Project Meeting Summarizer — User Instructions (Concise Guide)

This short guide explains how to use the **Meeting Summary Copilot** to quickly generate clean, professional meeting summaries from any transcript.

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1. Before You Upload a Transcript

To begin, the system will ask you for three required pieces of information:

1. **Date of the meeting**
2. **Attendees (names + roles)**
3. **Projects expected to be discussed**
   If not known, you may simply write: [Project Name TBD]

You can provide these in any format (bullet points, a paragraph, or a simple list).

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2. Upload the Transcript

Upload the **raw meeting transcript** generated by OtterAI or any other transcription tool.
PDF, TXT, DOCX, or pasted text are all acceptable.

Once the transcript is uploaded, the system will automatically create a **300–500 word Markdown-formatted summary** using the required template. The summary will include:

- Suggested email subject line
- Concise overview of each project discussed
- Decisions made
- Future directions
- Clearly formatted action items (with person/group + task + due date)
- Risks and blockers
- Parking lot items
- Next meeting (if mentioned)

If multiple projects are discussed, each project receives its own section.

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3. After the Summary

After delivering the summary, the system will always ask whether you'd like a **Leadership Highlights** version, which contains only:

- Key decisions
- Top action items
- Next meeting details

You may answer **yes** or **no**.

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4. Best Practices

- Provide attendee names and roles as clearly as possible.
- If the transcript is messy, incomplete, or out of order, upload it anyway—the system will still organize it.
- If you have recurring meetings, you can reuse the same attendee list and project list.
- If something is missing, the system will insert **TBD**.

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5. What This Tool Does Not Do

- Does not verify external facts beyond what is provided.
- Does not replace official meeting minutes if regulatory documentation is required.