

# ActionBoard AI User Manual

## Core Functionalities of ActionBoard AI

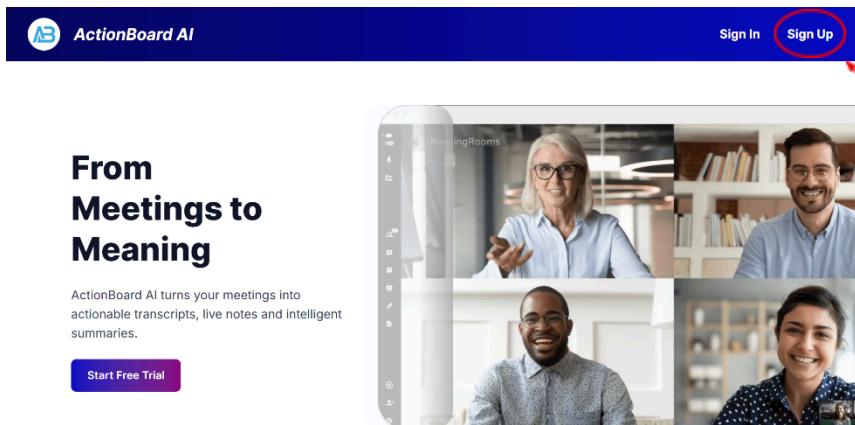
<ul style="list-style-type: none"><li>User Authentication: Secure login and registration system with JWT-based session management.</li></ul>
<ul style="list-style-type: none"><li>Integration with Video Conferencing Platforms: Native support for Zoom (production-ready), with upcoming support for Microsoft Teams and Google Meet.</li></ul>
<ul style="list-style-type: none"><li>Dashboard Interface: A responsive, interactive dashboard providing access to meetings, transcripts, reports, and user actions.</li></ul>
<ul style="list-style-type: none"><li>Organization Management: Ability to create and manage organizations, assign members, and control access levels.</li></ul>
<ul style="list-style-type: none"><li>Meeting Audio Ingestion: Upload and ingest audio from recorded meetings or live sources.</li></ul>
<ul style="list-style-type: none"><li>Transcription Engine: Accurate speech-to-text conversion using Whisper or equivalent models.</li></ul>
<ul style="list-style-type: none"><li>Summarization: Automated generation of concise meeting summaries using transformer-based NLP models.</li></ul>
<ul style="list-style-type: none"><li>Action Item Extraction: Identification and surfacing of key follow-up items, commitments, and deadlines from conversations.</li></ul>
<ul style="list-style-type: none"><li>Reminder &amp; Follow-up System: Email and SMS notifications for pending tasks, meetings, or important follow-ups.</li></ul>
<ul style="list-style-type: none"><li>Data Storage: Secure storage in Firebase or optionally Google Sheets for lightweight integrations.</li></ul>
<ul style="list-style-type: none"><li>Live Note-Taking: Real-time collaborative note-taking integrated with transcription during meetings.</li></ul>
<ul style="list-style-type: none"><li>Multi-Language Support: Transcription and summarization available in multiple languages.</li></ul>
<ul style="list-style-type: none"><li>Sentiment Analysis: Detection of sentiment shifts across meetings for engagement insights.</li></ul>

- Searchable Transcripts: Capability to search transcripts by keywords, topic clusters, or sentiment tags.
- Calendar Integration: Unified calendar view of upcoming, past, and shared events.

# How to Use ActionBoard AI?

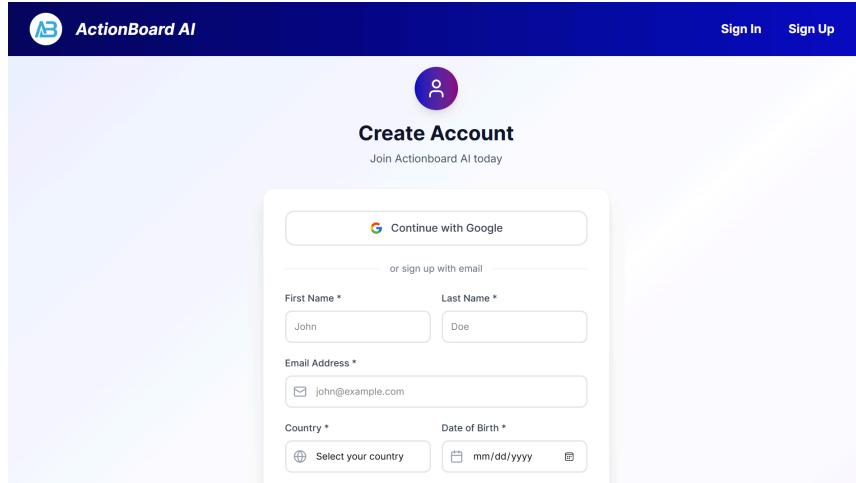
## 1.0 Signing Up:

When loading into the app, you will be greeted by the welcome page:

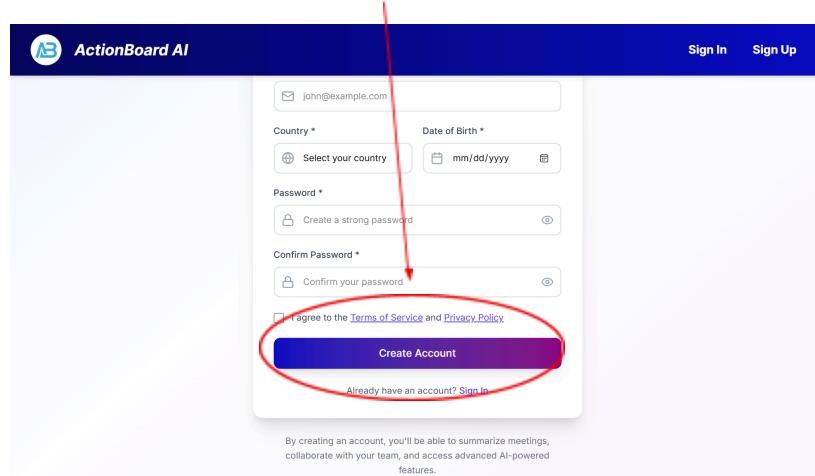


To get started, hit the “Sign Up” button on the top left.

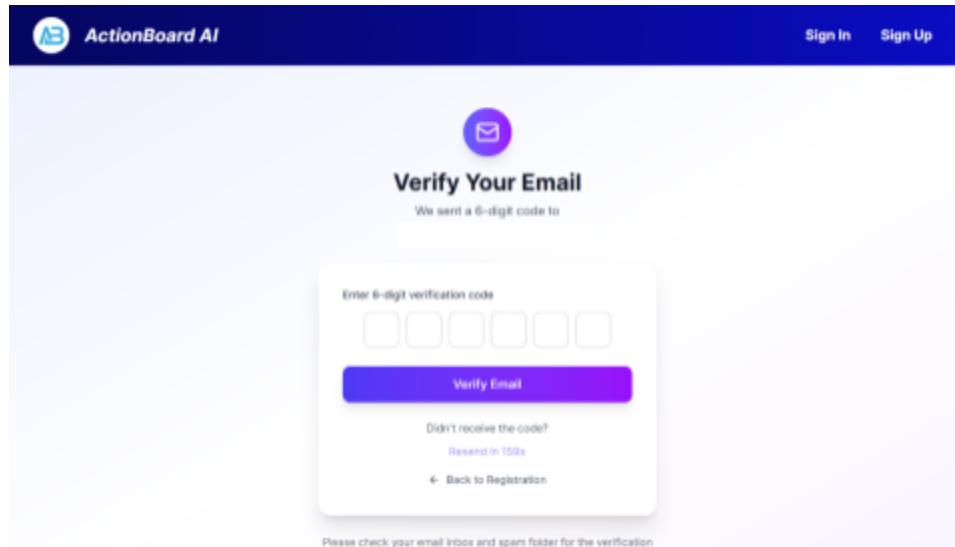
This will take you to the Sign Up page:



Fill in the required details, and then hit “Create Account” at the bottom:



After hitting “Create Account”, a six-digit one time passcode will be sent to your email. If you are having difficulties receiving the one time passcode, please check your spam and junk folders, or re-send the code. After receiving the passcode, copy the code into the verification, and hit “Verify Email”



Congratulations! You have successfully Signed Up! This will automatically redirect you into the Organization Dashboard. If not, please continue to the “Sign In” section of this document to find out how to Sign In.

## 2.0 Signing In:

Once an account has been created, to access ActionBoard AI, users must first Sign In.

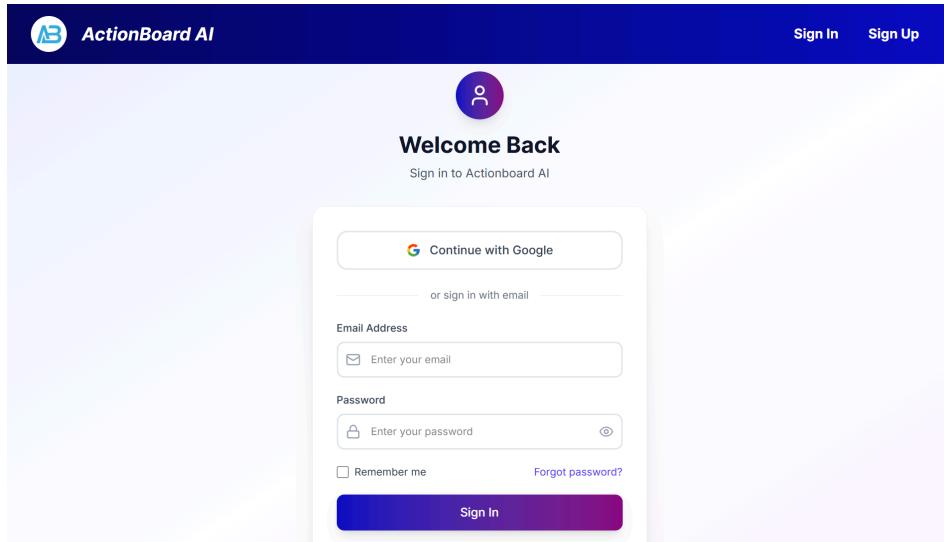
**From Meetings to Meaning**

ActionBoard AI turns your meetings into actionable transcripts, live notes and intelligent summaries.

Start Free Trial

To get started, hit the “Sign In” button on the top left.

This will take you to the Sign In Page. Enter your user credentials, and click the “Sign In” Button.

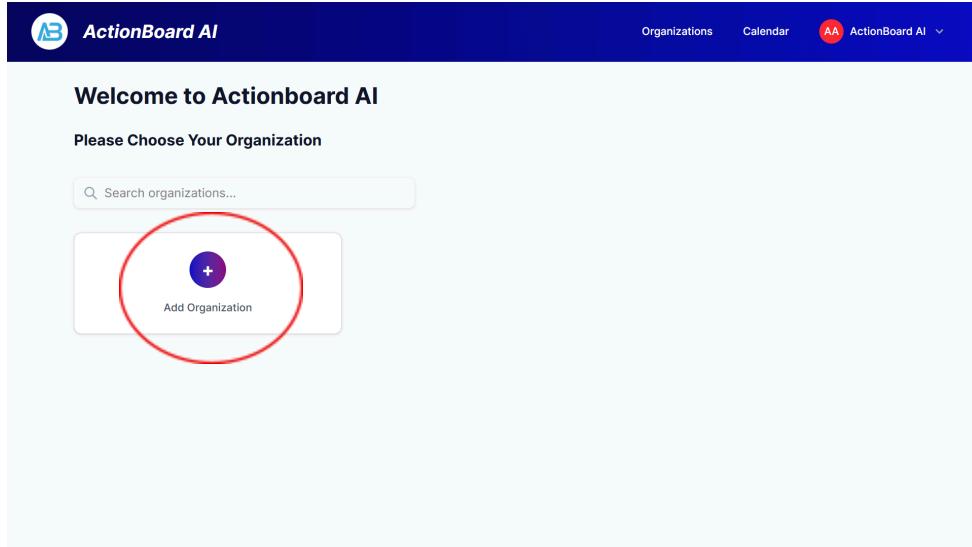


Congratulations! You have successfully Signed In! This will automatically redirect you into the Organization Dashboard.

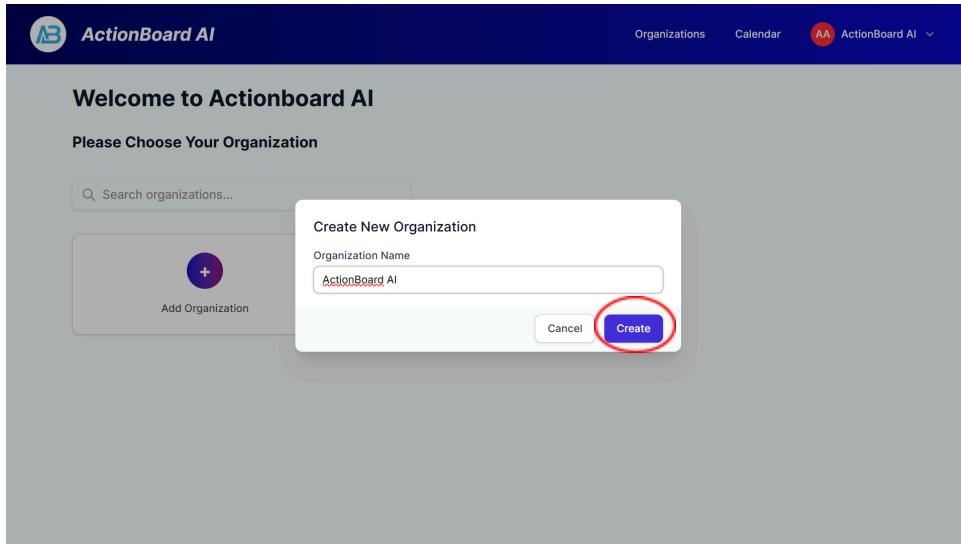
## 3.0 Organization Dashboard:

The Organization Dashboard is the “home” page of ActionBoard AI. From here, users can create, edit, search, access, or delete organizations.

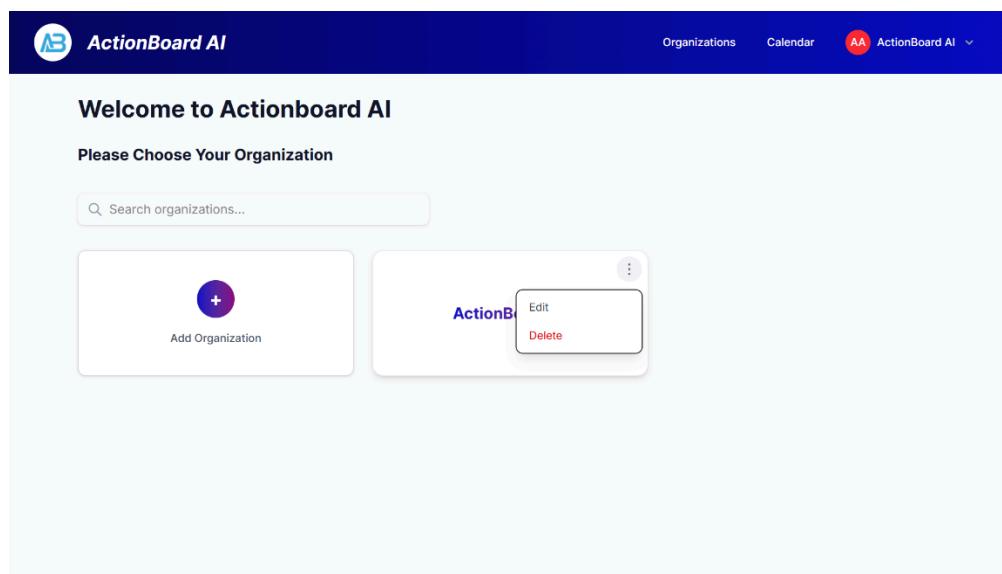
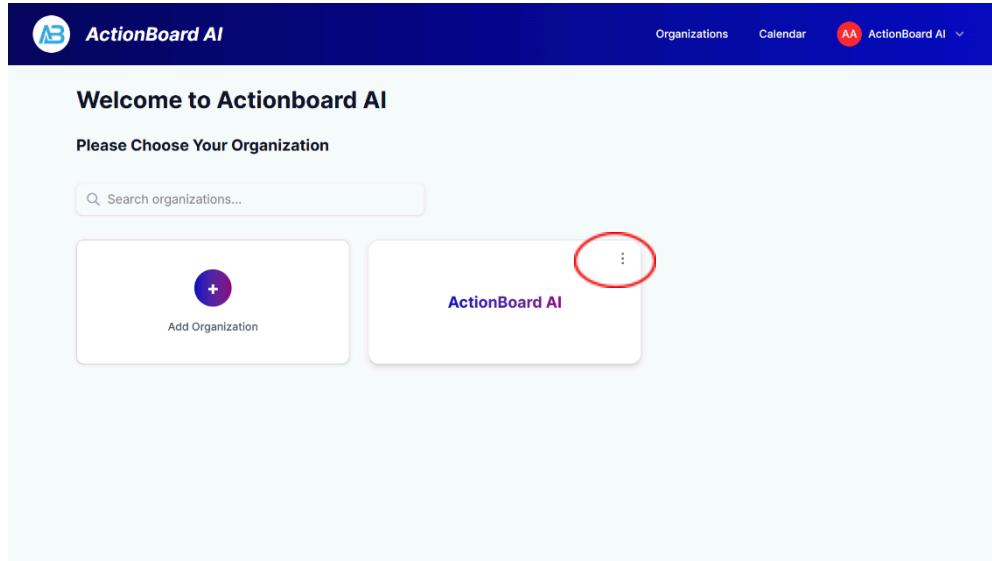
To get started, let’s create an organization. To do this, hit the “Add Organization” button.



This will let you name your new organization. After you have named your new organization, hit the “Create” button.



Now you will see your new organization in the Dashboard. To edit or delete an organization, hit the 3 dots in the top left of the organization the should be edited/deleted, and click the desired outcome.



At the top left of the page, there are 3 buttons that can be clicked: Organizations, Calendar, and User Options.

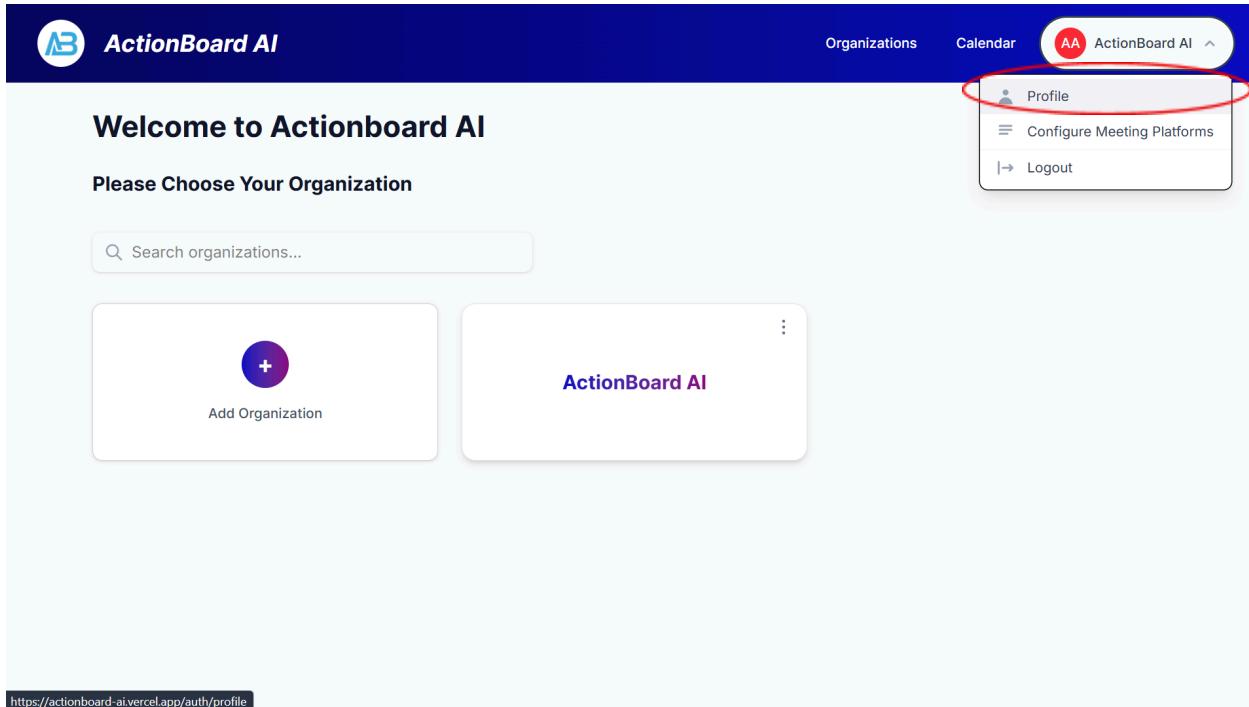
The “Organizations” button brings up a list of all the organizations a user has created, and each organization can be accessed through this list.

The “Calendar” button will take users to their ActionBoard AI calendar.

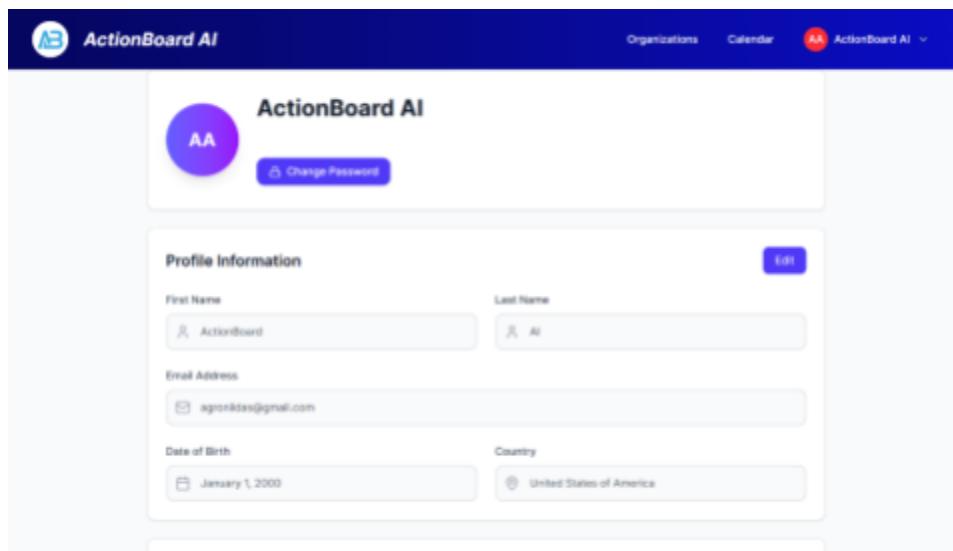
The “User Options” button will allow users to access their profile, configure meetings platforms, and logout.

## 4.0 Profile:

To access user profile, users must click the “User Options” button at the top left of the organization dashboard, and then click “Profile”.



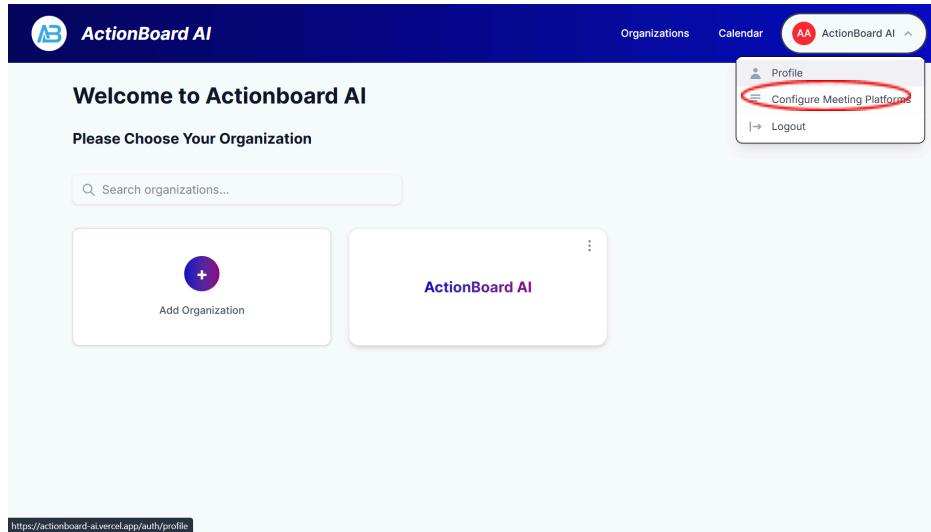
This will take you to the User Profile.



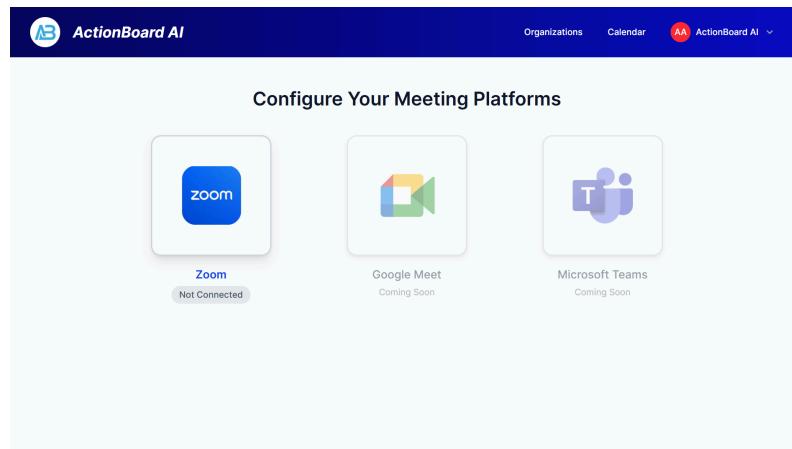
From here, users can change password, edit their personal details, and view their account status.

## 5.0 Configure Meeting Platforms:

To access meeting platforms, users must click the “User Options” button at the top left of the organization dashboard, and then click “Configure Meeting Platforms”.



To connect a meeting platform, users will click the meeting platform they wish to connect.



From there, they must sign into their meeting account to give ActionBoard AI access to their meetings.

## 6.0 Meetings:

To access an organization's home page, users should click on the desired organization from Dashboard. This will bring up an Organization's Home Page:

Users must connect a zoom account using the “Connect Zoom” button, and follow the subsequent steps to allow ActionBoard AI to view their meetings.

Once connected, users can Create Meetings, Search Meetings by Name, Date, or Status, View their Calendar, and Visit their Member List.

The Member List stores the names and email addresses of the Members of the Organization. This will allow ActionBoard AI to send meeting links to each member when a meeting is creates. To get started, click “Member List” on the sidebar.

The screenshot shows the ActionBoard AI platform's interface. On the left, a sidebar titled "Meeting Zone" contains four buttons: "Create Meeting", "Org Calendar", "Member list" (which is circled in red), and "Meeting Platforms". The main content area is titled "Welcome to ActionBoard AI" and displays a search bar and filter options for meetings. Below this, a message states "No meetings found" with a note to adjust filters or create a new meeting.

The screenshot shows the "Member List" page for the organization "ActionBoard AI". It includes a "Back to Org Home" link, the organization name, and a "Member List" heading. A red circle highlights the "+ Add Member" button located at the top right of the list area. Below the list, a message indicates "No members found in the list."

Click the “+ Add Member” button. This will allow users to add members to their organization.

After a member is added, users can edit or delete their members from the Member List.

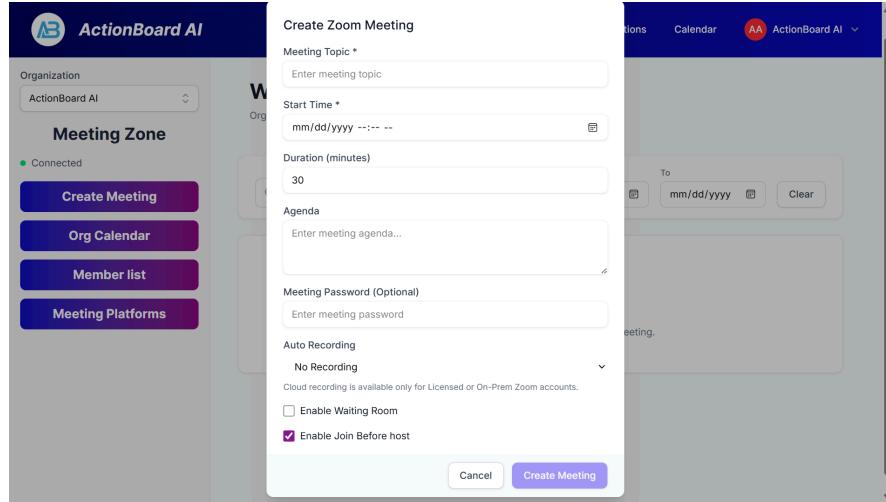
The screenshot shows the 'Member List' section of the ActionBoard AI platform. At the top, there's a back button labeled '← Back to Org Home' and the organization name 'Org: ActionBoard AI'. Below that is a 'Member List' header with a '+ Add Member' button. A single member entry is shown: 'Next Generation Innovation' with the email 'nji@gmail.com'. To the right of the member entry are 'Edit' and 'Delete' buttons.

Navigate back to the organization home page using the blue button above the organization name. Now that the user has added members to their organization, they can invite them to a meeting. Click the “Create Meeting” button in the sidebar:

The screenshot shows the 'Welcome to ActionBoard AI' page. On the left, a sidebar titled 'Meeting Zone' contains five buttons: 'Connected' (green dot), 'Create Meeting' (purple button, circled in red), 'Org Calendar', 'Member list', and 'Meeting Platforms'. The main content area is titled 'Welcome to ActionBoard AI' and shows 'Organization ID: JMA3575B'. It features a search bar with placeholder 'Search meetings...' and dropdowns for 'Status' (All), 'From' (mm/dd/yyyy), and 'To' (mm/dd/yyyy). Below the search bar, a message says 'No meetings found. Try adjusting your filters or create a new meeting.' with a small video camera icon.

This will allow you to create a Zoom meeting. Users must give a Meeting Title and Start Time, and can also specify the Meeting Duration, Meeting Agenda, Meeting Password, Auto Recording Setting, Waiting Room Status, and Ability to Join Before Host.

Users can then click the “Create Meeting” Button to create a meeting.



Success! A meeting has been created. The meeting will show up on the Organization Home Page and the User Calendar. On the Organization Home Page, users can join or invite members from their Member List to the meeting.

Once the meeting finishes, users can click on the meeting to access their AI Insights.

## 7.0 AI Insights:

To access the AI Insights of a meeting, users must click on the meeting they wish to view after it has ended.

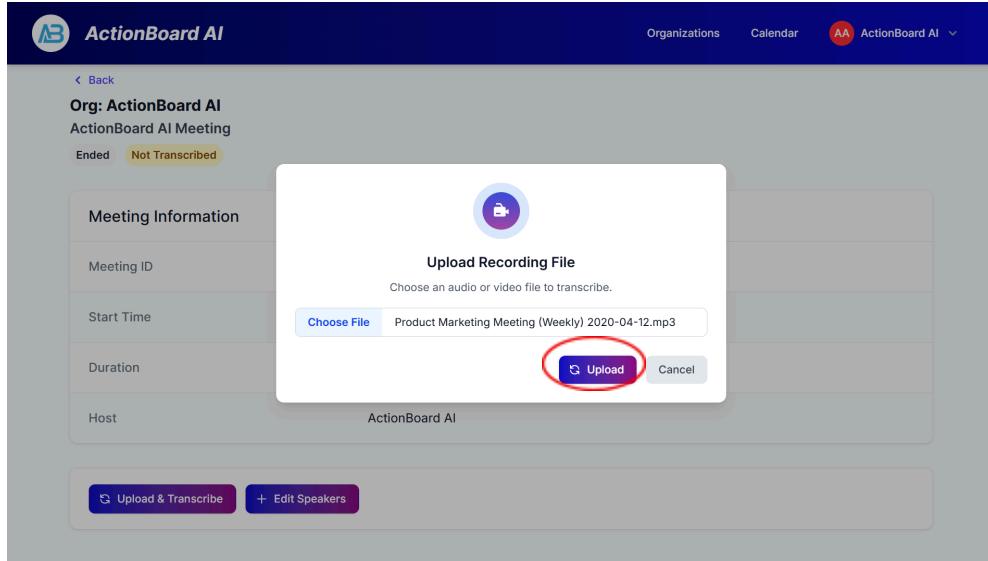
The screenshot shows the ActionBoard AI web interface. At the top, there's a navigation bar with the ActionBoard AI logo, 'Organizations', 'Calendar', and a user dropdown. On the left, a sidebar titled 'Meeting Zone' lists 'Connected' status, 'Create Meeting', 'Org Calendar', 'Member list', and 'Meeting Platforms'. The main area is titled 'Welcome to ActionBoard AI' with the organization ID 'JMA3575B'. It features a search bar and a list of meetings. One meeting, 'ActionBoard AI Meeting' from 8/15/2025 at 3:02:06 PM, which is 30 minutes long and has an 'Ended' status, is highlighted with a red oval. To the right of this meeting are 'Join' and 'Invite' buttons.

From here, users can upload the recording of the meeting.

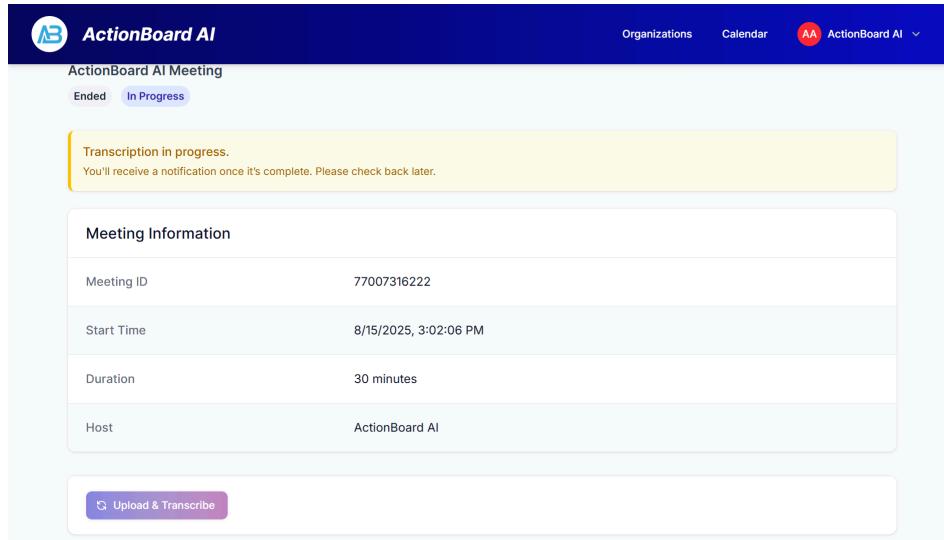
For Zoom Pro users, the meeting will be automatically uploaded to ActionBoard AI. For regular Zoom users, they must first download the meeting audio from Zoom and then upload the recording to ActionBoard AI.

This screenshot shows the details of a specific meeting. At the top, it says 'Org: ActionBoard AI' and 'ActionBoard AI Meeting'. Below that, it shows the meeting status as 'Ended' and 'Not Transcribed'. A large section titled 'Meeting Information' displays the meeting ID (77007316222), start time (8/15/2025, 3:02:06 PM), duration (30 minutes), and host (ActionBoard AI). At the bottom of this section is a button labeled 'Upload & Transcribe' with a red circle around it. Next to it is another button labeled '+ Edit Speakers'.

Once the meeting recording has been selected, users should click the “Upload” button to upload the meeting to ActionBoard AI.



Once the meeting is uploaded, users will see a “Transcription in Progress” tag, and must allow a few minutes for the AI to deliver insights. Once the AI has finished, the user will receive an email notification.



Once the recording has finished processing, users will be able to edit Speaker Names, access AI Insights, Meeting Transcript, Speaker Summaries and Overall Meeting Sentiment.

To start, users should edit the names of the speakers:

The screenshot shows the ActionBoard AI interface for a completed meeting. The top navigation bar includes the ActionBoard AI logo, 'ActionBoard AI Meeting', 'Organizations', 'Calendar', and a user profile. Below the navigation, the status is shown as 'Ended' and 'Transcribed'. The main content area is divided into sections: 'Meeting Information' (Meeting ID: 77007316222, Start Time: 8/15/2025, 3:02:06 PM, Duration: 30 minutes, Host: ActionBoard AI), 'Transcription Actions' (Meeting has been transcribed, options to 'Upload & Re-transcribe' or '+ Edit Speakers'), and 'AI Generated Insights' (Speaker A discusses work in progress). The '+ Edit Speakers' button is circled in red.

From here, the names of each person in the meeting can be edited.

The screenshot shows the 'Edit Speaker Names' modal overlaid on the main ActionBoard AI interface. The modal lists four speakers with their current names: Speaker A (Bob), Speaker B (Katie), Speaker C (Dylan), and Speaker D (Sarah). At the bottom of the modal are two buttons: 'Cancel' and 'Save Changes', with 'Save Changes' circled in red. The background interface shows the meeting details (Start Time: 8/15/2025, 3:02:06 PM) and the 'Transcription Actions' section.

To save the name edits, users should hit “Save Changes”

Users should then access the AI Insights of the Meeting by scrolling down:

The screenshot shows the ActionBoard AI web application. At the top, there's a dark blue header with the ActionBoard AI logo, navigation links for 'Organizations' and 'Calendar', and a user profile icon. Below the header, a purple button says 'Upload & Re-transcribe' and a green button says 'Speakers Updated'. The main content area has a light gray background. At the top of this area, there are tabs: 'AI Insights' (which is underlined in blue), 'Transcript', 'Speaker Summary', and 'Overall Meeting Sentiment'. Under the 'AI Insights' tab, the heading 'AI-Generated Insights' is followed by 'Speaker Summaries'. A section for 'Bob:' is shown, containing text about his contributions and a list of bullet points. Further down, there are sections for 'Meeting Agenda' and 'Minutes of the Meeting', each with its own list of bullet points.

In the AI Insights, users can see the Summaries of what each participant contributed, the Agenda of the Meeting, Minutes of the Meeting, and Action Items. These can all be accessed by scrolling down.

This screenshot is similar to the one above but shows more content due to a scroll-down action. The 'Speaker Summaries' section for Bob is now partially visible at the bottom of the page. Above it, the 'Meeting Agenda' and 'Minutes of the Meeting' sections are fully visible, each with their respective lists of bullet points. The overall layout remains consistent with the first screenshot, featuring the same header and navigation elements.

The screenshot shows the ActionBoard AI web application. At the top, there's a navigation bar with icons for 'Organizations', 'Calendar', and 'ActionBoard AI'. Below the navigation is a large text area containing a meeting transcript. The transcript includes a list of action items at the bottom.

```

    Katie explains their work with Gerald on the backend API and Zoom integration.
    The team encounters issues with email verification during the sign-up process and brainstorms solutions.
    Sarah emphasizes the importance of fixing bugs and ensuring a smooth user experience.
    Dylan shares their progress on Zoom integration and the need for testing.
    Bob suggests adding a Zoom button on the homepage for easier connection.
    The team discusses the organization feature and how to manage multiple Zoom accounts. Dylan suggests creating separate pages for each organization.
    Katie raises the question of summarizing individual meetings and the team discusses the scope of the project.
    Bob suggests adding a Zoom button to the homepage for now and focusing on the product demonstration for Sunday.
    Bob shares their progress on transcription, using Whisper X and Hugging Face models. They aim to reduce the transcription time from 4 hours to 30 minutes.
    The team discusses the trade-offs between local model loading and cloud-based solutions, as well as the potential use of 11 Lenses API for transcription.

Action Items:
    Katie will share materials and progress with the team.
    Bob and Dylan will work on Zoom integration and connect it to the app.
    Katie and Bob will test the sign-up, login, and other features for bugs and errors.
    Bob will research alternative transcription models and aim to reduce transcription time.
  
```

Next, users can access the Transcript of the meeting by scrolling up and clicking the “Transcript” button.

The screenshot shows the ActionBoard AI interface with the 'Transcript' tab highlighted with a red circle. The transcript section displays a list of speaker turns and their corresponding timestamps.

Speaker	Timestamp	Text
Speaker Bob	[00:00:05]	Okay so can you guys show us what you.
Speaker Katie	[00:00:10]	Yes.
Speaker Bob	[00:00:11]	Yeah.
Speaker Katie	[00:00:25]	It.
Speaker Dylan	[00:01:04]	Hello.
Speaker Katie	[00:01:06]	How are you doing today? Hello foreign how are you today?
Speaker Bob	[00:01:26]	Hi, I'm good. So who is going to share like you said. You guys said that it's done so I just wanted to see.
Speaker Katie	[00:01:41]	Yeah, okay. So basically yeah so me and like General we had a like meeting yesterday and we just you know work together and just about the API and today I also worked and I just finished like signing and like sign up and you know OTB verification stuff. Okay, let me share share you so all of all of you guys here Actor ng ag. Okay so let me. Let me share my screen. So so can you allow me to share my screen?
Speaker Bob	[00:02:19]	Yeah.

The Transcript is a word-by-word written recount of what was said and who said it during the meeting.

Next, users should navigate to the Speaker Summary tab

**Speaker Summary**

Select Speaker: Bob

Bob contributed the following to the meeting:

- Prompting other speakers to share their work and progress, and providing clarification on various topics regarding the project, including the need to include a favorite meetings section and feedback on email setup issues
- They also provided feedback on the project's progress, suggesting the addition of a zoom button for seamless integration and suggesting the display of a transcribe option once a meeting is over for organization purposes

They also highlighted the need to show the product by Sunday and reducing the time of the code from 4 hours to 30 minutes, which they will improve upon and provide tomorrow for review.

They also mentioned researching and trying alternative models to reduce loading time and using storage and bandwidth more efficiently. In addition, they provided a summary of the work done, including the use of Whisper X by Open AI, the loading time of the model, and the need to switch to a different model if necessary.

They also mentioned the use of Scribe early on but decided to change it to Whisper.

They assured others that they would work on it and come up with a solution by tomorrow.

They also contributed to the meeting by facilitating the discussion and keeping the conversation moving smoothly.

Overall, Bob played a key role in the meeting by providing valuable insights, feedback, and encouragement to ensure the project's successful completion.

They also demonstrated active listening and critical thinking skills throughout the meeting.

Let me know if you would like to know more about the meeting or Bob's contributions!

The Speaker Summary tab shows a selected participant's contributions to the meeting, the sentiments they exhibited, their positive contribution to group sentiment, and sentiment distribution by speaker.

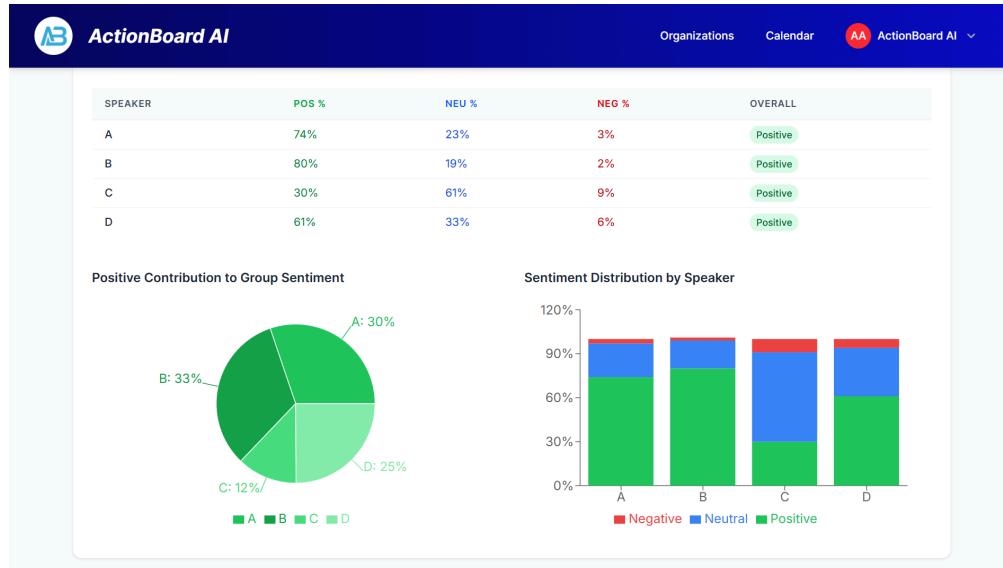
They also demonstrated active listening and critical thinking skills throughout the meeting.

Let me know if you would like to know more about the meeting or Bob's contributions!

Positive: 79% / Neutral: 19% / Negative: 2%

■ Negative ■ Neutral ■ Positive

SPEAKER	POS %	NEU %	NEG %	OVERALL
A	74%	23%	3%	Positive
B	80%	19%	2%	Positive
C	30%	61%	9%	Positive
D	61%	33%	6%	Positive



The speaker summaries can be filtered by each participant to get a detailed, person-by-person breakdown.

Lastly, users can navigate to “Overall Meeting Sentiment” to get an analysis of the overall meeting sentiment.

The screenshot shows the ActionBoard AI interface. At the top, there's a dark blue header with the "ActionBoard AI" logo, navigation links for "Organizations", "Calendar", and "ActionBoard AI", and a user profile icon. Below the header, the main content area has a white background. On the left, there's a sidebar with "Transcription Actions" and a message: "Meeting has been transcribed. You can re-transcribe to update the content." Below this are two buttons: "Upload & Re-transcribe" (blue) and "Speakers Updated" (green). The main content area has tabs: "AI Insights", "Transcript", "Speaker Summary", and "Overall Meeting Sentiment" (which is underlined and circled in red). Underneath these tabs is a box titled "Overall Meeting Sentiment Analysis" containing the following data:

Overall Sentiment:	Positive
Average Compound Score:	0.326
Average Positive:	0.370
Average Neutral:	0.611
Average Negative:	0.019

## 8.0 Calendar:

The Calendar feature is modularized into two parts: the Organization-Specific Calendar and the Personal Calendar. Both Calendars show the meetings of a user. This can be filtered by month, week, day, or a custom amount of time. Users can also see a list of all meetings, search for certain meetings, or access personalized reports. However, there are some key differences between the two types of calendars:

### Organization-Specific Calendar:

The Organization-Specific Calendar will show all the meetings from a specific organization. The title, description, and participants of the meeting can be accessed from the calendar. Additionally, the timing of these events can be edited from the calendar. New Organization-Specific Events can be added from the "+ Add Event" button in the top right corner.

The meetings from other Organizations will be shown as simply "Occupied Slots" and will be greyed out. These meetings cannot be accessed or edited from the Calendar.

The screenshot shows the ActionBoard AI Calendar interface for August 2025. The top navigation bar includes the ActionBoard AI logo, 'Organizations' and 'Calendar' buttons, and a user dropdown. The main header displays 'ActionBoard AI Calendar' and the date 'Friday, August 15'. A sidebar on the left shows a calendar for August 2025 with the 15th highlighted. Below it, an 'ORGANIZATION' section lists 'ActionBoard AI'. The main calendar grid shows days from 27 to 30. On August 14, there is a yellow-highlighted event 'ActionBoard AI M...' and a blue-highlighted event 'ActionBoard AI'. On August 15, there is a grey-highlighted event 'Occupied Slot Occupied'. The bottom right corner of the calendar grid has a vertical scroll bar.

## Personal Calendar:

The Personal Calendar will show **all** meetings and events from **all** organizations. These events can be edited directly from the Calendar. Additionally, Personal Events that do not belong to any Organization can be added to the calendar, as well as Organization Events from any of a user's organizations.

The screenshot shows the Personal Calendar interface for August 2025. The top navigation bar includes the ActionBoard AI logo, 'Organizations' and 'Calendar' buttons, and a user dropdown. The main header displays 'Personal Calendar' and the date 'Friday, August 15'. A sidebar on the left shows a calendar for August 2025 with the 15th highlighted. Below it, an 'ORGANIZATIONS' section lists 'ActionBoard AI' and 'Next Generation Innovatio...'. The main calendar grid shows days from 27 to 30. On August 14, there is a yellow-highlighted event 'ActionBoard AI M...' and a blue-highlighted event 'ActionBoard AI'. On August 15, there is a green-highlighted event 'Next Generation I...' and a grey-highlighted event 'Next Generation Inno...'. The bottom right corner of the calendar grid has a vertical scroll bar.