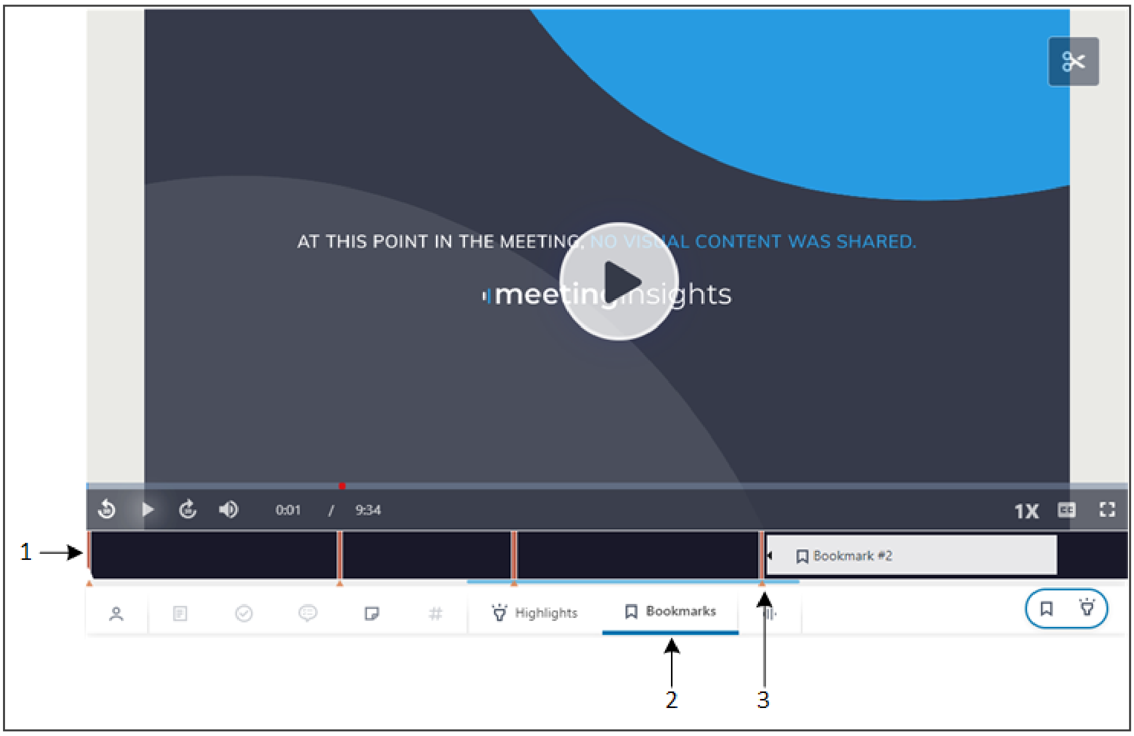
> To add bookmarks during a meeting recording using Meeting Insights' app for Teams, see Adding Highlights in Teams Meeting Window on page 74.

➢ **To add and view bookmarks on video player:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Pause the video at the location where you want to add the bookmark.
4. On the Speakers & Recap bar, click , as shown below:



To view your bookmarks on the Speakers & Recap bar, click (#2 in figure). To view the bookmark name, hover over the bookmark's line (#3 in figure). To play the video from a bookmark, click the bookmark's line.



Trimming a Meeting Recording's Video

Meeting Insights lets you hide (trim) video content (visual and sound) that you don't want shown when the video is played. Meeting Insights automatically synchronizes the trimmed video regarding speech and video frames (slides). In some cases, it even removes slides that it considers unimportant.

- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can trim the video.
- Trimming a video deletes any AI-generated summary and outline. Therefore, if you still want an AI-generated summary and outline, you need to re-generate it.

➢ **To trim a meeting recording's video:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. On the video, click ; a blue box appears on the Speakers & Recap bar:

4. Drag the left side of the blue box (#2 in figure) to where you want the video to begin and drag the right side of the blue box (#3 in figure) to where you want the video to end. When you trim the video, everything to the outside of the box is removed; only the portion in the box is kept (#1 in figure).
5. Click **Update** to trim your selection (or **Cancel** to ignore your trimmings).

To undo the trimmings of a video and restore it to original, click , and then drag the left and right sides of the blue box to the begining and end of the video, respectively.

Managing Video Slides

If media was presented and shared through the desktop or an application (e.g., PowerPoint presentation, web browser, or Word document) during the meeting recording, Meeting Insights processes the recorded media, generating a video and slides of the video similar to a PowerPoint presentation. The slides are created from key images (frames) of the presented media.

Management of slides is done in Meeting Insights' Gallery, which includes the following:

- Viewing slides of a meeting recording (see Viewing Slides below)
- Hiding slides (see Hiding or Restoring Slides on page 243)
- Downloading slides (see Downloading Slides on page 244)

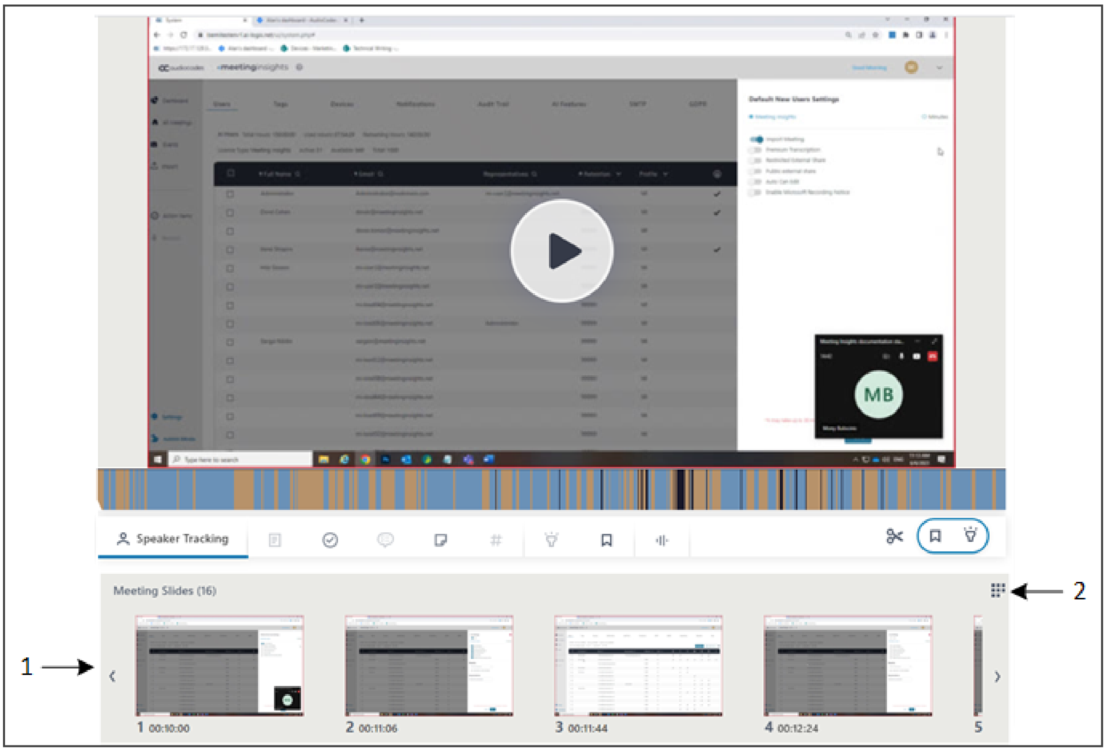
Viewing Slides

You can view the slides created from the meeting recording's video. The slides are displayed in the slide gallery, which can be accessed from various areas in Meeting Insights, as described below.

> ⚠ You can only view slides of published meeting recordings.

➢ To view slides of a meeting recording:

1. In the Navigation pane, click **All Meetings**.
2. Access the slide gallery using any of the following methods:
   - **All Meetings page:** Click located in the same row as the meeting recording that you want; the slide gallery appears in a pop-up window.
   - **Player page:**
     i. Click the name of the meeting recording that you want; the Player page appears. The slide navigation pane is displayed below the video, as shown in the following example:



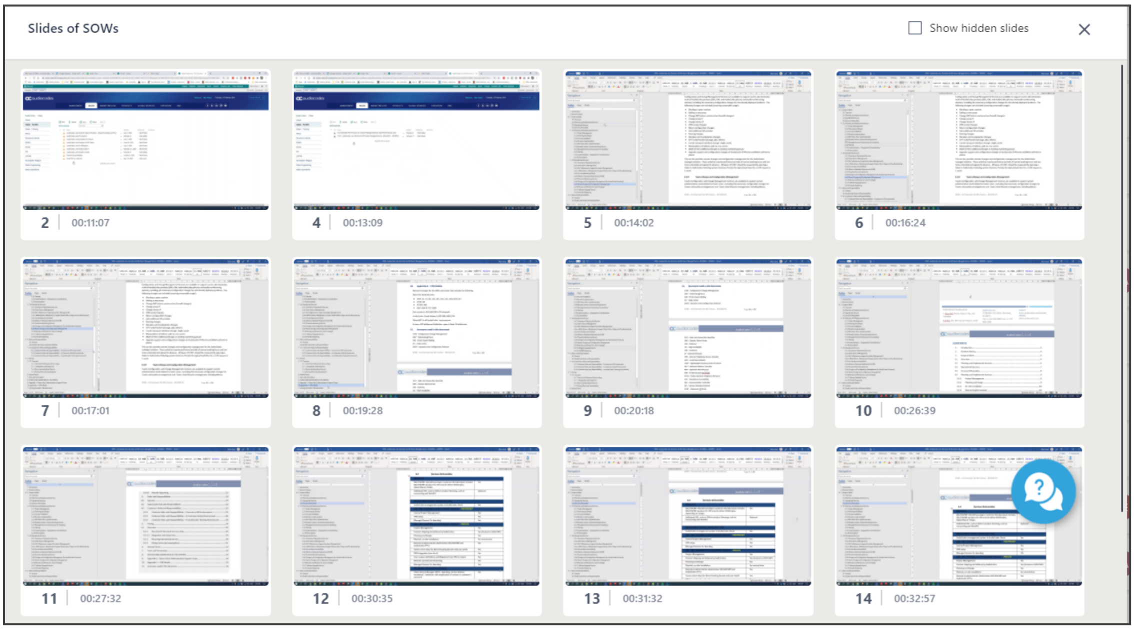
Legend:

1 = Slide navigator with slide thumbnails

2 = Icon to open the slide gallery

- You can perform similar actions (i.e., hide and download) on slides in the slide navigator as you can in the slide gallery. Simply hover your mouse over a slide, and then click the pop-up action icon that you want.
- When you play the video of a meeting recording, thumbnails of the slides are displayed in the slide navigator. You can also use the slide navigator to easily locate a specific place in the video that you want to listen to, by navigating through the slide thumbnails, and then clicking the required slide to play the video from it.

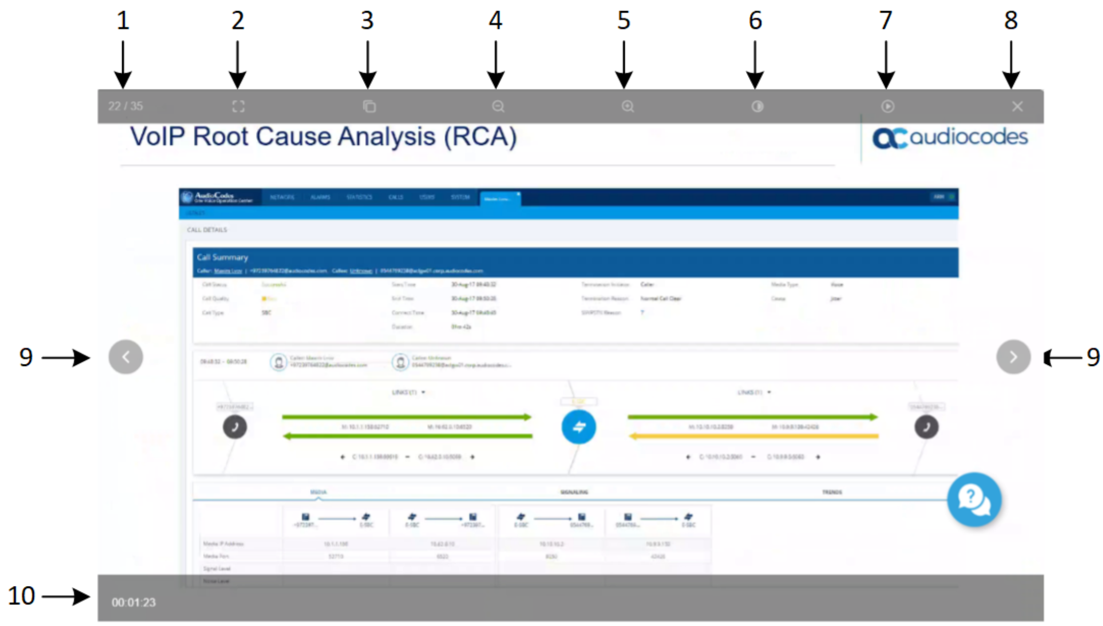
ii. Click (#**2** in previous figure); the slide gallery page appears:



3. To show hidden files (if any), select the **Show Hidden Files** check box. (For hiding slides, see Hiding or Restoring Slides on the next page.)

4. To play the meeting recording video from a specific slide, hover your mouse over the slide, and then click  .

5. To view or play a slide in a pop-out window, hover your mouse over the slide, and then click  ; the following pop-out window appears:



1 = Slide number out of total slides

2 = Displays the slide in full screen mode

3 = Zooms in and zooms out to 100%

4 = Zooms in

5 = Zooms out

6 = Background color scheme for slide control

7 = Plays (or pauses) video

8 = Closes pop-out slide window

9 = Left and right slide navigation buttons

10 = Time in meeting recording of transition to slide

Hiding or Restoring Slides

You can hide slides so that they are not visible to users when they view the meeting recording's slides. This may be useful, for example, to conceal slides that are not relevant or important to the meeting. Hiding irrelevant slides also eliminates clutter in the slide gallery.

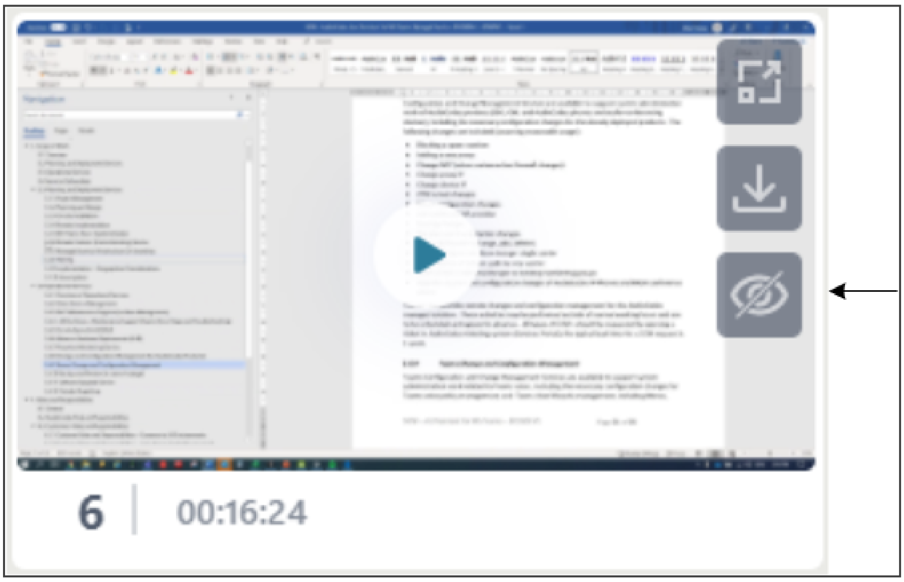
The slide gallery allows you to hide slides, view hidden slides, and restore hidden slides.

- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can hide slides.
- When you create a meeting recording, Meeting Insights may automatically hide certain slides that it considers not important to the meeting. These slides are displayed with the icon.
- Hiding a slide only hides it from the slide gallery; it doesn't remove any related content from the video.

➢ To hide a slide:

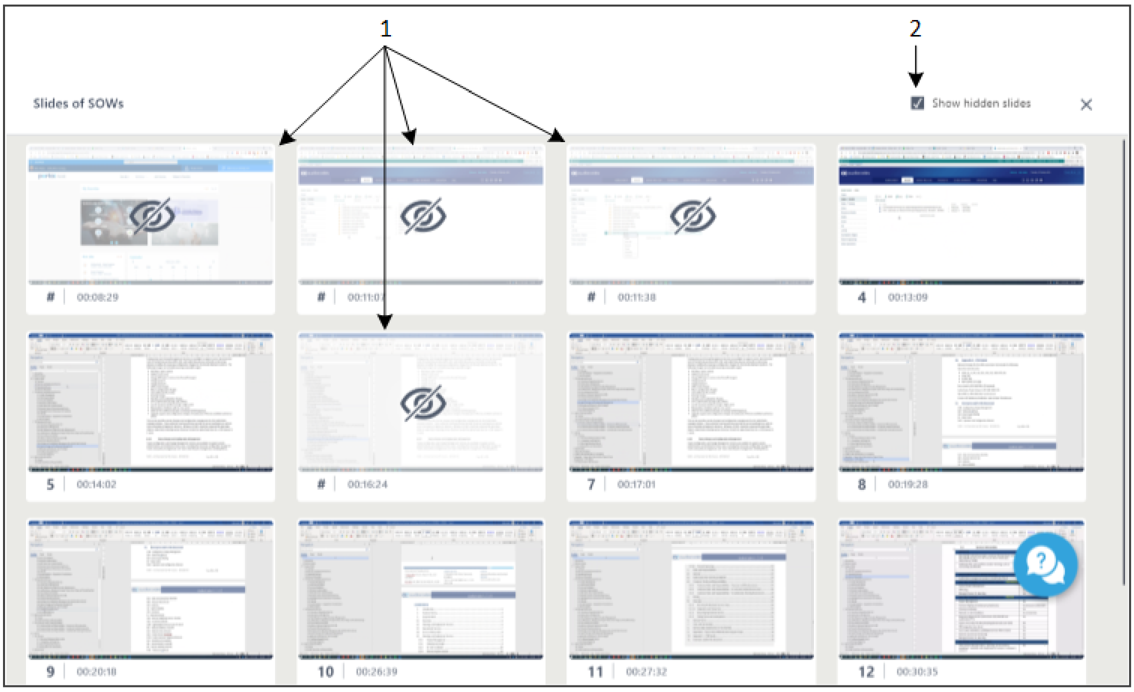
1. Open the slide gallery (see Viewing Slides on page 240).

2. Hover your mouse over the slide that you want to hide, and then click ; the slide is removed from the gallery.



➢ To view hidden slides:

1. Select the **Show hidden slides** check box; the hidden slides are displayed in the gallery as grayed out and with the icon, as shown in the following example:



➢ To restore a hidden slide to the slide gallery:

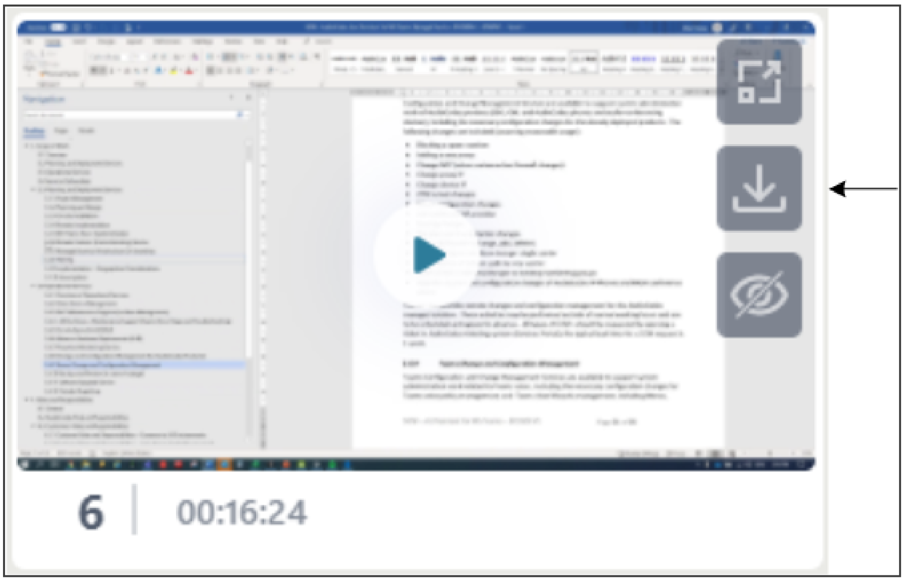
- Select the **Show hidden slides** check box, and then click the hidden slides that you want to restore; the slides are restored and shown with their slide number and without the icon.

Downloading Slides

You can download any slide to your computer as an image file (.png).

➢ To download a slide:

1. Open the slide gallery (see Viewing Slides on page 240).
2. Hover your mouse over the slide that you want to download, and then click ; the slide is downloaded to your computer as a .png image file.



Managing Participants

This section describes how to manage participants of meeting recordings:

- Viewing Participants of Meeting Recordings below
- Assigning Privileges to Participants on page 247
- Removing Participants from Meeting Recordings on page 247

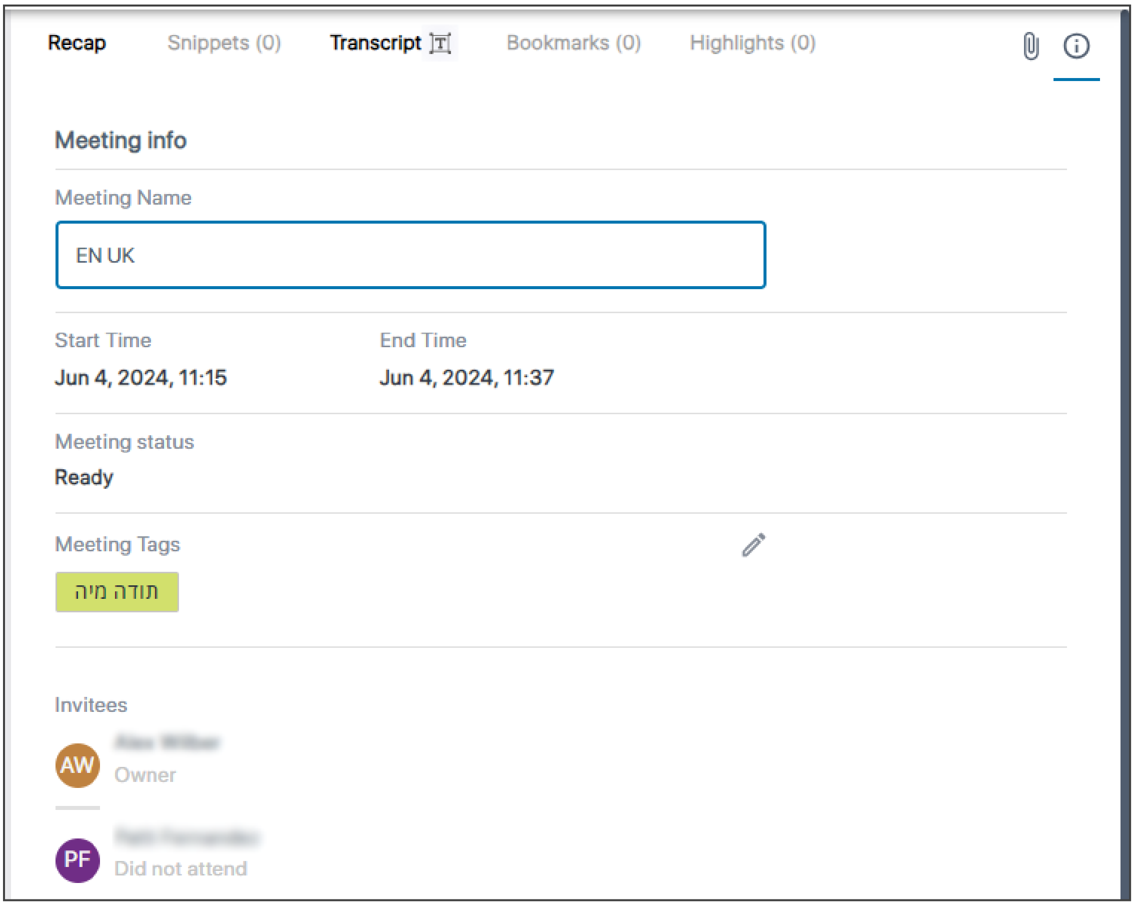
Viewing Participants of Meeting Recordings

You can view the participants of a meeting recording. Participants are users that were invited to the meeting recording, joined the meeting recording, or were added after the meeting recording.

Participants are displayed with their profile avatar alongside their names. Meeting Insights randomly assigns a color to the participant's profile avatar, but attempts to assign a unique color to each participant. However, if there are many participants, some may share the same color.

➢ **To view participants of a meeting recording:**

1. In the Navigation pane, click **All Meetings**.
2. Click the meeting recording that you want; the Player page appears.
3. Click the icon; the Meeting info pane is displayed, listing the participants under the **Invitees** group:



The type of participant is displayed with the participant's name, as explained in the following table:

Displayed Value	Description
"Owner"	Indicates that the participant is the Owner of the meeting recording.
"Did not attend"	Indicates that the participant did not attend the meeting. For example, the participant was invited to the meeting but didn't join, or the participant wasn't invited but the meeting recording was later shared with the participant.
"Can edit"	Indicates that the participant has the same privileges for the meeting recording as the Owner. These can be participants that are Representatives of the Owner (configured in Configuring Representative Users on page 26) or co-organizers of the meeting (see Scheduling Meeting Recordings through Microsoft Outlook Calendar on page 33).
"External user"	Indicates that the participant is from outside of your organization.

Displayed Value	Description
	Indicates that the participant also presented visual media (e.g., a PowerPoint presentation) during the meeting recording.

Assigning Privileges to Participants

By default, participants are assigned read-only (view) privileges to meeting recordings. However, you can also assign a participant write (editing) privileges.

To assign privileges, see Sharing Meeting Recordings within Organization on the next page

- You can assign privileges to participants only for published meeting recordings.
- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can change the privileges of participants.
- You can also change a participant's privileges during the meeting recording through your Teams window, as described in Changing Permission of Participants on page 64.

Removing Participants from Meeting Recordings

You can remove a participant from a meeting recording. If you do this, the meeting recording is no longer listed the participant's Meeting Insights account and therefore, the participant no longer has access to the meeting recording.

To remove a participant, see Sharing Meeting Recordings within Organization on the next page

- You can remove participants only from published meeting recordings.
- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can remove participants.

Sharing Meeting Recordings

By default, when you publish a meeting recording, Meeting Insights automatically shares it only with invited participants within your organization. However, you can also share your meeting recording with other people:

- **Internally** - share meeting recording with people within your organization that weren't invited:
  - Share it only with specific people in your organization.
  - Share it with everyone in your organization.

  For more information, see Sharing Meeting Recordings within Organization on the next page.
- **Externally** - share meeting recordings with people outside of your organization:

- Share only with people that were participants of the meeting recording.
- Share with anyone outside of your organization.

For more information, see Sharing Meeting Recordings Outside of Organization on page 250.

Sharing Meeting Recordings within Organization

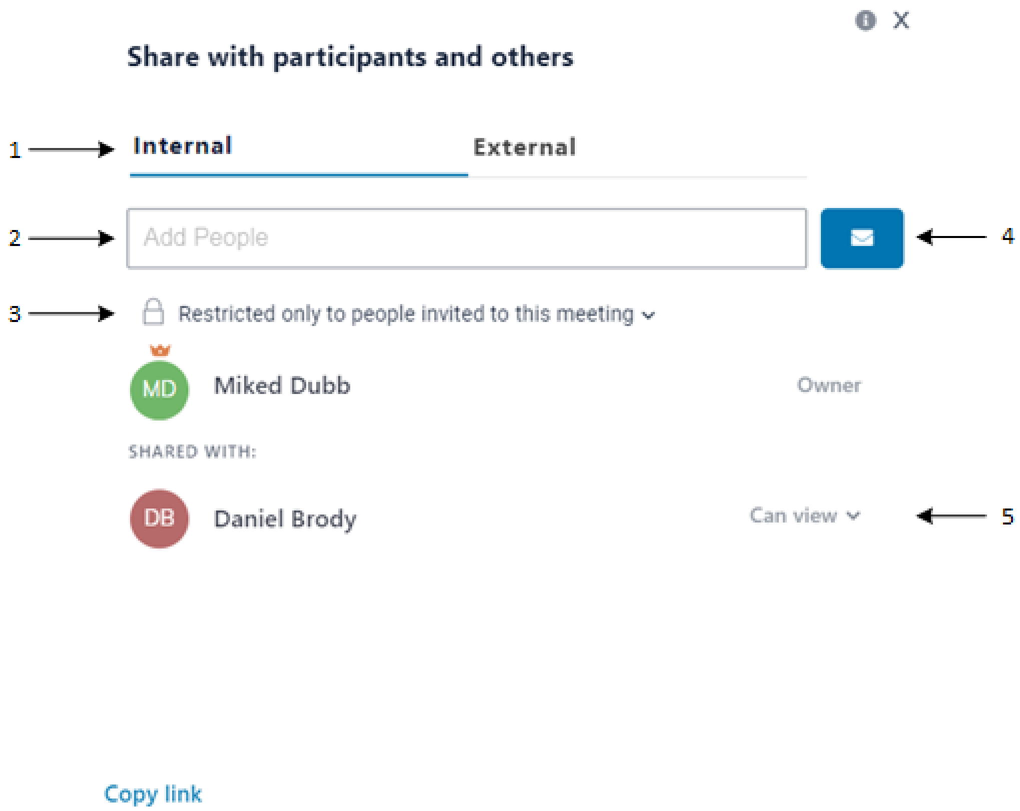
By default, when you publish a meeting recording, Meeting Insights automatically shares it only with participants within the organization. However, you can also share your meeting recording with other people within your organization that weren't invited:

- Share it with only specific people in your organization.
- Share it with everyone in your organization.

> - You can share only meeting recordings that have been published.
> - Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can share meeting recordings.

➢ To share a meeting recording within your organization:

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page opens.
3. On the toolbar, click **Share**; the following dialog box appears with the **Internal** tab (#1 in figure) selected by default and the list of participants with whom the meeting recording is currently shared:



4. **To share with specific people within the organization:**

   a. From the 'Choose meeting share method' drop-down list, select **Restricted only to people invited to this meeting** (#3 in figure).

   b. In the Add People text box (#2 in figure), start typing the person's name and then select it from the offered list. Multiple names can be selected.

   c. Click the envelope button (#4 in figure); the following dialog box appears:

   d. In the Message text box, type a message (optional), and then click **Send**; an email is sent to the selected people to notify them that the meeting recording has been shared with them. Their names now appear in the meeting recording's list of participants.

e. Define the privileges of each participant (or remove a participant), by clicking the icon (#5 in figure) corresponding to the participant's name, and then choosing one of the following options:

- **Can view:** Participant can only view (read-only) the meeting recording - video and recap.
- **Can edit:** Participant can view and edit (read-write) the meeting recording - video and recap.
- **Remove:** Removes the participant from the meeting recording.

5. **To share with everyone in your organization:**

   a. From the 'Choose meeting share method' drop-down list, select **Everyone in the organization can access this meeting**; a confirmation message box appears.

   b. Click **Got It, Proceed**.

Sharing Meeting Recordings Outside of Organization

By default, when you publish a meeting recording, Meeting Insights automatically shares it only with participants **within** your organization, as a safeguard against unauthorized people gaining access to confidential information. However, you can also share your meeting recording with people outside of your organization:

- Share it only with specific people outside of your organization **that were participants of the meeting recording**.
- Share it with anyone outside of your organization.

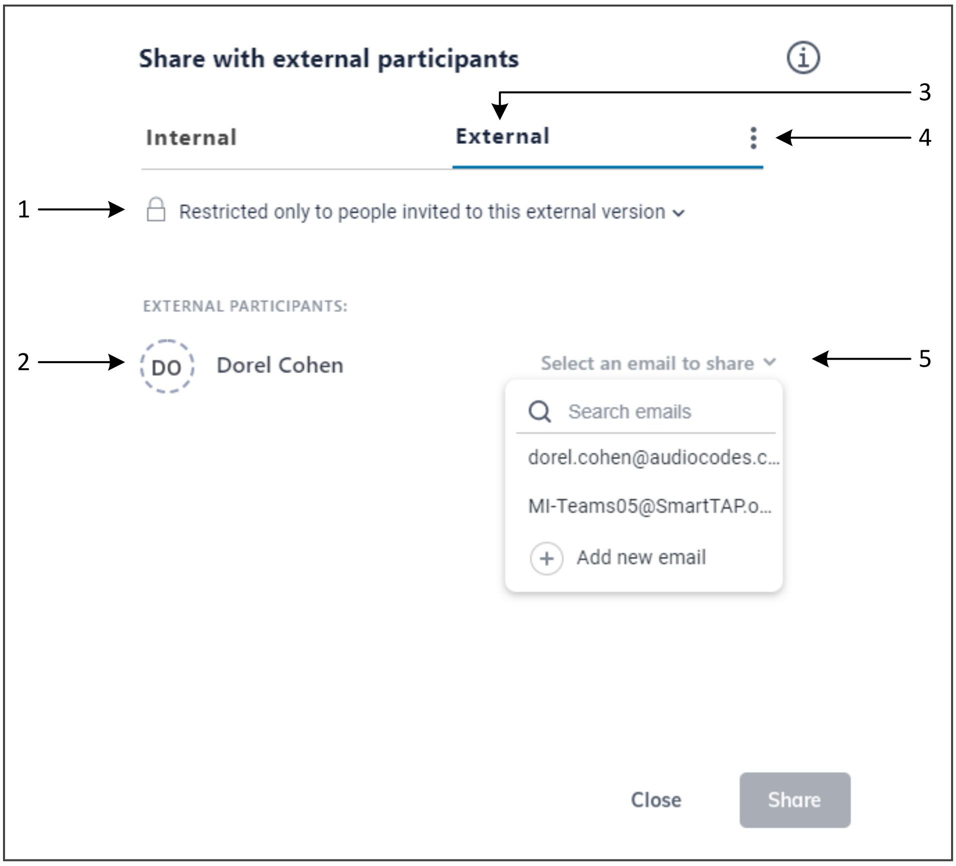
When you share a meeting recording with external people, Meeting Insights creates a copy (*version*) of the meeting recording and shares this version. If you make subsequent changes to your meeting recording, the shared meeting recording version will not reflect these changes, unless you specifically instruct Meeting Insights to update the shared version (described later in this section).

- You can share meeting recordings externally only if your Meeting Insights Administrator has enabled this feature (see Viewing Account Information on page 23).
- You can share only published meeting recordings.
- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can share meeting recordings.

➢ **To share meeting recording with people outside your organization:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page opens.
3. On the toolbar, click the **Share** button.

4. Select the **External** tab; the following appears, listing all the external participants of the meeting recording:



Legend:

1 = Drop-down list for sharing only with specific people or anyone outside of your organization.

2 = List of people from outside your organization that were participants in the meeting recording.

3 = **External** tab selected.

4 = Vertical three-dots menu, providing additional options.

5 = Participant's drop-down menu for selecting an email to where the link to the meeting recording is sent.

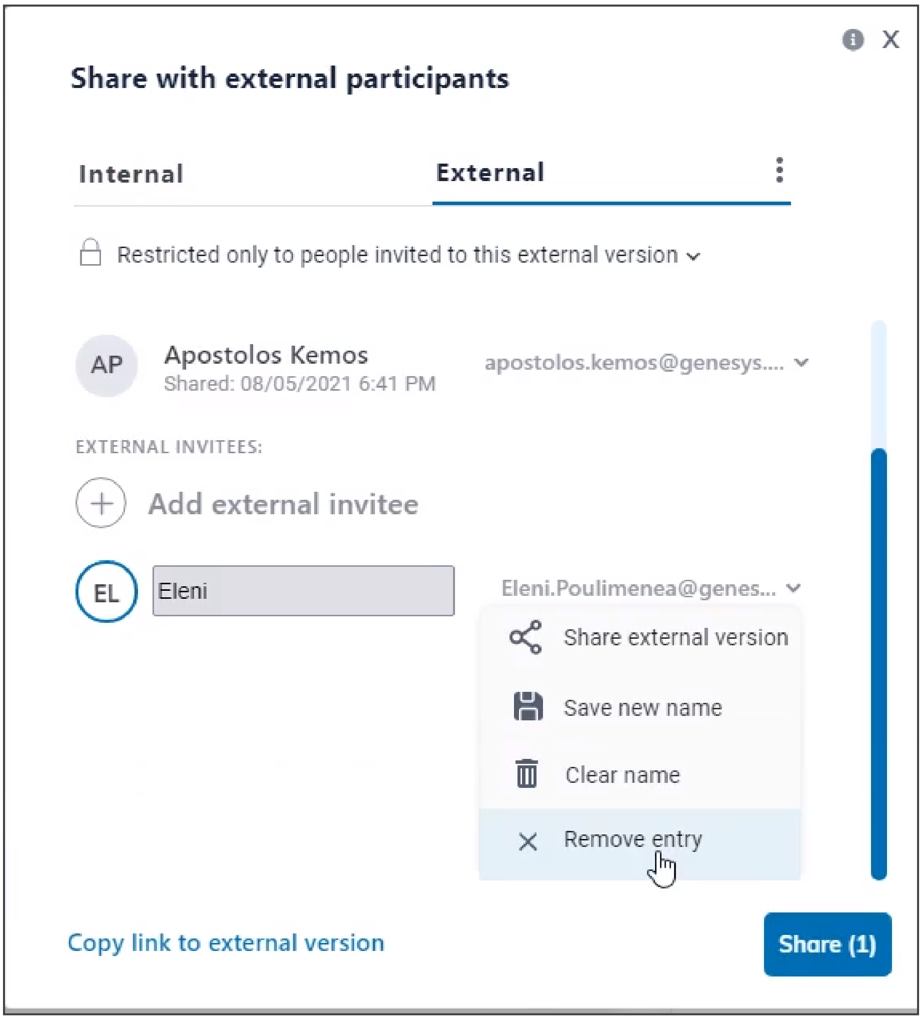
5. To share the meeting recording with specific people outside of your organization that were participants:

   a. If you're already sharing with all outside of your organization (see Step 6), then stop sharing with them, by clicking ⋮ , and then from the drop-down menu, choosing **Stop sharing with all** (see end of this section).

   b. Select **Restricted only to people invited to this external version** (#1 in figure); all the external participants are listed.

c. Click the **Select an email to share** drop-down list, and then select an email address, or add a new address by clicking **Add new email**; Meeting Insights sends an email to the recipients, which contains a URL link to the shared meeting recording.

Once you have selected an email address, the address is associated with the participant and if you click ˅ , the following drop-down menu appears:

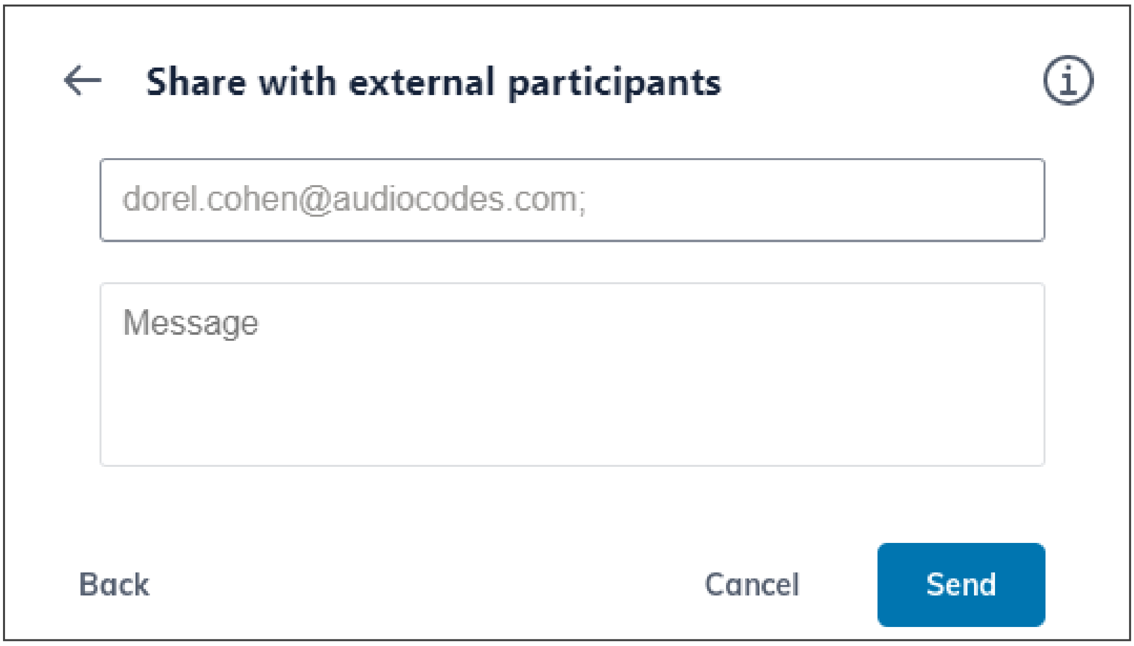


d. You can do the following for each participant:

- **Share external version:** Shares the meeting recording with this specific person (see next step).
- **Save new name:** Changes the person's name to the name you enter in the field.
- **Clear name:** Clears the person's name from the field.
- **Remove entry:** Removes the entry to keep the meeting as is.

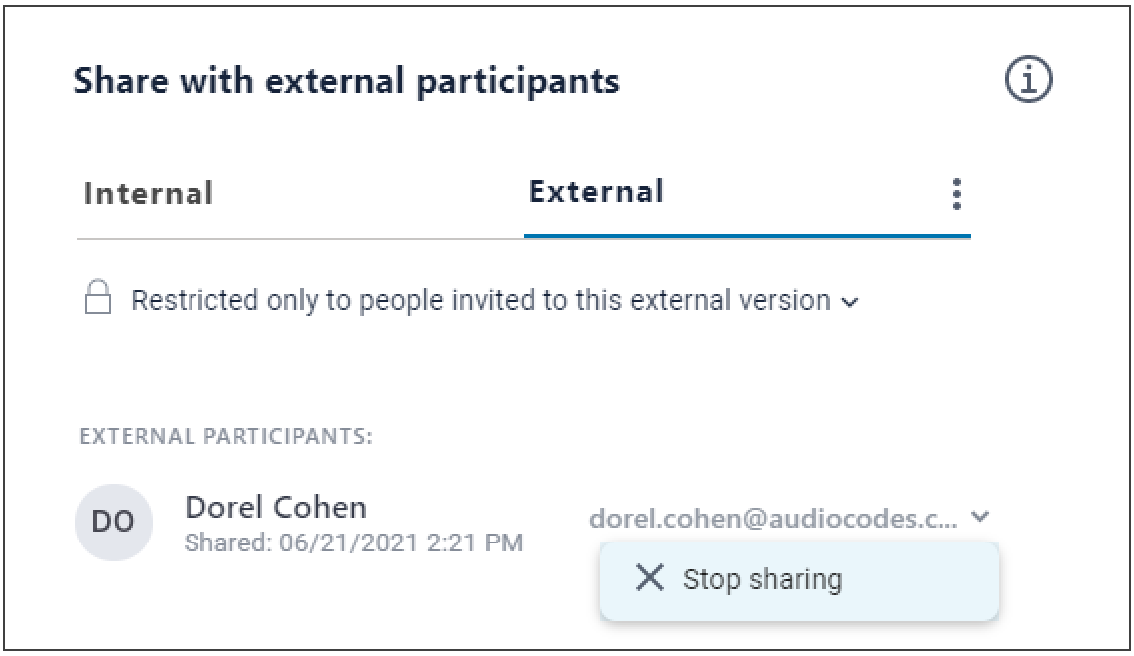
e. If you chose **Share external version** or you clicked the **Share** button (also indicates the number of external participants with which you have shared the meeting recording), a confirmation message box appears.

f. Click **Got it, proceed**; the following appears:



g. In the Message text box, type a message (optional), and then click **Send**; an email is sent with the URL link of the meeting recording to the selected people.

h. If you want to stop sharing with a specific person, click the icon next to the participant's email, and then choose **Stop sharing**:



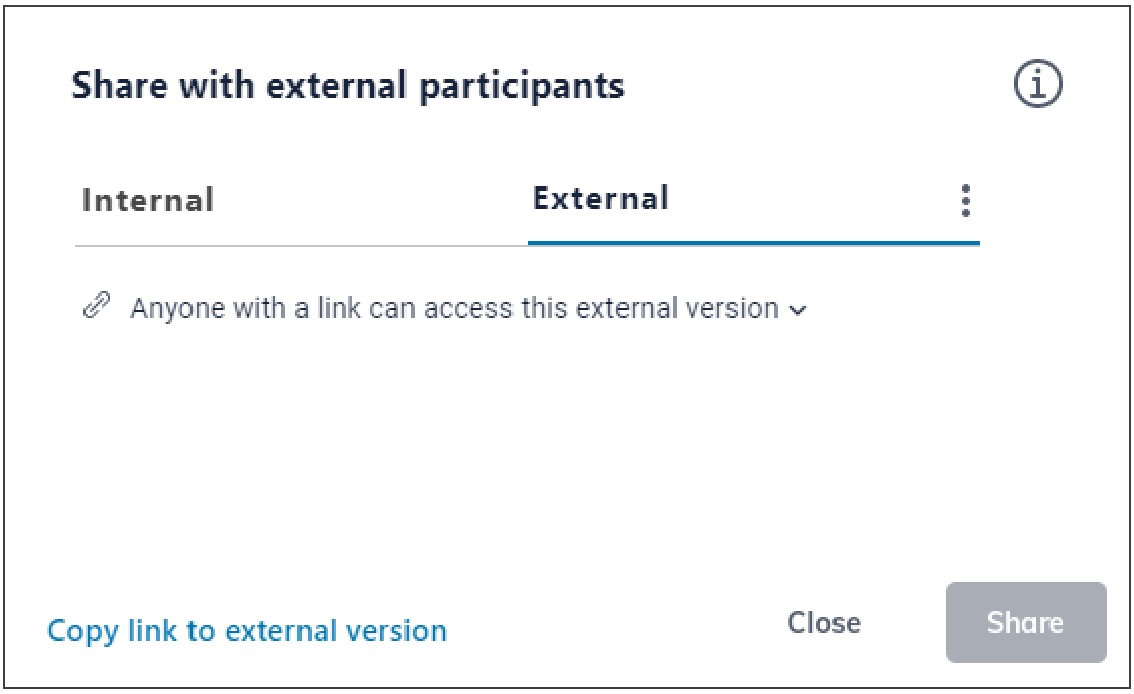
6. **To share the meeting recording with anyone outside of your organization:**

a. If you're already sharing with specific external participants (see above), then stop sharing with them, by clicking , and then from the drop-down menu, choosing **Stop sharing with all** (see end of section).

b. Click **Restricted only to people invited to this external version**, and then from the drop-down list, select **Anyone with a link can access this external version**.

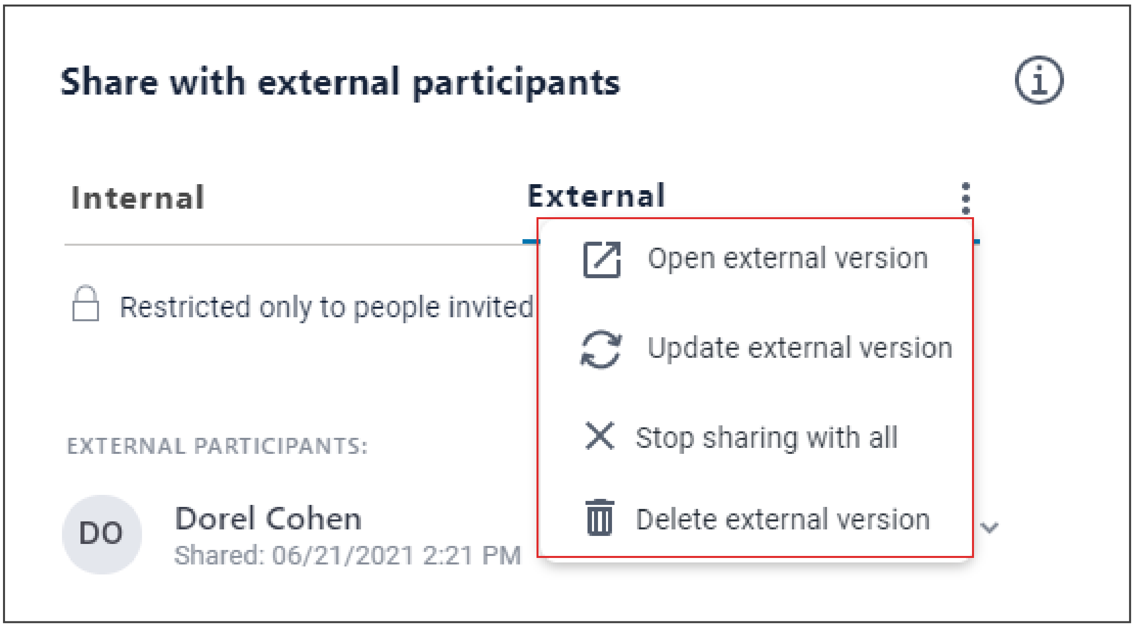
c. Click **Share**; a confirmation message box appears,

d. Click **Got it, proceed**; the **Copy link to external version** link appears:



e. Click **Copy link to external version** to copy the link to your clipboard, and then send the link (for example, by email) to whomever you want to share the meeting recording with.

Once you have shared the meeting recording with people outside of your organization, you can use the menu next to the **External** tab to do the following:



- **Open external version:** Opens the shared version of the meeting recording, allowing you to view the meeting recording version that you shared.
- **Update external version:** Updates the version of the meeting recording that you shared with the original meeting recording. This is useful if you have subsequently updated the original meeting recording, for example, added recap items and you want the shared meeting recording version to reflect these latest updates.
- **Stop sharing with all:** Stops sharing the meeting recording with all people outside of your organization.
- **Delete external version:** Deletes the shared version of the meeting recording. In this case, the people with whom it was shared will no longer be able to access it.

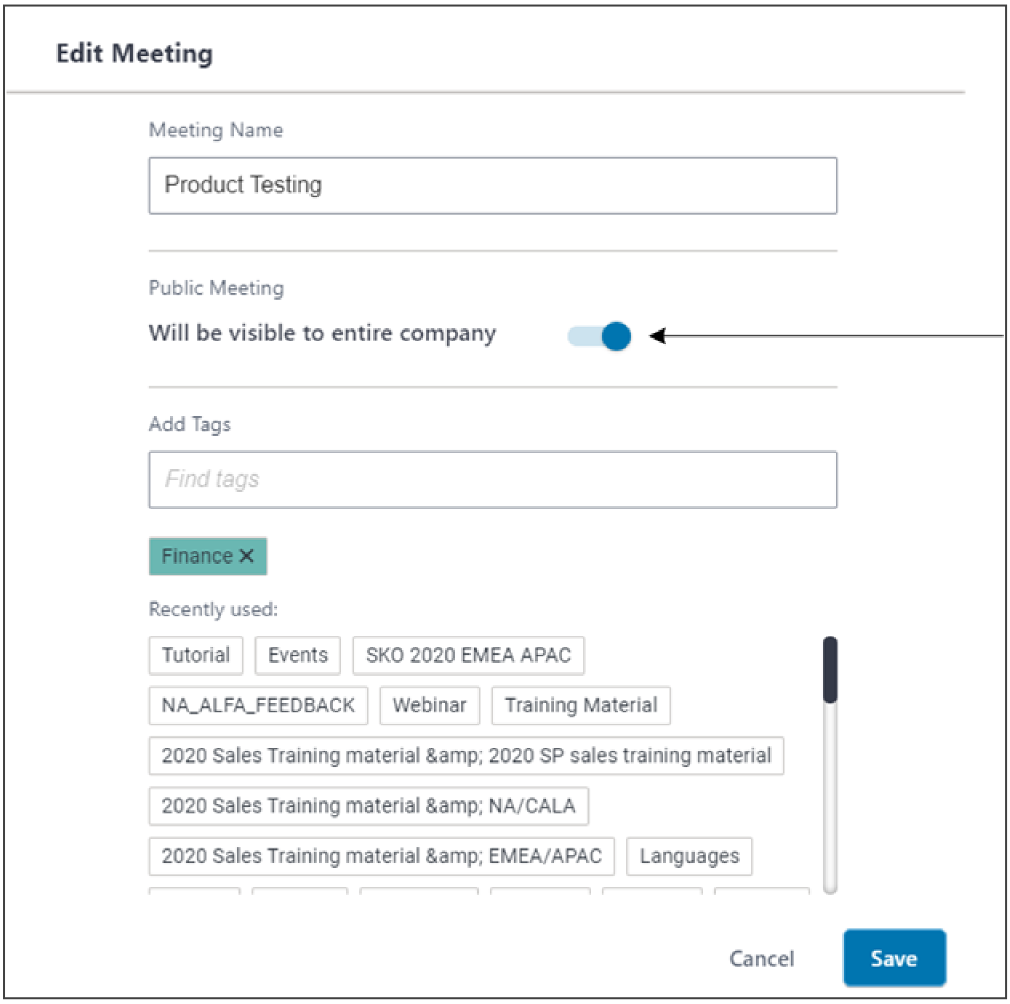
Making Meeting Recordings Public

When you publish a meeting recording, only its participants can view it in their Meeting Insights account. However, you can also share the meeting recording with everyone in your organization that has access to Meeting Insights, even if they weren't participants.

> ⚠ Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can make it public.

➢ **To make meeting recording public:**

1. In the Navigation pane, click **All Meetings**.
2. Click the ellipsis (three dots) button corresponding to the meeting recording that you want, and then from the drop-down menu, choose **Edit Meeting**; the following dialog box appears.
3. Under Public Meeting , click the toggle switch to turn on visibility to the entire company:



4. Click **Save**.

Attaching Files to Meeting Recordings

You can attach files to your meeting recordings. This is useful if you want to provide additional material to your viewers.

- You can attach only the following file types to a meeting recording: .doc, .docx, .rtf, .txt, .pdf, .gif, .jpg, .jpeg, .png, .svg, .tiff, ppt, xls, and xlsx
- You can attach up to five files to a meeting recording.
- Each attached file can have a maximum size of up to 28 MB.
- You can only select and upload one file at a time.
- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can attach files to the meeting recording.

Uploading Files

You can upload and attach multiple files to your meeting recording, for example, PowerPoint presentation files, Word files, or Visio files. This may be useful for providing additional information to users with whom you have shared your meeting recording.

- You can attach only the following file types to a meeting recording: .doc, .docx, .rtf, .txt, .pdf, .gif, .jpg, .jpeg, .png, .svg, .tiff, ppt, xls, and xlsx
- You can attach up to five files to a meeting recording.
- Each attached file can have a maximum size of up to 28 MB.
- You can only select and upload one file at a time.
- Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can attach files to the meeting recording.

➢ To upload a file:

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Click (#1 in figure); the Attachments group appears:

4. Click **Choose**(#2 in figure), and then browse to and select the file on your computer; the selected file appears listed.
5. If you want to remove any previously attached files with the same name as the file you're currently attaching, select the **Overwrite existing file(s)** check box (#3 in figure).
6. Click **Upload**; Meeting Insights starts uploading the file and when complete, a notification message box appears indicating that the file was uploaded successfully.
7. Click **OK** to close the message box.

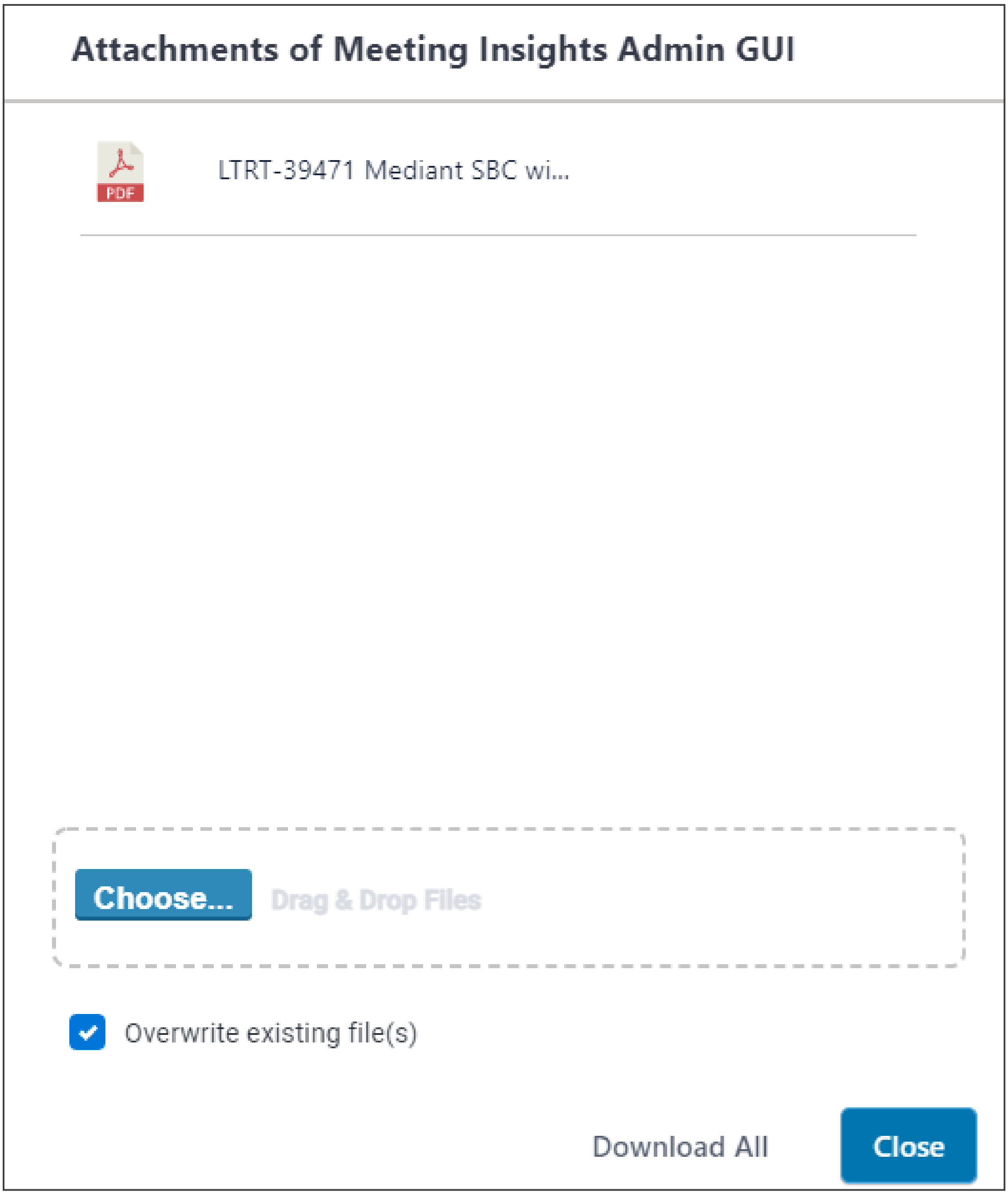
Downloading Attached Files

If a meeting recording includes an attached file, for example, a presentation (i.e., PowerPoint) or Word document, you can download it to your computer.

You can download the file only if the meeting recording has been published.

➢ To download a file:

1. In the Navigation pane, click **All Meetings**.
2. Do one of the following:
   - **All Meetings page:**
     i. Click corresponding to the meeting recording that you want; the following appears, showing the presentation file:

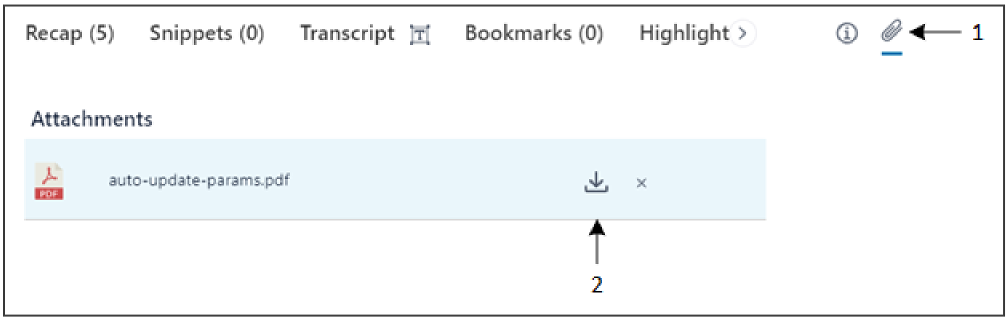


ii. Click **Download All**; the file is downloaded to your computer.

- **Player page:**

  i. In the All Meetings page, click the name of the meeting recording that you want; the Player page appears.

  ii. Click (#1 in figure); the Attachments group appears, listing the attached files:



iii. Click (#2 in figure); the file is downloaded to your computer.

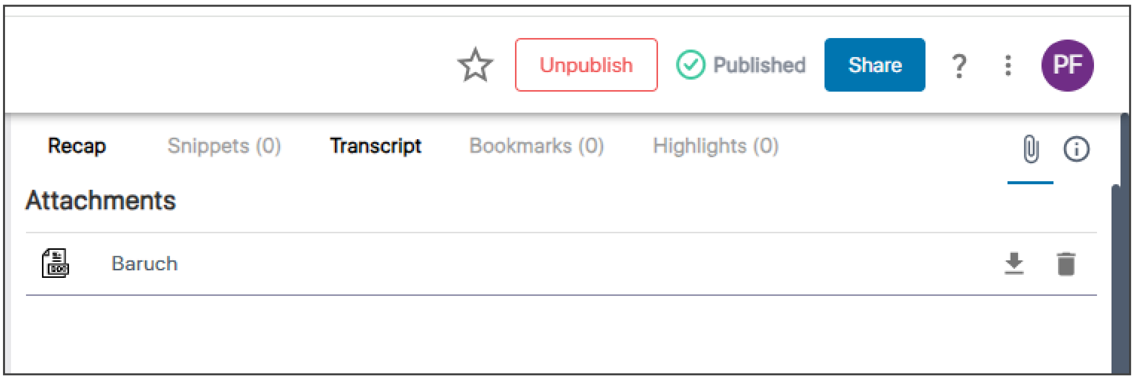
Deleting Attached Files

You can delete files that are attached to your meeting recording.

> Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can delete attached files.

➢ **To delete a file:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. Click ; the Attachments group appears, listing the attached files.



4. Click the delete icon corresponding to the file you want to delete; a confirmation message appears.
5. Click **Delete**.

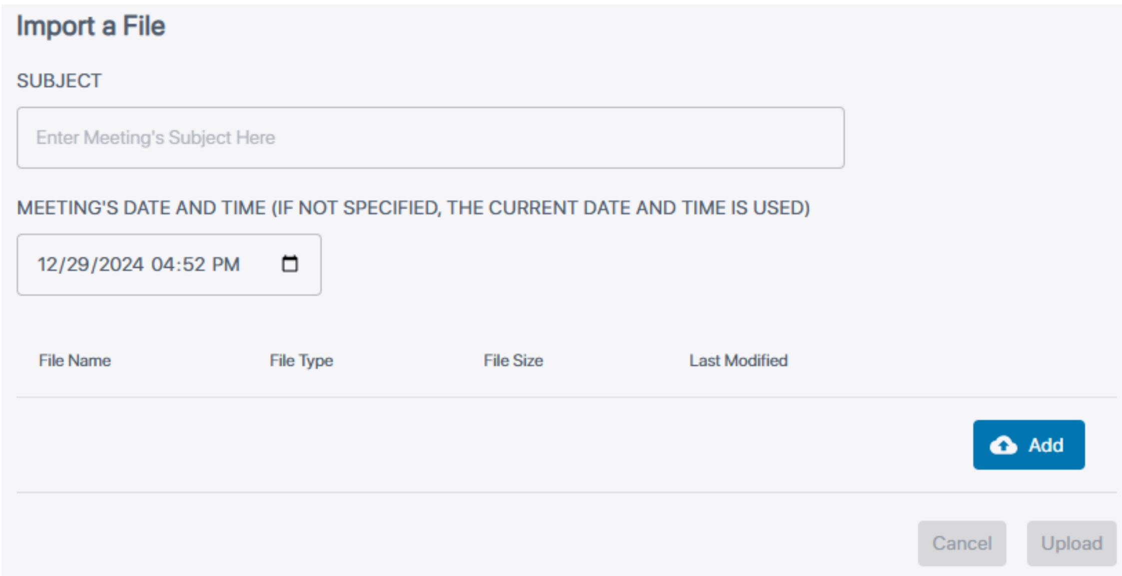
Importing Meeting Recordings Created by Third-Party Tools

You can create a meeting recording using a third-party recording program (e.g., webinar) and then upload the recorded file to Meeting Insights. Once uploaded, it's listed with all the other meeting recordings and displayed with the icon. You can manage these uploaded recordings like meeting recordings created by Meeting Insights.

- You can import meeting recordings only if your Meeting Insights Administrator has enabled this feature for you. To see if it's enabled, refer to the 'Meeting Import' field in your account information (see Viewing Account Information on page 23).
- You can import a recorded file in any of the following file formats: .avi, .mp4, .wmv, .mpeg, .wav, .mov, .flv, .mpg, .aac, .flv, .flac, .wma, .mp3, .m4a, .webm, and .wmv

➢ **To import recorded meeting done by third-party program:**

1. In the Navigation pane, click **All Meetings**.
2. On the toolbar, near your profile picture, click ; the Import a File page appears:

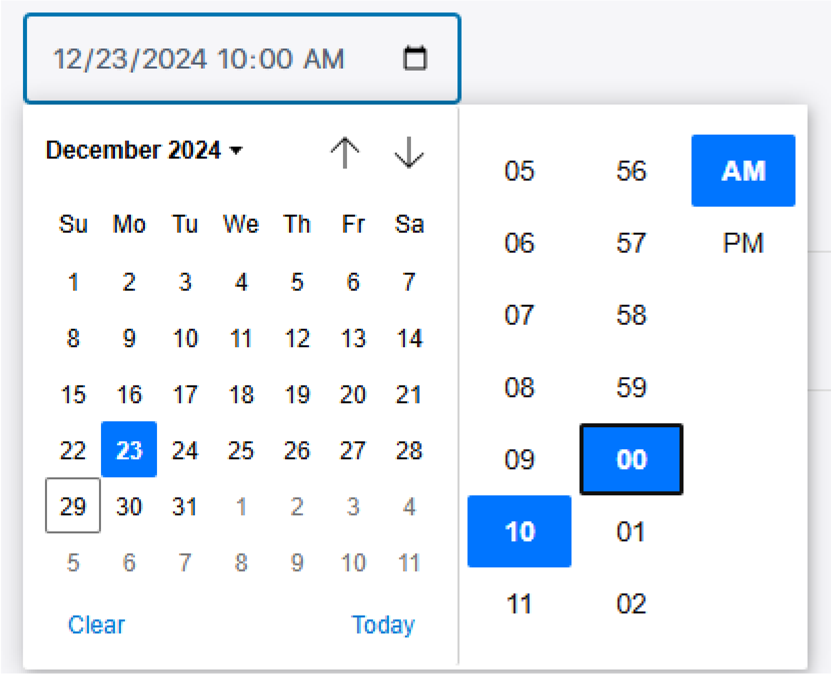


3. In the 'Subject' field, type a subject for the meeting recording.
4. In the 'Meeting's Date and Time' field, select the date and time of the meeting:
   - Clicking each segment of the date or time, and then typing in the new value. For the time, the possible values are "AM" or "PM".

   a. Click the calendar icon; the calendar dialog box appears.

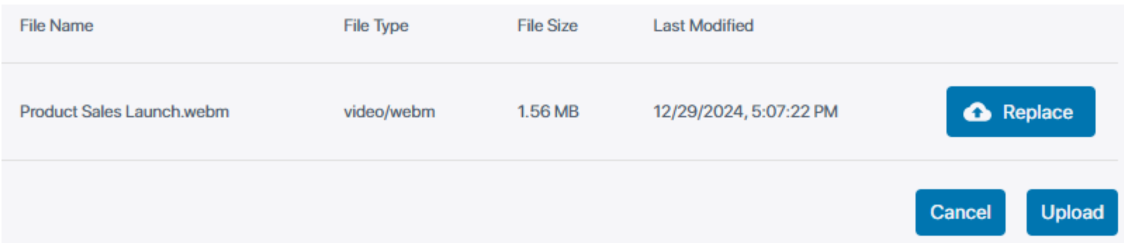
   b. On the left pane, select the date.

   c. On the right pane, select the time in 12-hour format, using the **AM** or **PM** buttons to denote morning or afternoon, respectively.



> ⚠ If you don't specify the date and time, the current date and time is used.

5. Click the **Add** button, browse to the folder on your computer in which the recorded file is located, and then select it; the file's name, type, size and last modified date is displayed, for example:



File Name	File Type	File Size	Last Modified	
Product Sales Launch.webm	video/webm	1.56 MB	12/29/2024, 5:07:22 PM	Replace

Cancel Upload

If you want to choose a different file, click the **Replace** button, and then select a different file.

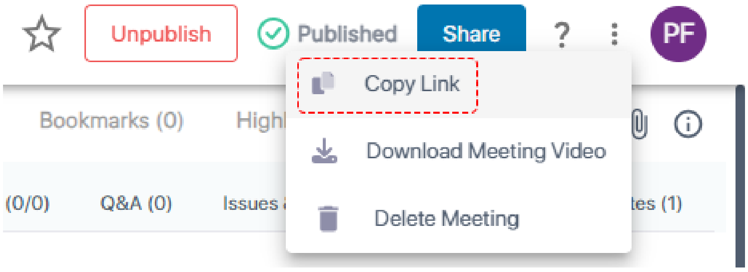
6. Click the **Upload** button; Meeting Insights starts uploading the file. When file upload is complete, the "100% Complete" message is displayed and Meeting Insights starts processing the meeting recording. At this stage, you're automatically navigated to the  **All Meetings** page, where the uploaded meeting recording is listed and displayed with the  icon.

Copying URL of Meeting Recordings

You can copy the URL of a meeting recording to your clipboard. Once copied, you can paste it in whatever application (e.g., email) and send it to someone for viewing.

➢ **To copy meeting recording URL:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. On the toolbar, click the icon, and then from the drop-down list, choose **Copy Link**:



4. Paste the link, for example, in an email.

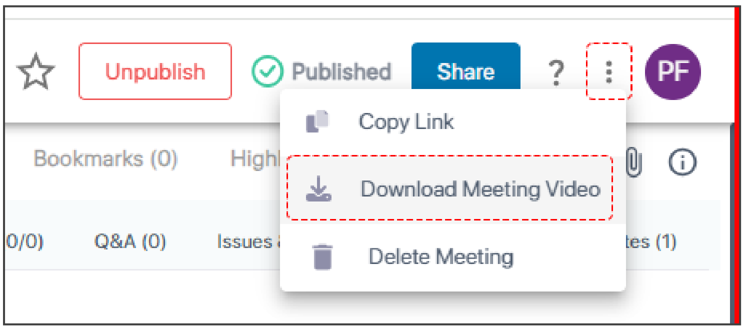
Downloading Meeting Recordings

You can download a meeting recording to a folder on your computer as an .mp4 file.

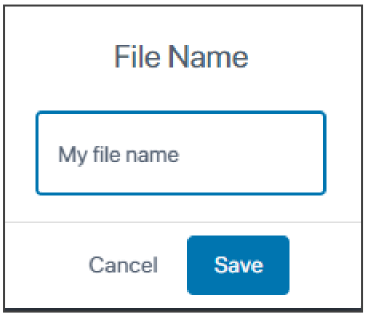
> Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can download the meeting recording.

➢ **To download a meeting recording:**

1. In the Navigation pane, click **All Meetings**.
2. Click the name of the meeting recording that you want; the Player page appears.
3. On the toolbar, click the icon, and then from the drop-down list, choose **Download Meeting Video**:



A dialog box appears:



4. Type a name for the meeting recording file (default is the subject name), and then click **Save**; the meeting recording is downloaded to your computer.

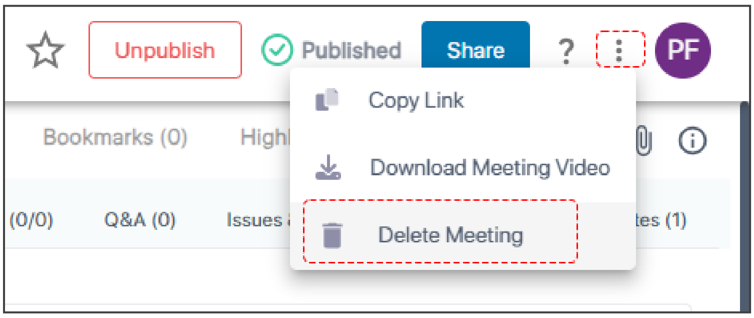
Deleting Meeting Recordings

You can delete any of your meeting recordings.

> ⚠ Only the Owner, Co-owner, or users assigned editing privileges of the meeting recording can delete the meeting recording.

➢ **To delete a meeting recording:**

1. In the Navigation pane, click **All Meetings**.
2. Do one of the following:
   - **All Meetings page:**
     i. Click the icon corresponding to the meeting recording that you want, and then from the drop-down menu, choose **Delete**; a confirmation message appears.
     ii. Click **Yes**.
   - **Player page:**
     i. In the All Meetings page, click the name of the meeting recording that you want; the Player page appears.
     ii. On the toolbar located on the top of the page, click the icon, and then from the drop-down menu, choose **Delete Meeting**:



A confirmation message appears.

iii. Click **Remove**.

9 Getting Help

You can obtain help using one of the following :

- Help **?** icon (see Using the Help ? Icon on page 268)
- Help bot (see Using the Help Bot below)

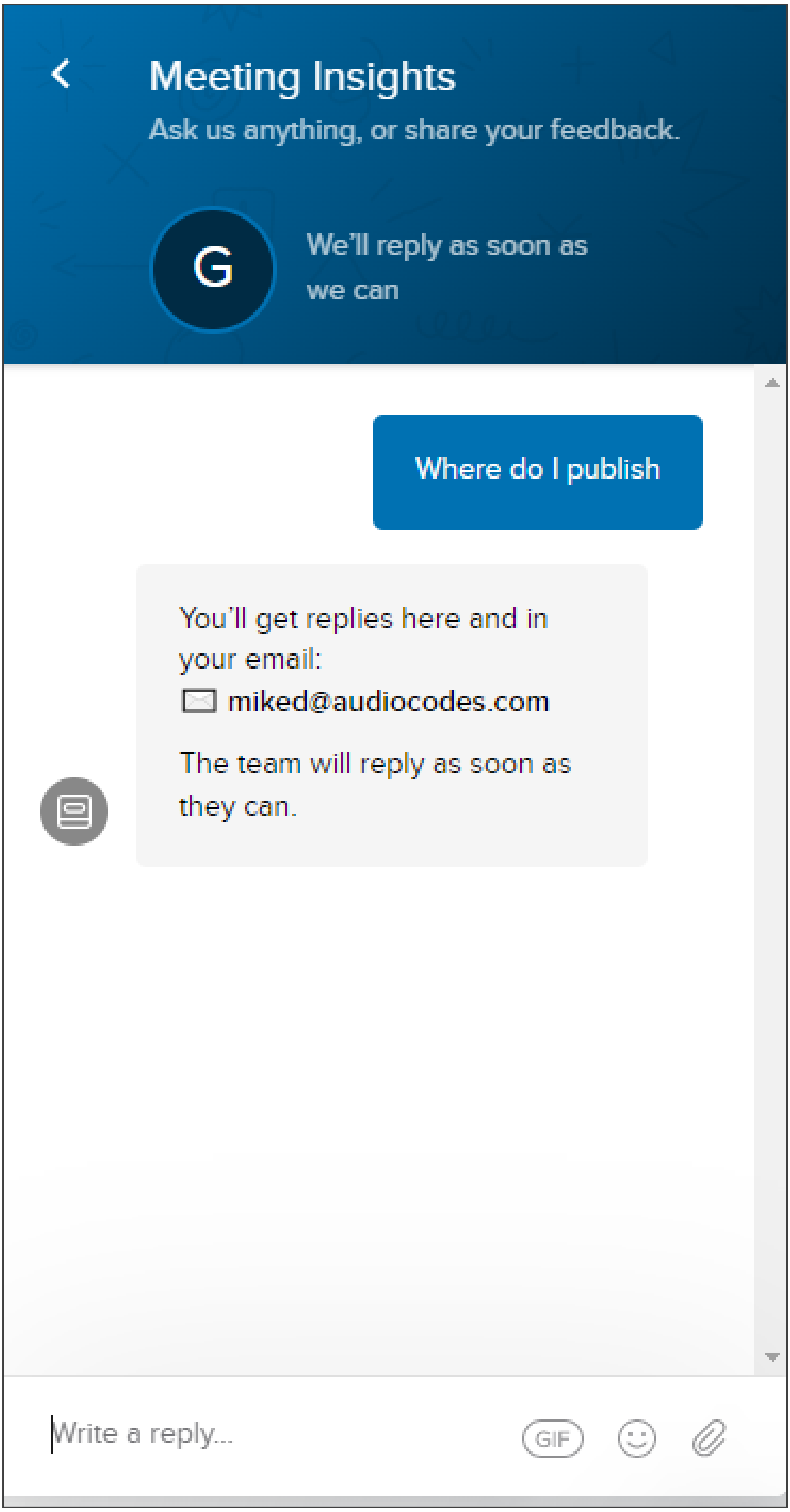
Using the Help Bot

Meeting Insights provides on every page of the application a chat bot aka an 'intercom' application or 'Contact us' customer engagement platform through which users can engage with the Meeting Insights Support Team and the Meeting Insights Customer Success Team about issues they may be encountering, feedback they'd like to give, or requests for new features they'd like to have in the product.

➢ To access the chat bot:

1. In the lowermost right corner of Meeting Insights pages, locate the Bot icon.

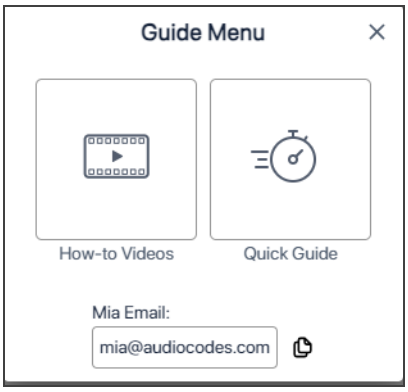
2. Click the icon and in the screen shown below, enter a textual question and send it.


Meeting Insights
Ask us anything, or share your feedback.
G
We'll reply as soon as we can
Where do I publish
You'll get replies here and in your email:
miked@audiocodes.com
The team will reply as soon as they can.
Write a reply...
GIF

3. Click to view the status of this conversation and any other you may have had. You can then continue the conversation or start a new conversation.

Using the Help ? Icon

You can get help when using Meeting Insights' web-based management interface by clicking the ? (question mark) icon located on the toolbar of some pages (see Get Familiar with the Web Interface on page 6):



The help page provides the following:

- **How-to Videos:** Opens AudioCodes YouTube channel that provides how-to videos on performing various tasks in Meeting Insights.
- **Quick Guide:** Opens this document from the AudioCodes website.
- **Mia Email:** Email address of Meeting Insights assistant "Mia" for requesting help about any issue about Meeting Insights.

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