



Navigate Meeting Summary Assistant

The Meeting Summary Assistant feature in Navigate allows users to transcribe student meetings and use AI to summarize a meeting transcript, summarize attachments, or summarize text to put in your Appointment Summary Report or Notes. You can use this feature when creating either an Appointment Summary Report or a Note.

Using Meeting Summary Assistant

Meeting Summary Assistant appears at the top of the Appointment Summary and Note text fields.

In an Appointment Summary Report:

APPOINTMENT REPORT FOR GARRY CAGLEY

Appointment Details

Career Counseling
01/27/2026 1:00pm - 1:10pm UTC

Care Unit
Advising

Location
North Campus 3

Service
CAREER COUNSELING
Select Service

Course
Start typing to search all courses

Meeting Type
INTERVIEW
Select Meeting Type

Date of visit
01/27/2026

Meeting Start Time
1:00pm to Meeting End Time
1:10pm

All times listed are in UTC.

Attendees
Grace Charles (she/her)
2021001234
Advisor
Attended
Garry Cagley- 362228553
Sophomore
Attended
Checkin
to Checkout

Suggested Followup
This will be saved on the report as a suggestion. No appointment will be created.
Date
Time

Summary Details For Garry Cagley

Assignments Discussed
We discussed next steps on Thesis paper submission. Importance of writing precise

Objectives of the Session
The appointment stayed focus on prepare for thesis dissertation and guidelines to

Study Skills Used
Communication Skills; Presentation skills; Effective writing
Student arrived on time and was ready to begin our session.
Student was prepared (attended class, read lesson, had notes, etc.)?
Student asked for explanation of material not understood?
Student responded positively to instruction (as you suggested)?

Yes No N/A
Yes No N/A
Yes No N/A
Yes No N/A

Appointment Summary

Meeting Summary Assistant

Choose how you'd like to create your summary:

Transcribe & Summarize Audio
Transcribe audio and generate AI summary

Summarize Attachments
Upload file for AI summary

Summarize Text
Use text for AI summary

Paragraph
1. We discussed next steps on Thesis paper submission.
2. Importance of writing precise goals , sample space and results identified
3. The appointment stayed focus on prepare for thesis dissertation
4. Also, guidelines to defend a successful thesis
5. Communication Skills; Presentation skills; Effective writing

Attachments
Attach File
Choose File No file chosen

Privacy
Student(s) can see this report.

Report Information
Created By: Grace Charles (she/her) on 01/28/2026 7:00am UTC

Delete

Edit Report Cancel

In a Note:

ADD A NOTE TO BEN (00) DAVIS

Note (Required)

Meeting Summary Assistant

Choose how you'd like to create your summary:

Transcribe & Summarize Audio
Transcribe audio and generate AI summary

Summarize Attachments
Upload file for AI summary

Summarize Text
Use text for AI summary

Paragraph B I [link icon] [list icon] [indent icon] [undo icon] [redo icon]

Attach File
Choose File No file chosen

Note Subject
Ben (00) Davis- 00630759091

Relations
Note Reason
Note URL

Visibility
☐ Support 24 Only?
☐ Ben (00) Davis?

Cancel Save Note

There are three ways to add content to the Meeting Summary Assistant: (1) audio transcription and summarization, (2) attachment summaries, or (3) text summary. Select one to start creating a summary for the appointment, and content is updated in the field below.

Transcribing Live Audio

To transcribe live audio, select **Start Transcription**.

Meeting Summary Assistant

< Back to Options

Live Audio Transcript

Start Transcription

Additional notes (optional)

Add any additional context or notes to include with the transcript...

Meeting Assistant uses AI to generate summaries, action items, and insights from your meeting content. The outputs are provided for informational purposes only and...

IMPORTANT: After clicking Start Transcription, you need to receive verbal consent from the student to transcribe the meeting before you proceed. If student consent is given, select “Yes.”

Course

Start Transcription

Consent Required

By proceeding, you confirm that all participants have been informed and have provided consent to this meeting being transcribed in accordance with your institution's privacy and consent policies.

No Yes

Meeting Start Time Meeting End Time Comprehensive - Detailed narrative with all sections

The live audio transcription then begins. This transcript can be paused and restarted during the conversation. Note that you will also see the transcript "live" as the conversation

occurs. If there are multiple individuals in the meeting, it's recommended that speakers identify themselves in the beginning of the conversation for optimal live transcription. Transcription is also supported for one speaker if, for example, a staff would like to dictate appointment notes following an interaction.

Course

Start typing to search all courses

Meeting Type

Select Meeting Type

Date of visit

02/09/2026

Meeting Start Time

5:50pm

to

Meeting End Time

All times listed are in UTC.

Attendees

Support 24

Administration, Super User

☒ Attended

Rich Shih - 69569332

☒ Attended

Checkin

to

Checkout

Appointment Summary

Meeting Summary Assistant

< Back to Options

Live Audio Transcript ⓘ

⏸ Pause Transcription (00:27)

...1: Good morning. This is a live transcription. Of the meeting summary assistant

Additional notes (optional)

Add any additional context or notes to include with the transcript...

Meeting Assistant uses AI to generate summaries, action items, and insights from your meeting content. The outputs are provided for informational purposes only and should be reviewed before use.

Summary Style

Comprehensive - Detailed narrative with all sections

✦ Summarize

After the conversation is finished, the transcription is stopped. If desired, the transcript can be deleted before summarization, both when paused and once finished.

Note (Required)

Meeting Summary Assistant

< Back to Options

Live Audio Transcript ⓘ

⏮ Resume Transcription (00:20)

transcript_2026-02-19T18-52-57-758Z

Additional notes (optional)

Add any additional context or notes to include with the transcript...

Meeting Assistant uses AI to generate summaries, action items, and insights from your meeting content. The outputs are provided for informational purposes only and should be reviewed before use.

Summary Style

Comprehensive - Detailed narrative with all sections

✦ Summarize

If an in-progress Note or Appointment Summary Report is paused and the user tries to close or minimize it, the transcript will be lost. Users might choose to summarize the audio transcript before closing. Appointment Summary Reports cannot be minimized while a live transcript is in progress, only when paused or ended.

The screenshot shows a web application window titled "APPOINTMENT REPORT FOR RODEN ALOY". The interface is divided into two main sections: "Appointment Details" on the left and "Summary Details For Roden Aloy" on the right. The "Appointment Details" section includes dropdown menus for "Care Unit" (set to "Advising"), "Location" (set to "AARC WRITING WORKSHOPS"), "Service" (set to "GUIDE SERVICE 1"), "Course" (with a search bar), and "Meeting Type" (set to "Hybrid"). The "Summary Details" section includes text input fields for "Assignments Discussed", "Objectives of the Session", and "Study Skills Used". Below these are three questions with radio button options: "Student arrived on time and was ready to begin our session.", "Student was prepared (attended class, read lesson, had notes, etc.)?", and "Student asked for explanation of material not understood?". A modal dialog box is open in the center, asking "Are you sure?" with the text "You have a transcript that will be lost if you close this dialog. Are you sure?" and "No" and "Yes" buttons.

Select one of four Summary Styles (or a custom style) and select **Summarize**. You can also add additional notes or context that may not have been discussed in the live transcriptions that will be included in the summarization.

Live transcription has a maximum of 90 minutes. If you reach the end of 90 minutes, summarize the transcription, remove the file, and resume a second live transcription on the report.

Summarizing Text

Separate from transcription, you can also use the Meeting Summary Assistant to summarize text. You might use this to paste in notes taken separately.

The screenshot shows the "Meeting Summary Assistant" interface. It has a header with a back arrow and the text "Meeting Summary Assistant". Below the header is a "Back to Options" link. The main section is titled "Enter or paste your meeting notes" and contains a large text input field with the placeholder text "Type or paste meeting notes here...". Below the input field is a paragraph of text: "By initiating this action, you consent to the use of this application provided by EAB, our third-party service provider and OpenAI, their third-party service provider. EAB and Whitehurst University will record and maintain a transcript of this interaction. For further information about our information practices, please see our Privacy Policy here. AI systems are not perfect and may make mistakes. Please review the message carefully. You are responsible for the messages you send." Below this text is a "Summary Style" dropdown menu with the selected option "Comprehensive - Detailed narrative with all sections". At the bottom is a "Summarize" button with a plus icon.

There are four options for the Summary Style, along with Custom Summarization. Custom Summarization Instructions allows the staff user to create their own summary style and apply it to the text, transcript, or upload.

Additional notes (optional)

Add any additional context or notes to include with the transcript...

Meeting Assistant uses AI to generate summaries, action items, and insights from your meeting content. The outputs are provided for informational purposes only and should be reviewed before use.

Summary Style

Comprehensive - Detailed narrative with all sections ^

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

Summarizing Attachments

You can also upload attachments to create an automatic summary. This can help extract information from an attachment to add to Appointment Summary Report notes or can process an uploaded transcript file from a virtual meeting platform like Zoom.

< Back to Options

Upload Notes

Drop your files or [Browse](#)

1.0 MB Max Size

Advanced Search User Guide.pdf

By initiating this action, you consent to the use of this application provided by EAB, our third-party service provider and OpenAI, their third-party service provider. EAB and Whitehurst University will record and maintain a transcript of this interaction. For further information about our information practices, please see our Privacy Policy here. AI systems are not perfect and may make mistakes. Please review the message carefully. You are responsible for the messages you send.

Summary Style

Comprehensive - Detailed narrative with all sections v

+ Summarize

Paragraph B I

The document is an Advanced Search User Guide from Navigate360 within EAB's Navigate360 platform, focusing on building and using complex search queries to identify specific student groups. It is structured as a practical, how-to guide for advisors and staff, detailing categories of filters, example use cases, and the expected outcomes of various search configurations. The content also includes a legal caveat and organizational information about EAB.

Key sections and themes

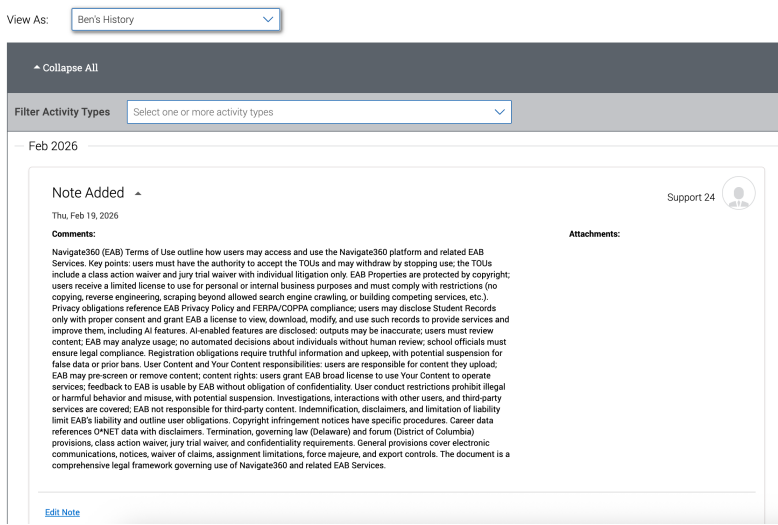
1) Purpose and scope

If you use more than one of Meeting Summary Assistant's options, e.g. transcribing audio and then uploading a document, these will both be added to the summary. The document summary will not overwrite the summarized transcript and vice versa.

Staff users can review and edit the output of Meeting Summary Assistant before saving and filing the Appointment Summary report or Note as they would before. Always review summary text created before saving.

Meeting Summaries in Student Success

After an Appointment Summary Report is filed or a Note is saved, it is connected to the profile of the student the note/appointment summary was about. In the first example, the Meeting Summary Assistant summary of a sample document shows in the Student Profile **History** tab.



Appointment Summaries also show in the History tab. You may also view Appointment Summaries on a student on the Staff Home page by opening a report in the **Recent Reports You Created** tab.

Reporting

Recent Appointments	Recent Reports You Created				
DATE	STUDENT NAME	SUMMARY	FOLLOW-UP?	DETAILS	
02/18/2026	Cagley, Garry	Test	No	Details	Delete
02/18/2026	Cagley, Garry	Nice job!	No	Details	Delete
02/12/2026	Prospect, Chris (prospect)	Grace Charles greets the attendees and notes that Chris P...	No	Details	Delete
02/12/2026	Cagley, Garry	Grace asked Garry how he is doing and checked in on his w...	No	Details	Delete
02/12/2026	Cagley, Garry	- Hello! Here are the main points about effective appoint...	No	Details	Delete
01/28/2026	Farson, Abbott	We discussed next steps on Thesis paper submission. Impor...	No	Details	Delete
01/28/2026	Cagley, Garry	We discussed next steps on Thesis paper submission. Impor...	No	Details	Delete

Improving the Live Transcription Experience

Here are some suggestions if Meeting Summary Assistant is not capturing audio in the way you expect:

- Live transcription uses your microphone to capture audio. Make sure you approve microphone use in your browser when starting transcription.
- Use the live transcription to verify your spoken words are being picked up by the microphone. Not seeing what you expect? Verify you've selected the correct microphone.
- If you're using a headset during a virtual meeting like Zoom or Teams and find that spoken words aren't picked up by the microphone, upload the transcript file output from that meeting as an attachment to Meeting Summary Assistant instead. Supported file types are docs, txt, pdf, and md with a max size of 1.0 MB.

Questions? Email navigateinfo@utah.edu