AudioCodes Continuous Enterprise Productivity Powered by Voice.AI

Next Generation Meeting Insights



Caudiocodes

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Related Documentation

Document Name

Meeting Insights User's Manual

Document Revision Record

LTRT	Description
12726	Initial document release
12729	MIA auto-invite rule
12750	Power BI. Recording Notifications. Automatic AI. Meeting join & lobby in TAC.
12751	Microsoft Outlook Add-In. User Permissions.
12752	Internal / External Share. Provide permissions in customers' Azure enterprise applications. URL to sign in. Grant permission screenshots. AAD Group - security. AAD Group - Group type. AAD Group - Owners. Create AAD group of users. 'Licensing' separated from group. Calendar icon in Teams. New Meeting. Modified instructions for Scheduled Unscheduled meetings. Outlook add-in restructured. Intro to 'Devices' changed. 'Insights' added to Add User Profile page under 'Automatic AI Triggering'. AI Settings: Transcript & AI Insights separated.
12753	Lock icon in Licensed Users page. Enable Zoom for group of users; view and reset voiceprints
12754	BYOS storage; note added for PowerPoint Live not supported; email notifications updated; publishing time preferences; TLS 1.2
12755	Salesforce integration
12756	Miscellaneous
12757	Salesforce limitation re overwriting existing content removed; Meeting Insights standalone mobile app (enabling app and enabling ad hoc recording for user profiles); Template-based AI-powered summaries

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1 Introduction

AudioCodes Meeting Insights is an Al-powered enterprise solution that enables users to record any meeting-generated content (audio and video), and automatically creates meeting minutes for Microsoft Teams meetings.

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' in-meeting voice assistant 'MIA' 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 about Meeting Insights, see AudioCodes' website.



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

Intended Audience

This guide is intended for the admin of the enterprise | organization.

2 Pre-Deployment Requirements

Before deploying Meeting Insights, customers must provide:

- Customer's domain name
- Emails of customer contact point for the deployment status
- UPNs of default administrator for the initial access to the application
- Preferable region for recording storing (when a region is unavailable in Azure Cloud, a default region will be selected)

3 Signing in

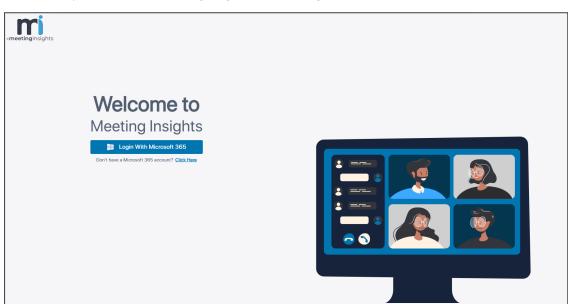
Meeting Insights enables you to sign in as admin. Admin can perform management tasks which regular users cannot. Up to five admins are allowed.

• Default admin is added when the customer application is created.

- Default admin receives an email when the app is ready for sign-in.
- Admin has full access permissions.
 - ✓ Admin has full access to system configuration and meetings.
 - Admin can act on behalf of the meeting owner and within the scope of the meeting owner's permissions, for example, admin can share a meeting externally if the meeting owner has permission to share externally.

> To sign in as admin:

- 1. Access the app at the link provided by AudioCodes in the email and paste it into your browser's address field. The link will be:
 - https://emea.meetinginsights.com/mi/login -OR-



• https://americas.meetinginsights.com/mi/login

2. Click Login with Microsoft 365 and then sign in with the default admin's UPN.

	eeting Insights Tenant ID 4869ca-0bd8-4c79-93d6-3430ce352426		
CONSENT NAME	ACTION	COMPLETED	DESCRIPTION
M365 Login	Grant Admin Consent 🗲	0	Provide the application with permissions to authenticate users with their M365 credentials, application revoutes users to M365 for authentication (Azure Active Directory authentication - Microsoft OpenID Connect). M365 Administrator permissions are required to grant the consent.
Read Azure Active Directory Groups and Users	Grant Admin Consent >	٥	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application. M365 Administrator permissions are required to grant the consent.
Allow Meeting Insights to Join Meetings	Grant Admin Consent >	٥	Provide the application with permissions to join your Tenant's Teams meetings to record the calls' infi and media. M365 Administrator permissions are required to grant the consent.
Publish Meeting Insights Teams Client App in your Tear	ns Store Publish	0	Add the application to users' Teams Clients for access and adding it into ongoing meetings. Click on the "Publish" button to publish the app in your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users.
Allow Meeting Insights to Be Added to Ongoing Meetin	gs Download Script టి	٥	Provide the Meeting Insights Teams Client Application with permissions to be pulled into ongoing meetings through Online Meeting Global Application access. You must also publish the Meeting Insights Teams App from a step above in your Teams Store. It may take up to 30 minutes for the permissions to take effect. The M365 Administrator must run the downloaded script from a PC that has PowerShell installed and unrestricted execution policy.

3. You've successfully signed in. Next: Connect to Microsoft 365 as shown here.

4 Setting up Meeting Insights

Follow the three steps described here to set up Meeting Insights.

To set up the app:

- 1. Configure an Azure Active Directory (AAD) group for Meeting Insights users as shown here.
- 2. Connect to your Microsoft 365 as shown here.
- 3. Assign a Meeting Insights license to your users group as shown here.

After setting up Meeting Insights, test the setup as shown here.

Connecting to Microsoft 365

Connecting to Microsoft 365 requires admin to:

- 1. Grant three consents
- 2. Publish the Meeting Insights Teams client app in the Teams Store



Optionally, admin can *manually* add the app to the Teams store *without needing to grant permissions*, as shown here.

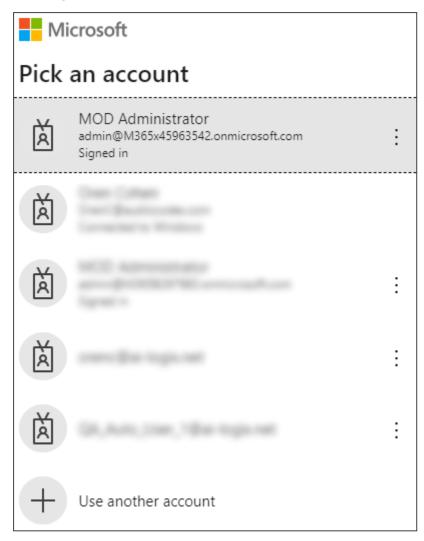
3. Download and run the script that allows the app to be added to ongoing meetings

To connect to Microsoft 365:

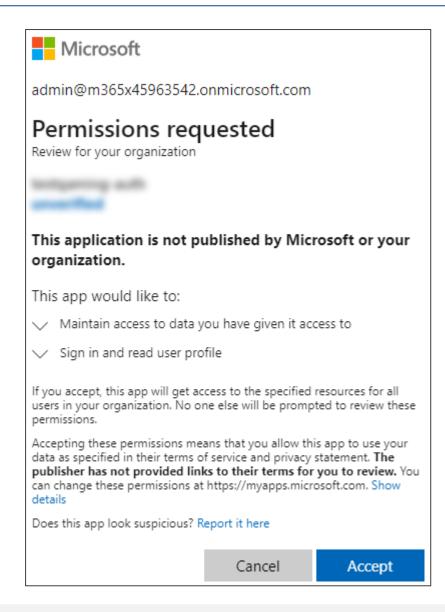
 After signing in, the 'Connect to your M365' page is displayed (Admin Settings > System Settings > Connect to your M365).

	Meeting Insights Tenant ID 074869ca-0bd8-4c79-93d6-3430ce352426		
CONSENT NAME	ACTION	COMPLETED	DESCRIPTION
M365 Login	Grant Admin Consent >	0	Provide the application with permissions to authenticate users with their M365 credentials, application reroutes users to M365 for authentication (Azura Active Directory authentication – Microsoft OpenID Connect), M365 Administrator permissions are required to grant the consent.
Read Azure Active Directory Groups and Users	Grant Admin Consent 🔸	٥	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application. M365 Administrator permissions are required to grant the consent.
Allow Meeting Insights to Join Meetings	Grant Admin Consent >	٥	Provide the application with permissions to join your Tenant's Teams meetings to record the calls' into and media. M365 Administrator permissions are required to grant the consent.
Publish Meeting Insights Teams Client App in your T	eams Store Publish	0	Add the application to users' Teams Clients for access and adding it into ongoing meetings. Click on the "Publish' button to publish the app in your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users.
Allow Meeting Insights to Be Added to Ongoing Mee	tings Download Script 土	٥	Provide the Meeting Insights Teams Client Application with permissions to be pulled into ongoing meetings through Online Meeting Global Application access. You must also publish the Meeting Insights Teams App from a step above in your Teams Slove. It may take up to 30 minutes for the permissions to take effect. The Md65 Administrator must run the downloaded script from a PC that has PowerShell installed and unrestricted execution policy.

- Under the 'Completed' column, the icons ⁽²⁾ indicate consent has not been granted yet and must be granted.
 - The first consent is hyper linked indicating that this consent must be granted first.
 - Microsoft 365 Administrator permissions are required to grant each consent.
- 2. Next to 'M365 Login', click Grant Admin Consent.



3. Click **+ Use another account** and in the prompts, enter the admin's email address and password.

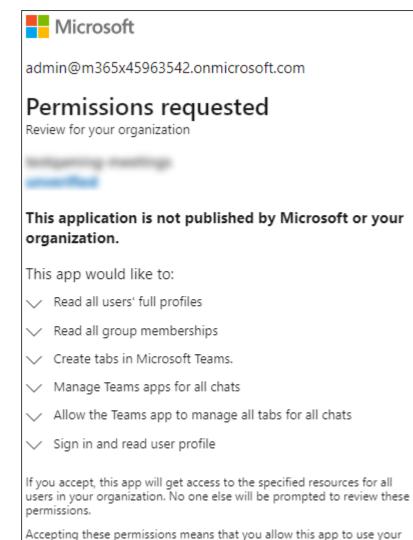


- The consent provides the app with permission to authenticate users with your M365 credentials; the app reroutes users to M365 for authentication (Azure Active Directory authentication Microsoft OpenID Connect).
 - M365 Administrator permissions are required to grant the consent.

4. Click Accept.

M365 Tenant ID 40615d8a-0c34-4c17-997c-8834b31ff1d1	Meeting Insights Tenant ID 074869ca-0bd8-4c79-93d6-3430ce352426		
CONSENT NAME	ACTION	COMPLETED	DESCRIPTION
M365 Login	Grant Admin Consent >	9	Provide the application with permissions to authenticate users with their M365 credentials, application reroutes users to M385 for authentication (Azure Active Directory authentication – Microsoft OpenID Connect). M365 Administrator permissions are required to grant the consent.
Read Azure Active Directory Groups and Users	Grant Admin Consent →	0	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application. M365 Administrator permissions are required to grant the consent.
Allow Meeting Insights to Join Meetings	Grant Admin Consent >	0	Provide the application with permissions to join your Tenant's Teams meetings to record the calls' info and media. M365 Administrator permissions are required to grant the consent.
Publish Meeting Insights Teams Client App in your 1	eams Store Publish	0	Add the application to users' Teams Clients for access and adding it into ongoing meetings. Click on the "Publish' button to publish the app in your Teams store using M385 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users.
Allow Meeting Insights to Be Added to Ongoing Me	tings Download Script ತಿ	0	Provide the Meeting Insights Teams Client Application with permissions to be pulled into ongoing meetings through Online Meeting Global Application access. You must also publish the Meeting Insights Teams App from a step above in your Teams Store. It may take up to 30 minutes for the permissions to take effect. The M365 Administrator must run the deverted effect and a step Apple Administrator must run the deverted effect and a constraint of the tas Power Shell installed and unrestricted execution policy.

- 5. View the icon ♥ under the 'Completed' column. It indicates you successfully granted consent (consent was successfully completed from this page for 'M365 Login'). You've successfully provided the app permission to authenticate users with your M365 credentials; the app reroutes users to M365 for authentication (Azure Active Directory authentication Microsoft OpenID Connect).
 - Even if consent is later revoked, the icon stays green.
 - The next consent down now becomes hyper linked for you to grant (Read AAD Groups and Users).
 - Microsoft 365 Administrator permissions are required to grant each consent.
- 6. Next to 'Read Azure AD Groups & Users', click Grant Admin Consent, and then select the account.



data as specified in their terms of service and privacy statement. The publisher has not provided links to their terms for you to review. You can change these permissions at https://myapps.microsoft.com. Show

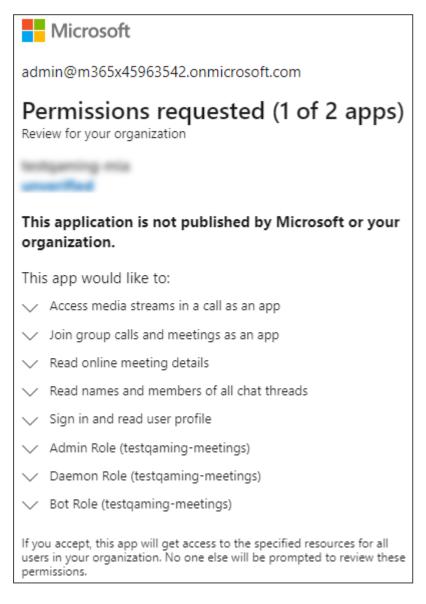


This consent provides the app with permission to read AAD groups and users, and permission for groups' users to access the app and record.

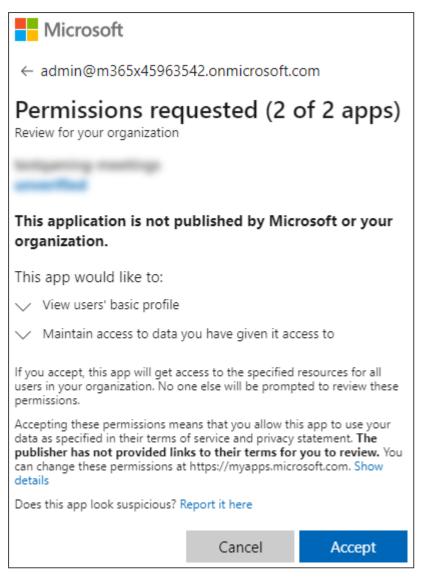
7. Click Accept.

	Aeeting Insights Tenant ID 74869ca-0bd8-4c79-93d6-3430ce352426		
CONSENT NAME	ACTION	COMPLETED	DESCRIPTION
M365 Login	Grant Admin Consent 🔺	0	Provide the application with permissions to authenticate users with their M385 credentials, application reroutes users to M365 for authentication (Azure Active Directory authentication – Microsoft OpenID Connect). M365 Administrator permissions are required to grant the consent.
Read Azure Active Directory Groups and Users	Grant Admin Consent >	٥	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application. M365 Administrator permissions are required to grant the consent.
Allow Meeting Insights to Join Meetings	Grant Admin Consent >	0	Provide the application with permissions to join your Tenant's Teams meetings to record the calls' into and media. M365 Administrator permissions are required to grant the consent.
Publish Meeting Insights Teams Client App in your Te	ams Store Publish	0	Add the application to users' Teams Clients for access and adding it into ongoing meetings. Click on the "Publish' button to publish the app in your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users.
Allow Meeting Insights to Be Added to Ongoing Meeti	ngs Download Script ئ	0	Provide the Meeting Insights Teams Client Application with permissions to be pulled into ongoing meetings through Online Meeting Global Application access. You must also publish the Meeting Insights Teams App from a step above in your Teams Store. It may take up to 30 minutes for the permissions to take effect. The M365 Administrator must run the dgive/gaded spript.fcgm.pPC that has PowerShell Installed and unrestricted execution policy.

8. Next to the consent 'Allow Meeting Insights to Join Meetings', click Grant Admin Consent, and then select the account.



9. Click Next.



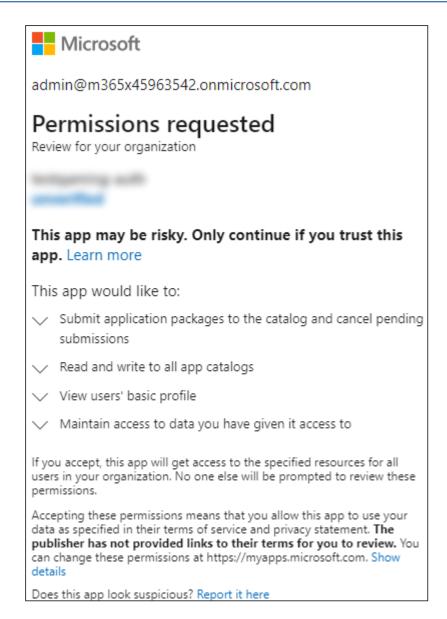
10. Click Accept.



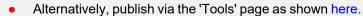
The consent provides the app with permission to join your Tenant's Teams meetings to record calls' info and media.

-			
M365 Tenant ID 40615d8a-0c34-4c17-997c-8834b31ff1d1	Meeting Insights Tenant ID 074869ca-0bd8-4c79-93d6-3430ce352426		
CONSENT NAME	ACTION	COMPLETED	DESCRIPTION
M365 Login	Grant Admin Consent >	0	Provide the application with permissions to authenticate users with their M365 credentials, application reroutes users to M365 for authentication (Azure Active Directory authentication – Microsoft OpenID Connect). M365 Administrator permissions are required to grant the consent.
Read Azure Active Directory Groups and Users	Grant Admin Consent >	0	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application. M365 Administrator permissions are required to grant the consent.
Allow Meeting Insights to Join Meetings	Grant Admin Consent >	0	Provide the application with permissions to join your Tenant's Teams meetings to record the calls' info and media. M365 Administrator permissions are required to grant the consent.
Publish Meeting Insights Teams Client App in your	Teams Store Publish	0	Add the application to users' Teams Clients for access and adding it into ongoing meetings. Click on the "Publish" button to publish the app in your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users.
Allow Meeting Insights to Be Added to Ongoing Me	etings Download Script ತೆ.	0	Provide the Meeting Insights Teams Client Application with permissions to be pulled into ongoing meetings through Online Meeting Global Application access. You must also publish the Meeting Insights Teams App from a step above in your Teams Store. It may take up to 30 minutes for the permissions to take effect. The M365 Administrator must run the dayrefloaded stepset, for a PC that has PowerShell installed and unrestricted execution palicy.

11. Click **Publish** next to 'Publish Meeting Insights Teams Client App in your Teams Store' to publish the app in your Teams store using M365 Administrator permissions, and then select the account.



12. Consent on behalf of your organization and click Accept.



- In the store, you can set policies for installing and automatically pinning the app for specific groups or users.
- The consent adds the app to users' Teams Clients for access and adding it into ongoing meetings.

	leeting Insights Tenant ID 74869ca-0bd8-4c79-93d6-3430ce352426		
CONSENT NAME	ACTION	COMPLETED	DESCRIPTION
M366 Login	Grant Admin Consent 🗲	0	Provide the application with permissions to authenticate users with their M365 credentials, application reroutes users to M365 for authentication (Azure Active Directory authentication – Microsoft OpenID Connect). M365 Administrator permissions are required to grant the consent.
Read Azure Active Directory Groups and Users	Grant Admin Consent >	٥	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application. M365 Administrator permissions are required to grant the consent.
Allow Meeting Insights to Join Meetings	Grant Admin Consent >	٥	Provide the application with permissions to join your Tenant's Teams meetings to record the calle' into and media. M365 Administrator permissions are required to grant the consent.
Publish Meeting Insights Teams Client App in your Tea	ms Store Publish	٥	Add the application to users' Teams Clients for access and adding it into ongoing meetings. Click on the "Publish' button to publish the app in your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users.
Allow Meeting Insights to Be Added to Ongoing Meetin	ngs Download Script 🕹	0	Provide the Meeting Insights Teams Client Application with permissions to be pulled into ongoing meetings through Online Meeting Global Application access. You must also publish the Meeting Insights Teams App from a step above in your Teams Store. It may take up to 30 minutes for the permissions to take effect. The M365 Administrator must run the dayrefladed spriph, from aPC that has PowerShell installed and unrestricted execution policy.

In addition to the icon < under the 'Completed' column indicating you successfully granted consent (consent was successfully completed from this page for 'Publishing Meeting Insights Teams Client App in your Teams Store'), the notification Application published in your Teams store successfully is displayed.

- 13. [Recommended] Install and pin the application for Meeting Insights users as shown here.
- Next to the consent 'Allow Meeting Insights to be Added to Ongoing Meetings', click Download Script; the 'policyScript' file is downloaded to your PC.
 - PowerShell must be installed on the PC and the PC must have an unrestricted execution policy for the Microsoft 365 admin to run the downloaded script.
 - Before running the downloaded script file, unblock it as the OS may block it. To unblock it, right-click the file and select **Properties**. If you're using Windows 11, first click **Show more options** to see the **Properties** option in the context menu. Select the **General** tab and check the **Unblock** option located lowermost under the 'Security' section.
 - Run the script from the PC using PowerShell, with a 'Bypass' execution policy.
 - The execution policy must be as follows: Set-ExecutionPolicy -ExecutionPolicy Bypass -Scope LocalMachine

→ In	nis PC > Downloads >				Date modified	Type	Size
					Date mounted	.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	0.LC
	Name V Today (1) policyScript	। 🖉	Open Run with PowerShell Edit Share with Skype Move to OneDrive Scan with Cortex XDR Share Open with Give access to WinZip Restore previous versions Send to Cut Copy Create shortcut	> > >	Date modified	Type Windows PowerS	Size 8 KB
		:	Delete Rename Properties	_			

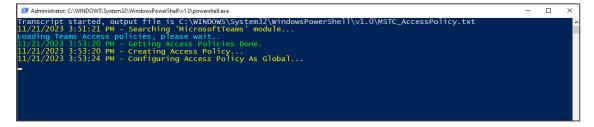
a. Right-click the file and select Run with PowerShell.

Open File	Open File - Security Warning X							
Do you want to open this file?								
		C:\Users\alanr\Downloads\policyScript.ps1 Unknown Publisher						
		Windows PowerShell Script C:\Users\alanr\Downloads\policyScript.ps1						
		Open Cancel						
Alwa Alwa	ys ask before o	opening this file						
1	While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not open this software. <u>What's the risk?</u>							

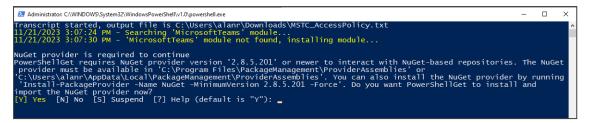
b. Click Open. PowerShell opens.

3 Windows PowerShell	-		×
Execution Policy Change The execution policy helps protect you from scripts that you do not trust. Changing the execution policy migh you to the security risks described in the about_Execution_Policies help topic at https:/go.microsoft.com/fwlink/?LinkID=135170. Do you want to change the execution policy? [Y] Yes [A] Yes to All [N] No [L] No to All [S] Suspend [?] Help (default is "N"): _	t ex	(pose	Â

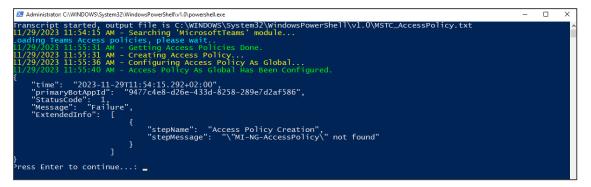
c. [Note that this screen is not always displayed after changing the execution policy the first time]. Type in **A** (Yes to All) and enter.



d. Type in Y (Yes) if the prompt below is displayed (it isn't always displayed), and enter.



e. Press Enter to continue...



You've successfully provided the Meeting Insights Teams client app with permissions to be pulled into ongoing meetings through Online Meeting Global Application access. It may take up to 30 minutes for the permissions to take effect. The M365 admin must run the downloaded script from a PC that has PowerShell installed and unrestricted execution policy.

CONSENT NAME	ACTION	COMPLETED	DESCRIPTION
M365 Login	Grant Admin Consent >	0	Provide the application permissions to authenticate users with your M365 credentials, application reroutes users to M365 for authentication (Azure Active Directory authentication - Microsoft OpenID Connect). M365 Administrator permissions are required to grant the consent.
Read Azure Active Directory Groups and Users	Grant Admin Consent >	0	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application. M365 Administrator permissions are required to grant the consent.
Allow Meeting Insights to Join Meetings	Grant Admin Consent >	0	Provide the application with permissions to join your Tenant's Teams meetings to record the calls' info and media. M365 Administrator permissions are required to grant the consent.
Publish Meeting Insights Teams Client App in your Teams Store	Publish >	٥	Add the application to users' Teams Clients for access and adding it into ongoing meetings. Click on the 'Publish' button to publish the app in your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users
Allow Meeting Insights to Be Added to Ongoing Meetings	Download Script 🛃	۰	Provide the Meeting Insights Teams Client Application with permissions to be pulled into ongoing meetings through Online Meeting Global Application access. You must also publish the Meeting Insights Teams App in your Teams Store (click 'Publish' below as the next action). It may take up to 30 minutes for the permissions to take effect. The M865 Administrator must run the downloaded script from a PC that has PowerShell installed and unrestricted execution policy

You've successfully connected to Microsoft 365. **Next**: Assign licenses to Meeting Insights users as shown here.

The 'Auto can edit' feature takes effect on a meeting only if the user with this permission has joined the meeting. If the user hasn't joined, they will not be able to edit it automatically.

Permissions in Customers' Azure Enterprise Applications

Some customers must have Meeting Insights application permissions in flat form to run it through internal IT / Security approvals before onboarding. The following sections list the permissions that must be provided for customers' Azure enterprise applications. Provide permissions for the following customer Azure enterprise applications:

Azure AD Meeting Insights Web Application below

Azure AD Meeting Insights Application below

Azure AD Meeting Insights Bot Application on the next page

Azure AD Meeting Insights Teams Application on the next page

Azure AD Notifications Bot Application (Optional) on the next page

Allow Meeting Insights to Be Added to Ongoing Meetings – script needs to be executed (optional) on page 19

Azure AD Meeting Insights Web Application

Provide the application with permissions to authenticate users with their Microsoft 365 credentials, application reroutes users to Microsoft 365 for authentication (Azure Active Directory authentication - Microsoft OpenID Connect).

Microsoft 365 Administrator permissions are required to grant the consent.

Permissions description:

- 1. Microsoft Graph email View users' email address (Delegated)
- Microsoft Graph offline_access Maintain access to data you have given it access to (Delegated)
- 3. Microsoft Graph openid Sign users in (Delegated)
- 4. Microsoft Graph profile View users' basic profile (Delegated)
- 5. Microsoft Graph User.Read Sign in and read user profile (Delegated)

For integration with MSFT Planner, when it is enabled by admin (optional):

 Microsoft Graph Tasks.ReadWrite - Create, read, update, and delete user's tasks and task lists (Delegated)

Azure AD Meeting Insights Application

Provide the application with permissions to read AAD groups and users to enable the groups' users for access to the application. Enable the application to add Meeting Insights Teams App to meetings.

Microsoft 365 Administrator permissions are required to grant the consent.

1. Microsoft Graph User.Read.All - Read all users' full profiles (Application)

- 2. Microsoft Graph TeamsTab.ReadWriteForChat.All Allow the Teams app to manage all tabs for all chats (Application)
- 3. Microsoft Graph TeamsTab.Create Create tabs in Microsoft Teams (Application)
- Microsoft Graph TeamsAppInstallation.ReadWriteForChat.All Manage Teams apps for all chats (Application)
- 5. Microsoft Graph GroupMember.Read.All Read all group memberships (Application)

Azure AD Meeting Insights Bot Application

Provide the application with permissions to join your Tenant's Teams meetings to record the calls' info and media and read the participants of the meetings (chat permission).

Microsoft 365 Administrator permissions are required to grant the consent.

- Microsoft Graph Calls.JoinGroupCall.All Join group calls and meetings as an app (Application)
- 2. Microsoft Graph OnlineMeetings.Read.All Read online meeting details (Application)
- Microsoft Graph Chat.ReadBasic.All Read names and members of all chat threads (Application)
- Microsoft Graph Calls.AccessMedia.All Access media streams in a call as an app (Application)

Internal communication application roles permissions:

- 5. BotRole Bot Role (Application)
- 6. DaemonRole Daemon Role (Application)
- 7. AdminRole Admin Role (Application)

Azure AD Meeting Insights Teams Application

Provide the application with permission to add and update Meeting Insights Teams app in Organizational Teams Store.

- Microsoft Graph AppCatalog.Submit Submit application packages to the catalog and cancel pending submissions (Delegated)
- 2. Microsoft Graph AppCatalog.ReadWrite.All Read and write to all app catalogs (Delegated)
- 3. Microsoft Graph openid Sign users in (Delegated)
- 4. Microsoft Graph email View users' email address (Delegated)
- 5. Microsoft Graph profile View users' basic profile (Delegated)

Azure AD Notifications Bot Application (Optional)

Provide the application with permissions to trigger MSFT Teams recording notifications in your Tenant's Teams meetings when recorded by Meeting Insights.

Microsoft 365 Administrator permissions are required to grant the consent.

- 1. Microsoft Graph Calls.JoinGroupCall.All Join group calls and meetings as an app (Application)
- 2. Microsoft Graph OnlineMeetings.Read.All Read online meeting details (Application)
- Microsoft Graph Calls.AccessMedia.All Access media streams in a call as an app (Application)

Internal communication application roles permissions.

- 4. BotRole Bot Role (Application)
- 5. DaemonRole Daemon Role (Application)
- 6. AdminRole Admin Role (Application)

Allow Meeting Insights to Be Added to Ongoing Meetings – script needs to be executed (optional)

Provide the Meeting Insights Teams Client Application with permissions to be pulled into ongoing meetings through Online Meeting Global Application access.

The Microsoft 365 Administrator must run the downloaded script from a PC that has PowerShell installed and an unrestricted execution policy.

Online Meeting Global Application access

Defining a Group of Users in AAD

Before assigning a license, the enterprise admin must define a group of users in Azure Active Directory (AAD) for those users who'll be using Meeting Insights.



If you later modify an AAD group, access the License Management page (see Assigning a Meeting Insights License to Users on page 21), and then click **Sync and Apply** for your changes to be reflected in Meeting Insights. For more information on the

To define a group of users in AAD:

- 1. Sign in from here to Microsoft Azure portal with your admin credentials.
- 2. Locate the Groups | All Groups page and click New group.

≡ Microsoft Azure	${\cal P}$ Search resources, services, and docs (G+/)
Home > Groups All groups >	
New Group	
₽ Got feedback?	
Group type * 🕡	
Security	\sim
Group name * 🕕	
Enter the name of the group	
Group description ①	
Enter a description for the group	
Microsoft Entra roles can be assigned to the group ①	
Yes No	
Membership type * 🕕	
Assigned	~
Owners	
No owners selected	
Members	
No members selected	

- 3. [Mandatory] From the 'Group type' drop-down, select Security.
- 4. [Strongly recommended] Define the group name as Meeting Insights Users.
- 5. Assign owners to the group. Note that group owners have unique permissions to manage the group. They can add and remove members, change group settings, rename the group, update its description, and more.
- 6. Assign members (i.e., users or groups) to the group.

Microsoft Azure	٩	Search resources, services, and docs	(G+/)			N 67		⑦ A ² admin@M365x5116 controso pasessenteess	5055
Home > Groups All groups > Meeting Meeting Insights Us Group			Add me	mbers					×
 Overview 	+ Add members × Remove U Refresh	Bulk operations ∨ ■■ ¢	 Try change Search ∩ 	ging or adding filters if you don't see wh	at you're looking for		Select Reset	ed (5)	
X Diagnose and solve problems Manage	Search by name	⁺ γ Add filters	All Users	Groups Devices Enterprise	applications			Adele Vance AdeleV@M365x51160550.OnMicrosoft.co	om 🗊
Members	Name No members have been found	↑., Туре		Name	Type	Details	-	Alex Wilber AlexW@M365x51160550.OnMicrosoft.cor Allan Deyoung	
Owners Roles and administrators				Azure Advanced Threat Protection	Enterprise ap	7b7531ad-5926-4f2d-8a1d-38495ad33e17		Allan Deyoung Allan D@M365x51160550.OnMicrosoft.cor Brian Johnson (TAILSPIN) Brian J@M365x51160550.OnMicrosoft.con	
 Administrative units Group memberships 				Azure Multi-Factor Auth Connect		1f5530b3-261a-47a9-b357-ded261e17918		Cameron White CameronW@M365x51160550.OnMicroso	ŵ
Applications Licenses Azure role assignments				Azure Portal AzureSupportCenter	Enterprise ap Enterprise ap	c44b4083-3bb0-49c1-b47d-974e53cbdf3c 37182072-3c9c-4f6a-a4b3-b3f91cacffce			
Activity				Bianca Pisani	User	BiancaP@M365x51160550.OnMicrosoft.com			
Privileged Identity Management Access reviews				Bing	Enterprise ap	9ea1ad79-fdb6-4f9a-8bc3-2b70f96e34c7			
 Audit logs Bulk operation results 				Box Brian Johnson (TAILSPIN)	Enterprise ap	f2318450-8ab3-47bf-b8e2-62aa82ae9652 BrianJ@M265x51160550.OnMicrosoft.com			
Troubleshooting + Support				Cameron White	User	CameronW@M365x51160550.OnMicrosoft.co			
			-	Christie Cline	User	ChristieC@M365x51160550.OnMicrosoft.com	-		
			Select						

7. View the group details in Microsoft Azure portal.

			𝒫 Search resources, set	vices, and docs (G+/)	
Home > Contoso Groups > Groups /	All groups >				
Meeting Insights Us Group	sers 🖈 …				
×	📋 Delete 🛛 🔗	Got feedback?			
 Overview 					
X Diagnose and solve problems	M	Meeting Ins	ights Users		
Manage	IVII	leeting Insights Users			
Properties					
A Members	Membership type		Assigned		D
A Owners	Source		Cloud		۵
👃 Roles and administrators	Туре		Security		D
Administrative units	Type		Security		Ļ
Group memberships	Object Id		c7292023-1a12-4fed-adec-8	def881d70e0	ũ
Applications	Created at		11/20/2023, 6:43:14 PM		Ð
🔓 Licenses					
📍 Azure role assignments	Direct members				
Activity	5 Total	S User(s)	A O Group(s)	0 Device(s)	0 Other(s)
A Privileged Identity Management				-	•
ã Access reviews	Group membersh	hips	Owners		Total members
Audit logs	№ 0		2 0) 5

Assigning a Meeting Insights License to Users

The License Management page in Meeting Insights enables the enterprise admin to assign a Meeting Insights license to a group of users.

> To assign a license to the group:

1. In Meeting Insights, click the License Management menu.

Admin Settings	License Management ()	
System Settings ^	Total User Licenses: 50 Assigned User Licenses: () 0 Available User Licenses: 50	
Connect to your M365		
Tools	UnerPulla	
Storage	Search for a goup in ADD Default User Profile (System) Add Group	
Tags		
Devices		
	ASSIGNED GROUPS USER PROFILE USERS IN GROUP	
User Settings 🗸 🗸		
License Management		
Al Settings 🗸 🗸	No rows	
Ai Setungs 🗸		
Monitoring 🗸		
Integrations		
integrations		Cancel Sync And Apply

In the 'Search for a group in AAD' field, enter the first letters of the name of the group you defined in the previous procedure; the field is auto-populated, i.e., Meeting Insights Users (5). Wait a few seconds for AAD to populate the field.

License Management ①	
Total User Licenses: 50 Assigned User Licenses: ① 0 Available User Licenses: 50	
Meeting Insights Users (5) * Default User Profile (System) Add Group	
ASSIGNED OROUPS USER PROFILE USERS IN GROUP	

- Leave the 'User Profile' field at its default, i.e., Default User Profile (System), permitting users to access Meeting Insights and to record meetings. [See more information about User Profiles here].
- 4. Click Add Group and then Sync and Apply; a Meeting Insights license is assigned to the group; the users in the group can go ahead and use the app.

icense Management ①		
Total User Licenses: 50 Assig	gned User Licenses: (i) 5 Available User Licenses:	: 45
Q Search for a goup in ADD	Default User Profile (System)	▼ Add Group
ASSIGNED GROUPS	USER PROFILE	USERS IN GROUP
Meeting Insights Users	Default User Profile (System)	▼ 5
]

- 5. View the license assignment displayed uppermost in the License Management page. In the example shown in the preceding figure:
 - Total User Licenses: 50
 - Assigned User Licenses: 5
 - Available User Licenses: 45
- 6. [Optionally] View this information as well as usage on the Dashboard (Licenses Consumption) page.

Coudic	codes meeting ins	ights Try new MI		🕴 💡 Good Afternoon 🚻 🕥
 Dashboar All meeting My Meeting 	System Settings 🗸	5 Total Licensed Users	Licenses Consumption Total User Licenses: 50 Available User Licenses: 45	
Shared W Events Favorites	Al Settings v	O Recorded Meetings Last 7 days	Recorded Meetings	
过 Snippets ◆ Records	Integrations Help Center	O Total Recorded Meetings	Jan Feb Mar Aer Mey Jan Jal Aeg Sep Oct New Dec	
Settings		Average Meeting Duration		
s Admin m	ode			



In the example shown in the preceding figure, a license to a group of five Meeting Insights users was assigned, 0 meetings were recorded in the last 7 days and 0 meetings were held in total.

Switching from Admin to User Mode, and Back

Admin can optionally switch from Admin Mode to User Mode, and then back to Admin Mode.



- The 'Admin Settings' menu bar also indicates you signed in as admin.
- Default admin must be a user who is logged in to the system (see here for related information).

> To switch to user view:

Click Admin mode; the link is deactivated and the user view is displayed. The figure below shows no meetings displayed following deployment.

C audiocodes	ameetinginsights	?	<u>ه</u> ~
All Meetings	Q Search meeting name.counectogs Date: All V Owner: All V Participants: All V Ø\$ (0) R V OMeetings		
My Meetings			
Shared with Me	®		
🔁 Events	* •		
* Favorites			
缸 Snippets			
Action Items	No Results Change search/filter parameters		
Records			
Settings			
🂁 Admin Mode			U

> To switch back to admin mode:

Click Admin Mode; admin view is displayed and the link is reactivated.

OC audiocode	s meeting insig	ghts		? Good Attempon 🔟 🗸
Dashboard All meetings Events	Admin Settings System Settings User Settings	O Total Licensed Users	Licenses Consumption Total User Licenses: 95 Ansigned User Licenses: 0 Available User Licenses: 95 0 95	
」 Snippets	License Management Al Settings v	0 Recorded Meetings Last 7 days	Al Hours Consumption Total Hours: 3000	
¢	Monitoring v	O Total Recorded Meetings	Recorded Meetings	
		O0:00:00 Average Meeting Duration (Overali)	Teb Mar Agr Mag Agr Ad Ang Ege Da Non Da An 2022 2023 2023 2023 2023 2023 2023 2023	
 Settings Admin mode 				

5 Testing your Meeting Insights App

After setting up Meeting Insights, best practice is to test the app with one of the users that is in the Meeting Insights group.

> To test the app:

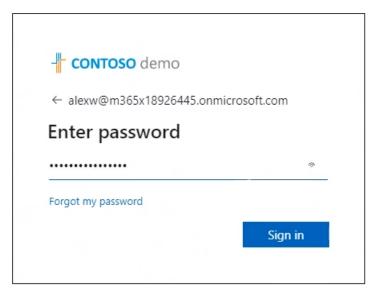
1. Click the Teams web app link.

Microsoft	
Sign in	
Email, phone, or Skype	
Can't access your account?	
	Next
	Next

2. Enter the user's Teams client username.

Microsoft Sign in	
alexw@M365x18926445.or	nmicrosoft.com
Can't access your account?	
	Next
	NEXL

3. Click Next.



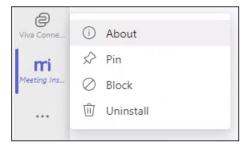
4. Enter the user's Teams client password and click Sign in.

Microsoft Pick an account				
à	Alex Wilber AlexW@M365x18926445.OnMicrosoft.com Signed in	:		
à	Alan Roberts alanr@audiocodes.com Connected to Windows			
à	MOD Administrator admin@M365x64321460.onmicrosoft Signed in	:		
à	Alan Roberts alanr@ai-logix.net Signed in	÷		
+	Use another account			

5. Click the account of the user.

÷	C A https://teams.microsoft.com/_#/conver	rsations/General?threadid=19:fssFmGyefROE_W4WeYUtllbb8V28nRsFURNw2EVMs15U1@thread.tacv2&ctx=channel	A* 🖒	3 3 0 4 6 8
	🕫 Try the new Teams 🔘	Q, Search		··· 🍖
Activity		General Posts Files Notes +		
Chat	_	💸 Reply		In this channel
Tearra	General 0 Monthly Reports	Megan Bowen 11/10 832 AM	2	People (16) 28 🚱 🐏 🏠 😪 🏰 🚺 See all
Calendar Galis	meeting insigh I Q	Design review Q Occurs every Monaty 900 PM		Description Design Team
6100 1710	Meeting Insights qaming AudioCodes Meeting Insights Privacy Terms of use Permissions	الله المراجع ا		Options Q. Find in channel \$3 Manage channel
Viva Conne	Soapbox Run better meetings, track goals and Add Privacy Terms of use Permissions	Megan Bowen 11/10.832 AM	2	Channel notifications Updates
00 Apps		Design editorial sync. () Occurs every Monday 1230 AM		MOD Administrator created channel American Design awards.
Apps		Reply		MOD Administrator created channel PNW Coffee Social Campaign. MOD Administrator added Pradeep Gupta and
				Irvin Sayers to the team. See all
	Get more apps	Megan Bowen 11/10.833 AM	2	
	General	Pacific Coffee project kick-off Tuesday, November 21, 2023 930 PM Join		
	• 💮 Retail ···· General 2			
	NC460 Sales	💐 Reply		
(?) Help	Remote living ···· General	[∕] Start a post		
<u> </u>	General 65	C Start Pox		

- 6. In the Teams web app, click the ... option in the left menu bar. In the 'Search for apps' field, enter Meeting Insights.
- Select the Meeting Insights app and click the Add button next to it; Meeting Insights is added to the Teams client.
- 8. Right-click the newly added Meeting Insights icon in the left menu bar.



9. From the popup, select Pin.

Activity		nsights qarning My moreting: About	С ⊙ ⊕
Chat		Q. Search meeting name,ownextags	?
Tearrs	All Meetings		
Et Calendar	My Meetings	©	
Calls	Shared with Me		
Files	Events		
Uva Conne	★ Favorites		
mi Meeting In.			
	°∰ Snippets	No Results	
Apps	Action Items	Change search/filter parameters	
	C Action tems	TA	
(?) Help			
<u> </u>	Settings	Copyright © 2023 AudioCodes Ltd. All rights reserved.	

The user has not used Meeting Insights before so no meeting recordings are displayed.

10. Click the Calendar icon in Teams and in the Calendar, click New meeting.

1	New meeting Details Scheduling Assistant	
Shov	v as: Busy 🗸 Category: None 🗸 Time zone: (UTC+02:00) Jerusalem 🗸 Response options 🗸 Require registration	on: None 🗸
0	Add title	
°°	Add required attendees	+ Optional) All day
¢	Does not repeat V Add channel	
0		Online meeting 🗾
12	B $I \ \cup \ \ominus \ \mid \ \forall \ A$ A Paragraph $\sim \ \mid \ \ominus \ \ \ominus \ \ \ \ \ \ \ \ \ \ \ \ \$	
۳	Add an agenda	

- Schedule a meeting for at least five minutes before a start time to allow MIA (Meeting Insights Assistant) to join. Add MIA to the invitees' list using its email address (xx.mia@meetinginsights.com). Meeting Insights will join two minutes before the meeting.
- **12.** Click **Start Meeting**. You've successfully tested the new user's ability to start a meeting and record it. Make sure the Meeting Insights app icon is displayed at the top of the meeting window and that MIA is one of the participants.



- The instructions above describe testing a scheduled meeting, with MIA joining in.
 If the meeting was unscheduled, go to + Apps and select Meeting Insights;
 make sure MIA joins and that there's a Meeting Insights tab at the top of the screen.
- At the end of the meeting, go to 'List View' to play the recording. Note that it takes time for Meeting Insights to process a meeting but the video recording can be viewed and the audio can be played almost immediately.

6 Enabling Users to Record Zoom Meetings

The instructions below show how to enable users (associated with a specific User Profile) to record their Zoom meetings.

> To enable users to record Zoom meetings:

1. Select a User Profile with which the users for whom you want to enable Zoom are associated.

	s meeting insights		🌷 🛧 🤶 Good Marring 💽 🗸 🗸
 Dashboard All meetings 	Admin Settings System Settings User Publics include permissions and recording options that are assigned to the tu- Duer Public Name Duer Public Name Du		
Events Glossary Action Rems	Lore detrog Admin Profile Adm	Recording Enable recording options Enable Enable Meeting Types Constraints Enable Constraints Constrai	ALSTT Settings Select M functionality that users associated with the profile will have
¢	Al Setting: Accomputation Mentoring Integration Integration	Europe GIRS Europe GIRS Meeting Recordings Retartion Parloid 11mar-Default Above Livers to Extend Recordings Retartion	
	Help Center		Cancel Apply
 Settings Admin mode 			

 [Optionally] In the UC Recording Integration page (Admin Settings > Integrations > UC Recording) in the 'Zoom Bot Name' field under 'Bot Settings', configure a Zoom Bot name.

	s meeting insights	🕴 🛧 ? Good Morning 😡	~
B Dashboard	Admin Settings UC Recording Integration		
All meetings	System Suttings Bot Settings Zoom Bot Hame ①		
Events	User Settings A cUterDipleyName>-OuestBot		
	Admin Profiles	Cancel Apply	y
Glossary	Uniferrated Uses Revolting Netifications		
⊘ Action items	Email Notifications		
	Licerse Management		
	A Settings v		
<	Aconymization		
	Montaning v		
	htegations A		
	UC Recording		
Settings	Help Center		
https://testqaming.ai-k	giune/mi/asting/licensad-users		

3. Click the i icon adjacent to 'Zoom Bot Name' and use the tooltip as reference:



The 'Zoom Bot Name' field includes <UserDisplayName> in brackets.

- This is the name the Zoom Bot will use to join meetings.
- 4. Click Apply.

Enabling Zoom for All Employees

This section shows how to enable Zoom for all employees in the enterprise with access to Meeting Insights. Admin can configure enabling Zoom for all users in the enterprise, or for a group of users, in the User Profiles page. Additionally, admin can customize the Zoom Bot name.

> To enable Zoom for all enterprise employees with access to Meeting Insights:

1. Select the User Profile with which all users in the enterprise, for whom you want to enable Zoom, are associated. In the figure below, the User Profile Name is 'All Employees'.

m	Meeting	Insights			① Present
88 0	Dashboard	Admin Settings	Edit User Profile User Profiles include permissions and recording options that are ass	igned to the users associated with the profile	
		System Settings	C User Profile Name		
	All meetings	Connect to your M365	All Employees All users with access to	MI	
		Tools			
	vents	Storage	Permissions	Recording	AI, STT Settings
		Tags	Select permissions that users associated with the profile will have	Enable recording options	Select AI functionality that users associated with the profile will have
		Devices			
			Access User Meetings (3)	Enable	Automatic Triggering
	Blossary	User Settings ^	External Restricted Share	Meeting Types	
		User Profiles	External Share with a Link	User Meetings	
\otimes	Action items	Admin Profiles	Premium Transcription	MSFT Teams Hosted by Organization	
		Licensed Users	Can Edit Other Users Meetings	Zoom Meetings	
	<	Unlicensed Users		 Import Meeting Recordings 	
	,	Recording Notifications		Select Storage	
		Email Notifications		Europe GRS 🗸	
		License Management		Meeting Recordings Retention Period	
a s	iettings	· '		Unlimited ~	
		Al Settings 🗸 🗸		Allow Users to Extend Recordings Retention	
20	Admin mode				
-		Anonymization			
					Cancel Apply

 [Optionally] In the UC Recording Integration page (Admin Settings > Integrations > UC Recording) in the 'Zoom Bot Name' field under 'Bot Settings', configure a Zoom Bot name.

mi Meeting	Insights		
	Admin Settings	UC Recording Integration ①	
🔡 Dashboard	System Settings	Bot Settings	Define the name the Bot will use to join meetings. You can use templates like <userdisplayname>, <userfirstname>, <userlastname>, or <companyname>.</companyname></userlastname></userfirstname></userdisplayname>
All meetings	Connect to your M365	Zoom Bot Name (1)	Example: ' <userfirstname>'s Meeting Assistant' for Bot to appear as 'John's</userfirstname>
	Tools	<userfirstname>'s Meeting Assistant and Recorder</userfirstname>	Meeting Assistant'.
Events	Storage		
	Tags		
	Devices		
Glossary	User Settings 🗸 🗸		
⊘ Action items	License Management		
<	Al Settings 🗸 🗸		
	Anonymization		
💠 Settings	Monitoring ~		

7 Determining Who has Permission to Perform What Action

The table below shows who has permission to perform what actions for highlights, bookmarks, snippets, etc., with Meeting Insights.

	Actions	Admin	Owner	Delegate	Auto Can Edit	Participant
Highlight	Add	Х	V	V	V	V
	Edit	Х	OWN	OWN	OWN	OWN
	Delete	Х	OWN	OWN	OWN	OWN
	View	V	OWN	OWN	OWN	OWN
Bookmark	Add	Х	V	V	V	V
	Edit	Х	OWN	OWN	OWN	OWN
	Delete	х	OWN	OWN	OWN	OWN
	View	V	OWN	OWN	OWN	OWN
Snippet	Add	х	V	V	V	V
	Edit	х	OWN	OWN	OWN	OWN
	Delete	х	OWN	OWN	OWN	OWN
	View	V	OWN	OWN	OWN	OWN
Snippet	Restricted	х	V	V	V	V
Sharing	Shareable	х	V	V	V	Х
	Organization	х	V	V	V	Х
Notes	Add	х	V	V	v	V
Private	Edit	х	OWN	OWN	OWN	OWN
	Delete	Х	OWN	OWN	OWN	OWN
	View	Х	OWN	OWN	OWN	OWN

	Actions	Admin	Owner	Delegate	Auto Can Edit	Participant
Notes Public	Add	Х	V	V	V	V
	Edit	Х	V	v	V	OWN
	Delete	V	V	v	V	OWN
	View	V	V	V	V	V
Recap	Add	V	V	V	V	х
	Edit	V	V	V	V	х
	Delete	V	V	V	V	Х
	View	V	V	V	V	v
	AI trigger	V	V	V	V	If everyone can trigger, enabled by admin
Transcription	Edit	V	V	V	V	х
	Delete	V	V	V	V	Х
	View	V	V	V	V	V
	Trigger	V	V	V	V	If everyone can trigger, enabled by admin
Delete		V	V	V	V	х
Download		V	V	V	V	х
Meeting info	Edit	V	V	V	V	Х
	View	v	v	V	V	V
External Share	Only when both the owner and the other	V	V	V	V	Х

	Actions	Admin	Owner	Delegate	Auto Can Edit	Participant
	party have permission to share (this is due to the sensitivity of the external share).					
Internal Share		V	V	V	v	Х

8 **Recording Teams Live Events or Webinars**

To record Teams Live Events or Webinars:

Make sure to add the Meeting Insights Assistant (MIA) email address to the invitation or forward the invitation to MIA.



MIA can't be added as a presenter | producer.

9 Configuring System Settings

Regular users cannot perform management tasks. Only enterprise admins can. After logging in as admin, view 'Admin Settings' displayed.

Admin Settings	
System Settings	*
User Settings	~
License Management	_
AI Settings	*
Monitoring	~
Integrations	
Help Center	

Tools

Two supplementary apps are provided by AudioCodes as installation additions:

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

The Tools page enables admins to add the Meeting Insights app to the Teams client and/or to Outlook.

To add the app to Teams client | Outlook:

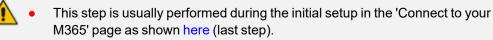
1. Under the 'System Settings' menu, click the **Tools** option.

Admin Settings	đ	
System Settings	Meeting Insights Teams Client Application	Meeting Insights Outlook Add-On
Tools	Recommended Option Manual Option	The application can be added to Teams users' Outlook Desktop as an add-on to create Teams meetings with Mia and a customizable disclaimer. To
Storage Tags	Add the application to users Teams Clients. Click on the "Publish" button using M365 Admin	install the application, simply run it on the user's PC and restart Outlook after installation is complete.
Devices	permissions. In the store you can set policies for installing the app automatically for specific groups or users.	This meeting will be recorded Save
	Publish In Your Teams Store	Download App
User Settings ^		

- 2. (Optionally) Add the Meeting Insights app to users':
 - Teams client go here
 - Outlook go here

Adding Meeting Insights to Teams Client

The Tools page enables the admin to add the Meeting Insights app to Teams users' Teams clients.



• Optionally, admin can *manually* add the app to the Teams store *without needing* to grant permissions, as described below.

> To add the Meeting Insights app:

- 1. Under the 'System Settings' menu, click the **Tools** option.
- 2. Under 'Meeting Insights Teams Client Application' either:
 - Click Recommended Option and then click Publish in your Teams Store

-OR-

- Manually add the Meeting Insights app to the Teams client (if for example it has been customized for your organization and you harbor concerns about Meeting Insights requesting permissions for Teams app publishing):
 - i. Download the app package.
 - ii. Add it manually to the Teams store: In Teams admin center, open the 'Manage apps' page and upload it as shown in the figure below:

iii 😽 Contoso Elect	tronics	Microsoft Teams admin center			,P Search				Ŧ 🚥	o ? 🛩
=										
Dashboard		Manage apps								
፟ጟ ⁴ Teams	~	Control which apps are available to inst approve, and publish custom apps mad use an app setup policy to pre-install ap	e specifically for your organiz	ation to the app store. After mana					+ Upload new	app
와 ^R Users 전 Teams devices	č	use an app setup pointy to pre-instant ap	gis for your users. Cean more	e accourt managing apps.					Org-wide ap	.p settings
Teams apps	ž	Pending approval		Featured app Priority Matrix	App details					
Manage apps		0 0	<	Empower your project I task prioritization to be this ano. It is sublisher	ost productivity with					
Permission policies		Submitted custom apps Updated	custom apps	with M365 Copilot						
Setup policies Customize store		All apps All subscriptions								
Meetings	~	Browse by Everything $\!$								
Messaging	~	成 Edit availability 内 Add to team 🖌	Customize 2520 item	5				Q. Search b	y name	∞ ⊚
& Voice	~	Name	Supported on ()	Available to 🕕	App status ()	Certification ()	Publisher	Publishing status	Requests by users ()	Licen
O Locations	~	CSP Customer App Simplify Microsoft icens	6 6 6	Everyone	Unblocked	Publisher attested	Communication Square LLC		0	-
増 Frontline deploy	~	1-on-1 Hub Everything you need to r	6	Everyone	Unblocked	Publisher attested	Appfluence inc		0	
 Enhanced encrypt Policy packages 		1-to-1 Worldvds Com Comunicate segmented	6	Everyone	Unblocked		Amplitudenet LDA		0	Pure
III Planning	~	1&1 Business Phone Smart telephony feature	¢.	Everyone	Unblocked		NFON AG		0	📮
∠ Analytics & reports	~	123 Timer and Clock	0 . 10	Everyone	Unblocked	Publisher attested	BlueSky Apps		0	



	🔀 Contoso Electronic	; Microsoft Teams admin center	✓ Search	
≡		Published Version 2.7.111	Everyone	
ŵ	Dashboard	By using this app, you and your users agree to the Privacy policy	and Terms of use.	
3 4°	Teams \checkmark	About Users and groups Permissions PI	lans and pricing	
RR	Users \checkmark	App details	ans and pricing	
后	Teams devices \checkmark	App details		
8	Teams apps	Short name Meeting Insights	Categories	Supported on 🕜
	Manage apps			
	Permission policies	Certification ①	Short description AudioCodes Meeting Insights	Scope Group chat, Team, Personal
	Setup policies			
	Customize store	Admin can install in meetings Yes	App ID 06e9fc36-76e1-4e6e-83f6-8e96dad86801	Publisher Audiocodes Inc
	Meetings \checkmark	External app ID 🕕	Privacy policy URL	Website URL
Ţ	Messaging \checkmark	cfb26268-2eaa-5772-bec4-d80d48a33989	https://www.audiocodes.com/media/15178/meeting -insights-privacy-policy.pdf	https://www.audiocodes.com 🛛
S	Voice \checkmark	Terms of use URL	Documentation URL	Full description
٢	Locations \checkmark	https://www.audiocodes.com/media/15178/meeting -insights-privacy-policy.pdf [2]		Get more out of meetings with Mia – the AudioCodes in-meeting voice assistant. Mia seamlessly joins your Microsoft Teams meetings and
檔	Frontline deploy \checkmark			listens to key moments and actionable insights, allowing participants to take notes, action items and more by simply talking to Mia over natural
۲	Enhanced encrypt			language. Mia then automatically creates a real- time meeting recap – available for you to review
r.	Policy packages			and share across the team, once the meeting is over. Want even more? Use the application to easily
1	Planning \checkmark			search through your meeting content, from audio to slides – based on transcript, visual cues or a specific speaker. Here to make meetings productive
Ł	Analytics & reports $\qquad \lor$			specific speaker. Here to make meetings productive again, Mia leverages state-of-the-art Voice.Al technology, helping you make the most out of each

iv. Update it in Meeting Insights under Tools > Manual Option:

L i								
Meeting Insights Teams C	Meeting Insights Teams Client Application							
Recommended Option	Manual Option							
the "Download App" and u organization Teams store. application catalog ID afte In the store you can set po	Add the application to users Teams Clients. Click on the "Download App" and upload it to the organization Teams store. You must provide the application catalog ID after completing the process. In the store you can set policies for installing the app automatically for specific groups or users.							
Downlo	Download App							
Catalog ID	Submit							

v. Enter it in the 'Catalog ID' field and then click Submit.



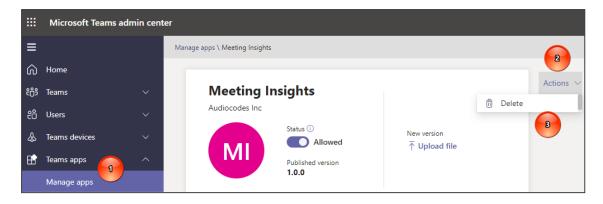
Alternatively, add the app during the initial setup in the 'Connect to your M365' page as shown here (last step).

Adding App to Organization's Teams Store via TAC

This section describes how to add the Meeting Insights app to your organization's Microsoft Teams Store via Microsoft's Teams admin center (TAC).

> To add Meeting Insights app to Teams store via Teams admin center:

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



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

	Microsoft Teams ac	lmin center	r				
		≡					
බ	Dashboard		Manage apps				
දිරියි	Teams	~	When you are managing app			controlling what apps are availab	
ا	Devices	~	organization's app store. You specific users. Learn more	can then use	app permission and	d app setup policies to configur	e what apps will be available for
۲	Locations	~					
දර	Users		Pending approval				
Ē	Meetings	~					
E	Messaging policies		O Submitted custom apps	0 Updated cu	stom apps		
B	Teams apps						
	Manage apps						
	Permission policies		+ Upload	Ø Block	88 Add to team	883 items	
	Setup policies		Name T		Certification ①	Publisher	Publishing status ①

- b. In the displayed dialog box, click Select a file, and then browse to and select the Meeting Insights Teams app installation file (*TeamsApp.zip*) that you received from AudioCodes.
- 4. Provide AudioCodes with the app ID:
 - a. From the left navigation menu, navigate to **Teams apps** > **Manage apps**.
 - **b.** Locate the newly installed Meeting Insights Teams app in the list of apps, and then select it.
 - c. Under the **About** tab, copy the 'App ID' field value:

	Microsoft Teams admin	n center		
		≡ м;	anage apps \ Meeting Insights	
ଭ	Dashboard			
ະຕິອ	Teams		Meeting Insights	
٨	Devices		Audiocodes Inc	Version 2.0.39.0
۲	Locations			By using this app, your users agree to the Privacy policy
දී	Users		Publishing status () Published	and Terms of use.
Ē	Meetings		Status ①	
E	Messaging policies		Allowed	
B	Teams apps			
	Manage apps		About Permissions Settings	
	Permission policies		Details	
	Setup policies		Short name	Categories
	Customize store		Meeting Insights	
ଙ୍କ	Voice		Short description	Scope
ê	Policy packages		AudioCodes Meeting Insights	Team, Group chat, Personal
<i>.</i>	Analytics & reports	~	App ID 49cad6b6-be04-4e4b-a228-91e051e879f3	Publisher Audiocodes Inc
ø	Org-wide settings	~ L	49Ca0obo-be04-464b-a226-916051667913	Audiocodes Inc

- d. Enter the app ID in the 'Catalog ID' field in Meeting Insights' Tools page as shown here.
- 5. Pin the Meeting Insights app to the Teams client navigation bar:

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

$\langle \rangle$				Q Search	
Activity	m	Meeting Insights	View my meetings	Action Item	s About
⊡ Chat					
ငိုံဘိ Teams					
tt Calendar		Q Search			Date: All V Owner: All V Participants: All V
الله Calls		Date	Duration	Owner	Meeting Name
Files mi		11:58 AM	Ø	og	MIA - Reinstall & First training se
Meeting in		🟠 🛛 Feb 11	Ø	čw	

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

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

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

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

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

	Microsoft Teams admi	in center		✓ Search	
≡					
ጨ	Dashboard		App setup policies		
ትድ	Teams	\sim	App setup policies control how apps are made available to a user with the Teams app. U and customize it or create custom policies and assign them to a set of users. Learn more		policy
۶ ^R	Users	~			
品	Teams devices	~	App setup policies summary		
₿	Teams apps	^	2 1		
	Manage apps •		Default policies Custom policy		
	Permission policies				
	Setup policies		Manage policies Group policy assignment		
	Customize store		·		
	Meetings	~	+ Add 🖉 Edit 🕼 Duplicate 🗓 Delete 💭 Reset Global policy 😤 Manage	e users 💛	
Ţ	Messaging	~	✓ Name ↓	Description	Custom policy
S	Voice	~	Global (Org-wide default)		No
6	Locations	~	SmallMediumBusiness_BusinessVoice	This is a SmallMediumB	Yes
6	Enhanced encrypt		FirstLineWorker	This is a default app set	No

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

Microsoft Teams admin center					۶۹	sarch		
=		App setup polic	ties \ Global					
Dashboard		Globa	al (Org-wide defaul	t)				
ንድ Teams	~	Default p	olicy for users who aren't assigned	to a policy.				
R ^R Users	~							
码 Teams devices	~	Upload	i custom apps 🕧		On			
🗄 Teams apps	^	User pi	inning 💿		On			
Manage apps								
Permission policies			ed apps which apps and messaging extension	ns you want insta	alled in your users' personal Teams envi	ronment and in meetings the	y create. Users can install other available apps from t	the Teams app stor
Setup policies Customize store		+ Add a	apps × Remove 1 item					
El Meetings	~		Name	App ID	P	ublisher		
Messaging	,		🔊 Mia app	ab7bd922	-915f-4a12-bc19-eb8bf0d8e1	utilizates Inc		
Voice	Ŭ							
Voice Output	Č	Pinned						
	Ň	Pinned ap	ops are installed for people assigne	a to this policy. 3	elect apps to pin to the app bar, messa	ging extensions, and meeting	extensions; then rearrange them in the order you w	ant them to appe
Enhanced encrypti		+ Add a	apps ↑ Move up ↓ Move dowr	n × Remove	7 items			
Policy packages			✓ App bar ③		 Messaging extensions (i) 	 Meeting extensions 		
IE Planning	×	1	Activity	=	0	0		
 Analytics & reports 	~	2	D Chat	=	No pinned apps	No pinned a	ipps	
D Notifications & ale	~	3	# Teams	=				
Other settings	~	4	Calendar	=				
··· Show pinned		5	Calling	=				
		6	Files	=				
				=				
		7	Teams Bot Test Ron 5					

- **3.** To apply to a group, create a separate policy, add the Meeting Insights Teams app to the installed and pinned apps, and then assign group(s) as shown below.
- 4. To assign to a group, click **Group policy assignment** under the setup policy option.

	Microsoft Teams admin	center				♀ Search		
=								
ŵ	Dashboard		App setup policies					
*	Teams	~	App setup policies control how apps are and customize it or create custom polic			rg-wide default) policy		
RR	Users	~		-				
40	Teams devices	~	App setup policies summary					
BÊ	Teams apps	^	2 1					
	Manage apps •		Default policies Custom p	policy				
	Permission policies							
	Setup policies		Manage policies Group policy	r assignment				
	Customize store							
	Meetings	~	+ Add Remove 0 item					
Ţ	Messaging	~	✓ Group name ③	Rank 1	Group email	Assigned policy		
S	Voice	~						
٢	Locations	~						
۵	Enhanced encrypti							
ъ	Policy packages						() No (data is available.

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

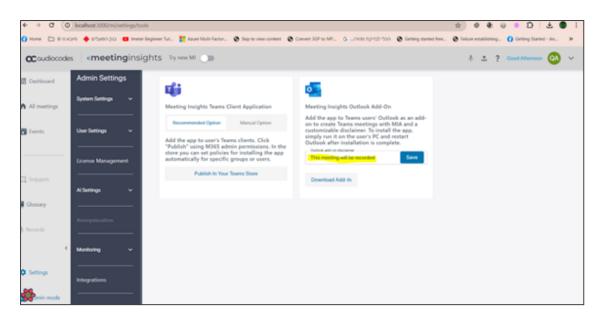
III Microsoft Teams admin	center	A Seach	
=			Assign policy to group
Deshiboard		App setup policies	If users of the selected group have any direct assignments than it will override group assignments. Learn more about effective policy
12th Tearns		Ago setup particles control how works available to a user with the Teams pay take the Grade (Dip-vide indust), porty- and customer to the control control particles and particles and a setup takes to a setup control to the control customer to the customer to the customer to the customer to the control customer to the control customer to the	and precedence rules.
R ^R Users			Select a group
40 Teams devices		App setup policies summary	MeetingInChannel ×
🖽 Tearrs apps		2 2	
Manage apps *		Defact patien Contra police	Select a policy MeetingInsights
Permission policies			Select rank 💿
Setup policies		Manage gold Kee Group policy assignment	1
Customize store			Select rank 1. If you want the selected policy should be effective for all users in the selected group.
Meetings		+ Ad 8 Beros 9ten	
(III) Messaging		Strop news () Kerk () Oriog anal August poly	
% Voice			
Decations			
③ Enhanced encrypti		No gata to minore	
Policy packages		i ne das sietade.	
III Planning			
E Analytics & reports			
Notifications & ale			
Other settings			
··· Show pinned			
			Apply Cancel

Setting up Outlook Add-In

The Tools page enables admin to add the Meeting Insights app to Teams users' Outlook as an add-on to create Teams meetings with MIA. The instructions below show how to set up the Microsoft Outlook add-in.

To set up Outlook add-in:

 [Recommended] Set a disclaimer in the Meeting Insights 'Tools' page (Admin Settings > System Settings > Tools), as shown here:



2. Download the add-in by clicking the Download Add-In button

< → a ⊙	localhost:3000/mi/settings/tools			2 C C C C C C C C C C C C C C C C C C C
🕜 Home 🖿 16-0 KGP	n 🔶 arturan pia 🛛 Imeter Begin	vner Tut 🎦 Azure Multi-Factor 🔕 Skip to view content 🚳	Convert 3GP to MP. 5	e 🗞 Falure establishing 🚺 Getting Started - An 😕
	meetinginsight	ts Try new M		🗄 土 📍 Good Athemacen 🚳 🗸
邁 Deshboard	Admin Settings System Settings V	ulii	•	
 All meetings 		Meeting Insights Teams Client Application	Meeting Insights Outlook Add-On	
B Events	User Settings v	Recommended Option Manual Option Add the app to user's Teams clients. Click "Publish" using M365 admin permissions. In the	Add the app to Teams users' Outlook as an add- on to create Teams meetings with MiA and a customizable disclaimer. To install the app, simply run it on the user's PC and restart Outlook after installation is complete.	
	License Management	store you can set policies for installing the app automatically for specific groups or users.	This meeting will be recorded Save	
II Snippets	Al Settings v	Publish In Your Teams Store	Downland Add In	
Glossary				
b Records	Anonymication			
<	Monitoring ~			
🗘 Settings	Integrations			

3. Log in to https://admin.microsoft.com/ to view the Microsoft 365 admin center.

\leftarrow	C (D https://admin.microsof	.com/Adminportal/Home#/homepage	A Q D D D A & Q	(
ш	Microsoft 365 admin center	,₽ Search		
=				
۵	Home	🛃 Dashboard view 🖂 🤗 Add a user 🖉 Edit a user 🔍 Reset password 🖉	Edit a group ···· AudioCodes Ltd. (al-L.	
8	Users 🗸 🗸			
*	Teams & groups 🛛 🗸 🗸	A Techange Online: Ensure your email authentication records are set up to avoid mail flow issues to f	bird party email accounts See Details	¢.
	Billing ~			
0	Setup	Recommended based on more than 4 global admins		
		Limit admins to the access they need Code admin accounts are twice as likely to be attacked by horkers, and here almost unlimited access to data and resources. We recommend here to one than 4 global admins, and reassigning others to inneed admin sites with only the access needed to get the work down.	Assigned admin roles	
		Microsoft Teams	User management 🖾 Gave Fored	
		Support remote workers with Teams	Microsoft Entra Connect	

4. Click **Show All** as shown in the preceding figure.

÷	C D https://admin.r	microsoft.com/	/Adminportal/Home#/homepage	A 🖸 🖬 🛛	0 0 0 0 0 🤇
ш	Microsoft 365 admin cen	ter	,D Search		5 6 6 6 7 U
=					
	Home Users	J	😥 Dashboard view 🗸 🤌 Add a user 🖉 Edit a user 🔍 Reset password 🖉 E	dtagroup ···	AudioCodes Ltd. (ai-L
	Teams & groups Roles	č	▲ Scharge Online: Ensure your email authentication records are set up to avoid mail flow issues to the	d garty email accounts <u>Sec Details</u>	×
-8	Resources	÷	Recommended based on more than 4 global admins		
	Billing Support	č	Limit admins to the access they need		
0	Settings Domains Search & intelligence	î	Global admin accounts are twice as fairly to be attacked by factors, and here almost uninitied access to data and resources. We recommend having no more that 4 plotal admins, and reassigning others to limited admin roles with only the access needed to get the work done.	Antigred admin reles	
	Org settings Microsoft 365 Backup Integrated appro		View recommendation		
	Directory sync errors Viva				0 Help & support
	Partner relationships Microsoft Edge		Microsoft Teams	User management	🗇 Give Feedback
0	Setup		Support remote workers with Teams	Microsoft Entra Connect	

5. Expand the **Settings** menu as shown in the preceding figure and click the **Integrated apps** option.

÷	C (https://admi	in microsoft.co	am/Adminportal/Home#/Settings/IntegratedApps	× ☆ □ C □ ⊅ @ % (
	Microsoft 365 admin o	enter	,₽ Search	5 6 0 A 5
=			Integrated apps	
ŵ	Home		Discover, purchase, acquire, manage, and deploy Microsoft 365 Apps developed by Microsoft partners. You can also	deploy and manage Line-of-business add-ins developed within
8	Users	~	your organization. For advanced management of these apps go to the respective admin center or page : Azure Active Directory Shar	ePoint Teams Add-ins
20	Teams & groups	~		
$\beta_{\rm B}$	Roles	~	Deployed apps Available apps Blocked apps	
-8	Resources	\sim	All apps in this list have been installed for tenant users.	
	Billing	~	Popular apps to be deployed	^
0	Support	~		deTwo for Outlook Salesforce
۲	Settings	~	C C C C C C C C C C C C C C C C C C C	Outlook 🧕 👻 💁 Outlook
	Domains			in: Automatic email signatures, en & marketing banners in The Salesforce Particine to Outo
	Search & intelligence		Get it now View details Get it now View details Get it n	ow View details Get it now View
	Org settings			
	Microsoft 365 Backup		View more apps	
	Integrated apps			
	Directory sync errors		🗄 Get apps 👎 Upload custom apps 🔘 Refresh	0 items 🛛 Filter 🔎 Search 🚍
	Viva Partner relationships			•
	Microsoft Edge		Name Host products Status	Test deployment Last modified 1 gro
0	Setup			_

6. Click the Upload custom apps option.

\leftarrow	C D https://adm	in microsoft	com/Adminportal/Home	#/Settings/IntegratedApps		A 🟠 🖪	0 0 0 0	s 🖏
	Microsoft 365 admin o	center		,P Search			50 A C	20
=			Integra	Deploy New App				
	Home		Discover, purche					
8	Users	~	your organizatio For advanced m	 Upload custom app 	Upload Apps to deploy			
**	Teams & groups	~		O Users				
$\beta_{\mathbf{h}}$	Roles	~	Deployed app		App type			
-85	Resources	~	All apps in this	O Deployment	Office Add-in 🗸	0		
•	Billing	~	Popular apps to					
0	Support	\sim	0		Choose how to upload app			
0	Settings	^	() wave		 Upload manifest file (xmi) from device 			
	Domains		With a de		Outlook/ddirumi Marviet lie validated	Choose File		
	Search & intelligence		Get		Mannest file valuated			
	Org settings				Provide link to manifest file			
	Microsoft 365 Backup		View more apps		https://	Validate		
1	Integrated apps							
	Directory sync errors		E Get apps					
	Viva		CE ou spys					
	Partner relationships		Name					
	Microsoft Edge							
0	Setup				Next			Cancel

From the 'App type' drop-down, select Office Add-in, select the Upload manifest (.xml) from device option and then click Choose File. Click Next after xml validation.

÷	C (D https://admin.m	icrosoft.cor	n/Adminportal/Home#	/Settings/IntegratedApps		^ ☆ ⊡	G D	51	6 6	- (2
	Microsoft 365 admin cent	ler		,P Search				eh o	۲	? 🔘	5
=			Integrat	Deploy New App							
	Home		Discover, purche								
	Users	~	your organizatio For advanced m	 Upload custom app 	Add users						
×	Teams & groups	~		Users							
8	Roles	¥	Deployed app	Ī	Meeting Insights dev						
6	Resources	~	All apps in this	O Deployment							
-	Billing	~	Popular apps to		Is this a test deployment? () • No						
0	Support	~			Assign users						
8	Settings	^	(where		○ Just me (liorp@ai-logik.net)						
	Domains		343 e000								
	Search & intelligence		Get		Entire organization						
	Org settings		-		 Specific users/groups 						
	Microsoft 365 Backup Integrated apps		View more apps		Search for users or groups to add						
	Directory sync errors										
	Viva		🗄 Get apps								
	Partner relationships		Name								
	Microsoft Edge										
D	Setup				Back Next				Car	cel	

8. Select who can use the add-in and then click Next.

← C () https://admin.microsoft.c	com/Adminportal/Home#/Settings/IntegratedApps	* \$ 🗇 🖬 3 🛙 🖉 🖷 🗸
III Microsoft 365 admin center	,P Search	□ G Q @ ? (₽)
-	Integral Deploy New App	
INome Inome <	Discover, punch for advanced of Deployed appr All apps in this Popular apps for Cont States The states Cont States	Accept permissions requests Read the app permissions and capabilities carefully before proceeding App Permissions and Capabilities Meeting besights dev Control Control Permissions
Microsoft Edge Ø Setup		Back Next Cancel

9. Accept the required permissions the application requires by clicking on the permissions and then click **Next**.

\in	C D https://admin	microsoft	com/Adminportal/Home4	/Settings/IntegratedApps	A A D O D A A A A A A A A A A A A A A A	>
	Microsoft 365 admin ce	nter		P Search	5 B 0 0 ? (v	
=			Integrat	Deploy New App		٦
ŵ	Home		Discover, purcha			
8	Users	~	your organizatio For advanced m	 Upload custom app 	Review and finish deployment	
20	Teams & groups	~		O Users		
$\beta_{\rm B}$	Roles	~	Deployed app	o uses	Review your selected settings and deploy.	
-8	Resources	~	All apps in this	 Deployment 	Apps to deploy	
	billing	~	Popular apps to	Permissions	Meeting Insights dev	
Q	Support	~		Finish	Cuttork	
0	Settings	~	() where			
	Domains		With a de 365 with		Assigned users	
	Search & intelligence		Get		Entire organization	
	Org settings					
	Microsoft 365 Backup		View more appa			
1	integrated apps					
	Directory sync errors		E Get apps			
	Viva					
	Partner relationships		Name			
	Microsoft Edge					
0	Setup				Back Finish deployment Cancel	

10. Review the deployment and then click Finish deployment.

÷	C (https://admin/	microsoft.co	m/Adminportal/Home#/	Settings/IntegratedApps		🗄 🔄 🖬 🕼 🖬 🖉 🗠 🔇
ш	Microsoft 365 admin cen	iter		,₽ Search		5 6 0 6 7 (P
=			Integrat	Deploy New App		
$\widehat{\mbox{\ }}$	Home		Discover, purche			
R	Users	~	your organizatio For advanced m	 Upload custom app 	Opployment co	mpleted
30	Teams & groups	~		O Users	•••••••	
$\rho_{\rm fb}$	Roles	÷	Deployed app	- Coars		
-25	Resources	~	All apps in this	 Deployment 		
•	Billing	~	Popular apps to		Meeting Insights dev	 Deployed. It can take up to six hours for the app to appear in Outlook.
0	Support	~	09			
0	Settings	^	0		Announce this to your users	
	Domains		With a de			e successfully adopted when users are informed about the software and how scenent email that explains to your users what you deployed and how to get
	Search & intelligence		Get			and this email to your users to improve your adoption rate 2-5x.
	Org settings				View this deployment	
	Microsoft 365 Backup		View more apps			
	Integrated apps					
	Directory sync errors		Get apps			
	Viva					
	Partner relationships		Name			
	Microsoft Edge		Meet		_	
0	Setup		Create		Done	Cancel

View the screen shown in the preceding figure after the deployment is completed.

Storage

By default, Meeting Insights stores meeting recording audio, screen sharing content, generated images, transcriptions, and AI insights in separate Azure Blob storage, tailored to regional preferences, and hosted in AudioCodes data centers. For more information, see Storage Hosted on AudioCodes Azure Blob on page 50.

However, Customers who need control and ownership of their stored data can add their Azure Blob Storage accounts for various locations (Bring Your Own Blob Storage or BYOS). Once the BYOS locations are configured, they can be assigned to user profiles, enabling recordings for users assigned to these profiles to be stored in the designated storage. For more information on BYOS, see Storage Hosted on Customer Azure Blob on page 51. Meeting Insights supports the following Azure storage options:

- Local redundant storage (LRS): This is a local, redundant storage, whereby data is replicated in the same region.
- Geo-redundant storage (GRS): This is a geographically, redundant storage, whereby data is replicated across two regions (primary and secondary). The benefit of GRS is that it protects the recordings in case of a regional outage.

Meeting Insights also allows you to monitor the storage services, by displaying maximum storage, storage utilization, and remaining storage.

- Meeting Insights default storage is LRS.
 - GRS is a feature available for purchase from AudioCodes.
 - Bring Your Own Blob Storage requires the BYOS feature key.

> To view Meeting Insights storage accounts:

1. Under the 'System Settings' menu, click the **Storage** option; the default storage account is displayed (e.g., Europe LRS).

🔡 Dashboard	Admin Settings	+ Bring Your Own Blob Storage							
	System Settings								
All meetings	Connect to your M365 Tools	NAME	STATUS	CONSUMED	LAST MONTH GR	AVAILABLE STOR	STORAGE LEFT	MONTH LEFT	
Events	Storage	Europe LRS	#Connected;	-	-	-	-	-	
	Tags Devices	My BYOS Storage	#Connected;		-	-	-		
⊘ Action items	User Settings V								
<	License Management								
Settings	Al Settings V								Q
🂁 Admin mode	Anonymization								

The following table describes the table columns:

Table Column	Description
Name	Displays the region in which the storage (LRS) is located (e.g., 'Canada LRS').
Status	Displays the status of connection to storage account: "Connected" "Disconnected" "Failed"
Consumed	Displays the storage space (in GB) that has been utilized. Note: This column is applicable to Locally-Redundant Storage (LRS) and

Table Column	Description
	Geo-Redundant Storage (GRS).
Last Month Growth	Displays the change of storage for the last month. This typically shows an increase (growth), but if more meeting recordings are deleted than created, then it shows a decrease.
Available Storage	Displays the total available storage space (in GB). Note: This column is applicable only to GRS.
Storage Left	Displays the remaining storage space (in GB). Note: This column is applicable only to GRS.
Month Left	Displays the estimated number of months remaining before the storage is full.

Storage Hosted on AudioCodes Azure Blob

The Meeting Insights application stores the recorded media (audio, screen sharing content, generated images) and recaps (transcription, summary, action items, and AI-generated insights) in separate Azure Blob storage containers, tailored to regional preferences and hosted in AudioCodes data centers.

Meeting Insights supports the following Azure storage options:

- Local redundant storage (LRS): This is a local, redundant storage, whereby data is replicated in the same region. By default, Meeting Insights provides you with a single storage LRS platform in AudioCodes data center. This storage platform doesn't include storage monitoring.
- Geo-redundant storage (GRS): This is a geographically, redundant storage, whereby data is replicated across two regions (primary and secondary). The benefit of GRS is that it protects the recordings in case of a regional outage. If you require GRS, you can purchase this feature from AudioCodes. GRS is enabled by a feature key, which also specifies the storage capacity (GB). This storage platform allows you to monitor storage.

For monitoring the storage connectivity status and capacity, see Monitoring Storage Connectivity Status and Capacity on page 55.



Meeting Insights doesn't limit storage when hosted by AudioCodes.

> To view storage hosted by AudioCodes:

Under the 'System Settings' menu, click the Storage option; the default storage account is displayed (e.g., Europe LRS).

Admin Settings	+ Bring Your Own Blob Storage				
System Settings ^ Connect to your M365	NAME	STATUS	CONSUMED	AVAILABLE STORAGE	STORAGE LEFT
Tools	Europe LRS	#Connected	0 GB	-	-
Tags					
Devices					
User Settings 🗸 🗸					
License Management					
Al Settings V					
Monitoring ~					
Help Center					

Storage Hosted on Customer Azure Blob

If you require control and ownership of your stored Meeting Insights data, you can use Meeting Insights *Bring Your Own Blob Storage* (BYOS) feature to use your Azure Blob Storage account across different locations (regions). After configuring BYOS for each location (region), you can assign these storage accounts to specific User Profiles, ensuring that recordings for users associated with these profiles are stored in the designated storage locations.

Adding BYOS storage includes the following main steps:

- 1. Setting up your Azure Blob storage account.
- 2. Configuring Meeting Insights with your storage account (BYOS).
 - Bring Your Own Blob Storage requires the BYOS feature key. Contact your Service Provider if it's not available in your Meeting Insights application.
 - Make sure that your BYOS accounts are registered on your Microsoft 365 tenant.
 - Performance latency may occur if the storage location is geographically distant from the Meeting Insights deployment instance.
 - The customer's user information such as Display name, email, Azure OID, and recorded meeting metadata such as time, duration, subject, participants, and invitees are stored in the Meeting Insights separate database per customer.
 - When a user is assigned to multiple user profiles, all profiles must be configured with the same storage. User recordings will be stored in arbitrary storage locations if the user is assigned to user profiles with distinct storage locations.
 - You can delete an added BYOS storage only when there are no active meeting recordings.

Defining Your Azure Blob Storage Account

Before you can configure Meeting Insights with BYOS, the first step is to configure a storage container in your Azure Blob Storage account. This process includes generating a Shared Access Signature (SAS) token and URL, which you'll need later when configuring BYOS in Meeting

Insights. In addition, this process includes specifying a start date and time, as well as an expiry date and time for the SAS token.



This section assumes that you have an Azure Blob Storage account with a storage container.

Set up Azure Blob Storage account:

- 1. Log in to your (customer tenant) Microsoft Azure portal account.
- 2. Access the Storage accounts page, and then select the relevant Blob Storage account.
- Navigate to Data storage > Containers, and then select the container where you want to store media.
- Right-click the container, and then from the drop-down menu, choose Generate SAS; the Generate SAS dialog box opens.

Microsoft Azure							
Iome > Storage accounts > byos1							
Storage accounts	«	byos1 Containers	x * ···				;
+ Create 🏷 Restore \cdots			+ Container 🛔 Change access level 🤌 Restore conta	iners 🗸 💍 Refresh 🕴 📋 Delete 🛛 🛱 Gi	ve feedback		
ilter for any field		Cverview	Search containers by prefix		 • 	Show deleted containers	
Name 🗘		Activity log					
and the second second	^	🥏 Tags	Name	Last modified	Anonymous access level	Lease state	
		🗙 Diagnose and solve problems	Slogs	3/4/2024, 12:09:09 PM	Private	Available	
		Access Control (IAM)	67257920	6/6/2024, 3:04:55 PM	Private	Available	
		P Data migration	333	6/26/2024, 9:50:50 AM	Private	Available	
		🗲 Events	ai-logix-1	5/29/2024, 12:08:12 PM	Private	Ai ᇶ Container properties	
		Storage browser	ai-logix2	6/13/2024, 1:28:41 PM	Private	Av 🐵 Generate SAS	
byos1		🚔 Storage Mover	Container	5/20/2024, 2:37:41 PM	Private	Av Access policy	
-		✓ Data storage	container1	3/4/2024, 12:13:04 PM	Private	Ar Acquire lease	
		Containers	container2	4/1/2024. 1:10:21 PM	Private	Ar of Break lease	
		Ille shares	deb-media-container	6/10/2024, 5:13:41 PM	Private	An A Change access level	
		m Queues	🔲 ilana	5/30/2024, 12:01:43 AM	Private	Av Edit metadata	
		Tables	m365edu891557	5/29/2024, 11:58:40 AM	Private	Av iii Delete	
		> Security + networking	m365edu8915572	6/3/2024, 10:25:56 AM	Private	At Delete	-
		> Data management	m365x36353013	6/20/2024, 12:42:48 PM	Private	Available	
		> Settings	m365x36353013second	6/20/2024. 12:43:42 PM	Private	Available	
	~	> Monitoring	m365x67257920	5/29/2024, 11:58:07 AM	Private	Available	
Page 1 V of 6 >		> Monitoring (dassic)	m365x67257920-1	5/30/2024, 10:02:29 PM	Private	Available	

- 5. In the Generate SAS dialog box, configure access settings to the storage:
 - a. Under the Signing method group, select the Account key option.
 - b. From the 'Signing key' drop-down list, select Key 1.
 - c. From the 'Stored access policy' drop-down list, select a shared access policy.
 - **d.** From the 'Permissions' drop-down list, select (check) all the listed permissions check boxes.
 - e. In the 'Start' and 'Expiry' fields, define the start and expiry time-date of the signed key, respectively.



For Meeting Insights' BYOC, the SAS token expiration period must be **at least three months**.

- **f.** Under the Allowed protocols group, select the **HTTPS only** option to allow only requests using the HTTPS protocol.
- g. Click the Generate SAS token and URL button; a shared access signature (SAS) token and URL are generated and displayed in the fields below the button:

≡ Microsoft Azure		,	5+/)	区 Q ② &	
Home > Storage accounts > byos1				Generate SAS	×
Storage accounts + Create ? Restore ···	 byos1 Storage acco Search Overview 		⑦ Restore containers ∨ () Refresh	Stored access policy	^
Name 1↓	 Activity log Tags 	Name	Last modified	Permissions * ① 7 selected V	
	Diagnose and s Access Control		3/4/2024, 12:09:0 6/6/2024, 3:04:55	Start and expiry date/time ① Start	
	Data migration Fevents	aaa	6/26/2024, 9:50:5 5/29/2024, 12:08:	03/07/2024 🗐 3:16:01 PM (UTC+03:00) Current Time Zone	~
	Storage browse Storage Mover	r al-logiz2	6/13/2024, 1:28:4 5/20/2024, 2:37:4	Expiry 03/07/2024 11:16:01 PM	
	Data storage Containers	container1	3/4/2024, 12:13:0 4/1/2024, 1:10:21	(UTC+03:00) Current Time Zone Allowed IP addresses ①	~
	File shares Queues	deb-media-container	6/10/2024, 5:13:4 5/30/2024, 12:01:	for example, 168.1.5.65 or 168.1.5.65-168.1 Allowed protocols ① HTTPS only	
	··· Tables	m365edu891557 m365edu8915572	5/29/2024, 11:58: 6/3/2024, 10:25:5	Generate SAS token and URL	
byos1	Data managem Settings	ent m365x36353013 m365x36353013second	6/20/2024, 12:42: 6/20/2024, 12:43:	Blob SAS token 🛈	🗅
■ Page 1 ∨ of 6 >	> Monitoring > Monitoring (da	m365x67257920	5/29/2024. 11:58: 5/30/2024. 10:02:	Blob SAS URL https://byos1	D

6. Copy and paste the Blob SAS URL in a secure location (e.g., in Notepad). You'll need this URL (which includes the SAS token key) when configuring this BYOS storage in Meeting Insights (see Configuring Meeting Insights with BYOS below).

Configuring Meeting Insights with BYOS

Once you have configured your Azure Blob Storage account and generated a SAS URL, you can configure Meeting Insights with a BYOS.



Meeting Insights doesn't display BYOS storage capacity. Storage monitoring can only be done through your Azure Blob storage account.

> To configure Meeting Insights with BYOS:

- 1. Under the 'System Settings' menu, click the **Storage** option; the default storage account is displayed (e.g., Europe LRS).
- 2. Click the Bring Your Own Blob Storage button; the following dialog box appears:

Bring Your own Blob storage

Friendly Name		
Blob SAS URL		
	Cancel	Apply

- 3. In the 'Friendly Name' field, type a meaningful name for your Blob storage container so that you can easily identify it later, especially useful if add multiple Blob storage containers (e.g., "West US BYOS" or "North Europe BYOS").
- 4. In the 'Blob SAS URL' field, paste the Blob SAS URL (also contains the SAS token key) that you copied from your Azure Blob Storage account (see Defining Your Azure Blob Storage Account on page 51).
- 5. Click Apply; the BYOS is added to Meeting Insights:

Admin Settings	+ Bring Your Own Blob Storage								
System Settings									
Connect to your M365	NAME	STATUS	CONSUMED	LAST MONTH GR	AVAILABLE STOR	STORAGE LEFT	MONTH LEFT		
Tools Storage	Europe LRS	#Connected;	-	-	-	-	-		
Tags Devices	My BYOS Storage	#Connected;	-	-	-	-	-	۲	
User Settings ~									
License Management									
Al Settings V									0
	System Settings Connect to your M365 Toots Storage Tags Devices User Settings License Management	+ Bring Your Own Blob Storage System Settings Connect to your M365 Tools Storage Tags Devices User Settings V License Management License Management	System Settings Connect to your M385 Tools Storage Tags Devices User Settings Al Settings Kultionse Management	Bring Your Own Blob Storage NAME STATUS CONSUMED Incole Storage Tags Devices License Management Al Settings				System Settings Connect to your M305 Tools Strangs Tags Devices User Settings ASsettings ASSETTING </th <th>System Settings Connect to your M305 Tools Storage Tools Buryle LISS #Connected; Onextend; Idear Settings Vast Settings</th>	System Settings Connect to your M305 Tools Storage Tools Buryle LISS #Connected; Onextend; Idear Settings Vast Settings

6. Associate the BYOS account to a Users Profile, by selecting it from the 'Select Storage' dropdown list, as described in User Profiles on page 60.

For monitoring the storage connectivity status, see Monitoring Storage Connectivity Status and Capacity on the next page.

Connectivity Issues to BYOS Storage

If Meeting Insights is unable to access the BYOS storage, it deletes the recording after several retry attempts. Loss of connectivity to the BYOS storage can occur for several reasons, such as:

- Storage no longer exists
- Network issues
- SAS token key expired

Meeting Insights notifies you about the upcoming token key expiration at 30 days, 7 days, and on expiration day, both via email and in the system activity logs. In addition, Meeting Insights triggers an alarm if the connection to the storage is lost or the token key expires.

• The SAS token key expiration period must be at least three months.

To prevent outages and the potential loss of recordings, it's essential that you generate a new SAS token key before it expires and update Meeting Insights with the new key.

Monitoring Storage Connectivity Status and Capacity

Meeting Insights allows you to monitor the storage connectivity status as well as storage capacity (depending on storage platform). The support for monitoring storage per platform is shown below:

Storage Platform	Monitoring of Storage Capacity
Storage hosted by AudioCodes Azure Blob storage account	Storage monitoring depends on Blob storage option:
	LRS: No monitoring provided.
	GRS: Monitoring is through Meeting Insights (described below).
Storage hosted by Customer's Azure Blob storage account	Monitoring is through Customer's Azure Blob storage account (not through Meeting Insights).

The following describes how to monitor storage connectivity status and storage capacity through Meeting Insights.

> To monitor storage connectivity and capacity:

Under the 'System Settings' menu, click the Storage option; the storage account(s) are displayed:

Dashboard	Admin Settings	+ Bring Your Own Blob Storage							
	System Settings ^	NAME	STATUS	CONSUMED	LAST MONTH G	AVAILABLE STO	STORAGE LEFT	MONTH LEFT	
All meetings	Connect to your M365 Tools	Europe GRS	#Connected;	42693.36 GiB	0 GiB	50000.00 GiB	7306.64 GiB	Unknown	
Events	Storage	West US BYOS	#Connected;	-	-	-	-	-	
	Tags Devices								
Glossary	User Settings 🗸 🗸								
⊘ Action items	License Management								
<	Al Settings V								
Settings	Anonymization								
🂁 Admin mode	Monitoring ~								

The storage connectivity status and capacity are monitored using and following fields on the page:

Table Column	Description
Name	Displays the region in which the storage is located (e.g., "Canada LRS", "Europe GRS", or "West US BYOS").
Status	Displays the status of connection to storage platform:
Consumed	Displays the storage space (in GB) that has been utilized. Note: This column is applicable only to AudioCodes hosted storage for GRS.
Last Month Growth	Displays the change of storage for the last month. This typically shows an increase (growth), but if more meeting recordings are deleted than created, then it shows a decrease. Note: This column is applicable only to AudioCodes hosted storage for GRS.
Available Storage	Displays the total available storage space (in GB). Note: This column is applicable only to AudioCodes hosted storage for

٦

Table Column	Description
	GRS.
Storage Left	Displays the remaining storage space (in GB). Note: This column is applicable only to AudioCodes hosted storage for GRS.
Month Left	Displays the estimated number of months remaining before the storage is full. Note: This column is applicable only to AudioCodes hosted storage for GRS.

Tags

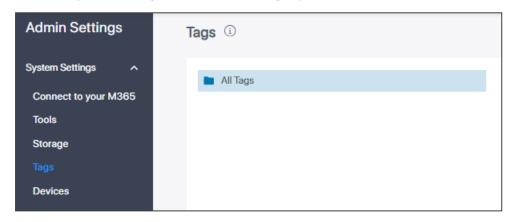
Г

Tags can be added to meeting recordings to make it easier to search for specific information in them.

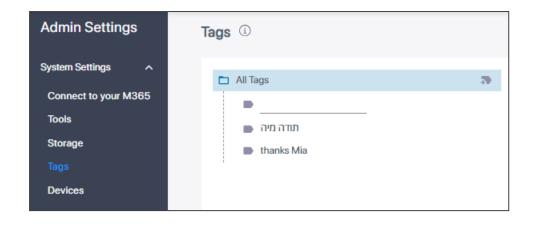
Q tag:"Tutorial" ×	Date: All V Owner: All V Participa
Tutorial	€ Ayelet and Tania sync
00:37:40	🔵 Tania Adar + 1 📄

> To define a tag:

1. Under the 'System Settings' menu, click the Tags option.



2. Point you mouse over the All Tags bar and then click the **D** icon.



3. In the field

______, enter a tag name and then enter.

Tags	(i)		
	All Tags		
	🖿 תודה מיה		
	thanks Mia		
	Tutorial	Add Alias 🍵	1

4. Select Add Alias from the menu.

Tags	(i)	
	All Tags תודה מיה 🖝	3
	thanks Mia	
	Tutorial	Add Alias 🍵 🥒
	@	

Two categorical levels of 'alias' can be added under the tag. These categorical levels facilitate organizing your corporate meetings around subject matter (for example, around products).

5. Optionally select the delete icon or edit icon to facilitate building meeting junctures.

Devices

Admin must define a device in the enterprise's physical conference room. Meeting Insights identifies speakers participating physically in the room by their voice and doesn't assign a specific user to the device. Defining the room's email address is sufficient to associate the device with the room.

> To configure a device:

1. Under the 'System Settings' menu, click the **Devices** option.

Cauc	diocodes meeting in	sights 👔			🌷 🛧 Good Afternoon 🛛 📿 🗸
88	Total devices: 0				New Device
4	Email 💠	USERS	NOTE		
ń			N	o rows	
Ö			New Device		
1			Device Email	Add	
坷			Device Users Email	Add	
\odot			Description		
>				Cancel Save	

- 2. Enter the device email and click Add.
- 3. Enter the device user's email and click Add.

If a call comes in on a CAP located in a conference room around which a number of attendees are sitting and the device is unassociated with any specific user, recording management with Meeting Insights will not be possible. Defining an email address is sufficient to associate the phone with a specific user to make recording management possible.

Note that Meeting Insights applies speaker detection on the device by using the email addresses of all attendees in the meeting, i.e., the invited users voiceprint, if available, is used for device speaker detection.

10 Configuring User Settings

Admin can configure the following user settings:

- User Profiles
- Admin Profiles
- Licensed Users
- Unlicensed Users
- Recording Notifications
- User Preferences on page 76

User Profiles

Only users assigned with a license are able to access Meeting Insights or record meetings according to their profile. The remaining users who don't have a license but participated in a meeting will not have access to Meeting Insights. Meeting Insights caches their info to present them in the meeting info. To use Meeting Insights, a user must be connected to at least one user profile. Three user profiles are provided with Meeting Insights. Admin can create more.

See also 'Unlicensed Users' page here in which admin can view the info collected and if necessary remove. Users who had a license but were unassigned from their license will also be displayed in this page.

Three profiles are provided:

- Default User Profile (System). This profile is a default profile that includes user access to their meetings.
- External Restricted Share (System). This profile enables access to user meetings and restricted external share.
- **External All Share (System)**. This profile enables access to user meetings and both restricted and with a link share with external parties.



You cannot delete a profile while it is assigned to an AAD group. You must assign the group to another profile before you can delete the profile.

To configure a user profile:

1. Under the 'User Settings' menu, click the User Profiles option.

User Profiles			
+ New Profile			
PROFILE NAME	GROUPS ASSIGNED	DESCRIPTION	
Default User Profile (System)	Meeting Insights Users (5)	This profile is a default profile that includes user access to their meetings	
External Restricted Share (System)		This profile enables access to user meetings and restricted external share	
External All Share (System)		This profile enables access to user meetings and both restricted and with a link share with external parties	

- 2. View the three default profiles.
 - The figure above shows the **Meeting Insights Users (5)** user group assigned with **Default User Profile (System)**, which you did in step 3 when assigning a license shown here.
 - The figure below shows no groups assigned. To assign a group to a user profile, see step 3 when assigning a license shown here.

User Profiles			
+ New Profile			
PROFILE NAME	GROUPS ASSIGNED	DESCRIPTION	
Default User Profile (System)		This profile is a default profile that includes user access to their meetings	1
External Restricted Share (System)		This profile enables access to user meetings and restricted external share	
External All Share (System)		This profile enables access to user meetings and both restricted and with a link share with external parties	

3. Click New Profile to add another (customized) user profile to the three that are already available.

Admin Settings	Add User Profile User Profiles include permissions and recording o	ntions that are assigned to the users associated	with the profile
System Settings v		ription	
User Settings			
User Profiles	Permissions	Recording	AI, STT Settings
Admin Profiles	Select permissions that users associated with the profile will have	Enable recording options	Select AI functionality that users associated with the profile will have
Licensed Users			
Unlicensed Users	Access User Meetings	Enable	Automatic Triggering
Recording Notifications	External Restricted Share	Meeting Types	
User Preferences	External Share with a Link	User Meetings	Enable AI Templates
	Premium Transcription	MSFT Teams Hosted by	
License Management	Can Edit Other Users Meetings	Organization Zoom Meetings	
	Mobile Application Access	Import Meeting Recordings	
Al Settings V		Recording on Mobile App	

4. Configure the fields using the table below as reference.

Field	Description
'User Profile Name'	Enter an intuitive name for effective management later
'Description'	Enter a description of the profile for effective management later
Permissions	

Field	Description
Access User Meetings	Always enabled, this option is used for user access to their meetings. It cannot be disabled. The option is grayed out to indicate that the user always has access to meetings they organized or participated in and to meetings that were shared with them. This option is always enabled and can't disabled.
External Restricted Share	Enable this setting to allow the user to share meeting recordings with external parties who participated in the meetings. To access a meeting recording, external parties will go through their email verification and code access process.
External Share with a Link	Enable this setting to allow sharing the meeting recording with a link; anybody with the link will be able to access the recording.
Premium Transcription	The 'Premium Transcription' option applies only to Hebrew speakers and will mostly be unavailable. It's controllable at the tenant level. Contact your Service Provider if you are interested in this option.
Can Edit Other Users Meetings	People whose 'Auto Can Edit' setting is activated get the 'Can Edit' permission automatically prior to the meeting, i.e., this permission gives them the same level of control of the meeting as the owner, making them a co-owner. They can view, edit, etc. (just like owner of the meeting). It's the same permission that's available when 'Can View' is changed to 'Can Edit' through the meeting side panel or meeting sharing options.
Mobile Applic- ation Access	Enables access and use of Meeting Insights standalone mobile app.
Recording	
Enable	Allows users in the groups assigned to the profile to record the meetings they organize (they must be the meeting organizer).
User Meetings	Enables MIA to record meetings of users assigned to the profile when it's invited to the meeting and the user is the meeting organizer. This feature is by default supported by Microsoft Teams meetings. If you also want this feature supported by Zoom meetings, select the 'Zoom Meetings' check box.
Import Meeting Recordings	Allows the user permission to import meeting recordings created by third-party tools into Meeting Insights.
Recording on Mobile App	Allows users to ad hoc record conversations (by their mobile phone's microphone) when using Meeting Insights standalone mobile app.

Field	Description	
	Note: This option is available only if the Mobile Application Access toggle button (see above) is turned on.	
Select StorageMeeting Insights stores meeting recording audio, screen sharing content, generated images, transcriptions, and AI insights in sepa Azure Blob storage, tailored to regional preferences and hosted in AudioCodes data centers. Customers who need control and ownership of their stored data add additional Azure Blob Storage accounts for various locations Your Own Blob Storage or BYOS). Once the BYOS locations are configured, they can be assigned to user profiles, enabling record for users assigned to those profiles to be stored in the designated storage. To configure storage accounts, see Storage on page 48.		
To configure storage accounts, see Storage on page 48. Meeting Recordings Retention Period Select how long video meeting recordings are retained (i.e., how days recordings are kept in storage). If the set limit is exceeded, recordings will be deleted. Unlimited- recordings are never deleted and admins must pra- caution because the storage location will eventually reach ful capacity. 90 Days 180 Days 1 Year - Default 2 Years(730 days) 3 Years(1095 days) Custom - enter a specific number of days. Note: Once a day, Meeting Insights deletes recordings that exceeded		
Allow Users to Extend Recordings Retention	Allows users to overwrite the retention period (defined above in Meeting Recordings Retention Period) by setting the meetings to not be deleted. In this case, the meeting is not deleted as part of the retention period. It can be deleted manually when needed.	
AI, STT Settings		
Automatic Trig- gering	For details on these settings, see Enabling 'Automatic AI Triggering' in a User Profile on the next page.	

Field	Description
Enable Al Templates	For details on these settings, see Enabling Template-based AI-Powered Summaries on page 66.

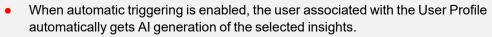
5. Click **Apply**. You can assign a user group to this user profile as shown here in step 3 (when assigning a license).

Enabling 'Automatic AI Triggering' in a User Profile

When Automatic AI triggering is enabled, you can control it in the User Profile page.



If your application excludes 'Automatic AI Triggering' and you would like to include the feature, contact your Service Provider.



- Al generation takes place when the meeting ends and may take time (up to half of the meeting's duration).
- For users configured with 'Automatic Publish', Meeting Recap with generated insights is automatically sent out to internal participants of the meeting when generation finishes.

> To enable Automatic AI Triggering:

1. Open the User Profile page. The figure below shows the Edit User Profile page.

CC oudiocode	s emeeting insig	hts		🕹 ? Good-Mermann 😃 🗸
Dathboard	Admin Settings System Settings ~~	Edit User Profile User Profiles include permissions and recording options that are assigned	ed to the users associated with the profile	
At maxings	User Settings A	Default User Profile (System) Default User Profile (System)	I Poludes-user access 1	
	User Profiles Admin Profiles Licensed Users	Parmissions Select permissions that users associated with the profile will have	Recording options	AI, STT Settings Select AI functionality that users associated with the profile will have
互 Snippets	Unlicensed Users Recording Notifications	Access User Meetings Access User Meetings Diternal Restricted Share	Meeting Types	IB Astonatic Triggering
Chossary A Records	Email Notifications	Differend Share with a Link Differend Share with a Link Differend Share with a Link	User Meetings import Meetings	
 Access 	License Management	Im Can Edit Other Users Meetings	Select Storage EuropeUKS v	
¢	Albeings v		Meeting Recordings Retention Period	
	Anonymization		Allow Users to Extend Recordings Retention	
© Settings	Monitoring ~			
S Admin mode	Integrations			Cancel Apply

2. [Refer to the previous figure] Enable the 'Automatic Triggering' setting.

Condicated	ies «meeting insig	phts		\$ 7 Sant Marson 🥥 🗸
II Deficient	Admin Settings	Edit User Profile User Profiles include permissions and recording options that are assigned to the	one enabled with the section	
A Al metings	System Settings	Decision Default User Profee Dynamic This profile is a default profile that includes		
C Ineth	ther beings a ther holdes Admin holdes	Penninations Select permissions that users associated with the profile will have	Recording Inshite recording entires	All, STE Settings Select Al functionality that same associated with the profile will have
11 trippen	Licensed Users Unicensed Users Recording Notifications	Access User Meetings Access User Meetings Beneral Reststat Thee	Couter Monthing Types	Automalis, Triggering Automalis, N
B Chosery & Seconds	Enal Notifications	Become Theory of the Softeen Become Theory of the Softeen Become Theory of the Softeen Become Theory of the Softeen	Cher Montinge import Monting Recordings Safact Stanupge	Language Dars lenguage can be selected during the matring and in advance for English only speakers. Only one option can be writered. English during Dated
	Alatings w		Europe-UH v Bearing Recordings Retestion Pariod Train Default v Advancement of the state of t	haighta Annury Antura form 0.4, source & Sourceson Mandring Types
	Monterry v Integrations			 #Mannya 🖒 Sant Mannya Tgan Canari Annya

When you enable 'Automatic Triggering' in a User Profile, users assigned to the profile will have Automatic AI triggered automatically on their meetings according to the configuration.

- **3.** Optionally select AI Insights to generate automatically. The rest of the available AIs can be generated manually after the meeting ends. Check the insights you want to generate.
- **4.** Configure 'Language'. Al languages can be one of the Speech To Text languages (STT) enabled in your application. The following Al languages are currently supported:
 - English (United States)
 - Hebrew
 - French (France)
- 5. Select 'Insights':
 - Summary
 - Action Items
 - Q&A Issues & Solutions
- 6. Select whether to trigger AI on 'All Meetings' or 'Select Meeting Types'. If you select the latter, the following options are available:
 - Meetings with External Parties
 - Meetings with *n* Invitees or More

Add User Profile		
User Profiles include permissions and recording options that are assigned to the users associated with the profile		
Utar Profile Name Description	Recording Excelor recording options Cacilla recording options Cacilla recording options Cacilla recording types Cacilla recording types Cacil	N. ST T Simp BetC Al Aucousting that uses associated with the portie will have Control of the second of the portie will have Control of the second of the
Attrouvery	Belectionage Emposition Emposition Maring Recenting Industrian Parliad There: DataR V Allow Uses to Estime Recording Interation	Atthon frames Atthon frames Atthon frames Atthon for the Atthone attributes Atthone for frame Atthone for the Atthone attributes Atthone attributes Atthone attributes attribut
		Cancel Apply

Enabling Template-based AI-Powered Summaries

You can enable AI-generated summaries to conform to a custom layout templates. The templates are tailored to the specific needs of your organization, allowing meeting summaries to adhere to a specific format. For example, the organization may want the summary to be categorized using specific terms such as 'Meeting Agenda', 'Main Concerns', and 'Wishful Goal'.

Owners of meeting recordings that are enabled to use templates can run AI-powered summaries based on one or more of the templates. In other words, the Owner can generate multiple summaries of the same meeting recording, where each is based on a different template.



To view a list of available templates, see Viewing and Naming Templates for Al-Powered Summaries on page 82.

To enable template-based AI-powered summaries:

- 1. In the Admin Settings menu pane, expand User Settings, and then click User Profiles.
- 2. Click New Profile to add a new User Profile, or select an existing User Profile.
- 3. Under the AI, STT Settings group, do the following:
 - a. Click the Enable AI Templates toggle button to turn it on.
 - b. From the 'Select Templates' drop-down list, select one or more templates:

AI, STT Settings

Select AI functionality that users associated with the profile will have

	Automatic Triggering
• ••	nable AI Templates
Deep	cil meeting in the municipality × Dive × Coaching Mentoring Interaction × • Templates
	Deep Dive
	Coaching Mentoring Interaction
	Council meeting in the municipality

4. Click Apply.

Admin Profiles

You can configure admin profiles.

The number of admins is limited to five by default. If more are needed, you can request your Service Provider.

> To configure an admin profile:

1. Under the 'User Settings' menu, click the Admin Profiles option.

Iministrators (Full Access) 🔅	
Email Address	Add
admin@M365x64321460.onmicrosoft.com ×	

2. Enter the email address of the admin to add and then click Add.

- Added email address(es) are of admins who will be the *default* admins.
 - Default admins have full access privileges; they can access all Meeting Insights pages and do and see everything.
 - If you lose access or the default admin account is unavailable or deleted, contact the Service Provider to reset the admin account by setting the account you provide.

Licensed Users

The Licensed Users page enables admin to view all licensed users in the system and their permissions. The page also enables admin to assign representatives for users in case a user will need another user to have full access to their recordings. If the employee will leave the company, for example, the assigned representative will have owner access to the departing employee's meeting recordings.

> To manage licensed users:

1. Under the 'User Settings' menu, click the Licensed Users option.

Admin Settings	Licen	sed Users														
System Settings 🗸 🗸	Total U	Jsers 21									III Sel	ect Colur	nns	.≱ Ex	port To C	SV
User Settings		NAME \$	EMAIL \$	AAD GROUPS	USER PROFILES	REPRESENTATIVES	ô	ADDED DATE & TIME	8	REC	Ţ		G	Rec	"+"	1
User Profiles		Start With	Start With	Start With	Start With	Start With	Ŧ	MM/DD/YYYY-M	Ŧ	Ŧ	Ŧ	Ŧ	Ŧ	Ŧ	Ŧ	Ŧ
Admin Profiles		Profession (1999)	Property (1998).	All Employees	Default User Pr	+ <u>*</u>		May 20, 2024 12:31 PM		~	~					
Unlicensed Users		-	Page 1 (1997) (1997)	All Employees	Default User Pr	+ <u>*</u>		May 20, 2024 12:31 PM		~	~					
Recording Notifications Email Notifications		10000		All Employees	Default User Pr	֥		May 20, 2024 12:31 PM	~	~	~					
		MOD Administr	admin@M365x	All Employees,	Default User	÷ <u>*</u>		May 19, 2024 2:20 PM	~	~	~	~	~			~

- 2. Select a single licensed user -OR- select multiple licensed users -OR- check the box next to the NAME column to select *all* licensed users.
- **3.** Point your mouse over a permission icon, e.g., the Admin Permission icon or the Recording Notification icon; a tooltip pops up identifying the icon.
- 4. Under the permission icon you require, click and from the popup, select ALL, Enabled or Disabled.
- [Optionally] Add Representatives: Click the icon * adjacent to the user to whom to add a representative.

Q	Search	×
		Apply

6. Enter in the 'Search' field the name of the user to add as representative.





Only a licensed user can be added as a representative of another user.

7. Check the box and then click **Apply**. The name of the user who you added as representative is displayed in the REPRESENTATIVES column in the Licensed Users page.

	NAME 👙	EMAIL ≑	AAD GROUPS	USER PROFILES	REPRESENTATIVES	ADDED DATE & TIME $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	8	REC	⇒	2	G	1
	Start With	Start With	Start With	Start With	Start With	MM/DD/YYYY – MM/DD/YYYY	$\overline{\overline{}}$	$\overline{\mathbf{T}}$	$\overline{=}$	Ŧ	$\overline{\mathbf{x}}$	₹
	Brian Johnson (TAILSPIN)	BrianJ@M365x51160550	Meeting Insights Users	Default User Profile (Syst	Alex Wilber	Dec 3, 2023 5:04 PM		~				

8. View the 'lock' icon 💼 if it's displayed (not shown in the preceding figures).



- Purpose: The 'lock' icon is a security feature displayed in rare cases involving user account changes within the organization.
- The icon is displayed when a former employee's User Principal Name (UPN) is reused. This can happen if the employee returns to the organization or if the same UPN is assigned to a new employee. When this icon is displayed adjacent to a listed account, if the organization's admin wants to allow that employee (user) access to the meeting recordings of the employee that left, click the icon to unlock them. If you don't want the new employee to have access, open a support ticket with Service Provider's Support to resolve the conflict.
- What the feature does:
 - When a user with the same UPN is detected, the account is locked.
 - The lock prevents the new user from accessing old meeting recordings on behalf of the old user.
 - The lock also stops new recordings and logins for the new account.
- Admin can unlock the user; the user will then have access to the meeting recordings of the old user.
- a. Select the user.
- b. Click the 💼 icon.

Unlicensed Users

The Unlicensed Users page enables admin to manage all unlicensed users in the system. Unlicensed users are users who either participated in licensed user meetings and their info such as name and UPN are maintained in the system for presentation as part of the meetings they participated in, or users who had a license before.

If an unlicensed user receives an email from Meeting Insights about, for example, the recap, when the user clicks the button for accessing the meeting recording, the following message is displayed:

Immeetinginsights

No license

You do not have a Meeting Insights license to view meetings. Please reach out to your admin to get a license.



C audiocodes

• Admin can delete these users if their info needs to be deleted.

- The user and their info will be added again if they participate in a meeting after it is deleted.
- Deletion of a user from the page doesn't delete their display name from meetings.

To manage unlicensed users:

1. Under the 'User Settings' menu, click the Unlicensed Users option.

Admin Settings	Unlicensed Users						
System Settings 🗸 🗸	Total Accounts 1					Delete Selected Users	
	NAME ≑	EMAIL 👙	AAD OID	REPRESENTATIVES	Ô	ADDED DATE & TIME 👙	8
User Settings ^	Start With	Start With	Start With	Start With	Ŧ	MM/DD/YYYY - MM/DD/YYYY	Ŧ
Admin Profiles	Greg B	greg@M365x76188811.o	b123c963-74f4-4dc2-b2e3-4f2a0	+ <u>*</u>		Sep 4, 2024 12:10 PM	
Licensed Users Unlicensed Users							
Recording Notifications							
Email Notifications							

- 2. (Optionally) Select all unlicensed users listed in the page by checking the box next to 'Name'; to deselect all, click the same box again.
- **3.** Select a single unlicensed user or select multiple unlicensed users by checking the box next to each entry; the number of unlicensed users you selected is displayed out of the total number of unlicensed users.
- 4. (Optionally) Filter the page by
 - 'Name': In the **Start With** field under the 'Name' column, enter letters in the name.
 - 'Email': In the **Start With** field under the 'Email' column, enter an email address.
 - 'AAD OID': In the **Start With** field under the 'AAD OID' column, enter the OID of the AAD user.

- 'Representatives': In the **Start With** field under the 'Representatives' column, enter the name of a representative.
- 🚺 : Filters by ALL, Unlocked or Locked users.
- 'Added Date & Time': Click MM/DD/YY MM/DD/YY and in the calendar that pops up, select the start and end day of a period.
 - The lock icon is a security feature displayed in rare cases involving user account changes within the organization.
 - The icon is displayed when a former employee's User Principal Name (UPN) is reused. This can happen if the employee returns to the organization or if the same UPN is assigned to a new employee. When this icon is displayed adjacent to a listed account, if the organization's admin wants to allow that employee (user) access to the meeting recordings of the employee that left, click the icon to unlock them. If you don't want the new employee to have access, open a support ticket with Service Provider's Support to resolve the conflict.
 - What the feature does:
 - ✓ When a user with the same UPN is detected, the account is locked.
 - The lock prevents the new user from accessing old meeting recordings on behalf of the old user.
 - The lock also stops new recordings and logins for the new account.
 - Admin can unlock the user; the user will then have access to the meeting recordings of the old user.

Recording Notifications

Meeting Insights can trigger Microsoft recording notifications. Admin can configure the feature in the Recording Notifications page.

When a meeting is recorded, Meeting Insights triggers Microsoft to provide audio and visual notifications to meeting participants. Users can't overwrite the configuration. Meeting recording starts only when the owner-organizer joins the meeting. If they leave the meeting, recording is paused; if they rejoin, recording resumes. If the feature is disabled, recording continues regardless of whether they joined, left, or didn't join or leave.



The procedure described in this section for enabling recording notifications involves running a Microsoft script that requires Teams Administrator permissions.

- > To trigger recording notifications during meetings when recorded by Meeting Insights:
- 1. Under the 'User Settings' menu, click the Recording Notifications option.

Admin Settings	Recording Notifications			A
System Settings 🗸 🗸	Recording Notifications			*
Al Settings 🗸 🗸	Allow Triggering Teams Recording Notifications	Grant Admin Consent >	COMPLETED	Provide the application with permissions to trigger MSFT Teams recording notifications in your Tenant's Teams meetings when recorded by Meeting Insights. M365 Administrator permissions are required to grant the consent.
User Settings 🗸 🗸				
License Management	Total: 4			
Anonymization	PROFILE NAME	status 💠		
Monitoring ~	search			
Integrations V	All Employees			
Help Center 🗸	External Restricted Share (System)			
	External All Share (System)			
	Al Automatic Triggering			

 Make sure admin has been granted consent to allow Teams recording notifications to be triggered during meetings recorded by Meeting Insights.



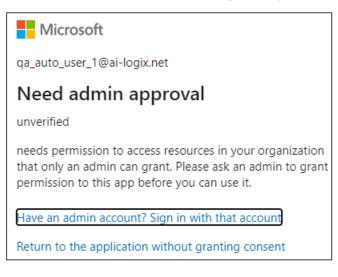
indicates consent has been granted

😵 indicates consent has not been granted yet and must be granted



If consent has not been granted, the page will be uneditable.

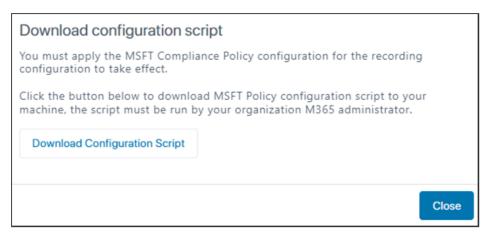
- Recording notifications require the 'Allow Meeting Insights to Be Added to Ongoing Meetings' script to be successfully executed from the 'Connect to M365' page. The script enables the notification bot to access meeting information.
- 3. Click Grant Admin Consent > if consent has not been granted yet.



- 4. Sign in with your M365 admin account.
- 5. Enable the User Profile.
 - For example, enable the default user profile Default User Profile (System).
 - All users with this profile will receive recording notifications during meetings they
 organize.
 - See here for information about how to configure a User Profile.
- 6. After changing a User Profile, the Recording Notifications page displays this message:

Recording Notifications #Pending MSFT Policy Execution

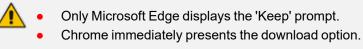
 Click the Download Configuration Script button. The script must be executed by the M365 admin.



The script must be run to enable recording notifications in Microsoft. It may take time for the Microsoft configuration to take effect. Meetings of the users enabled for recording notifications will not be recorded until the configuration takes effect on the Microsoft side.

8. Click **Download Configuration Script**; the following prompt is displayed:

Dowr	nloads	Đ	Q		\checkmark		
configuration policy script.ps1 could harm your device. Do you want to keep it anyway?							
	Keep	Dele	te				
See m	nore						



- 9. (In Edge) Click Keep.
- 10. (In Chrome) Click the download icon.
- 11. Right-click the downloaded **policy script.ps1** file.

	Open	
	Run with PowerShell	
	Edit	
6	Share with Skype	
PC	Edit with PyCharm Community Edition	
•	Move to OneDrive	
	7-Zip	>
D	Edit with Notepad++	
0	Scan with Cortex XDR	
Ê	Share	
	Open with	
	Give access to	>
	Add to archive	
	Add to "configuration policy script (10).rar"	
	Compress and email	
	Compress to "configuration policy script (10).rar" and email	
	Restore previous versions	
	Send to	>
	Cut	
	Сору	
	Create shortcut	
	Delete	
	Rename	
	Properties	

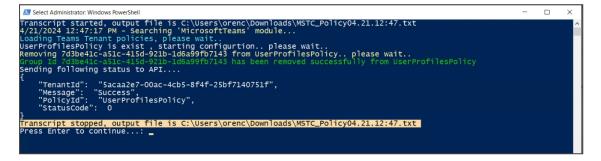
12. Select the option **Run with PowerShell**.

Open File	e - Security Warning	\times					
Do you	want to open this file?						
	Name:nc\Downloads\configuration policy script (10).ps1 Publisher: Unknown Publisher Type: Windows PowerShell Script						
	From: C:\Users\orenc\Downloads\configuration policy sc.						
Alwa	Open Cancel						
	While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not open this software. <u>What's the risk?</u>						

13. Click Open.



- 14. Click Yes.
- **15.** In PowerShell, type 'A' and then enter.



16. After the script is run, you'll view the 'Transcript stopped' indication shown in the figure above, and the 'Successful' message shown in the Recording Notifications page in the figure below.

Admin Settings	Recording Notifications	#Successful		ĸ
System Settings 🗸 🗸	Allow Triggering Teams		Provide the application with	permissions to trigger MSFT Teams recording notifications in your Tenant's Teams meetings when recorded
User Settings V	Recording Notifications	Grant Admin Consent 🕨 📀	Completed Provide the application with by Meeting Insights. M365 A	polinisations of original in the required to grant the consent.
				Download Configuration Script
License Management	PROFILE NAME	STATUS 🌩		
Al Settings 🗸 🗸	Default User Profile (System)			
Anonymization	Nava Prf			
				Discard Apply
Monitoring ~	Successful MSFT configuration	script execution acknowledgement received	0	
Integrations			Apr 21, 2024 12:51 PM	
Help Center				

- Enabling users for recording notifications may slow down users' call establishment.
 - Removing an AAD group or adding an AAD group to User Profiles that are enabled for recording notification requires downloading and executing the script for the change to take effect.

User Preferences

You can configure the following preferences for users:

- Email notification preferences see Email Notifications below
- Publishing time preferences for meeting recordings see Publishing Time Preferences on page 78

Email Notifications

You can configure Meeting Insights with permissions to enable Microsoft recording notifications for your users during meetings in your Teams' tenant.

> To manage email notifications:

1. Under the 'User Settings' menu, click the **User Preferences** option. The email notification options are displayed under the **Default User Email Notifications** group:

Default User Email Notifications			
Owner		Recipient	
Al finished: Ready or Failed		Action item was assigned to you in a meeting you were not invited to	
Meeting Processing Failure email notification		Get meeting recap email once a meeting is published	
Transcription finished: Ready or Failed	\bigcirc	Get meeting recap UPDATE email once it is updated and sent by owner	
Weekly unpublished meetings reminder		Get a notification email once a meeting is shared/unshared with you	
Added/Removed as a Representative for someone else		Meeting recording is ready (Video ready)	
Get recap email once it's ready (for meetings not published yet) - only for cases you are configured as 'Not AutoPublish'		Use Hebrew recap email template if recap is in Hebrew	

2. Under **Owner**, configure email notifications for Owners of meeting recordings:

Email Notification	Description
Owner	
Al finished: Ready or Failed	Switch on off for an email notification be sent not sent to users, indicating that AI Summarization is finished and that its status is Ready Failed.
Meeting Processing Failure email notification	Switch on off for an email notification to be sent not sent to users indicating that meeting processing failed.

Email Notification	Description
Transcription finished: Ready or Failed	Switch on off for a notification to be sent not sent to users indicating that the transcription is finished and that its status is Ready Failed.
Weekly unpublished meetings reminder	Switch on off for an email notification to be sent not sent to users every week, reminding them about their unpublished meetings.
Added/Removed as a Representative for someone else	Switch on off for a notification to be sent not sent to users indicating that they've been added removed as a representative for someone else.
Get recap email once it's ready (for meetings not published yet) - only for cases you are configured as 'Not AutoPublish'	Switch on off for an email to be sent not sent to users indicating that a recap is ready (for unpublished meetings). Applies only if users are configured as 'Not AutoPublish'.

- 3. Under Recipient, configure email notifications for participants of meeting recordings:
 - a. Click the toggle button corresponding to each email notification type to switch it on or off:

Email Notification	Description
Recipient	
Action item was assigned to you in a meeting you were not invited to	Switch on off for a notification to be sent not sent to users after an action item is assigned to them in a meeting to which they were not invited.
Get meeting recap email once a meeting is published	Switch on off for a notification to be sent not sent to users indicating the meeting recording has been published.
Get meeting recap UPDATE email once it is updated and sent by owner	Switch on off for a notification email to be sent not sent to users indicating that a meeting recap has been updated by the owner.
Get a notification email once a meeting is shared/unshared with you	Switch on off for a notification email to be sent not sent to users, indicating a meeting recording has been shared unshared with them.
Meeting recording is ready (Video ready)	Switch on off for a notification to be sent not sent to users indicating that the meeting recording is ready (video ready).
Use Hebrew recap email	Switch on off for a Hebrew recap email template to be

Email Notification	Description
template if recap is in Hebrew	used if the recap is in Hebrew.

Publishing Time Preferences

Meeting Insights supports the following publishing time options:

- Auto Publishing: (Default) Meeting Insights automatically publishes the meeting recording immediately after it ends.
- Manual Publishing: The user needs to manually publish the a meeting recording (by clicking the meeting recording's Publish button).
- Delayed Publishing: Meeting Insights automatically publishes the meeting recording three days (72 hours) after it has ended.

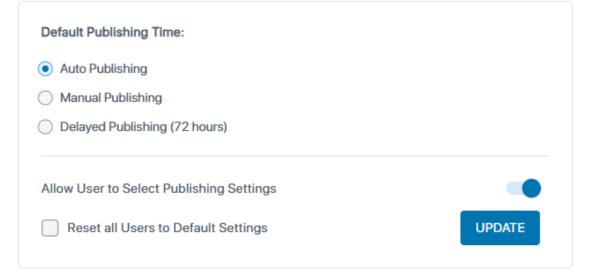
You can configure preferences for your organization's users regarding publishing of meeting recordings, including the following:

- Selecting one the above publishing options as the default.
- Allowing users to select any of the above publishing options; otherwise, only the default publishing option is available.
- Resetting the currently selected publishing option of each user to the default option.

> To configure publishing preferences:

- 1. Under the 'User Settings' menu, click the **User Preferences** option; the User Preferences page appears.
- 2. Scroll down to the Meeting Publishing Settings group:

Meeting Publishing Settings



- Under 'Default Publishing Time', select the default publishing option for your users (Auto Publishing, Manual Publishing, or Delayed Publishing (72 hours). You can find an explanation of each option in the beginning of this section.
- 4. To allow users to select any of the publishing options, click the Allow User To Select Publishing Settings toggle button to on. If you don't want publishing options available (displayed) to users, but instead want them to use only the default publishing option, then click the toggle button off.
- 5. If you've allowed users to select a preferred publishing option (see Step 4 toggle button on), you can force (overwrite) all the users' currently selected publishing option to change to the default publishing option (see Step 3). To enable this, select the 'Reset all Users to Default Settings' check box.
- 6. Click **Update** to apply your settings.
 - If you change the default publishing option and all options are available to users (i.e., **Allow User To Select Publishing Settings** toggle button is on), but the 'Reset all Users to Default Settings' check box is cleared:
 - ✓ For users whose currently selected option was not the previous default option, their selected option is retained (i.e., not changed to default).
 - For users whose currently selected option was the previous default option, their option is changed to the new default option.
 - If you change the default publishing option and all options are available to users (i.e., Allow User To Select Publishing Settings toggle button is on), and you've selected the 'Reset all Users to Default Settings' check box, all users are forcibly changed to the new default option.
 - If you disable users from selecting publishing options (i.e., Allow User To Select Publishing Settings toggle button is off), publishing options are not displayed to users and all users have the same publishing option, which is the default.

11 Al Settings

Meeting Insights supports various Artificial Intelligence (AI) features:

- Configuring AI-Powered Transcription below
- Configuring AI-Powered Insights on the next page
- Viewing and Resetting Voiceprints on the next page
- Viewing and Naming Templates for AI-Powered Summaries on page 82

Configuring AI-Powered Transcription

Meeting Insights supports Artificial Intelligence (AI) to convert audio recordings of meetings to textual documentation.



The AI-powered transcription feature is enabled by default.

To configure AI-powered transcription:

1. Under the 'AI Settings' menu, click the Transcription option.

Admin Settings	Transcription	
System Settings V	Transcription	•
User Settings V	Languages	English (United States) × Hebrew (Israel) ×
License Management	Transcription Activation	Meeting Owner V
Al Settings ^ Transcription Al Insights Voiceprints		

- 2. Click the Transcription toggle button to turn on the AI-powered transcription feature.
- **3.** From the 'Transcription Activation' drop-down list, select who can trigger AI-generated transcriptions of meeting recordings:
 - Meeting Owner only the owner or a user with edit permissions.
 - Anyone anyone with access to the meeting recording.

Configuring AI-Powered Insights

Meeting Insights supports AI-powered Insights.



The AI Insights feature is enabled by default. If you disable the AI Insights feature, admin will view the AIs of old meetings but will not be able to trigger new ones.

To configure AI-powered Insights:

1. Under the 'AI Settings' menu, select AI Insights.

Admin Settings	Al Insights	
System Settings 🛛 🗸	AI	Full Disclaimer Preview
User Settings V	Al Activation	English (United States)
	Meeting Owner 👻	The content is generated by an artificial intelligence model. It may generate occasionally inaccurate information.
License Management	English (United States) - Default	Users must review and edit the content to ensure accuracy and relevance before sharing it internally or externally.
Al Settings ^	Users must review and edit the content to ensure accuracy and relevance before sharing it internally or externally.	
Transcription	Hebrew (Israel)	
Al Insights	המשתמש חייב לסקור ולערוך את התוכן כדי להבטיח דיוק ורלוונטיות לפני שיתוף פנימי או חיצוני. 🖉	
Voiceprints	0	

- 2. Click the AI toggle button to turn on the AI-powered Insights feature.
- From the 'AI Activation' drop-down, select who can trigger AI-generated insights of meeting recordings:
 - **Anyone** anyone with access to the meeting recording (default).
 - Meeting Owner only the owner or a user with edit permissions.
- 4. To customize the disclaimer:
 - a. Click the pencil icon corresponding to the disclaimer language.
 - **b.** Type the disclaimer text, and then click the tick icon.
 - c. To view a preview of your disclaimer, from the 'Full Disclaimer Preview' drop-down list, select your disclaimer.

Viewing and Resetting Voiceprints

Admin can view users' voiceprints and their confidence level. Admin can also reset voiceprints.

Voiceprint examiners interpret spectograms using aural and instrumental comparisons of a known voice with an unknown voice. They examine time, frequency and intensity of the sounds captured on the spectograph. Pitch, dialect, resonance, breath patterns and other speech characteristics are registered.

> To view users' voiceprints and their confidence level:

1. Open the Voiceprints page (Admin Settings > Al Settings > Voiceprints).

Admin Settings	Voiceprints	
System Settings V	Total Users: 1 Selected: 1	On Reset Voiceprint
User Settings 🛛 🗸	NAME 🗘 EMAIL 🇘 CONFIDENCE LEVEL 🌩	
	Starts With Starts With	
License Management	MOD Administrat admin@M365x7 58%	
Al Settings ^		
Transcription		
Al Insights		
Voiceprints		

- 2. View each voiceprint and its (color-coded) confidence level:
 - Red = no voiceprint
 - Yellow = insufficient
 - Green = good

To reset a voiceprint:

- **1.** On the Voiceprints page, select the voiceprint(s) to reset.
- 2. Click the Reset Voiceprint button; a confirmation message appears.
- 3. Click **RESET** to confirm.

Viewing and Naming Templates for AI-Powered Summaries

You can view a list of all uploaded templates. Additionally, you can configure a 'Custom Name' for each template, which is displayed to end users in Meeting Insights. This name should be clear and user-friendly, making it easy for users to recognize and identify the template.



- The template 'Name' is only for the administrator, but is displayed to end users if you don't configure a 'Custom Name'.
- The template 'Custom Name' must be unique.
- To enable template-based AI-powered summaries per User Profile, see Enabling Template-based AI-Powered Summaries on page 66.

To view templates or change custom name:

1. In the Admin Settings menu pane, expand AI Settings, and then click Templates Library; a list of the installed templates are displayed:

Admin Settings	Templates Library			
System Settings V	Total Templates: 2			
User Settings 🗸 🗸	NAME \$	DESCRIPTION	SECTOR 👙	CUSTOM NAME
	Search		Select -	Search
License Management	Council meeting in the munici	Feel free to inquire about any aspect of this meeting. What infor		
Al Settings ^	Deep Dive	For those seeking comprehensive analysis of this meeting, this		
Transcription				
Al Insights				
Voiceprints				
Templates Library				

2. To configure a name for the template:

Edit Template

a. Click the \checkmark icon corresponding to the required template; the following dialog box appears:

Luit template		
- Template Name		
Custom Name		
	Cancel	Save

- **b.** In the 'Custom Name' field, type a name for the template.
- c. Click Save.

12 Monitoring

Two menu options are available:

- Audit Trail
- System Activity Log

Audit Trail

Meeting Insights features an 'Audit Trail' which logs for future reference admin and user activities performed in Meeting Insights.

> To monitor the audit trail:

Total: 9927						🛃 Export
DATE & TIME	NAME 👙	ROLE	ACTIVITY	ITEM	MEETING SUBJECT	DESCRIPTION
DATE & TIME 👳	NAME 🤟	ROLE		ITEM	MEETING SUBJECT	DESCRIPTION
MM/DD/YYYY - MM/DD/YYYY	Select name		Select	<u>.</u>	Contains	
Dec 25, 2023 8:51 AM	Shirel Megidish	Admin	Accessed	Meeting Page		
Dec 25, 2023 8:45 AM	Shirel Megidish	Admin	Changed	Group		Added "Test" Group
Dec 25, 2023 8:45 AM	Shirel Megidish	Admin	Downloaded	User Profile Group		Added association of user profile "Default
Dec 25, 2023 8:44 AM	Shirel Megidish	Admin	Deleted	System Automatic AAD		Added automatic AAD groups synchroniza
Dec 25, 2023 8:42 AM	Shirel Megidish	Admin	Added	Group		Added "team-1" Group
Dec 25, 2023 8:42 AM	Shirel Megidish	Admin	Added	User Profile Group		Added association of user profile "Default
Dec 25, 2023 8:42 AM	Shirel Megidish	Admin	Executed	Manual AAD Synchroniz		Executed manual AAD groups synchroniza
Dec 25, 2023 8:40 AM	Shirel Megidish	Admin	Deleted	System Automatic AAD		Deleted automatic AAD groups synchronia
Dec 25, 2023 8:39 AM	Shirel Megidish	Admin	Added	System Automatic AAD		Added automatic AAD groups synchroniza
Dec 25, 2023 8:39 AM	Shirel Megidish	Admin	Deleted	System Automatic AAD		Deleted automatic AAD groups synchronic
Dec 25, 2023 8:37 AM	QA_Auto_User_1	User	Accessed	Page		

1. Under the 'Monitoring' menu, click the **Audit Trail** option.

2. [Optionally] Select an Activity filter in order to filter the page by an action users perform in the system (Accessed, Changed, Downloaded, Added, Deleted, etc.). Other filters can also be selected to exclude more unwanted information from the page for more effective management. After the user profile of a user group is changed, for example, the Audit Trail page's Activity filter enables you to determine details such as at what time the change was made, who made it, which user group's user profile was changed, and from what profile to what profile.

Audit Trail						
Total: 8						🛃 Export
DATE & TIME	NAME 崇	ROLE	ACTIVITY	ITEM	MEETING SUBJECT	DESCRIPTION
MM/DD/YYYY - MM/DD/YYYY	Select name 👻		Select Changed	• ×	Contains	
Jan 10, 2024 10:04 AM	MOD Administrator	Admin	Changed	Meeting Admin Mode		ON
Jan 9, 2024 11:01 AM	MOD Administrator	Admin	Changed	Meeting Admin Mode		ON
Jan 8, 2024 3:35 PM	MOD Administrator	Admin	Changed	Meeting Admin Mode		ON
Jan 8, 2024 1:21 PM	MOD Administrator	Admin	Changed	Meeting Admin Mode		ON
Jan 8, 2024 12:25 PM	MOD Administrator	Admin	Changed	Meeting Admin Mode		ON Changed user group "Design" to be associated with user profile "External
Jan 8, 2024 10:59 AM	MOD Administrator	Admin	Changed	Meeting Admin Mode		Restricted Share (System)", replacing the previous association with "Default User Profile (System)"
Jan 7, 2024 3:06 PM	MOD Administrator	Admin	Changed	User Profile Group		Changed user group "Design" to be associat
Jan 7, 2024 2:47 PM	MOD Administrator	Admin	Changed	Meeting Admin Mode		ON
						L



- All logins / logouts of all users are recorded.
- The activity **Deleted** is also associated with the item of **Meeting deletion**, so if you select this activity, this item will also be displayed.
- The activity Downloaded is associated with items such as Meeting Downloaded or Recap downloaded.
- There are no items associated with the activity Accessed; the activity implies generic access to content, or else the item indicates Meeting and the subject of the meeting.
- Items associated with the activity Added | Deleted | Changed are (for example) Participant | ActionItem | Highlight | EditPermissions | External share, etc.; these items will be displayed if you select this activity.
- **3.** [Optionally] Select a Date filter. Click the calendar icon and from the popup calendar select a month | day | year; only activities that took place on this date will be displayed in the page (activities that did not take place on this date will be excluded).
- [Optionally] Select a Meeting Subject filter. Enter the subject of the meeting; only activities associated with meetings whose subject line matches the text you entered will be displayed (activities associated with meetings whose subject line does not match the text will be excluded).
- [Optionally] Select a Name filter. Click the drop-down arrow and in the 'Search' field displayed, specify the name of a user; only entries related to that user will be displayed.

More than one filter can be applied: Activity, Date, Meeting Subject and/or Name.

Click the Export to CSV option to export the Audit Trail in CSV format that you can easily share with others.

System Activity Log

The System Activity Log page enables admin to view system activities that occur either following admin operations (license added due to admin mapping of groups or adding users), or automatically, such as when

a new user is added via automatic synchronization from AAD to a user group -or-

a new user group is added via automatic synchronization from AAD to Meeting Insights

Logged activities can be filtered by date and time so that system activities which occurred outside that date | time are excluded from display.

To filter the System Activity Log:

1. Under the 'Monitoring' menu, click the System Activity Log option.

Admin Settings	Tota	95 Selected 18 Select All			d, Export
System Settings V		DATE AND TIME \$	LOG TYPE 💠	ACTIVITY TYPE 💠	LOG DESCRIPTION
User Settings 🗸		MM/DD/YYYY - MM/DD/YYYY			
License Management	V	Nov 14, 2023 10:28 AM	warning	license	Some users are assigned to multiple AAD groups, each associated with different User Profiles having distinct storage or retention settings. When users are assigned to User Profiles with varying storage locations or retention periods, the longest retention policy will be applied, and storage locations may be assigned arbitrarily. Please ensure that all users belong to a single AAD group mapped to Meeting Insights.
Al Settings V		Nov 13, 2023 5:34 PM	warning	license	See Full List Of Users 15 new users were assigned with the license. Overall 15 users exceed the number of available licenses.
Monitoring ^		Nov 13, 2023 5:34 PM	warning	license	Some users are assigned to multiple AAD groups, each associated with different User Profiles having distinct storage or retention settings. When users are assigned to User Profiles with varying storage locations or retention periods, the longest retention policy will be applied, and storage locations may be assigned arbitrarily. Please ensure that all users beiong to a single AAD group mapped to Meeting Insights.
Audit Trail					See Full List Of Users
System Activity Log		Nov 13, 2023 5:33 PM	info	license	18 users were unassigned from the licenses.
Integrations		Nov 13, 2023 5:32 PM	warning	license	Some users are assigned to multiple AAD groups, each associated with different User Profiles having distinct storage or retention settings. When users are assigned to User Profiles with varying storage locations or retention periods, the longest retention policy will be applied, and storage locations may be assigned arbitrarily. Please ensure that all users belong to a single AAD group mapped to Meeting Insights. See Fall Latd Of Users
Help Center 🗸 🗸		Nov 13, 2023 5:00 PM	warning	license	See Full List OF Users 2 new users were assigned with the license. Overall 18 users exceed the number of available licenses.
		Nov 13, 2023 5:00 PM	warning	license	Some users are assigned to multiple AAD groups, each associated with different User Profiles having distinct storage or retention settings. When users are assigned to User Profiles with varying storage locations or retention periods, the longest retention policy will be applied, and storage locations may be assigned arbitrarily. Please ensure that all users belong to a single AAD group mapped to Meeting Insights. See Fall lat of Users
		Nov 13, 2023 4:59 PM	warning	license	See Full List Of Users 2 users were unassigned from the license. 16 users exceed the number of available licenses.
		Nov 13, 2023 4:59 PM	warning	license	Some users are assigned to multiple AAD groups, each associated with different User Profiles having distinct storage or retention settings. When users are assigned to User Profiles with varying storage locations or retention periods, the longest retention policy will be applied, and storage locations may be assigned arbitrarily. Please ensure that all users belong to a single AAD group mapped to Meeting Insights.

- 2. (Optionally) Select all logs by checking the box next to 'Date and Time'; to deselect all, click the same box again.
- **3.** Select a single log or select multiple logs by checking the box next to each log entry; the number of logs you selected is displayed out of the total number of logs available.
- **4.** (Optionally) Filter the page by 'Date and Time', 'Log Type' or 'Activity Type' column; click the column header.
- (Optionally) Filter the page by period: Click MM/DD/YY MM/DD/YY and in the calendar that pops up, select the start day and the end day.
- 6. Under the 'Log Description' column, click the See Full List Of Users link in the row of a log.

Tota	95 Selected 18 Select All				🛓 Export
	DATE AND TIME 👙	LOG TYPE 💠	ACTIVITY TYPE 💠 🛛 L	LOG DESCRIPTION	
•	Nov 14, 2023 10:28 AM	warning	ê		h different User Profiles having distinct storage or retention settings. When users on periods, the longest retention policy will be applied, and storage locations may be D group mapped to Meeting Insights.
	Nov 13, 2023 5:34 PM	Full list of users			number of available licenses.
		NAME	AAD GROUPS	USER PROFILES	Iferent User Profiles having distinct storage or retention settings. When users mode, the longest retention policy will be applied, and storage locations may be
~	Nov 13, 2023 5:34 PM	MOD Administrator	All Company, License users, All Employees	10 license test- no recording, Default User Profile (System)	oup mapped to Meeting Insights.
	Nov 13, 2023 5:33 PM	Christie Cline	License 1o users, All Employees	license test- no recording, Default User Profile (System)	
	Nov 13, 2023 3.331 M	Debra Berger	License 1o users, All Employees	license test- no recording, Default User Profile (System)	fferent User Profiles having distinct storage or retention settings. When users
~	Nov 13, 2023 5:32 PM	Alex Wilber	ming-main, All Employ	rees main-profile DONT DELETE, Default User Profile (System)	criods, the longest retention policy will be applied, and storage locations may be oup mapped to Meeting Insights.
		Adele Vance	ming-main, All Employ	rees main-profile DONT DELETE, Default User Profile (System)	
	Nov 13, 2023 5:00 PM			A second a s	umber of available licenses.
V	Nov 13, 2023 5:00 PM	warning	ء license ۽		In different User Profiles having distinct storage or retention settings. When users on periods, the longest retention policy will be applied, and storage locations may be D group mapped to Meeting Insights.
~	Nov 13, 2023 4:59 PM	warning	license 2	2 users were unassigned from the license. 16 users exceed the numbe	er of available licenses.
	Nov 13, 2023 4:59 PM	warning	٤		h different User Profiles having distinct storage or retention settings. When users in periods, the longest retention policy will be applied, and storage locations may be D group mapped to Meeting Insights.

- 7. In a log, view for example how many times users were added or removed from a license (the count).
- 8. (Optionally) Click the **Export** button in the uppermost right corner of the page and in the format prompt, click the **Export to Excel** button.

13 Integrations

You can integrate the following third-party applications with Meeting Insights:

- Microsoft Planner see Integrating Meeting Insights with Microsoft Planner below
- Salesforce customer relationship management (CRM) platform see Integrating Meeting Insights with Salesforce on page 91

Integrating Meeting Insights with Microsoft Planner

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



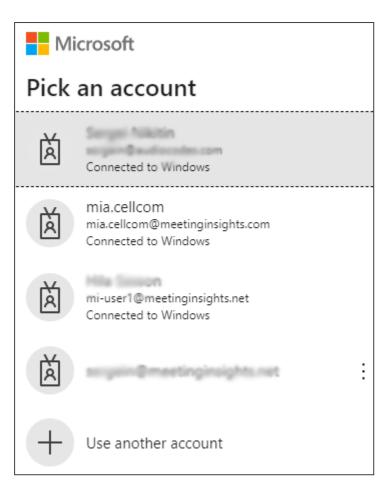
Before integrating Microsoft Planner, the logged-in user must have Meeting Insights 'admin' privileges and Azure 'tenant admin' privileges.

> To integrate Microsoft Planner:

1. Under the 'Settings' menu, click the Integrations option.

Integrations (i)	
Meeting insights - Enable Integrations With External Platforms	
Send To Planner	

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



3. Pick an account.

	Microsoft						
ser	gein@meetinginsights.net						
	Permissions requested Review for your organization						
	nlab-auth-app verified						
	is app may be risky. Only continue if you trust s app. Learn more						
Thi	s app would like to:						
\sim	Create, read, update, and delete user's tasks and task lists						
	Allows the app to create, read, update, and delete the signed-in user's tasks and task lists, including any shared with the user.						
	This is a permission requested to access your data in Audiocodes Itd - MI.						
	View users' basic profile						
\sim	view users basic profile						
Ċ	Allows the app to see your users' basic profile (name, picture, user name)						
	Allows the app to see your users' basic profile (name, picture,						
~	Allows the app to see your users' basic profile (name, picture, user name) This is a permission requested to access your data in						
~	Allows the app to see your users' basic profile (name, picture, user name) This is a permission requested to access your data in Audiocodes Itd - MI.						
^	Allows the app to see your users' basic profile (name, picture, user name) This is a permission requested to access your data in Audiocodes Itd - MI. Maintain access to data you have given it access to Allows the app to see and update the data you gave it access to, even when users are not currently using the app. This						
alÍu	Allows the app to see your users' basic profile (name, picture, user name) This is a permission requested to access your data in Audiocodes ltd - MI. Maintain access to data you have given it access to Allows the app to see and update the data you gave it access to, even when users are not currently using the app. This does not give the app any additional permissions. This is a permission requested to access your data in						
all u revi Acc you stat for	Allows the app to see your users' basic profile (name, picture, user name) This is a permission requested to access your data in Audiocodes ltd - MI. Maintain access to data you have given it access to Allows the app to see and update the data you gave it access to, even when users are not currently using the app. This does not give the app any additional permissions. This is a permission requested to access your data in Audiocodes ltd - MI.						
all u revi Acc you stat for http	Allows the app to see your users' basic profile (name, picture, user name) This is a permission requested to access your data in Audiocodes ltd - MI. Maintain access to data you have given it access to Allows the app to see and update the data you gave it access to, even when users are not currently using the app. This does not give the app any additional permissions. This is a permission requested to access your data in Audiocodes ltd - MI. Du accept, this app will get access to the specified resources for users in your organization. No one else will be prompted to ew these permissions. epting these permissions means that you allow this app to use r data as specified in their terms of service and privacy ement. The publisher has not provided links to their terms you to review. You can change these permissions at						

- 4. Click Accept; you're giving the app permission to create, read, update, and delete the signed-in user's tasks and task lists, as indicated in the prompt; you'll be redirected back to the 'Settings' page; click the Integrations tab to make sure it's enabled.
- 5. Use the following example of the user sending an action item to Microsoft Planner (during a live meeting) as a reference:

 Meeting Recap of test 2 		⊘ Published ?
Start Time Jun 23, 2022 8:15 PM End Time Jun 22, 2022 8:17 PM	Meeting Summary [®] + Add a Summary	
Send to email	Decisions	
Download CSV	Action Items 📕	
Invitees	🚱 wei C Awayn to Den Gene, Jan 32 2022 🗮	00
Conner	🕐 1952 G Anageria Din Anni M 2022 🗮	00
	text 3 G Aways to Deriver: An 30, 2022	Mark as done
	Notes - Add solar	■ Send To Planner ✓ Edit ① Delete

- 6. Click the Action Items menu.
- 7. Choose a plan and a bucket, and then click Send to Planner.

Add Action Item to Planner				
	Plan			
Dorel - privat	e v			
	Bucket			
To do	~			
Cancel	Send to Planner			

Integrating Meeting Insights with Salesforce

You can leverage the power of AI-generated meeting summaries by integrating Meeting Insights with your organization's Salesforce platform. This integration allows users to send summaries to specific Salesforce objects, such as the Account object, populating designated fields like 'ACompany'. This ensures key discussion points from sales meetings are readily accessible within Salesforce, opportunities are kept up-to-date, and sales efficiency is improved. • Only Al-powered bullet-summaries are sent to Salesforce.

- Only the following Salesforce objects are supported:
 - Account
 - Opportunity
- When Meeting Insights updates a Salesforce object field with the AI-powered summary, it adds the new content to any existing content.
- Disabling Salesforce integration deletes all associated data and settings of the tenant.

Integration includes the following main steps:

- Setting up Salesforce and obtaining required information for Meeting Insights (see Setting Up Salesforce and Obtaining Required Information below).
- Configuring Meeting Insights for integrating with your Salesforce platform (see Configuring Meeting Insights for Salesforce Integration on page 97).

Setting Up Salesforce and Obtaining Required Information

Before you can configure Meeting Insights to integrate with your organization's Salesforce platform, you need to do the following in Salesforce:

- 1. Create a Connected App for integration with Meeting Insights see Creating a Connected App in Salesforce below.
- 2. Obtain the following information for Meeting Insights:
 - Salesforce domain URL Obtaining the Salesforce Domain URL on page 94.
 - Connected App client ID and client secret key Obtaining Client ID and Secret of Salesforce Connected App on page 94.
 - Field (API) names of the Account and Opportunity Salesforce objects where Meeting Insights can send AI-powered meeting summaries - Obtaining Salesforce Object Field (API) Names on page 96.

Creating a Connected App in Salesforce

A connected app is a framework that enables an external application (i.e., Meeting Insights) to integrate with Salesforce using APIs and standard protocols.

To create a connected app:

- 1. Sign in to your Salesforce account.
- 2. Click the gear \odot icon in the top-right corner, and then choose **Setup**.
- 3. In the left navigation menu, expand **Apps**, and then choose **App Manager**.
- 4. Click the New Connected App button; a dialog box appears.

5. Select **Create a Connected App**, and then click **Continue**; the New Connected App page appears:

-	Q
Setup Home Object	t Manager 🗸
Q. Quick Find	E SETUP App Manager
Setup Home Salesforce Foundations	New Connected App
Sales Setup	Save Cancel
Service Setup Assistant	To publish an app, you need to be using a Developer Edition organization with a namespace prefix chosen.
Hyperforce Assistant	Basic Information
Release Updates	Connected App Name
Lightning Experience Transition Assistant	API Name
Salesforce Mobile App	Contact Break
Optimizer	Logo Image URL()
Sales Cloud Everywhere	Logo image dire
ADMINISTRATION	Choose one of our sample loops
> Users	Info URL
> Data	Description()
Email	▼ API (Enable OAuth Settings)
PLATFORM TOOLS	Enable CAuth Settings
V Apps	
App Manager	♥ Web App Settings
AppExchange Marketplace	Start URL 0
 Connected Apps 	Enable SAML

- 6. Under the **Basic Information** group, configure the following:
 - In the 'Connected App Name' field, type a name for the connected app.
 - In the 'Contact Email' field, type the email of the contact person for this integration.
- 7. Under the API (Enable OAuth Settings) group, configure the following:
 - a. Select the 'Enable OAuth Settings' check box.
 - b. In the 'Callback URL' field, enter all these URLs or the URL according to your region:
 - EMEA: https://emea.meetinginsights.com/mi/redirect/salesforce
 - Australia: https://au.meetinginsights.com/mi/redirect/salesforce
 - Americas: https://americas.meetinginsights.com/mi/redirect/salesforce
 - c. For Selected OAuth Scopes, select the following scopes from the Available OAuth Scopes list:
 - Full access (full)
 - Manage user data via APIs (api)
 - Perform requests at any time (refresh_token, offline_access)
 - d. Select the 'Enable Client Credentials Flow' check box.
- 8. Click Save; the connected app is created and is now listed in the App Manager list.

- **9.** In the App Manager list, click the down-pointing arrow corresponding to the new connected app, and then from the drop-down menu, choose **Manage**.
- **10.** Click the **Edit Policies** button, and then configure the following:
 - a. From the 'Permitted Users' drop-down list, select All users may self-authorize.
 - b. For 'Refresh Token Policy' it's recommended to select Expire refresh token after 24
 Hour(s). This means that once the user logs into Salesforce from Meeting Insights, the user only needs to log in again after 24 hours.

\$ETUP		
Connected App MiaToSfdc		
Connected App Edit		
		Wordsn 1 Description
Basic Information		
	Start URL 1	Mobile Start URL
OAuth Policies		
	Freminie Univer All uses may self-authorize Exactle linger Legent ()	P Relaxable Prices Precisions V Retress Takes Pulses Demonstrate quere entretes tales Demonstrate quere entretes tales Demonstrate quere entretes tales and Degress entretes tales and and 24 Degress pulses tales and and 24 Degress pulses tales and and 24 Degress pulses tales and and 24
Session Policies		₽.

11. Click Save.

Obtaining the Salesforce Domain URL

The following procedure describes how to obtain your organization's Salesforce domain URL, which you need for configuring Meeting Insights.

> To obtain client ID and secret:

- **1.** Sign in to your Salesforce account.
- 2. Click the gear \odot icon in the top-right corner, and then choose Setup.
- 3. In the left navigation menu, expand Company Settings, and then choose My Domain.

The domain URL is displayed in the 'Current My Domain URL' field:

My Domain Settings

My Domain showcases your company's brand and keeps your data more secure. The	lomains that Salesforce hosts for your org include your company-specific My Domain name.
My Domain Details	Edit
Current My Domain UF	L with enhanced domains
My Domain Nan	e audiocodes
Domain Suff	X Standard (*.my.salesforce.com)

Obtaining Client ID and Secret of Salesforce Connected App

Once you've created the connected app for Meeting Insights integration, you can obtain its client ID and client secret, which you need for configuring Meeting Insights.

To obtain client ID and secret:

- **1.** Sign in to your Salesforce account.
- 2. Click the gear \odot icon in the top-right corner, and then choose **Setup**.
- 3. In the left navigation menu, expand **Apps**, and then choose **App Manager**.
- 4. In the App Manager list, click the down-pointing arrow corresponding to the new connected app, and then from the drop-down menu, choose **View**.
- 5. Click the Manage Consumer Details button:

Manage Connec	ted Apps						
Connected App Name D99MiatoSFDC * Back to List: Custom Apps							
* back to List. Custom Apps		Edt	Delete	Manage	Migrate to External Client App		
			Version	1.0			
		AJ	PI Name	10000	ad#100		
		Creat	Created Date		08/12/2024, 09:44		
				By: AC.	Automation		
			ct Email	10.00	pr@audiocoles.com		
		Contact Last Modifi		16/01/2	025, 15:39		
			ee bese		Automation		
		Des	cription	wy. case			
			nfo URL				
▼ API (Enable OAuth Settings)							
	Consumer Key and Secret	Manage Consumer Details					
	Selected OAuth Scopes	Manage user data via APIs (api) Full access (full) Perform requests at any time (refresh_token, offline_ac	cess)				

A verification code is sent to your email.

6. Enter the code in the 'Verification Code' field in the displayed dialog box:

salesforce				
Verify You	ur Identity			
You're trying to access a cor your Salesforce account is s identity.	nnected app. To make sure secure, we have to verify your			
Enter the verification code ac				
Back	Verify			
Resend Code				

7. Click **Verify**; the client ID is displayed in the 'Consumer Key' field and the client secret is displayed in the 'Consumer Secret' field:

Manage Connected Apps		
Connected App Name D99MiatoSFDC * Back to Manage Connected Apps		
Consumer Details Consumer Key	Сору	
Consumer Secret	Сору	NUMBER OF BUILDING TO
Staged Consumer Details Generate staged values for the consumer key and secret. When you a	pply the staged values, they replace the	original consumer details.
Staged Consumer Key Staged Consumer Secret	Not generated Not generated	Generate Apply Cancel

Obtaining Salesforce Object Field (API) Names

The following procedure describes how to obtain the field names for the Account and Opportunity objects. These must be the API field names, which you need for configuring Meeting Insights.

> To obtain object field names:

1. Sign in to your Salesforce account.

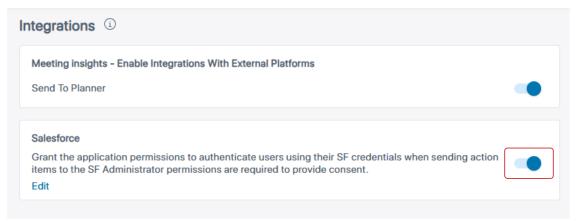
- 2. Click the gear \odot icon in the top-right corner, and then choose **Setup**.
- **3.** In the left navigation menu, choose **Object Manager**, and then select the object (e.g., Account).
- 4. Click **Fields & Relationships**, and then search for the required field. The API field name is displayed in the 'Field Name' column, as shown in the following example:

Elii Setup Home Obje	ct Manager 🗸		Q. Search Setup		**	a ? \$ # 🕜
SETUP > OBJECT MANAGER Account				1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1		× 11
Details Fields & Relationships	Fields & Relationships 1 Items, Sorted by Field Label			⊂ perł <u>⊥</u>		Set History Tracking
Page Layouts Lightning Record Pages	FIELD LABEL Periodic Update	FIELD NAME Periodic_Update_c	Long Text Area(131072)	CONTROLLING FIELD	INDEXED	v

Configuring Meeting Insights for Salesforce Integration

Once you have obtained the required information from your Salesforce account (see Setting Up Salesforce and Obtaining Required Information on page 92), you can configure Meeting Insights for integration with Salesforce.

- > To configure Meeting Insights for Salesforce integration:
- 1. Under the 'Settings' menu, expand Integrations, and then click Apps; the Integrations page appears.
- 2. Under the Salesforce group, click the toggle button to enable Salesforce integration:



The following dialog box appears:

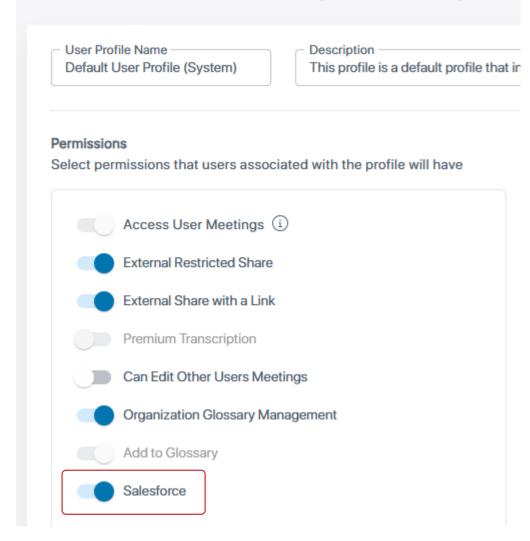
Salesforce Connection

Domain audiocodes.my.salesforce.com	Client ID 3MVG9WtWSKUDG.x5qVdYdvwi9ORUs7qO	Client Secret
Salesforce object to update	Salesforce field to update	
Account Summary	Periodic_Update_c	
Opportunity Summary	New_Update_c	
		_

- 3. Configure Salesforce connectivity:
 - a. In the 'Domain' field, enter the domain URL of your organization's Salesforce platform. For obtaining the domain URL, see Obtaining the Salesforce Domain URL on page 94.
 - b. In the 'Client ID' field, enter the client ID of the Salesforce connected app. For obtaining the client ID, see Obtaining Client ID and Secret of Salesforce Connected App on page 94.
 - In the 'Client Secret' field, enter the client secret key of the Salesforce connected app.
 For obtaining the client secret, see Obtaining Client ID and Secret of Salesforce
 Connected App on page 94.
- 4. For each Salesforce object listed under 'Salesforce object to update' (Account or Opportunity), enter the Salesforce field name in the corresponding 'Salesforce field to update' column. These are the fields where Meeting Insights sends the meeting summary (if selected by the user).
 - The field names must be the **API** field names. To obtain the API field names, see Obtaining Salesforce Object Field (API) Names on page 96.
 - Make sure that the field names are exactly as they appear in Salesforce.
 - Meeting Insights supports only the Account and Opportunity Salesforce objects.
 - When Meeting Insights updates a Salesforce object field with the AI-powered summary, it adds the new content to any existing content.
- 5. Click Submit.
- 6. Enable Salesforce for User Profiles:
 - a. Expand the User Settings menu, and then click User Profiles.
 - **b.** Add a new User Profile or edit an existing one.
 - c. Under the Permissions group, click the **Salesforce** toggle button to turn it on:

Edit User Profile

User Profiles include permissions and recording options that are assigned to th



7. Click Apply.

14 Configuring Automatic Invitation of MIA to Scheduled Meetings

Admins can configure automatically inviting Meeting Insights Assistant (MIA) to scheduled Teams and Zoom meetings, whether organized by a specific user or by a group of users. When the user then schedules a meeting, MIA is automatically added to the invitees list and the following disclaimer (for example) is added to the body of every invitation:

Disclaimer: The meeting is recorded



The disclaimer is not displayed to the meeting's organizer when the organizer opens the meeting invitation. It is displayed (at the top of the body of the invitation) to all other recipients of the meeting invitation.

Take the following three steps to configure an automatic invitation of MIA to scheduled meetings:

1. Add a mail-enabled security group in Microsoft 360 admin center. See here how.



Only a *mail-enabled security group* can be part of the mail rule.

- 2. Define an auto-invite rule in Exchange admin center. See here how.
- **3.** Test the rule. See here how.

Add a Mail-Enabled Security Group

The instructions below focus on how to create a mail-enabled security group through Microsoft 365 admin center.

> To add a mail-enabled security group:

 In Microsoft 365 admin center, go to Teams & groups > Active teams & groups > Security Groups tab.

	Contoso Electronics	Microsoft 365 admin center	𝒫 Search			Þ.	ch 12	۵	? (MA
=		Home > Active teams & groups	;				🕗 Enab	e Dark mod	e
	Home Users ~	Active teams an	d groups						
	Devices ~	🖓 About Groups 🛛 🕫 Usin	g Teams And SharePoint 🏾 🍄 Where to store files						
220	Teams & groups								
	Active teams & groups Policies	Teams & Microsoft 365 groups	Distribution list Security groups				l teams and	groups	
	Deleted groups Shared mailboxes	+ Add a security group + A	dd a mail-enabled security group 🞍 Export 💍 Refres	h			14	items 🚍	-
	Billing ^	Name 1	Email	Sync stat	tus Created on 🗔 G	boose columns			
	Purchase services Your products	sg-Engineering	1	0	November 9, 2023 at 4:4				
	Licenses	sg-Executive	1	0	November 9, 2023 at 4:4				
	Bills & payments Billing accounts	sg-Finance		۵	November 9, 2023 at 4:4				
	Payment methods	sg-HR	: :	0	November 9, 2023 at 4:4				
	Billing notifications	sg-IT	:	0	November 9, 2023 at 4:4				
P	Setup	sg-Legal	:	0	November 9, 2023 at 4:4				

2. In the 'Active teams & groups' page shown above, click + Add a mail-enabled security group.

	Contoso Electronics Microsoft 36	55 admin center	♀ Search		ß	Q	۵	?	MA
=	Home $ ightarrow$ Active teams and groups $ ightarrow$ Add a	mail-enabled security grou					🕗 Enab	le Dark	mode
ି ୧	O Basics	Set u	p the basics						*
*	Owners		ed security groups give people access to resources such as SharePoint s ing everyone in the group. To get started, fill out some basic info about						
	O Members								
<i>P</i>	O Settings	Name *	nsights Users						
	O Finish	Description	1						
		Users that	will use MI						
									-
		Next					Car	ncel	

3. In the 'Set up the basics' page shown above, enter **Meeting Insights Users** in the 'Name' field, enter a 'Description' to facilitate effective management later, and then click **Next**.

	Contoso Electronics Microsoft 365 admin	center $ ho$ Search				MA
=	Home $>$ Active teams and groups $>$ Add a mail-enable	ed security group		🕗 Enat	ole Dark	mode
	Basics Owners	Assign owners Group owners have unique permissions to manage the group. They can add and remove members, change group settings, rename the group, update its description, and more.				
D /2 	Members Settings Finish	Assign owners				
		Add group owners New owners will receive an email when you add them				
		Back Next		Ca	incel	

4. In the 'Assign owners' page that opens, click + Assign owners.

	Contoso Electronics Microsoft 365 adm	in center P Search	S G O (M)
=	Home $>$ Active teams and groups $>$ Add a mail-en	abled security group	×
ណ៍		0	Assign owners
8	Basics	Assign owners	Select up to 20 people to join this group as owners. You can add more later from Active teams & groups.
æ	Owners		Search for a name or email address
220		Group owners have unique permissions to manage the group. They can adc settings, rename the group, update its description, and more.	
	O Members	① You have to have at least one owner. We recommend adding two, so one can help a	Display name
P 	O Settings	+ Assign owners	Lidia Holloway LidiaH@M365x97148389.OnMicrosoft.com
	 O Finish		Lynne Robbins LynneR@M365x97148389.OnMicrosoft.com
		Add group owners New owners will receive an email when you	MB Megan Bowen MeganB@M365x97148389.OnMicrosoft.com
			MOD Administrator admin@M385x97148389.onmicrosoft.com
			Nestor Wilke NestorW@M365x97148389.OnMicrosoft.com
			D. M. F J
		Back Next	Add Cancel

5. From the list that pops up on the right side, select an owner(s) and click Add.

	💦 Contoso Electronics	Microsoft 365 admin center	𝒫 Search			۲		MA
=	Home > Active teams and	groups $>$ Add a mail-enabled security gro	up			🕗 Enab	ole Dark	mode
ଜ ୧	S Basics	Add	members					
*	 Owners 		embers have access to everything the group can access, and will receive e fress. By default, they can invite guests to join your group, but they can't e					
	Members	+ Add	members					
ß	O Settings							
	O Finish		Add your first group member New members will receive an email when you add th	em				
		Back	Next			Ca	ncel	

6. In the 'Add members' page shown above, click + Add members.

	XContoso Electronics	Microsoft 365 admin center	𝒫 Search								ß	Q	©	?	MA		
=	Home > Active teams and gr	oups $>$ Add a mail-enabled security gro	up												×		
ŵ		٥ ما ما	members		Ad	d mem	bers										
8	Basics	Add	members			ct up to 20 ve teams &			group as m	ember	rs. You o	an add	more la	er fron	n		
57	Owners			hing the group can access, and will		Search fo	or a name	or email	address								
24				ning the group can access, and will ite guests to join your group, but th											*		
	Members	+ Add	I members] Displa	ay name										
19	O Settings					AV		Vance /@M365x93	7148389.OnMi	crosoft.	com				۰.		
	 O Finish		New me	Add your first group member mbers will receive an email when yo	AlexiM@Ad265x07149299 OnMicro		rosoft.c	om									
						AE	All Em Employ	nployees yees@M36	5x97148389.Or	nMicros	oft.com						
						AD	Allan I AllanDi	Deyoung @M365x97	148389.OnMic	rosoft.	:om						
							Auto I group@	Invite Mia @M365x97	group 148389.onmicr	osoft.ci	om						
						вк	Bob K	elly (TAILS	SPIN)								
		Back	Next		4	Add (1)	Cance	el									

7. Select individual members to add to the group or groups, and then click Add.

Home	Home > Active teams and groups > Add a mail-enabled security group						
⊘ Bas	sics	Add members					
Ĭ	iners	Group members have access to everything the group can access, and will receive email messages sent to the group email address. By default, they can invite guests to join your group, but they can't edit group settings.					
Ме	embers	+ Add members					
O Set	tings						
O Fini	ich	Display name					
	ווכו	All Employees Employees@M365x97148389.OnMicrosoft					

8. Make sure the members you selected were added, and then click Next.

Contoso Electronics Microsoft 365 admi	in center 🦻 Search
Home $>$ Active teams and groups $>$ Add a mail-ena	abled security group
Basics	Edit settings
 Owners 	Mail-enabled security group
	Has all the functionality of a distribution list and additionally can be used to control access to OneDrive and SharePoint.
Members	
Settings	Group email address * Domains
	@ M365x97148389.onmicrosoft.com
O Finish	Communication Allow people outside of my organization to send email to this Mail-enabled security group
	Home > Active teams and groups > Add a mail-en. Basics Owners Members Settings

9. In the 'Group email address' field, enter a group name (e.g., MIGroup).

Basics	Review and finish adding group
Owners	You're almost there - make sure everything looks right before adding your new group.
Members	Group type Mail-enabled security
Settings	Edit
Finish	Name: Meeting Insights Users Description: Users that will use MI
	Edit
	Owners
	MOD Administrator
	Edit
	Members
	All Employees
	Edit
	Back Create group

10. Click Create group.



11. Click **Close**. View the newly created mail-enabled security group listed in the 'Active teams and groups' page:

Acti	ve teams and groups						
🖓 Ak	pout Groups 🛛 🤨 Using Teams And Shar	ePoint	4 Where to store files				
Teams a	ম Microsoft 365 groups Distribution list	Sec	urity groups			♀ Search all team	is and groups
+ Add	d a security group + Add a mail-enabled s	ecurity	group 🛓 Export 💍 Refresh				15 items 🚍
	Name 1		Email	Sync status	Created on 🖾 Cho	ose columns	
	Meeting Insights Users	:	MIGroup@M365x97148389.onmicrosoft.con	0	February 9, 2024 at 9:07		
	sg-Engineering	÷		0	November 9, 2023 at 4:4		

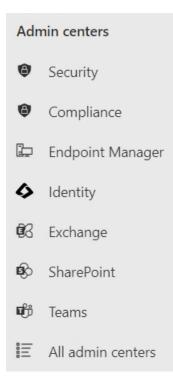
Next: Configure the 'Auto-Invite' rule as shown here.

Configure an Auto-Invite Rule

After adding a mail-enabled security group as shown previously, admins can configure an 'Auto Invite' rule from Microsoft's Exchange admin center. Configuring an Exchange rule from Microsoft 360 admin center involves defining specific conditions, including the message being a calendar event and containing the text 'Microsoft Teams meeting' for Teams meetings or 'Zoom meeting' for Zoom meetings.

> To configure the 'Auto Invite' rule:

1. From the list of admin centers displayed in Microsoft 365 admin center (in which you added a mail-enabled security group), click **Exchange**.



2. In Exchange admin center, navigate to Mail flow > Rules.

	🔀 Contoso Electronics	Exchange admin center	𝒫 Search (Preview)	Σ () ©	? (ма
=		Home > Rules			🕗 Dark m	ode
۵ ۸	Home Recipients	PowerShell. We recommend mi	nditions and actions in Mail flow rules are no longer supported and can no longer be created or edited in the Exchange Admin Center (EAC) or usi rating all OLP-related rules to Microsoft Purview DP in the compliance center as soon as possible. Once you have migrated these rules please de- riate DP policies). In DLP-conditions or actions			or
	Mailboxes Groups		will be retired in July 2023 and replaced by Microsoft Purview Message Encryption. Starting May 2023, all existing rules that use Office 365 Messagu off Purview Message Encryption. Learn More	Encryption	will	
	Resources Contacts	Rules				
	Mail flow ^	Add, edit, or make other change	to your transport rules. Learn more about transport rules			
1	Rules Remote domains	+ Add a rule 🖉 Edit 🗈 D	uplicate ORefresh Move up Move down 4 items 9	Search		=
	Accepted domains Connectors Alerts Alert policies	Status Rule	Priority Stop processing rules Size (Bytes) Last execution Configuration supp	Unsupport	ed reason	
Pa						

3. In the Rules page, click **+ Add a rule**.

New transport rule		
Set rule conditions Set rule settings	Set rule conditions	
Review and finish	Name and set conditions for your transport rule	
	Name *	
	Apply this rule if * The message properties	+ m
	The message type is 'Calendaring'	0
	And	
	The subject or body $\qquad \qquad \qquad$	۱.
	The subject or body includes any of these words 'Microsoft Teams meeting' or 'Microsoft Teams' or 'Join Zoom Meeting'	Ø
	And	
	The sender \checkmark is a member of this group \checkmark	۱.
	The sender is a member of 'MIGroup@M365x97148389.onmicrosoft.com'	Ø

- 4. Set the following rule conditions using the figure above as reference:
 - a. Set a name for the rule, for example, Auto Invite Mia.
 - b. From the two Apply this rule if drop-downs, select The message properties and include the message typerespectively. Select Calendaring as the message type.
 - c. Click +. From the two And drop-downs, select The subject or body and subject or body includes any of these words respectively. Enter Microsoft Teams meeting, Microsoft Teams, or Join Zoom Meeting as the words.
 - d. Click +. From the two And drop-downs, select The sender and is a member of this group respectively. Select the group you created in the previous procedure. In the figure above, it is MIGroup@M365x97148389.onmicrosoft.com
- 5. Scroll down and continue setting the rule conditions using the figure below as reference:
 - a. From the two **Do the following** drop-downs, select **Apply a disclaimer to the message** and **prepend a disclaimer** respectively.
 - i. For the disclaimer, define any disclaimer your organization requires, for example: 'Disclaimer: The meeting will be recorded'.
 - ii. Select 'Wrap' as the action to fall back to if the disclaimer can't be inserted.
 - b. Click +. From the two And drop-downs, select Add recipients and to the To box respectively. Define the To box email.
 - c. From the two Except if drop-downs, select The message and To or Cc box contains this person respectively. Define the person's email address.

d. From the two **Or** drop-downs, select **The subject or body** and **subject matches these text patterns**respectively. Define the text pattern **^Canceled:**

New transport rule		
Set rule conditions		¥.
Set rule settings	Do the following *	
Review and finish	Apply a disclaimer to the message \sim prepend a disclaimer \sim	+ 🛍
	Prepend 'Disclaimer: The meeting will be recorded' and fall back to action 'Wrap' if the disclaimer can't be inserted	Ø
	And	
	Add recipients \checkmark to the To box \checkmark	Ē
	Add these recipients to the To box 'mia.Tania-8389@meetinginsights.com'	Ø
	Except if	
	The message \checkmark To or Cc box contains this person \checkmark	+ 🖻
	The To or Cc box contains 'mia.Tania-8389@meetinginsights.com'	Ø
	Or	
	The subject or body \checkmark subject matches these text patterns \checkmark	۱ ۱
	The subject matches these text patterns '^Canceled:'	Ø

6. Click Next.

New transport rule	
Set rule conditions	
Set rule settings	Set rule settings
O Review and finish	
	Set settings for your transport rule
	Rule mode
	Enforce
	Test with Policy Tips
	C Test without Policy Tips
	Severity *
	Not specified \sim
	Activate this rule on
	2/9/2024 🗰 - 4:00 PM 🗸
	Deactivate this rule on
	2/9/2024 - 4:00 PM ~
	Stop process Back e. Next

- 7. Set the rule settings as follows:
 - a. Leave 'Rule mode' at its default Enforce.
 - **b.** For the 'Severity' level drop-down, optionally leave this filter at **Not specified** or set it according to your organizational requirements (to make the reports easier to use).
 - c. Select 'Activate this rule on' and set it to take effect immediately.
 - d. From the 'Match sender address in message' drop-down, select Header.
- 8. Click Next.

New transport rule			×
 Set rule conditions Set rule settings 	Review and finis	h	
Review and finish	After your finish creating this rule, it is turned off by Rule name Auto Invite Mia Rule comments	default until you turn it on from the Rules page	
	Rule conditions Apply this rule if The message type is 'Calendaring' The subject or body includes any of these words 'Microsoft Teams meeting' The sender is a member of 'MIGroup@M365x97148389.onmicrosoft.com'	Rule settings Mode Enforce Set date range Specific date range is not set Priority	
	Do the following Prepend 'Disclaimer: The meeting will be recorded' and fall back to action 'Wrap' if the disclaimer can't be inserted Add these recipients to the To box 'mia.Tania- 8389@meetinginsichts.com' Except if Back Finish	4 Severity Not specified For rule processing errors Ignore	

9. Make sure all settings are configured as described until now, and then click **Finish**.

New transport rule		
Set rule conditions		
	Transport rule created successfully	
Set rule settings		
Review and finish		

10. Make sure the newly configured rule ('Auto Invite Mia' in the example below) is listed in Exchange admin center.

	🔀 Contoso Electronics	Exchange admin center	✓ Search (Preview)	N)				D Q	©?
=		DLP policies and DLP-related	d conditions and actions in M	ail flow rules are no lon	iger supported and can no	longer be created or edited in	the Exchange Admin Center (EAC) or	using Exchange C	Inline
ŵ	Home		migrating all DLP-related rule Migrate DLP policies No DL			nter as soon as possible. Once y	ou have migrated these rules please	delete them here	in the EAC or
8	Recipients ^				osoft Purview Message Enc	ryption. Starting May 2023, all e	xisting rules that use Office 365 Mess	age Encryption w	(II
	Mailboxes	automatically start using Mi	crosoft Purview Message Encr	yption. Learn More					
	Groups	Rules							
	Resources								
	Contacts	Add, edit, or make other chan	ges to your transport rule	s. Learn more abou	t transport rules				
	Mail flow								
	Message trace	🕂 Add a rule 🖉 Edit 🗈	Duplicate 📋 Delete	🕐 Refresh 🛛 ^ M	ove up 🛛 🖂 Move dor	wn	5 items 1 selected $ imes$ /	Search	=
	Rules	No last execution data available	able at this time						×
	Remote domains								
	Accepted domains Connectors	Status F	Rule	Priority	Stop processing rules	Size (Bytes) Last ex	cecution Configuration supp	Unsupported	i reason
	Alerts	Enabled F	Protect with OMEv2	0	×	477	~		
	Alert policies	Disabled	Moderation for Lidia	1	×	524	~		
Re	Roles ~				×	471	~		
C [*]	Migration	O Disabled S	Signature for Lidia H	2	~ ~	4/1	~		
_	Mobile ~	Disabled	Company Email Discl	3	×	642	~		
		Disabled	Auto Invite Mia	4	×	980	~		

11. Enable the rule.

≡			Home > Rules						ď	×
۵ ۸	Home Recipients	~	PowerShell. We recomm	DLP policies and DLP-related conditions and actions in Mail flow rules are no longer supported and can no lo PowerShell. We recommend migrating all DLP-related rules to Microsoft Purview DLP in the compliance cente via PowerShell. Learn more: Migrate DLP policies No DLP-conditions or actions				Auto Invite Mia		
	Mailboxes			ryption will be retired in July 202 g Microsoft Purview Message En			cryp	Status: Enabled		
	Groups Resources		Rules					Enable or disable rule		
	Contacts Mail flow	^	Add, edit, or make other o	hanges to your transport ru	es. Learn more	about transport rules		Rule status updated successfully Rule settings	×	
	Message trace Rules		+ Add a rule 🖉 Edit	Duplicate 📋 Delete	🖒 Refresh 🗸	^ Move up ✓ Move do	own	Rule name Mode Auto Invite Mia Enforce		
	Remote domains Accepted domains		O No last execution data	available at this time				Severity Set date range Not specified Specific date range is not set		
	Connectors Alerts		Status	Rule	Priority	Stop processing rules	s	Senders address Priority Matching Header 4		
	Alert policies		Enabled	Protect with OMEv2	0	×	4	For rule processing errors Ignore		
<i>Р</i> е	Roles	\sim	Disabled	Moderation for Lidia	1	×	5			
ľ	Migration		Disabled	Signature for Lidia H	2	×	4	Rule description		
ıl.	Mobile	\sim	Disabled	Company Email Discl	3	×	e	Apply this rule if		



It's recommended to enable MIA automatic invite for all users by default. Users who don't want to record a meeting can either pause the recording or remove MIA participants from the meeting.

Next: Test the rule as shown here.

Test the Rule

It takes up to 30 minutes for the MIA 'Auto-Invite' rule to take effect.

Admins can test the MIA 'Auto-Invite' rule to make sure it functions according to expectations.

Test the MIA 'Auto-Invite' rule:

- 1. Log in to the admin's Teams app, open the Calendar and then click + New meeting.
- 2. Enter a title for the meeting, for example, 'MIA Auto Rule Test', and then add required attendees.

Image: Second line of the se					
Shov	v as: Busy \vee Category: None 🗸 Time zone: (UTC-05:00) Eastern Time (US & Canada) 🗸 Response options 🗸 Require registration	on: None $$		纷 Options	
Ø	Mia Auto Rule - Test		Who can bypass the lobby? ① People in my org and guests	~	
ු	🔞 Adde Vance x 🖓 Alex Wilber x + Optional		Record automatically		
Ŀ	2/9/2024 4:30 PM $\sim \rightarrow$ 2/9/2024 5:00 PM \sim 30m \bullet All dgy Suggested: No suggestions available.		More options		
¢	Does not repeat 🗸 🗸				
Ē	Add channel				
0	Add location Online meeting 💽				
	B $I \ \cup \ \odot$ $\bigcup \ \bigtriangleup \ A$ A Paragraph $\checkmark \ \cup \ \boxdot \ \longmapsto \ \varinjlim \)$ $\Im \ \ $ $ \odot \ \ \boxplus \ $ $ \blacksquare \ $ $) \% \ \% \ Type details for this new meeting $				
₽	Add an agenda others can edit				

3. Click the Send button; the rule kicks in.

4. In Outlook, make sure the invitation arrived and that MIA was invited.

Managing the Lobby for Teams Meetings

Admin can use the 'Meeting join and lobby' settings in Microsoft Teams admin center (TAC) to manage people joining meetings and to manage the lobby for Teams meetings. Configuration of 'Meeting join and lobby' is part of the meeting policy which takes effect on the meetings of users who are assigned to the policy.

[Refer to the figure below]

- When the meeting policy settings indicated in green (below) are configured, MIA will *bypass* the meeting lobby of users assigned to this policy.
- When the meeting policy settings indicated in red (below) are configured, MIA will be *routed* to the meeting lobby of the users assigned to this policy.

Meeting join & lobby	^
Meeting join and lobby settings let you control how people Learn more about meeting join and lobby settings	e join meetings and allow you to manage the lobby for Teams meetings.
Anonymous users can join a meeting () Find related settings at Meetings > Live events policies and Meetings > Meeting settings	On
Anonymous users and dial-in callers can start a meeting 🕤	O off
Who can bypass the lobby 🕕	People in my org \checkmark
People dialing in can bypass the lobby 🕦	Everyone
People can join external meetings hosted by 🗊	People in my org and guests People in my org, trusted orgs, and guests
Meeting engagement	People in my org
Meeting engagement settings let you control how people	Only organizers and co-organizers
Meeting chat ① Find related settings at Messaging > Messaging policies	People who were invited On for everyone
External meeting chat 🕕	On

15 Producing Power BI Analytics Usage Reports

Admin can integrate Meeting Insights Analytics Dashboard into their Microsoft Power Business Intelligence (BI).

The following links show how to

- 1. Enable Power BI integration in Meeting Insights (see here)
- 2. Install | configure Power BI (see here)
- 3. Determine usage statistics from reports (see here)
- 4. Disable Power BI integration (see here)

Enabling Power BI Integration in Meeting Insights

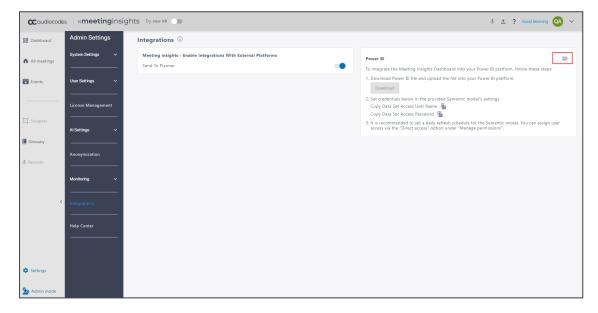
The instructions below show admin how to enable Power BI integration in Meeting Insights.

• Admin will view the integration only if it is enabled for their application.

If you don't have it and you want to have it, contact the Service Provider.

To enable Power BI integration in Meeting Insights:

1. In Meeting Insights, open the Integrations page.



2. Slide the switch indicated in the preceding figure to ON.

	s meeting insig	ghts Try new MI	I Cood Marring 🕢 🗸
Dashboard	Admin Settings	Integrations ①	
All meetings	System Settings V	Meeting insights - Enable Integrations With External Platforms Send To Planner	Power BI To integrate the Meeting Insights Dashboard into your Power BI platform. follow these steps:
Events	User Settings V		1. Download Power 81 file and upload the file into your Power 81 platform. Download
	License Management		2. Set credentials below in the provided Semantic model's settings. Copy Data Set Access User Name 🚡 Copy Data Set Access Password 🚡
년 Snippets	Al Settings 🗸 🗸		 It is recommended to set a daily refresh schedule for the Semantic model. You can assign user access via the "Direct access" option under "Manage permissions".
Glossary Records	Anonymization		
	Monitoring ~		
<	Integrations		
	Help Center		
Settings			
🂁 Admin mode			

- **3.** Click the **Download** button shown in the preceding figure to download the Power BI report file (.pbix) and upload it to your Power BI platform.
- 4. Copy the credentials and then see step 5 here for further instructions.

Installing | Configuring Power BI Analytics

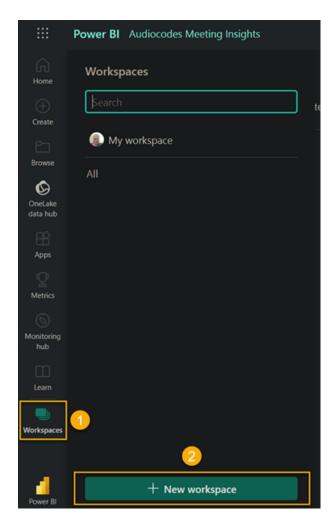
The procedure described here shows how to install | configure Meeting Insights Power BI Analytics.



- Office 365 E5 customer account or any Office 365 licensed account with an individual Power BI Pro license attached.
- One Power BI Pro license is included with Microsoft E5 license.

➤ To install | configure Power BI:

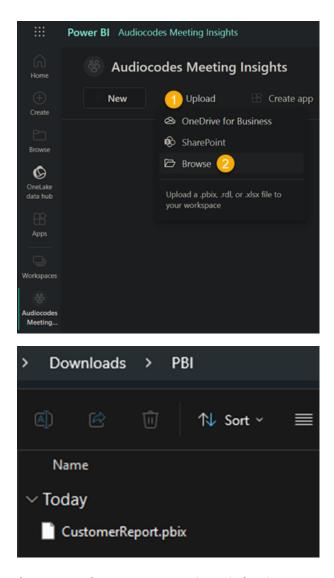
1. Sign in to the Microsoft Power BI portal at https://app.powerbi.com/



2. Click + New workspace.

Create a workspace
Name *
MeetingInsights PBI
Available
Description
Describe this workspace
Domain (preview)
Assign to a domain (optional) \sim
Learn more about workspace settings
Workspace image
eee ↑ Upload
> P Reset
Advanced \checkmark
Apply Cancel

- 3. Enter a name for the new workspace and click **Apply**.
- **4.** Install the Power BI report file (.pbix) that you downloaded using the Integrations page in Meeting Insights as shown in step 3 here.



5. Use the following figures as reference to set credentials for the report. Copy the credentials using the Integrations page shown here.

+ New ~	↑ Upload ~	🕆 Create app	ළු Manage access ද	3 Workspace settings
🖒 Name	•		Туре	Owner
L Custo	merReport		Report	My Plan
::: Custo	merReport		Semantic mo	odel My Plan
🥝 🕺 Custor	merReport.pbix		Dashboard	My Plan

+ Ne	wv ∽ T Up	oload 🗸	🗄 Create a	рр	89	Manag	e access	ô Work ()	space settings
C	Name						Туре		Owner
lh -	CustomerReport						Report		My Plan
::.	CustomerReport			C	6		Semantic	model	My Plan
0	CustomerReport.	pbix				Explo	re this data	(preview)	My Plan
						Analy	7e in Excel	Create report Auto-create report Create paginated report Delete Get quick insights Security Rename Open data model	
								Settings Download Manage p View line	permissions

General Dashboards	Semantic models Workbooks Dataflows App
	Settings for CustomerReport
CustomerReport	View semantic model 13
	This semantic model has been configured by sergein@audiocodes.com.
	Befresh history
	Describe the contents of this semantic model.
	500 characters left
	Apply Discard
	▷ Gateway and cloud connections
	Data source credentials
	◎ Failed to test the connection to your data source. Please retry your credentials. Learn more
	customers-powerbiaudcsql.database.windows.net 🛆 Edit credentials Show in lineage view (3

configure custom	erReport
server	
powerbiaudcsql.database.windows.net	
database	
customers	
Authentication method	
Basic	~
Password	
Password Privacy level setting for this data source	
	~

6. [Recommended] Set a daily refresh schedule for the Semantic model. You can assign user access via the **Direct access** option under 'Manage permissions'.

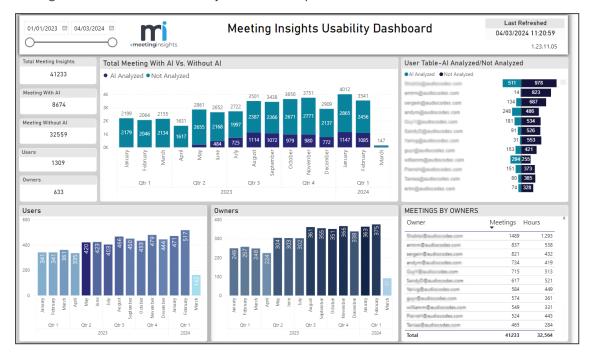
⊿ Refresh
Configure a refresh schedule
Define a data refresh schedule to import data from the data source
On
Refresh frequency
Daily
Time zone
(UTC+02:00) Athens, Bucharest 🔹 🗸
Time
Add another time
Send refresh failure notifications to
🗹 Semantic model owner
These contacts:
Enter email addresses

7. Go back to the Workspaces page and click **Refresh now** in the 'Semantic model' item.

O Name		Туре	Owner	Refreshed	Next refresh	Endorsement	Sensitivity	Included in app
📐 🥈 Customerfleport		Report	My Plan	3/10/24, 9:24:19 AM	-	-	-	(e) No.
📰 🥤 CustomerReport	с s	Semantic model	My Plan	3/10/24. 9:24:19 AM	N/A	-	-	
CustomerReport.pbix		Dachboard	My Plan	-	-	-	-	0 No

Using Reports to Determine Product Usage Statistics

After Meeting Insights is integrated with Microsoft's Power Business Intelligence (BI), administrators and/or management can create business analytics reports showing how and to what extent users in the enterprise are engaging with Meeting Insights and its features.



The figure below shows a **Usability Dashboard** report.

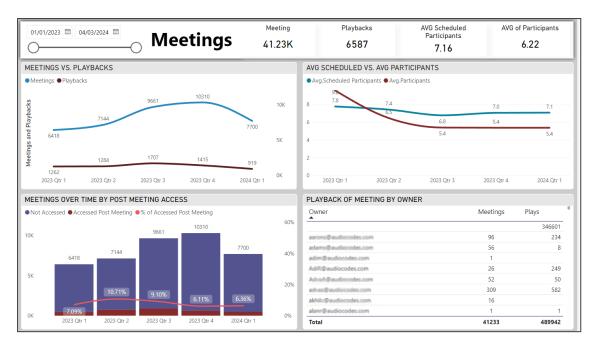
- The **Usability Dashboard** report can give administrators and/or management an indication of the value proposition of Meeting Insights and its key feature, AI.
- The report's statistics and graphs show admin the *extent* to which and the *depth* at which users are using the application and its key feature, AI.
- The report is generated in an admin-friendly Microsoft Power BI template.

[Refer to the preceding figure] Admin can assess at a glance how many meetings with Meeting Insights *in total* were held in the enterprise over a period of time defined in the uppermost left corner of the page. Admin can moreover assess how many of those meetings were analyzed using AI, versus how many were not. Admin can quickly see furthermore how many analyses were run by *users* after meetings, versus how many analyses were run by *owners*.

Admin can view these statistics *per user* in the **User Table-AI Analyzed/Not Analyzed** pane on the right side of the page. The pane presents an ordered list of users, the # of meetings each user had in the defined period, and the # of hours each user spent in meetings.

The **Meetings by Owners** pane below it presents how many meetings *each owner* held and how many hours *each owner* spent in meetings. The pane also shows the *total* # of meetings held by all owners and the *total* # of hours that were spent in meetings by all owners.

The figure below shows a **Meetings** report.



[Refer to the preceding figure] Admin can quickly gauge the *depth* at which users | owners engaged with the product over a period of time defined in the uppermost left corner of the page. The **Meetings vs. Playbacks** graph shows the # of meetings that were held in the organization vs. the # of playbacks that were run. If, for example, the playback feature was hardly taken advantage of (indicated by a significant gap between the Meetings and Playbacks curves as shown in the graph in the preceding figure), this can indicate that users | owners tend to use the product superficially, without playing back meetings. If, by contrast, the playback feature was that users | owners took good advantage of it. The graph therefore demonstrates feature effectiveness.

The **Average Scheduled vs. Average Participants** graph shows the # of invitees that were *invited* to meetings vs. the # of invitees that *actively participated* in those meetings. These statistics demonstrate product effectiveness, helping administrators and/or management assess whether they're getting a return (usage) from their investment.

The graph **Meetings over Time by Post Meeting Access** shows admin the # and % of users who accessed recordings of meetings after they ended, over time. This graph too demonstrates product effectiveness and the extent to which users are taking advantage of Meeting Insights' features.

The graph **Playback of Meeting by Owner** shows the extent to which Meeting Insight's *playback* feature was taken advantage of by meeting *owners*. The graph shows the behavior *per owner* as well *all owners in total*. Admin can at a glance determine:

- the # of owners vs. the # of playbacks run by them
- the # of meetings each owner had vs. the # of playbacks run by each

The figure below shows an AI Summary report.

01/01/2023 📾 04/03/2024 📾	Al Sur	nmary	% AI SUMMARY FROM MEETING INSIGHTS IN 21%		INSIGHTS-MEETINGS MEE		SUMMARY EETINGS 8762	external	INTERI 257	
USER	TOTAL MEETINGS	EXTERNAL	INTERNAL	AI SUMMARY	% AI By MI	AI EXPORTED	%GT OF EDITED BY US	ER		
Shabtai@audiocodes.com	1489	128	1361	511	34%	11	johnt@audiocode eitanm@audioco			14%
amirm@audiocodes.com	837	90	747	14	2%	2	johnco@audioco MichaelFa@audio	5%		
sergein@audiocodes.com	821	25	796	134	16%	7	casondrar@audio	3%		
andym@audiocodes.com	734	186	548	248	34%	5	paulme@audioco monuh@audioco	3%		
GuyM@audiocodes.com	715	101	614	181	25%	11	guyr@audiocode	2%		
SandyD@audiocodes.com	617	387	230	91	15%	3	haithamb@audio hillolc@audiocod	2%		
Yarivg@audiocodes.com	584	61	523	31	5%		leightonm@audio	2%		
guyr@audiocodes.com	574	337	237	153	27%	5	Tanias@audiocod	2%		
williamm@audiocodes.com	549	472	77	294	54%	4	andye@audiocod keithm@audioco	2%		
PierreH@audiocodes.com	524	286	238	151	29%	5	teroni@audiocod	2%		
Taniaa@audiocodes.com	465	18	447	81	17%	12	Tomerk@audioco charlesl@audioco	2%		
erinr@audiocodes.com	402	63	339	74	18%		0%	5%	10%	15%
aviade@audiocodes.com	400	145	255	9	2%			Edited Al Ins	iahta	
eitanm@audiocodes.com	395	146	249	176	45%	17		Eulteu Al IIIs	ights	
danielz@audiocodes.com	388	62	326	7	2%		EDITED NO EDITED			
andys@audiocodes.com	383	239	144	133	35%	2	Bullets		98%	
kathleenb@audiocodes.com	381	121	260	26	7%	1	Summary		98%	
tomersa@audiocodes.com	380	13	367	62	16%	1	ActionItem		100%	
drors@audiocodes.com	372	3	369	1	0%		QuestionsAndA		100%	
dianaw@audiocodes.com	356	241	115	56	16%	3	IssuesAndSoluti		100%	
a ib@audiocodes.com	346	12	334	58	17%	3	Outline		100%	
Total	41233	15531	25702	8762	21%	444	0%		50%	10

[Refer to the preceding figure] Admin can use this report to quickly determine **AI Summary** usage globally and per external | internal user, over a period of time. The report can give administrators and/or management an indication of the benefit Meeting Insights' AI Summary feature is providing the organization.

The report's title bar enables admin to quickly determine *global* statistics for AI Summary (from I-r):

- AI Summary from Meeting Insights shows the % of meetings in which the AI Summary feature was used. In the preceding example, the AI Summary feature was used in 21% of all meetings held during the period.
- Meeting Insights Meetings shows how many Meeting Insights meetings were held over the period. In the preceding example, 41233 meetings were held.
- Al Summary Meetings shows for how many Meeting Insights meetings the Al Summary feature was used. In the preceding example, the feature was used for 8762 meetings.
- **External** shows the *# of external meetings* each user had with Meeting Insights over the period. In the preceding example, *all* users had 15531 external meetings with Meeting Insights.
- Internal shows the # of internal meetings each user had with Meeting Insights over the period. In the preceding example, all users had 25702 internal meetings with Meeting Insights.

The report's main pane enables admin to determine AI Summary usage statistics *per user* in the following columns (from I-r):

Total Meetings shows the total # of meetings each user had with Meeting Insights over the period. The column can be ordered from most meetings to least meetings, or from least to most. Admin can easily determine which user in the organization had the most meetings using Meeting Insights, and who had the least.

- **External** shows the *# ofexternal meetings* the user had with Meeting Insights. The column can be ordered from most to least, or from least to most. Admin can easily determine which user had the most external meetings with Meeting Insights, and which user had the least.
- Internal shows the # ofinternal meetings the user had with Meeting Insights. The column can be ordered from most to least, or from least to most. Admin can easily determine which user had the most internal meetings, and which user the least.
- AI Summary shows the # of meetings for which AI was triggered (relative to the total # of meetings that were held over the period).
- AI by MI shows the % of meetings for which an AI Summary was generated, per user. Admin can use the statistic to determine the extent to which each user used the feature over the period.
- AI Exported shows how many times AI was exported over the period by anyone who had access.

Each column also displays global usage.

- ✓ % AI by MI column displays the total percentage.
- ✓ All other columns display the *total number*.

The report's **%GT of Edited by User** pane enables admin to determine per user the % of edits they performed relative to the number of meetings they had. This too can serve as an indication of the:

- extent to which and depth at which each user is engaging with the app's edit feature
- app's value proposition in terms of the edit feature
- app's ROI in terms of the edit feature
- benefit the organization is deriving from the service

The report's **Edited AI Insights** pane enables admin to determine editing patterns. In the preceding example, 2% of edits were made on bullets and 2% on the summary. Action Items, for example, were not edited at all. These patterns too can serve as an indication of the:

- extent to which and depth at which users are engaging with the app
- app's value proposition
- app's ROI
- benefit the organization derives from the service

Disabling Power BI Integration

Admin can optionally disable Microsoft's Power Business Intelligence (BI) Analytics in Meeting Insights.

> To disable Power BI in Meeting Insights:

- **1.** In Meeting Insights, open the Integrations page.
- 2. Slide the Power BI switch to OFF; the following notification is displayed:

s using their M365 credentials when sending action sions are required to provide consent.	Power Bl To integrate the Meeting Insights Dashboard Into your Power Bl platform, follow these steps: 1. Download Power Bl file and upload the file into your Power Bl platform.
	Download 2. Set credentials below in the provided Semantic model's settings. Copy Data Set Access User Name (a) Copy Data Set Access Password. (b) 3. It is recommended to set a daily refresh schedule for the Semantic model. You can assign user access via the "Direct access" option under "Manage permissions".
Disable Power BI integration Disabling Power BI integration will result in the loss of access to the Analytics Dashboard. Click 'Disable' to proceed or 'Cancel' to keep Compared to the proceed or 'Cancel' to be accessed on the proceed or 'Cancel' to be accessed on the proceed or 'Cancel' to be accessed on the proceed on the proce	

3. Click DISABLE.

16 Enabling Actionable Recap Emails

Admins can enable recipients of Action Items emails to set the status to "Done" in the email (by clicking the **DONE** button) by creating a new Outlook Office provider.

To create a new Outlook Office provider:

- 1. Go to https://aka.ms/publishoam.
- 2. Log in with the Teams Tenant admin that belongs to the same Tenant as the users to whom the meeting recordings will be sent; the following appears:

A	Actionable Email Developer Dashboard						
0	€ New Provider						
	Provider	Status					

3. Click New Provider; the following appears:

Actionable Email Developer Dashboard
€Back
1. New Provider
Friendly Name *
Please enter a name for provider Provider ld (originator)
11ed39bc-efd3-4a20-9ba1-f3eeb2a7ce0a
Organization Info
AudioCodes Ltd. (ai-logix.net)(ad41d6c3-67f0-47cc-9de3-e07fd185c1c7
Sender email address from which actionable emails will originate *
expense-notification@contoso.com
Add another email address
Target URLs * (HTTPS URLs which will be invoked by the actions from the message card. Regex can be used to club mutiple URL:
https://www.api.contoso.com/ or regex:https://.+\.contoso\.com/
Add another actions URL
Public Key
(Provide your own public key if you want to send <u>signed card payloads</u>) <rsakeyvalue></rsakeyvalue>
Add another public key
Logo
Logo must be of type .png, .jpg or .gif and no greater than 60 kb
2. Scope of submission
Who are you enabling this for? *
\bigcirc Test Users (Test your provider on users from same tenant, auto-approved)
Organization (You will be submitting this request to your organization's Exchange administrators
\bigcirc Global (Please note that rollout takes 2 weeks after this submission is approved)
3. Additional Information
Email addresses of other people who should be notified.
expense-notification@contoso.com
Add another email address
Comments
Any additional detail for your administrator to easily approve this request.
I accept the terms and conditions of the <u>App Developer Agreement</u> - 125 - You must accept the terms and conditions

- 4. Under the **New Provider** group, fill in the following fields:
 - 'Friendly Name': Enter any name for the provider (e.g., "be304qf4BE").
 - 'Provider Id': (Read-only) This value is automatically generated. Please provide it to AudioCodes.
 - 'Sender email address from which actionable emails will originate': Enter MIA's email address (provided by AudioCodes) from where Action Items emails will originate.
 - 'Target URLs': Enter the URL (provided by AudioCodes) that is invoked when users click DONE in Action Items emails.
- 5. Under the Scope of submission group, select the Organization option.
- 6. Under the Additional information group, enter the email addresses of other people who should be notified, and then type a message for this email notification.
- 7. Accept the terms of use, and then click **Save**.

17 About Meeting Insights Data Security

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

- Encryption: At rest (256-bit AES) and at transit (256-bit SSL / TLS 1.2 or later)
- Authentication: Microsoft Azure SSO
- Azure Open AI Data privacy: No data is used to train LLM (Azure Open AI security)
- **GDPR , CCPA, CPRA:** Compliant
- **Retention policy:** Automatic data retention policy per customer's configuration
- App user activities: Audit trail of user activities
- Development: Secured software development practices according to OWASP
- ISO-27001 and ISO27032: Certified
- Data security:
 - Encrypted at rest (disk and storage encryption)
 - Encrypted in transit, HTTPs connections
- Platform/Hosting security:
 - Azure subscription following MSFT Security and Compliance recommendation
- Application security:
 - Managed identity intercomponent authentication
 - Imperva Incapsula web application security, DDoS mitigation, and more
- Authentication:
 - Azure Active Directory, Teams SSO

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