Setting Up and Using Otter’s Live Transcription in Zoom Meetings

Quick Links:
- **Step 1: Allow live streaming in Zoom (meeting host)**
- **Step 2: Connect Otter to Zoom**
- **How to use Live Video Meeting Notes for Zoom**
  - Start live transcription automatically
  - Access the live transcript
  - Splitting your screen

*NOTE*: Make sure you sign up for Otter’s **FREE 2-month trial of Otter for Teams** in order to use Otter’s Live Transcription feature in a Zoom meeting. You do not need to enter a credit card or other payment to take advantage of this trial. Enter your Cal Poly email address and use the code **OTTER_RELIEF** when prompted. You can sign up for 10 of these Otter for Teams licenses for your team/department by May 31, 2020.

### Step 1: Allow live streaming in Zoom (meeting host)

1. Sign in to your Zoom profile at the [Cal Poly Zoom profile page](#) as a meeting host.
2. Click **Settings** on the far left.
3. In the **Meeting** tab, click **In Meeting (Advanced)**, and configure the following settings:
   - Allow live streaming meetings: **Enabled**
   - **Custom Live Streaming Service: Enabled** (it’s not necessary to insert or edit the text box)
Step 2: Connect Otter to Zoom

1. Sign in to Otter.ai, click your profile icon at the top right, and then click Account Settings.
2. Click the Apps tab, find Zoom under Connect Apps, and then click Connect.

*Note for existing users:*
If you had set up Otter to sync Zoom cloud recordings, you will need to Disconnect and Connect again to activate Live Video Meeting Notes.

3. If you are not already signed into Zoom, you would be prompted to sign in.
4. Click Authorize to connect Otter to Zoom.
Now you have completed this **one-time setup process** for live transcription in Zoom. From now on, Otter’s red LIVE transcription indicator will appear at the top of all Zoom meetings you host.

**How to use Live Video Meeting Notes for Zoom**

<table>
<thead>
<tr>
<th>WHO</th>
<th>CAPABILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting host</td>
<td><strong>Start live transcription automatically</strong></td>
</tr>
<tr>
<td>Participants</td>
<td><strong>Access the live transcript</strong></td>
</tr>
<tr>
<td>Collaborators (<em>must have Otter for Teams</em>)</td>
<td><strong>Take notes collaboratively</strong></td>
</tr>
</tbody>
</table>

**Start live transcription automatically**

1. Start a meeting with the Zoom account that is connected to *Otter for Teams*.
2. A red LIVE indicator will appear at the top left of the Zoom window, indicating that Otter has started live transcribing the meeting automatically. (NOTE: As host, if you don’t want to have live transcription for a particular meeting, click to the right of the red LIVE indicator and choose **Stop Live Stream**. Doing so will turn off live transcription and remove the red LIVE indicator.)

**Access the live transcript**

Meeting participants can open a live interactive transcript directly from Zoom to follow along and scroll back to read at their own pace.

1. Join a Zoom meeting.
2. Click to the right of the red LIVE indicator and choose **View Stream on Otter.ai Live Transcript** from the dropdown list.
3. The live transcript will open in a browser window.
4. Follow along and scroll back to read at your own pace.
Splitting Your Screen

You can split your screen so that one side (e.g. left side) has the live meeting in Zoom, and the other side (e.g., right side) has the Otter window where the live transcription is taking place. This setup can make it easier to view the live transcript while at the same time viewing or participating in the meeting. Here are links with step-by-step instructions for a quick setup that allows viewing two windows side-by-side in Windows 10 and MacOS.