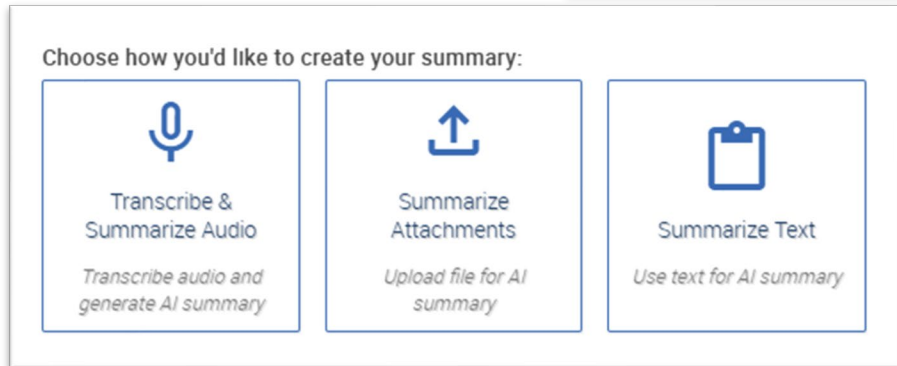
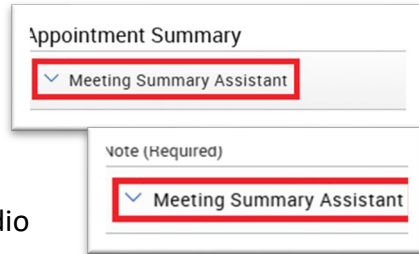


Navigate360: Meeting Summary Assistant

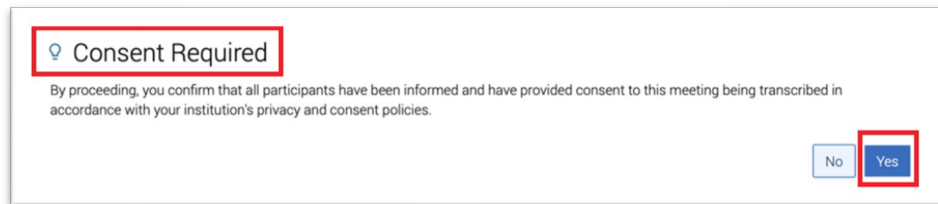
The Meeting Summary Assistant allows users to live transcribe and use AI to summarize a meeting transcript, attachments, or text put in a user's Appointment Summary or Notes.

1. Open the Meeting Summary Assistant

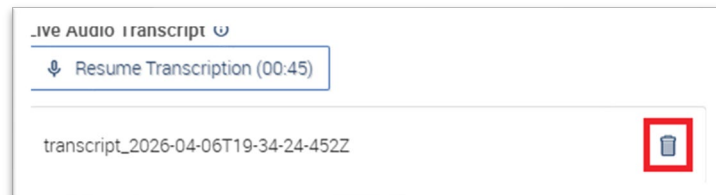
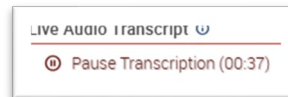
- In an *Appointment Summary* or *Note*, click the drop-down beside *Meeting Summary Assistant*
- Choose how you'd like to create your summary:
 - *Transcribe & Summarize Audio* – allows users to transcribe an audio conversation and generate an AI summary
 - *Summarize Attachments* – upload a file and generate an AI summary
 - *Summarize Text* – use meeting notes for AI summary



- *Transcribe & Summarize Audio*: Users will need to provide consent for recording before proceeding by reading the warning and selecting *Yes*.



- Users will see the transcript is live as the conversation occurs.
- The live transcript can be paused and restarted during the conversation by clicking *Pause Transcription*.
- Transcription is supported for one user dictation or for conversations with students.
 - **RECOMMENDATION:** If recording a conversation with multiple individuals, it's best if the speakers identify themselves in the beginning of the conversation for optimal live transcription.
 - **OPTIONAL:** Users can add *Additional Notes* under the *Live Audio Transcript* to include with the transcript either before or after the transcript is finished.
- After the conversation is over, the transcription will need to be paused.
 - **NOTE:** The transcript can be deleted after summarization. An *Appointment Summary* or *Note* cannot be closed, minimized, or saved until the transcription is stopped.

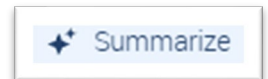


Continue to next page...

Navigate360: Meeting Summary Assistant

The Meeting Summary Assistant allows users to live transcribe and use AI to summarize a meeting transcript, attachments, or text put in a user's Appointment Summary or Notes.

- **NOTE:** Audio is **NOT** recorded or stored after an *Appointment Summary* or *Note* is saved or closed. Live transcription has a maximum of 90 minutes.
- Select a *Summary Style* to summarize the audio transcript:
 - *Comprehensive* – Detailed narrative with all sections
 - *Concise* – Brief overview in paragraph format
 - *Key Points* – Essential information by topic
 - *Bulleted* – Structured sections with action items
 - *Custom Summarization Instructions* – Users can create own summary style
- Click *Summarize* to summarize the audio transcript.
- Users **MUST** review summary transcript to remove FERPA sensitive information and edit for accuracy and clarity.
- Click *Save this Report*.



2. Summarizing Attachments

- Users can upload attachments to create an automatic summary. This can help extract information from an attachment to add to *Appointment Summaries* or *Notes*.
 - **NOTE:** Users can use more than one Meeting Summary Assistant option (ex: transcribing audio and then uploading a document) and both are added to the summary. The attachment summary will **NOT** overwrite the summarized transcript and vice versa.