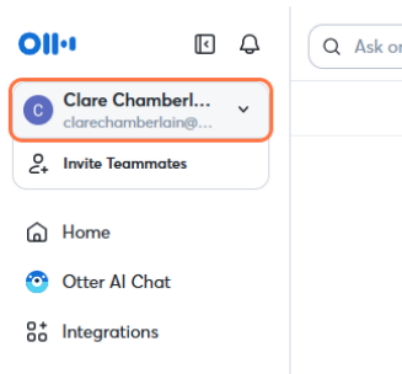


Managing account settings for Otter.ai (transcription tool)

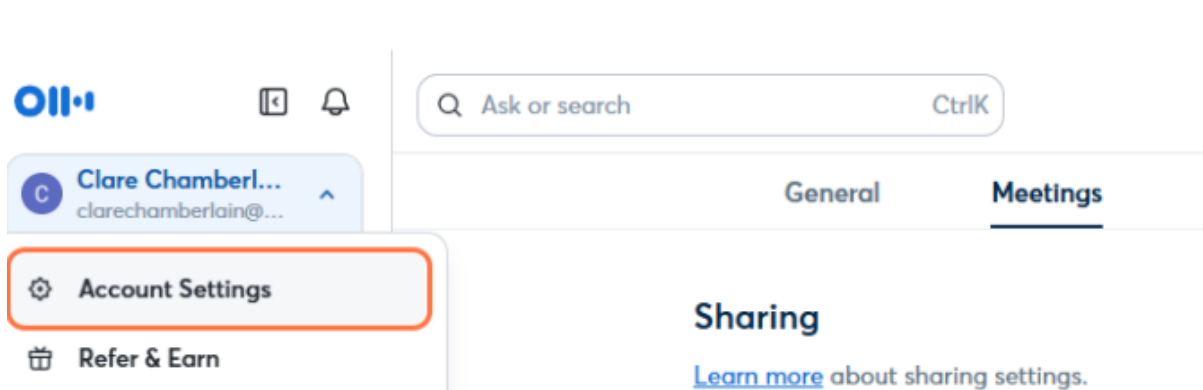
If you set up a free account with Otter.ai (<https://otter.ai/start-for-free>) make sure that, once you have verified your account, you manage your account settings straight away. This will enable you to limit the activities of your Otter Meeting Note Taker to be an opt in resource for you, rather than Otter sending a note taker, for example, into all the meetings in your Outlook calendar.

To do this:

1. go to your account settings by clicking on the drop-down arrow next to your name ...



2. Click on Account Settings and select the Meetings tab



3. Toggle off or select the following settings to shut down functionality as much as possible so that you can actively switch on the settings you want.

See the example below of how to do this.

Sharing

[Learn more](#) about sharing settings.

Default audience for shared notes

When recording a calendar event, automatically share the notes with your chosen audience.

Don't share



Default permission level

Change the permission level for specific meetings in your [Home calendar](#).

Viewer



Allow Collaborators to share

Change this for specific meetings in the Share popup. [Learn more](#).

Off

Otter Notetaker

Ready to join your Zoom, Google Meet, and Microsoft Teams to record and transcribe automatically. Appears in meetings as **Clare's Notetaker (Otter.ai)**.

Default auto-join settings

Turn on auto-join for specific meetings in your [Home calendar](#).

Meetings I manually select



Notetaker chat messages

Notetaker sends helpful messages in the virtual in-meeting chat (visible to all attendees) to make meetings more effective. [Learn more](#)

Send live transcript and summary

Send a link to the live summary and transcript when the meeting begins, and takeaways and action items before the meeting ends.

Off

Send Otter Chat Q&A

Send questions and AI-generated answers from Otter Chat.

Off

Send system alert messages

Get in-meeting messages about important system events, like when your notetaker detects silence, reaches the transcription limit, or does not have permission to record due to Zoom's compliance requirements.

Off

Send pre-recording emails

For all meetings Notetaker is scheduled to join, notify all calendar event guests in advance about Notetaker recording the meeting.

Off

Auto-capture meeting screens

Notetaker will automatically capture shared content from meetings.

Off

Chat

Settings to control AI Chat in your meetings.

Meeting Agent with voice

Allow voice questions and commands in meetings.

Off

Show virtual background

Display a virtual background during meetings to highlight voice capabilities.

Off 

Meeting Access

Control which meetings Chat has access to.

Past meetings within recurring series

Make previous meetings within a recurring series available to Chat.

Off 

Meetings shared to public channels in your workspace

Make meetings shared to public channels in your workspace available to Chat.

Off 

Otter Help

Ask questions about using Otter in Chat.

Off 

Feedback and Training

This helps our services become more useful and accurate. See our [Privacy Policy](#) for more details.

Help improve Otter

Allow Otter and its third-party service provider(s) permission to access my conversations for training and product improvement, including through human review.

Don't allow training



Here's a link to what the Meeting Settings all mean:

<https://help.otter.ai/hc/en-us/categories/13674443883031-Meeting-settings-recordings>

Also here is a link to Otter's Privacy Policy:

<https://otter.ai/privacy-policy>

Note the account setting above (Help improve otter) which you can switch to 'Don't allow training'.

How Otter uses your data:

- **Secure storage:** Otter stores your recordings and transcripts in secure cloud storage.
- **Service provision:** Your data is used to provide the services, including transcription and meeting summaries.
- **AI model improvement:** Otter may use your de-identified audio data to train and improve its AI models, but individual users cannot be identified from this data.
- **No manual access:** Otter staff does not access your personal audio recordings unless you give explicit consent to help with troubleshooting or if you opt-in to contribute data for system improvement.