

Otter.ai Quick Start Guide



Note: Students borrowing an iPad from ^{HF}CDHP will have the app pre-installed. The iPad is for school use only and only authorized apps are permitted. Students are responsible for keeping the iPad charged.

Creating & Logging Into Your Otter.ai Account

- 1. Invitation Email:** You will receive an email from ^{HF}CDHP to your WesternU email address with a unique activation link to set up your account.
- 2. Click the Activation Link.** Note: The link will expire if not used within 7 days.
- 3. Complete the Activation Process.** Follow the on-screen prompts, and use your WesternU email address to access the institutional account.
- 4. Create a Password.** Choose a secure password you can remember.
- 5. Log into [Otter.ai](#).**
- 6. Use “Other Login Methods”** to login with your WesternU email and password.
- 7. Stay Logged In:** Otter.ai will keep you logged in by default unless you manually log out.

Video Tutorials

The following tutorials provide a visual reference to the basics of Otter.ai and troubleshooting:

- [Learning Otter.ai](#)
- [Troubleshooting Otter.ai](#)



Otter.ai Pilot on multiple devices

Opening a Transcription

- 1. Open a Transcription:** Select the desired session from the list on your homepage and click on it.
- 2. View Summary Page:** Opens when you click on your session and provides a brief overview of the content.
- 3. Access the Full Transcript:** Click on the “Transcript” tab and the full transcription will appear, including speaker identification and access to Otter.ai’s built in tools for highlighting and commenting.

Live Training

To schedule a live training, contact ^{HF}CDHP at disabilityaccommodations@westernu.edu or at (909) 469-5441.

Connecting Apps (Zoom)

1. Click drop down menu next to your name and email.
2. Select **Account Settings**.
3. Navigate to the **“Apps”** tab.
4. Scroll down to **Zoom** and click the **“Add”** button.
5. Sign into your WesternU account and authorize the connection between Otter.ai and Zoom. Detailed instructions can be found on Otter.ai’s website under [Connecting and Syncing the Zoom Calendar](#).
6. To enable Live Notes during Zoom meetings, you must adjust your Zoom settings accordingly. Comprehensive instructions to [Set Up Otter Live Notes](#) are located on Otter’s Help Center website.

Note: Steps 1-4 can be repeated to synchronize Otter.ai with additional applications as needed.

Starting/Joining Recording Sessions

1. Open Otter.ai and log into your account.
2. Click the blue button featuring the **“Microphone”** icon. In the browser version, the button is labeled **“Record”** next to the icon.
3. Otter.ai will begin recording the session allowing you to view the transcription in real time.

Important Setting Information

The **“Meetings”** tab contains the settings that allow users to automatically share with a chosen audience and set permission levels. These are customizable according to user preferences. Per the User Agreement for Otter.ai that you signed, you are not allowed to share the transcriptions that Otter.ai produces for you. **You must turn the share setting off.**

Useful Tips & Troubleshooting

1. Position yourself as close to the speaker as possible.
2. Use an external microphone directed towards the speaker. ^{HF}CDHP can loan you one.
3. Temporarily disable any noise canceling software.
4. For the browser version, ensure microphone access is enabled.
5. Make sure the selected microphone is set as the default recording device on your system.
6. For troubleshooting audio drivers for Windows 10 or 11, refer to Microsoft support on [resolving sound and audio problems](#).
7. Maintain a stable internet connection.
8. Safari does not support audio recording. It is recommended that you use Chrome or Firefox.