

Otter.ai User Manual

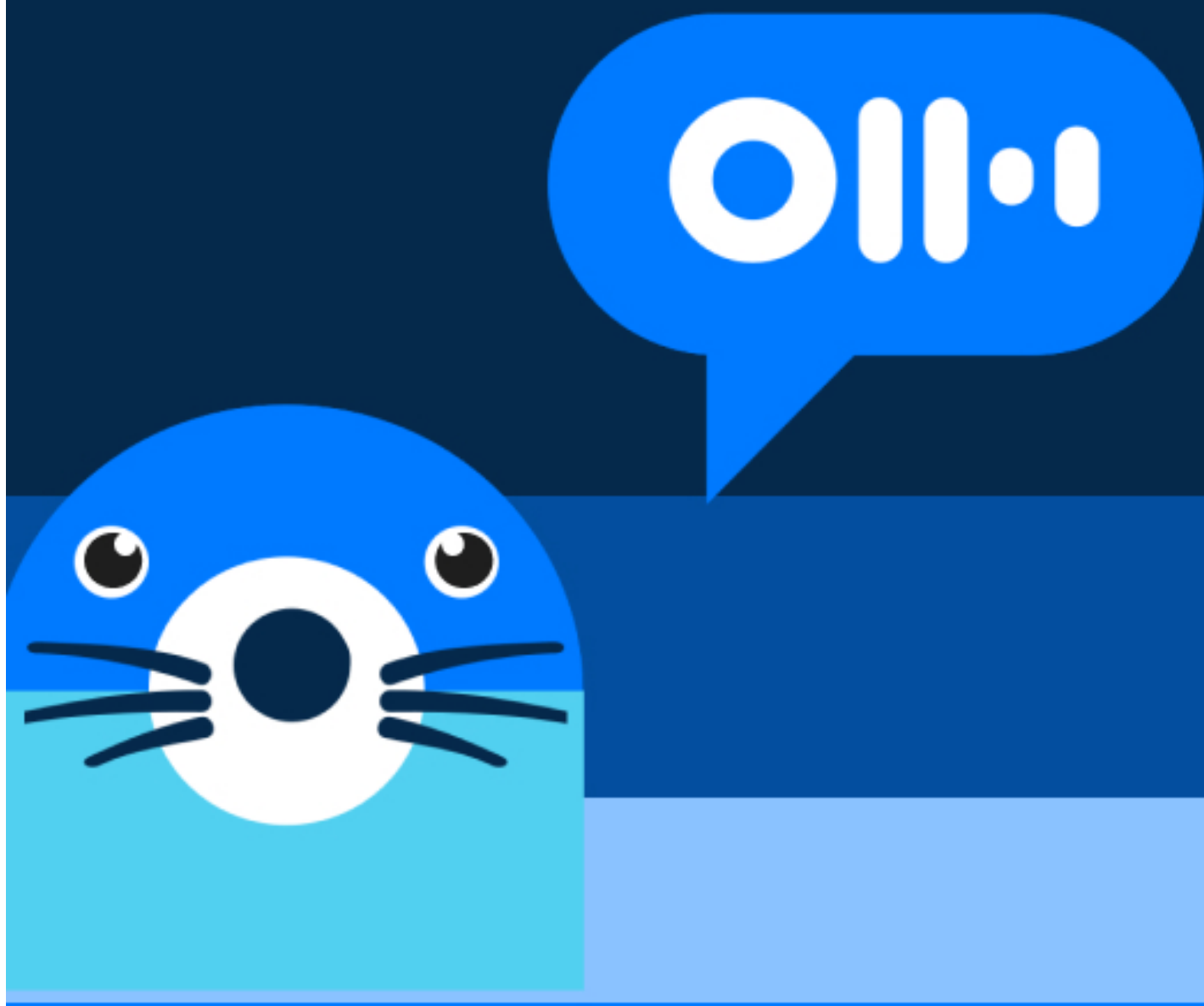


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Manual Overview

The Purpose of the Guide

This User's Manual provides you with the information you need to use the Otter.ai app.

This Manual is written for **iOS users**.

Click the respective links for [Android](#), [Chrome Extension](#), and [Slack](#) to troubleshoot your device or platform.

With this guide, you will learn about three important functions of the app:

- Otter Pilot
- Live conversation transcription
- Share

This guide is divided into three sections:

Feature Description	Basic description of the features OtterPilot; Live Conversation Transcription, and Share
Trouble Shooting Guide	A list of common problems a user might encounter while using Otter.ai, and solutions to these problems.
Glossary	A list of terms and definitions related to Otter.ai features and functionality.

Who Should Use This Guide

This guide was developed for the following users:

- Novice Otter.ai users
- Experienced Otter.ai users
- Developers interested in incorporating Otter.ai speech-to-text products in their apps.

Product Overview

Unlock the Power of Intelligent Transcription with Otter.ai

Welcome to Otter.ai, where cutting-edge technology meets seamless communication. As a leading tech company specializing in speech-to-text transcription, Otter.ai employs artificial intelligence and machine learning to transform spoken words into written text, revolutionizing the way we capture and share information. One standout feature is the integration with Zoom meetings through "OtterPilot," allowing real-time transcriptions during meetings. This not only facilitates accessibility for absent participants but also ensures everyone can effortlessly access detailed meeting notes. Whether you're conducting in-person interviews or virtual meetings, Otter.ai's live conversation transcription feature is your trusted ally, providing accurate and instantaneous transcriptions. Experience a new era of communication with Otter.ai—where every word matters, and sharing insights has never been easier.

Feature Description

Otter Pilot

Are you tired of taking notes during a meeting? Experience the cutting-edge automated meeting transcription service, Otter Pilot. Instantly transcribe, capture key points, and summarize discussions in real-time. Effortlessly share these summaries with colleagues, enhancing collaboration and decision-making. This feature also allows the user to add comments to their transcriptions. Revolutionize your meetings with swift, accurate, and shareable transcriptions.

Live conversation transcription

Not only could video meetings be recorded with a provided transcript, but so could live conversations. With the press of a button, you can record and document any in-person meeting. Our app will automatically write down what you and others say and highlight key ideas. This eliminates the need for you to manually take notes on what others say. No longer forget what others say with our app. Keep your mind stress-free with a click of a button!

Share

Transcripts recorded in the app can be shared with other people. Either through the app or through other external sources, making it convenient for those who do not have the app. Otter.ai empowers seamless collaboration by allowing the user to share their transcriptions or notes with those with and without the app. With the ability to export transcriptions in various formats, users can share their notes with a wide audience. Moreover, sharing with fellow app users is a breeze, fostering teamwork and ensuring everyone stays on the same page. Whether it's exporting for personal use or seamlessly connecting with colleagues, this feature simplifies sharing meeting

Instruction Features

Otter Pilot

Before you begin, ensure that Otter.ai is running on its latest version. Follow these simple steps to maximize your Otter.ai experience:

1. **Open the Otter.ai app.** If you haven't already logged in, enter your credentials to access your Otter.ai account. If you don't have an account, you can create one by following the on-screen instructions.
2. **Once you're logged in, locate the menu button (☰).** Various options should be shown to the left.
3. **Select "My Agenda" (see Figure A below)** You will be taken to a page that shows what "events" you may have (see Figure B below).
4. **Select ** located on the bottom right of the page.
5. A pop-up stating **"Add Otter to live meeting"** will appear, enter your meeting URL (see Figure C below).
6. Select **"Add now."** Otter.ai is now connected to your Zoom meeting

Figure A

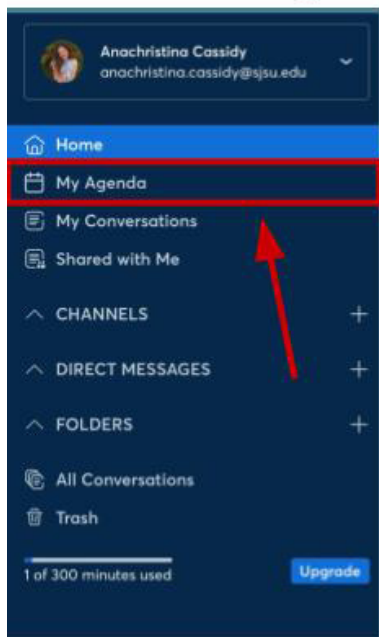


Figure B

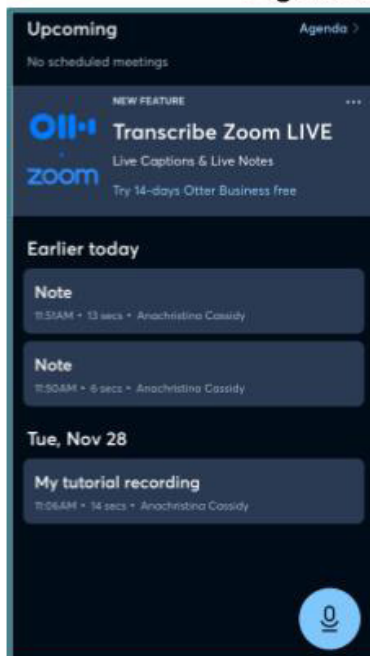
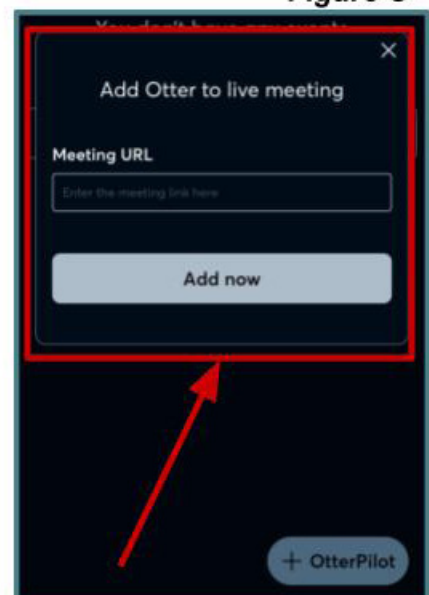


Figure C

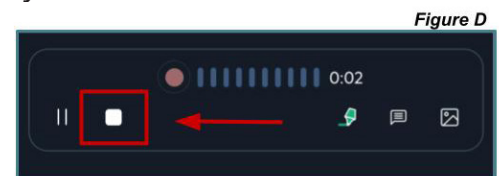


Instruction Features cont'd

Live conversation transcription

Before you begin, ensure that Otter.ai is running on its latest version. Follow these simple steps to maximize your Otter.ai experience:

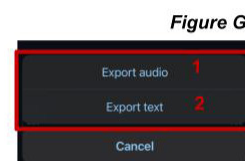
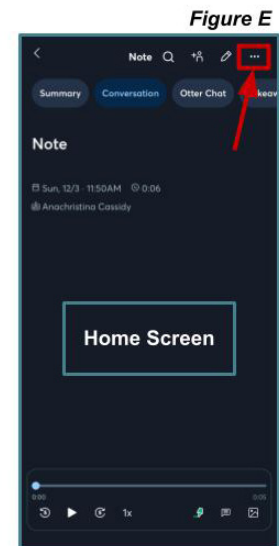
1. **Open the Otter.ai app.** If you haven't already logged in, enter your credentials to access your Otter.ai account. If you don't have an account, you can create one by following the on-screen instructions.
2. Ensure that you are on the home page, **select**  located on the bottom right of the page.
3. Once selected, Otter.ai will initiate the recording of your live conversation.
4. **To stop the recording, select the white square (see Figure D).** Otter.ai will automatically save the recorded conversation within the app.



Share

Before you begin, ensure that Otter.ai is running on its latest version. Follow these simple steps to maximize your Otter.ai experience:

1. **Open the Otter.ai app.** If you haven't already logged in, enter your credentials to access your Otter.ai account. If you don't have an account, you can create one by following the on-screen instructions.
2. **Navigate to the Home page,** select the transcription you wish to share.
3. **On the chosen transcription,** locate the three dots positioned at the top right corner (see Figure E).
4. **Select "Export"**(see Figure F). A menu with two options, "Export audio" and "Export text"(see Figure G), will appear. Select your preferred option based on your sharing needs.
5. With the export completed, you are now ready to share the transcribed text



Troubleshooting Guide

Sympton	Action
App crashing	1. Make sure the app is up to date. 2. If not, check overdue software updates notifications. 3. Power off/on phone to load the latest update.
Cannot start live transcription	1. Start on the Home page. 2. Select the blue microphone button at the bottom of the page. 
Cannot locate Zoom meeting link	1. Start on the Home page. 2. Click top left Menu 3. Select My Agenda 4. Select OtterPilot 5. Select Add Now 
Can share conversation transcription	1. Start on the Home page. 2. Select preferred transcription. 3. From the three-dot menu, select Export. 4. Select Export Text or Export Audio, based on your needs. 5. Once export is complete, share using your preferred platform.
Cannot sync app to calendar	1. Open the app. 2. Tap Menu 3. Tap on your profile to access Settings. 4. Tap Connect calendars under 5. Set Up. 6. Tap the plus button (+) to connect to the right account. 7. Follow steps to sign into the selected account. 8. Allow permissions to connect your account to your Otter account.

Glossary

Otter Pilot

The AI transcription software that Otter.ai uses to transcribe your meetings.

Otter Chat

An AI tool that allows you to ask questions about the transcribed meeting.

My Agenda

The section of the Otter.ai app where you can see your upcoming events. You can also start OtterPilot manually when in this section.

Summary Keywords

The section in the transcription where Otter.ai highlights the important information from a meeting.

Rematch Speakers

A feature from the transcription service where you can add names to the transcription. The AI will then change the name of the speaker in the transcription automatically.

Word Cloud

A feature from the transcription service where Otter.ai will give you a procedurally generated image that highlights the most significant words from the transcription.