### Al products to monitor and improve business communication and performance

Ulla® Notetaker, Ulla® HR Engagement, Ulla® HR Personality Assessment, Ulla® HR Growth and Progression, Ulla® Sales, will make your meetings and communications effective and enjoyable. All Ulla® Family products match each other and can be combined or used individually; integrated with your notetaker; cloud or on-premise.

Ulla® Notetaker

Ulla HR Engagement ~

Ulla HR Personality Assessment 2

Ulla HR Growth and Progression 11



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### Overview

Ulla® Notetaker is the most simple and secure Al instrument in a world

Ulla Notetaker captures meetings, creates clear summaries with action points, and keeps teams focused on what matters. Simply sign in, and your dashboard is ready. This is where you find your meeting transcripts and summaries. When you schedule a meeting in Google Calendar, Microsoft Outlook, or Zoom, invite Ulla as bot@ulla.bot as an attendee.

That is it.

### Content



Registration

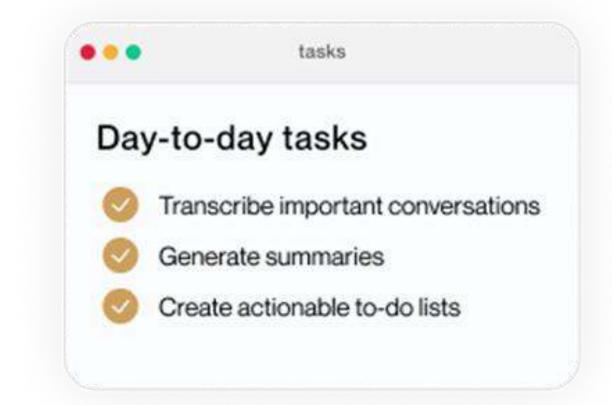
Ulla Interface overview

Change Speakers

Getting started

Data security



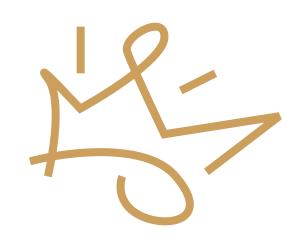


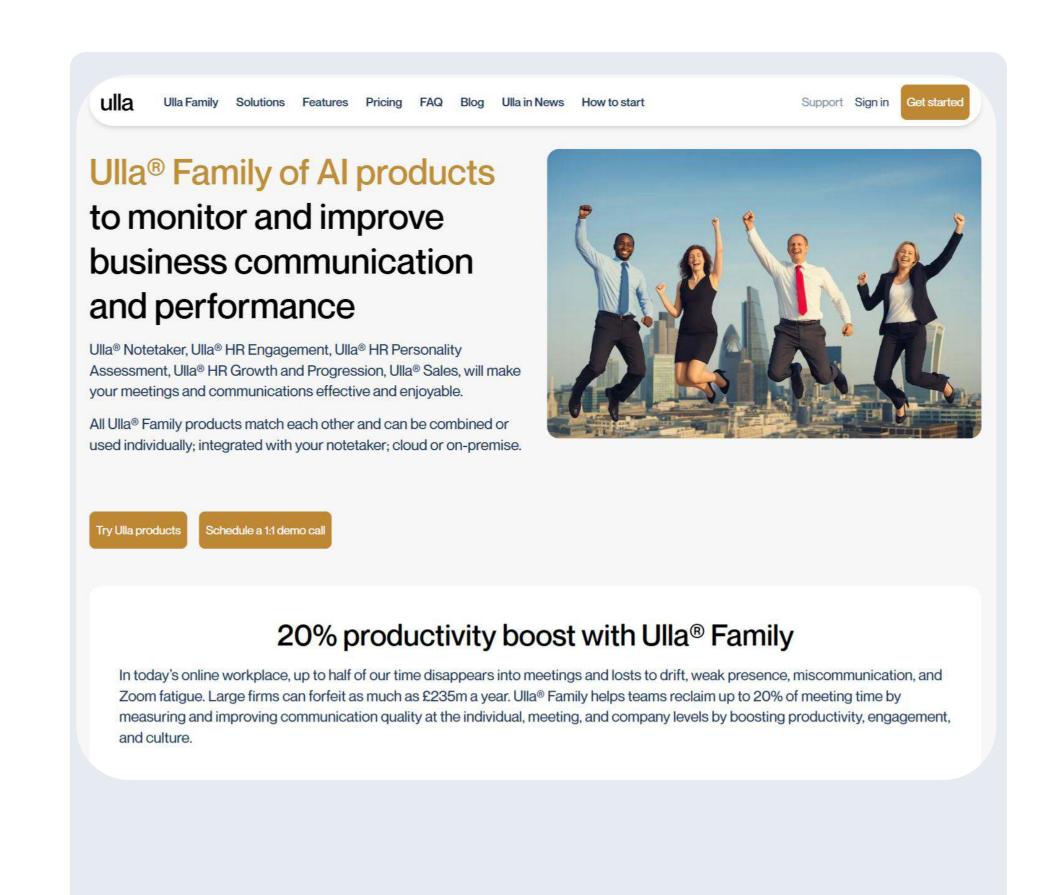
don't focus
on routine

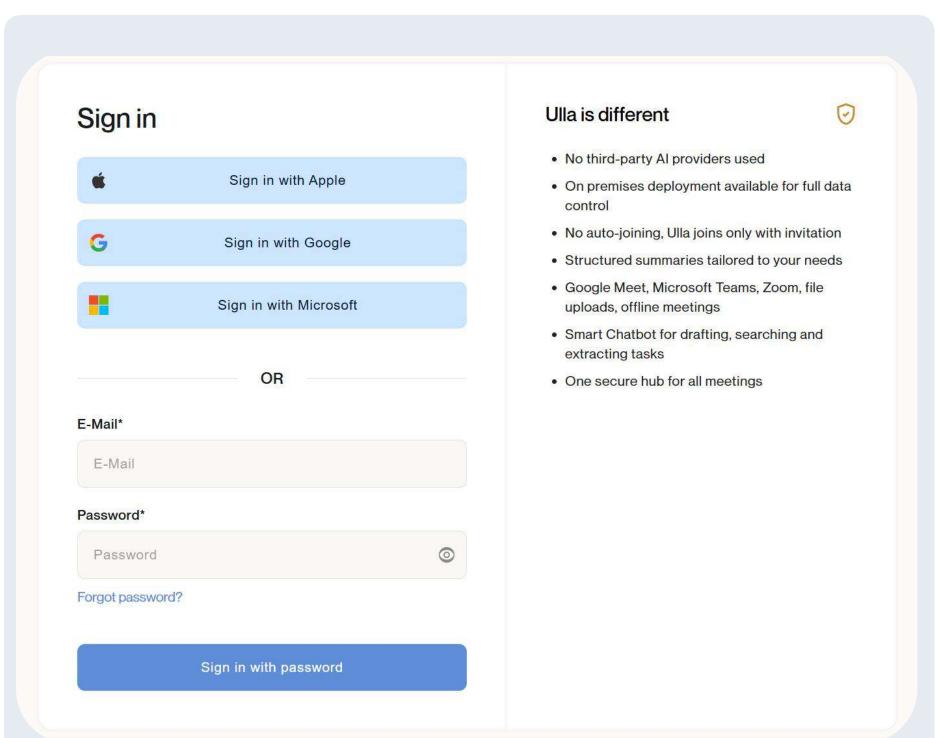


sync-notes **Attendance Note** Date: October 5, 2024 Time: 14:00 - 15:30 Caseworker: Joanna Smith Client: Peter Johnson, Rachel Green Matter: Negotiation of Manufacturing Agreement for New Product Line **Summary of Consultation:** Peter and Rachel sought advice on negotiating a manufacturing agreement with Allied Manufacturers Ltd. The discussion covered contract terms, intellectual property, and liability clauses. Joanna suggested revisions to the draft agreement and highlighted key negotiation points. **Details:**  Peter and Rachel are negotiating a manufacturing deal with Allied Manufacturers Key concerns: IP protection, clear production timelines, and limited liability. Joanna recommended adding clauses on IP ownership, quality assurance, and indemnity for defective products. Suggested a meeting with Allied's legal team to finalize terms. **Action Points:**  Peter and Rachel to review revisions. Joanna to draft the revised agreement. Schedule a meeting with Allied's legal team. Joanna will draft the revisions, and a follow-up meeting is scheduled to finalize the

# Steps to Register







of Visit the website

or register with Ulla at <a href="https://uk.ulla.bot/">https://uk.ulla.bot/</a>

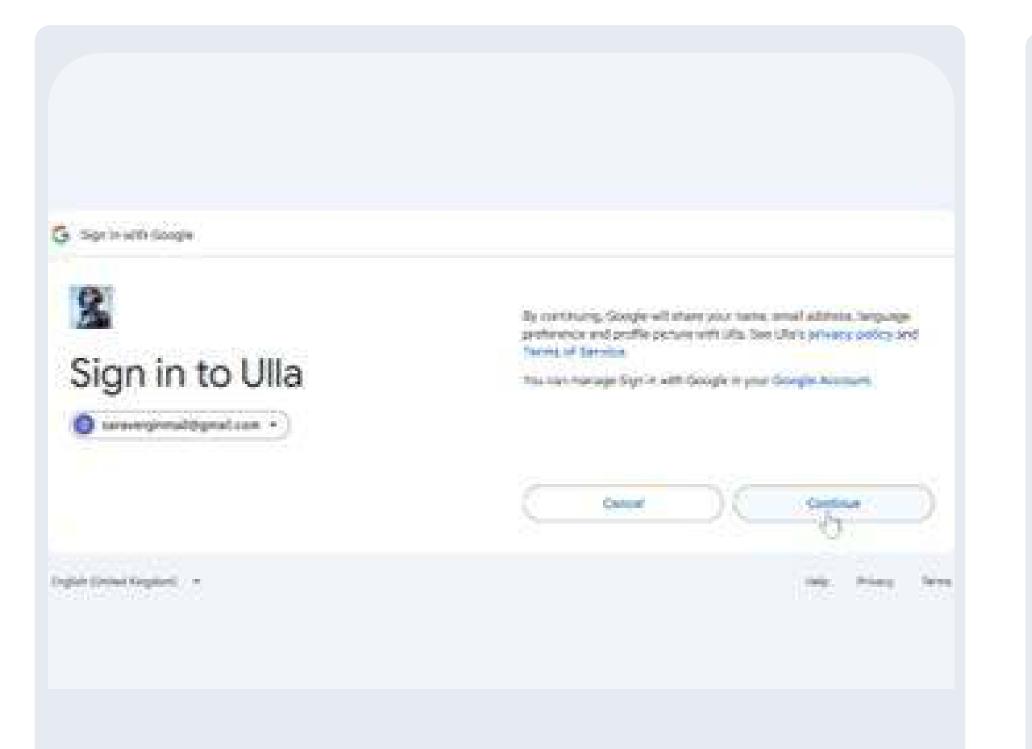
Click "Get started" buttom

auth/register

#### <sup>02</sup> Sign In

Registration Options

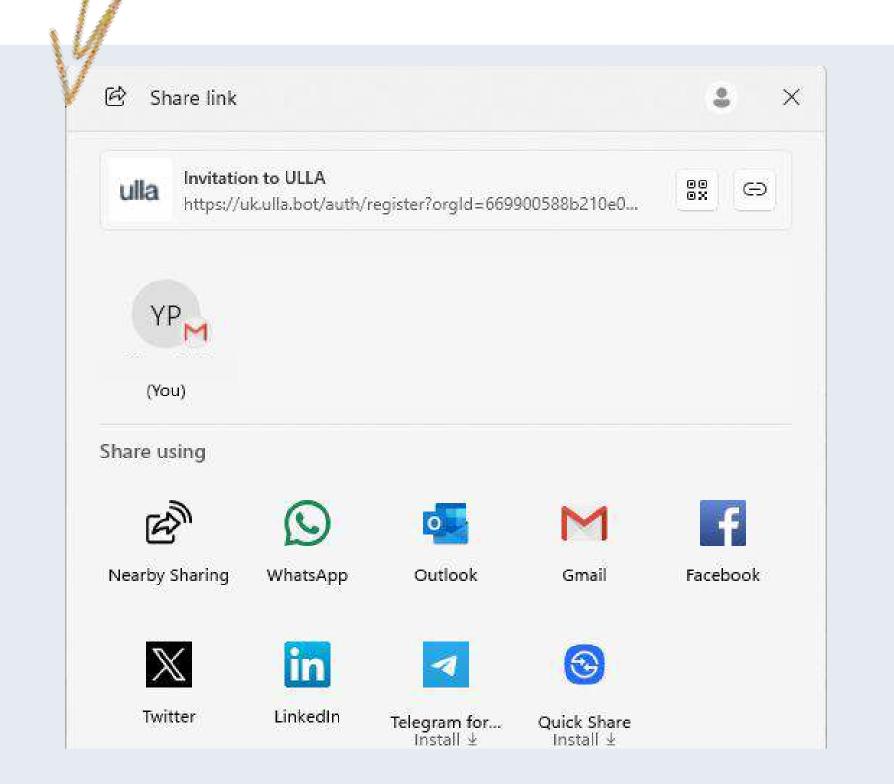
- Option 1: Use your email to sign in.
- Option 2: Sign in with a provider
   (Google, Microsoft, or Apple)



#### OB Authorise account

- Confirm permissions if required by your chosen provider, such as Google, Microsoft, or Apple.
- If you register with email and password, confirm your account via the verification link sent to your inbox.





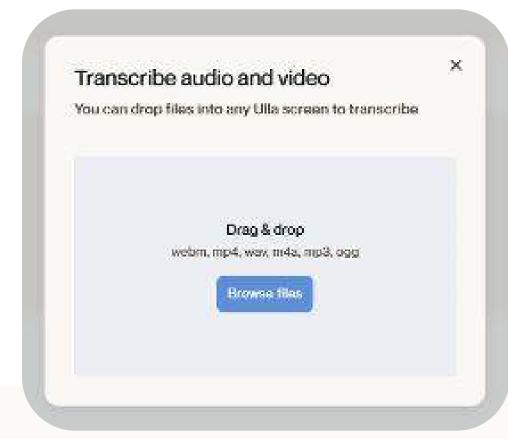
#### <sup>03</sup> Register via invitation link

#### Only for Professional plan

- Admin can share or copy the invitation link
- Registration is completed directly via this link

### Dashboard





#### What it is:

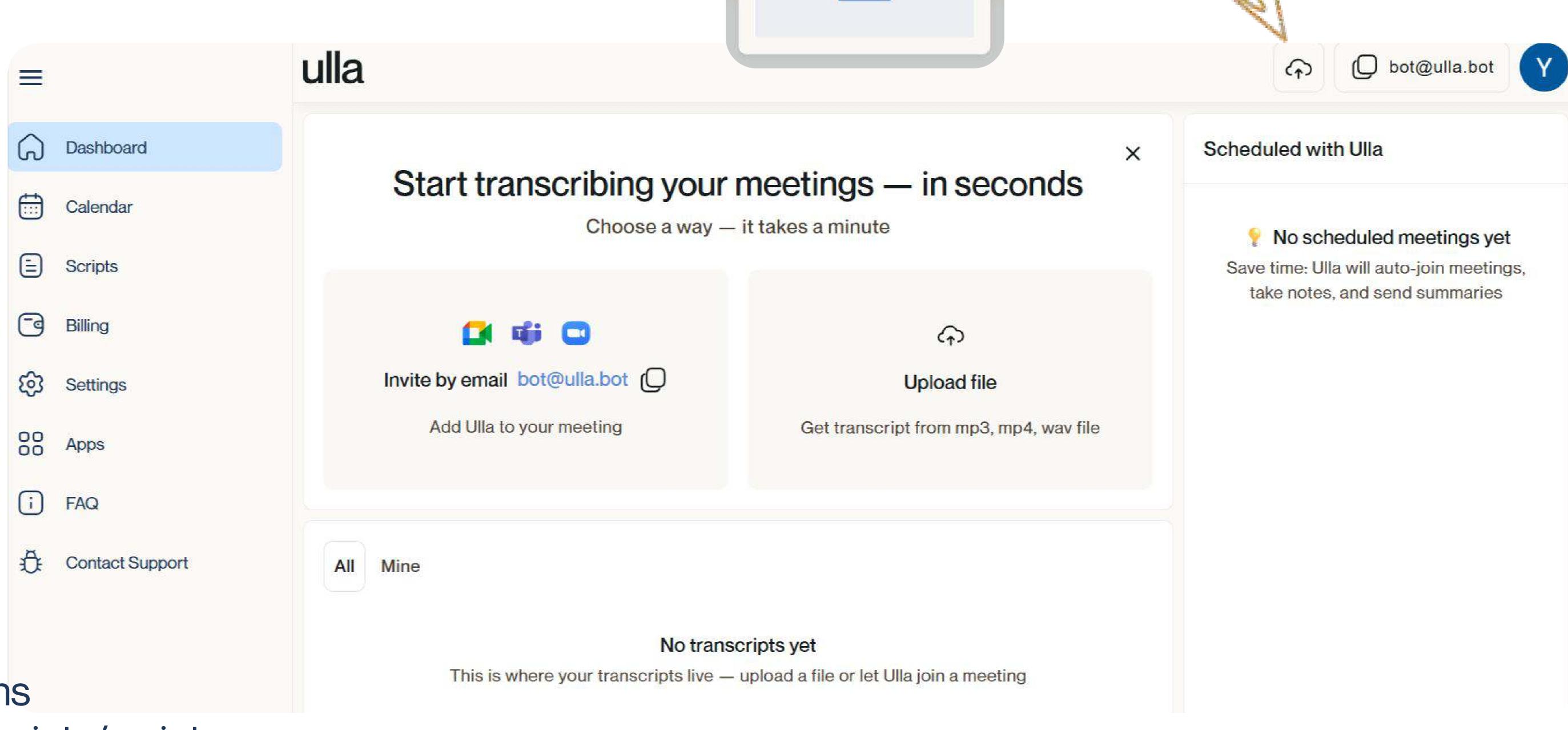
Main page of Ulla Shows meetings, transcripts, and scripts

#### How it works:

- Left menu → navigation to other sections
- Centre → meetings of the week + transcripts/scripts
- Right panel → scheduled meetings with Ulla

#### What to do:

- Invite Ulla by email bot@ulla.bot
- Or upload file (mp3, mp4, wav)
- Use tabs All / Mine to filter transcripts

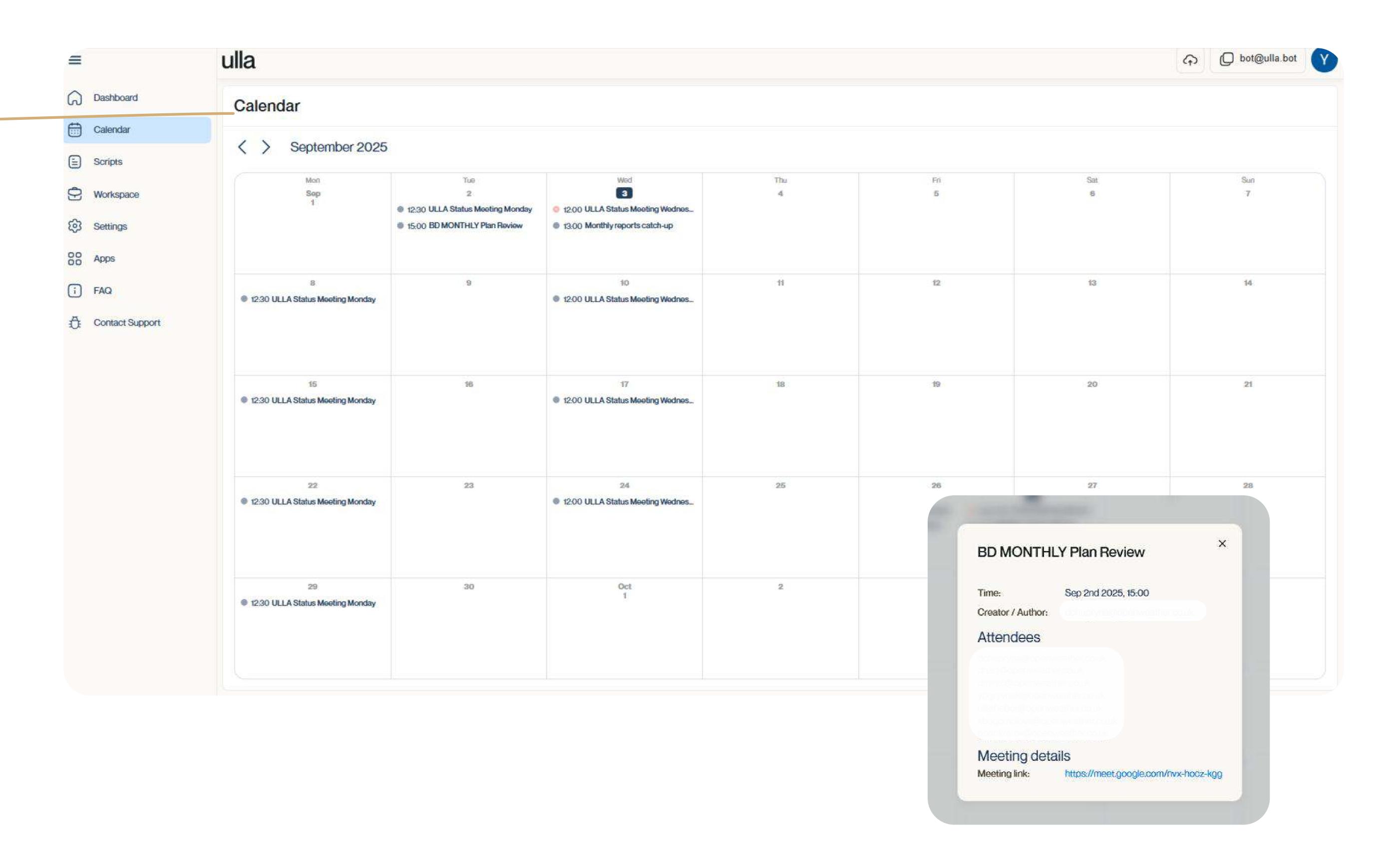


### Calendar

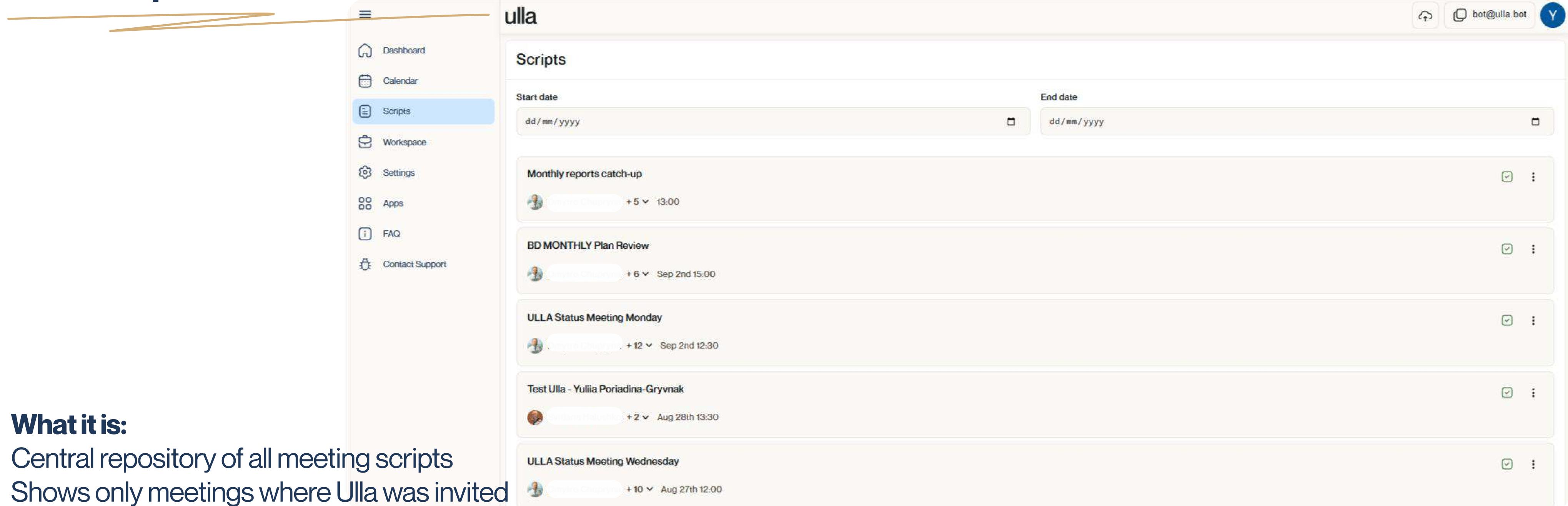
#### What it is:

Monthly view of meetings with Ulla

- Only meetings with Ulla appear here
- Click on a meeting to see details:
  - Date and time
  - Creator
  - Attendees
  - Meeting link



# Scripts - Overview



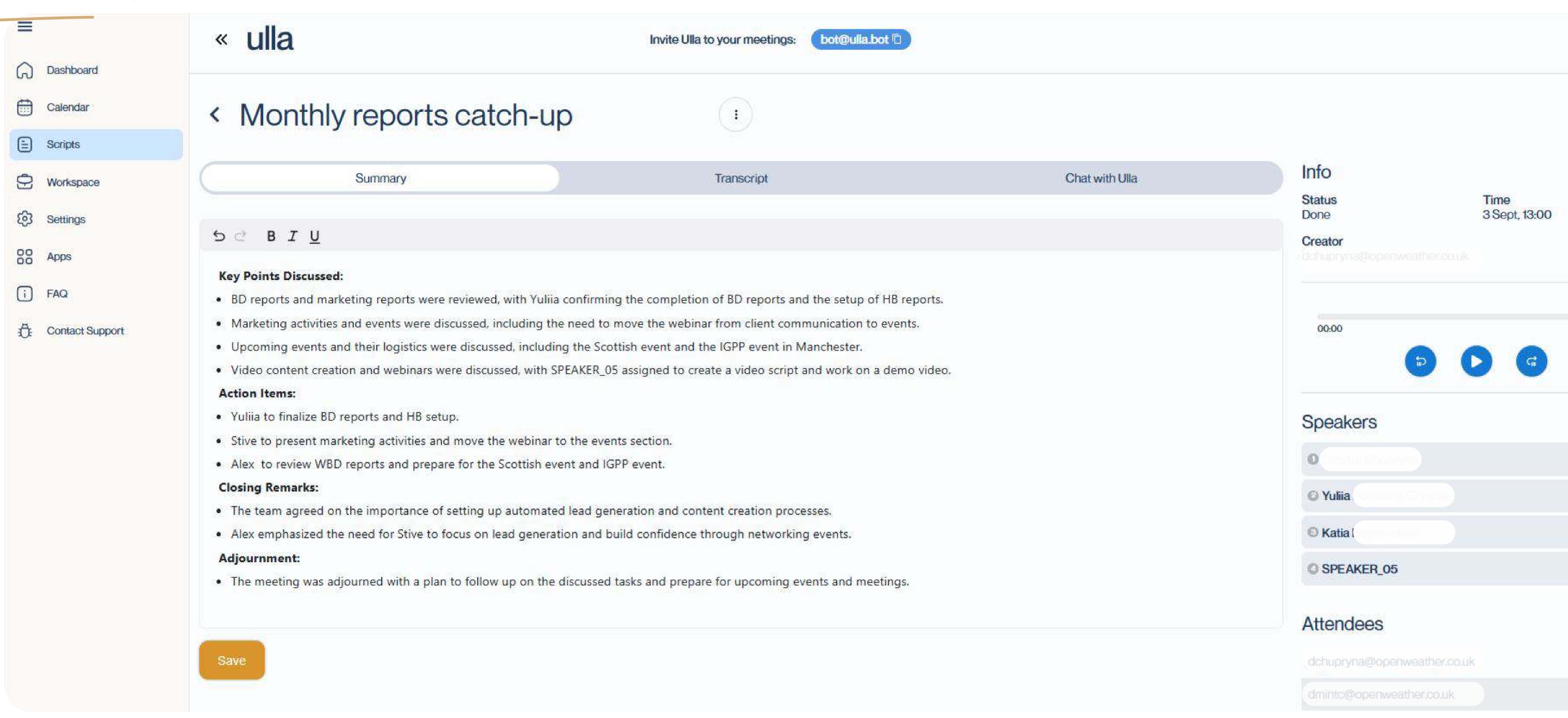
#### How it works:

- Filter by start date / end date
- Green checkmark → transcription is finished
- Click a script → open detailed view

#### What to do:

Click on a meeting to open its script

# Scripts - Summary tab

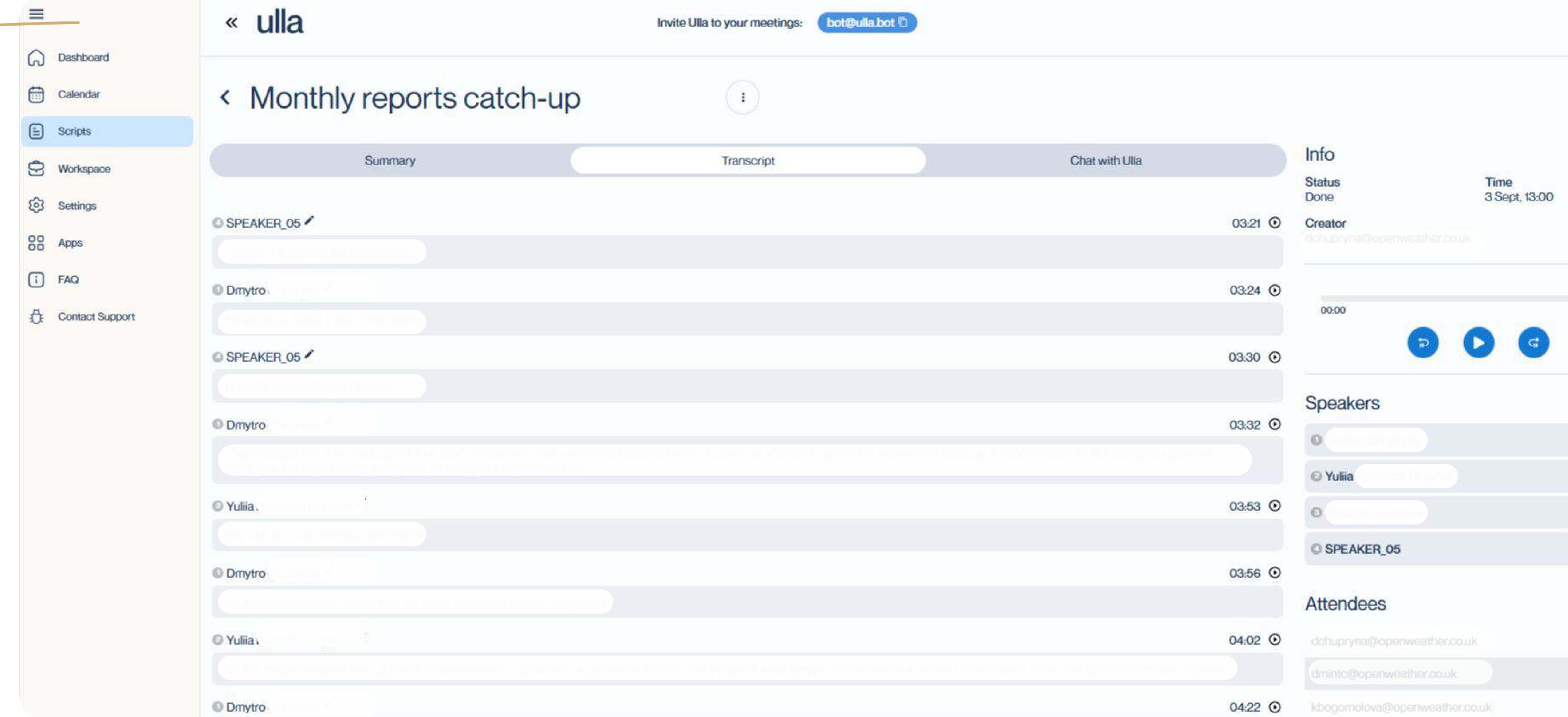


#### What it is:

Smart meeting summary

- Key points, action items, closing notes
- Text is clear, structured, editable

Scripts - Transcript tab

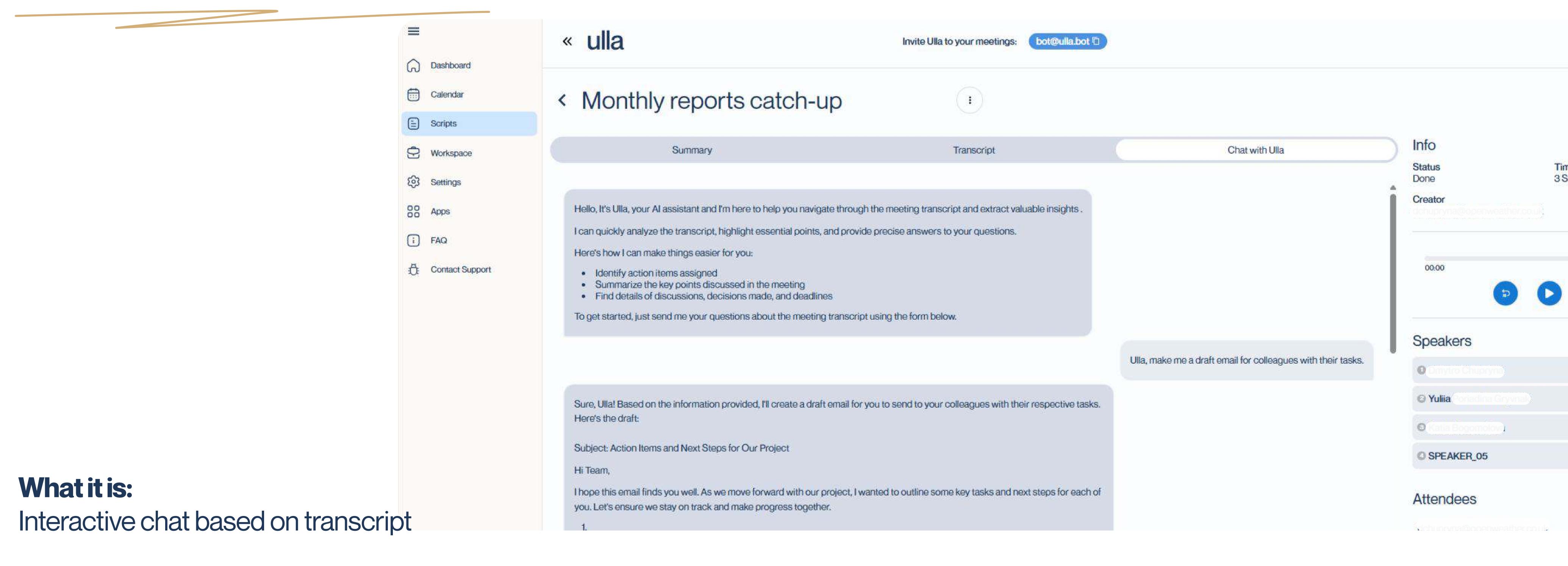


#### What it is:

Full transcript of the meeting

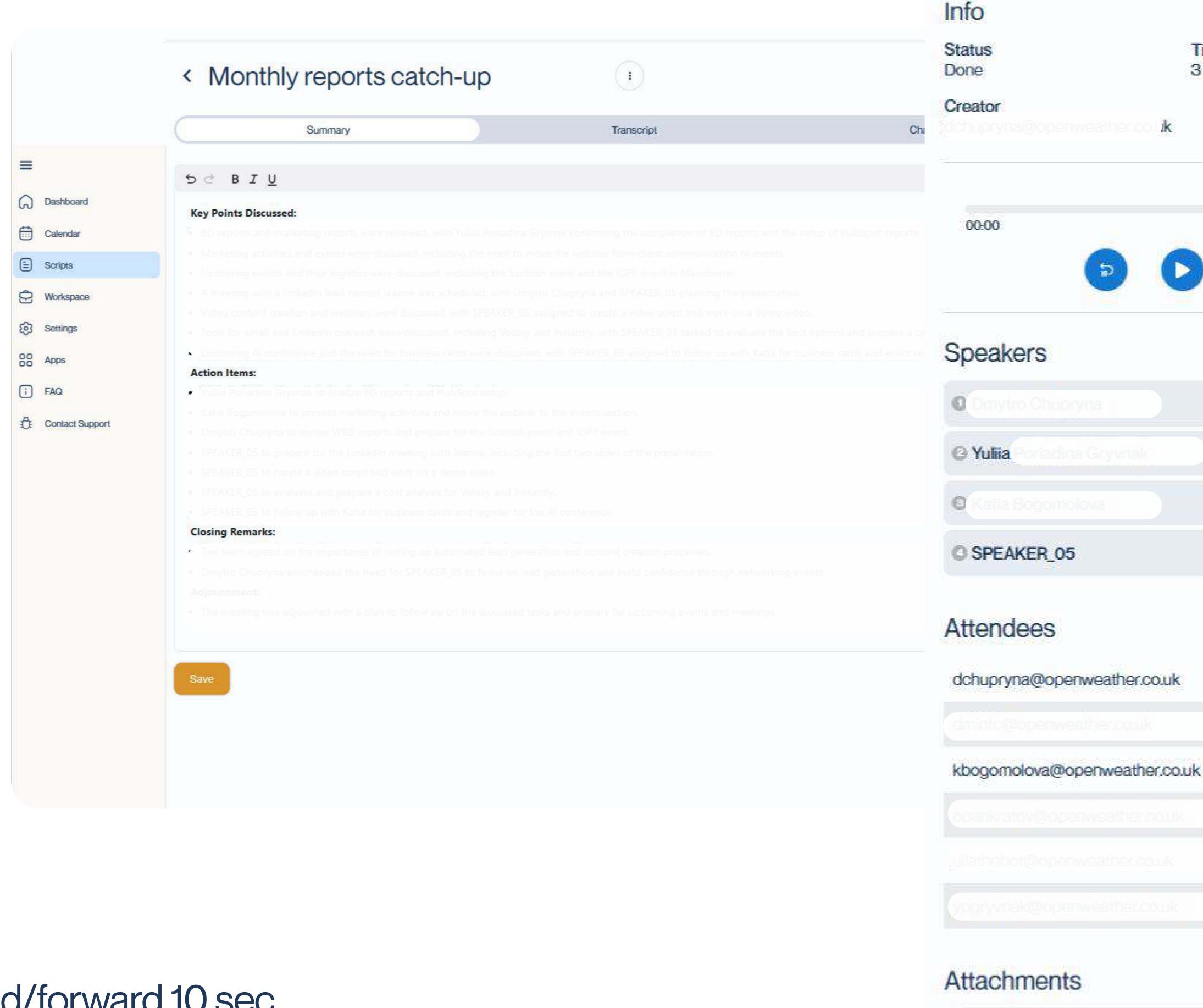
- Speaker labels and timestamps
- Edit speaker names
- Listen to each speech fragment via timestamp

### Scripts - Chat with Ulla tab



- Ask questions about the meeting
- Find who said what
- Get summaries in different formats (standard, bullet points, email-ready, focused)
- Request draft emails
- Ask follow-up questions for more detail

# Scripts - Info panel



Time

Audio recording

Screen recording

3 Sept, 13:00

10

10

10

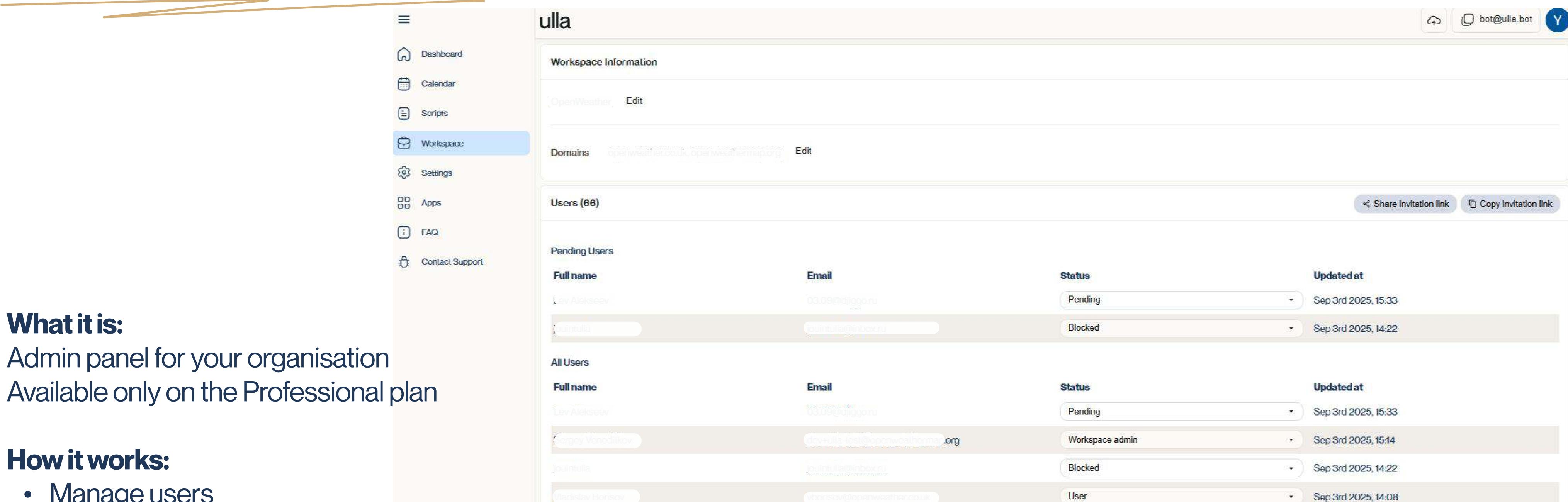
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#### What it is:

Side panel with meeting details

- Status, date, creator
- Audio player: listen to the whole meeting, rewind/forward 10 sec
- Speakers: view and edit names
- Attendees: full invited list
- Attachments: download audio or video, or watch video recording directly

# Workspace (Professional plan only, admin only)



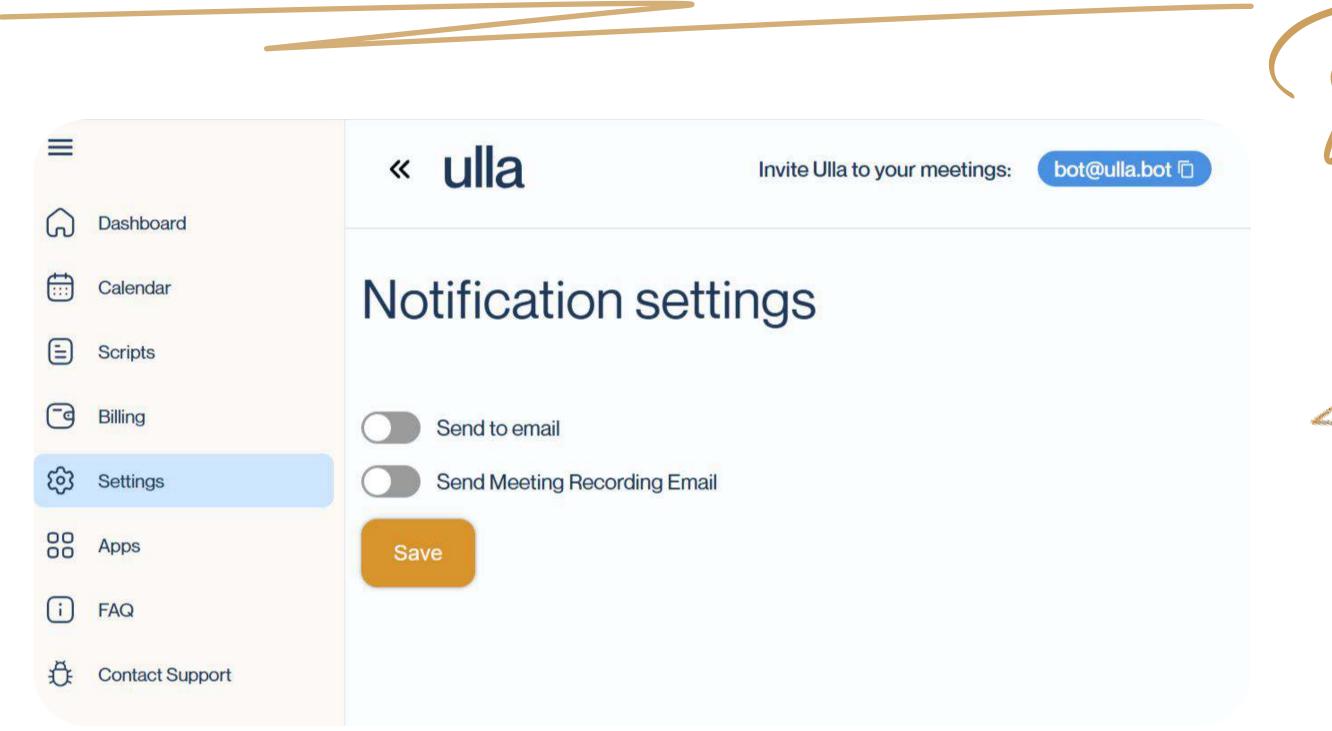
#### How it works:

- Manage users
- User statuses: Pending awaiting approval, User active user, Workspace admin administrator rights, Blocked access denied

#### What to do:

- As an admin:
  - Invite users via the invitation link
  - Approve or block requests
  - Assign roles (User / Admin)

Settings (Personal and Professional plans)



#### What it is:

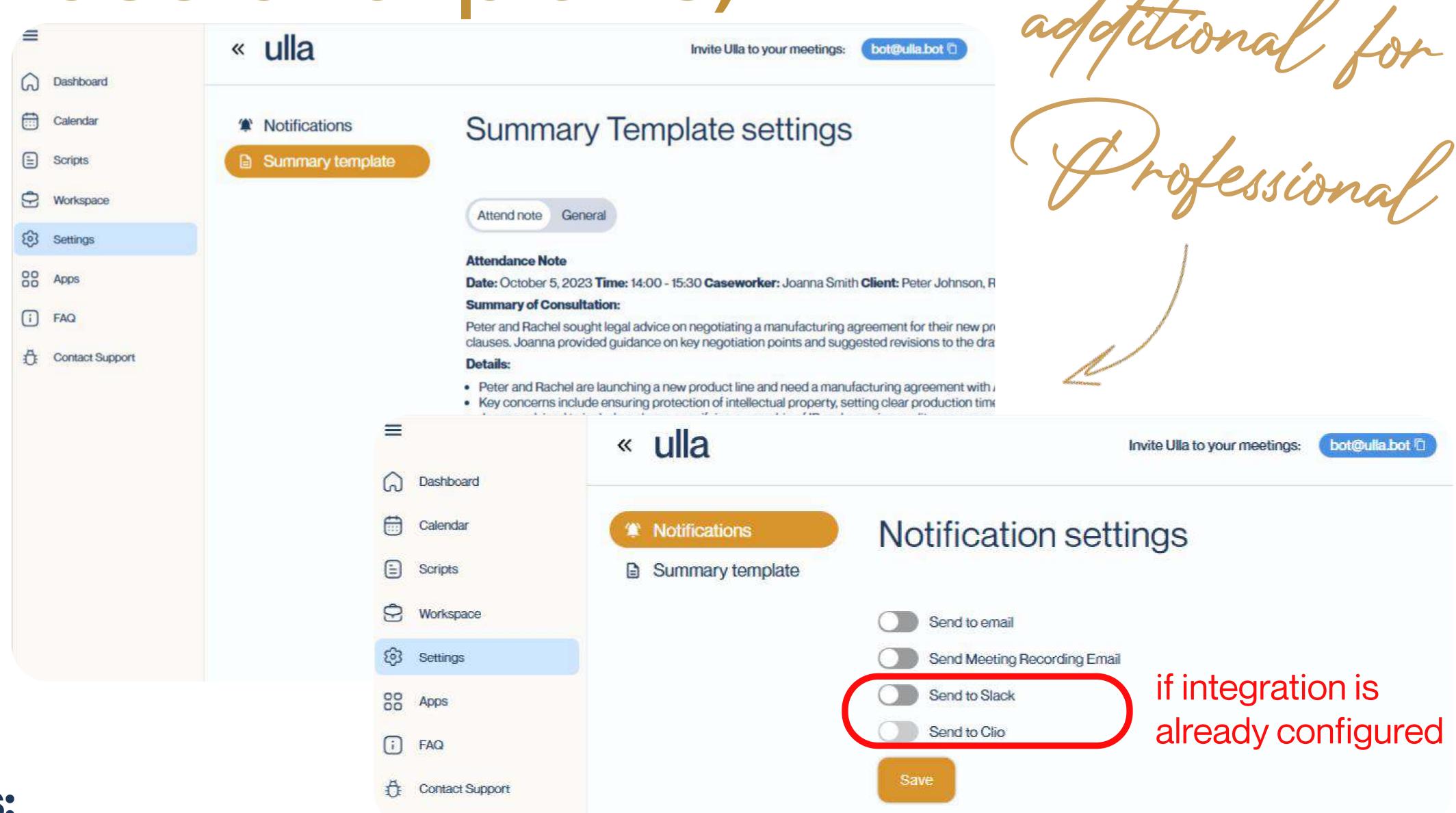
Personal - notification options
Professional - Organisation-level settings for teams

#### How it works:

- Notification settings:
  - Send to email meeting notes go to your inbox
  - Send Meeting Recording Email informs participants that the meeting will be recorded

#### What to do:

Toggle the notifications you need and click Save



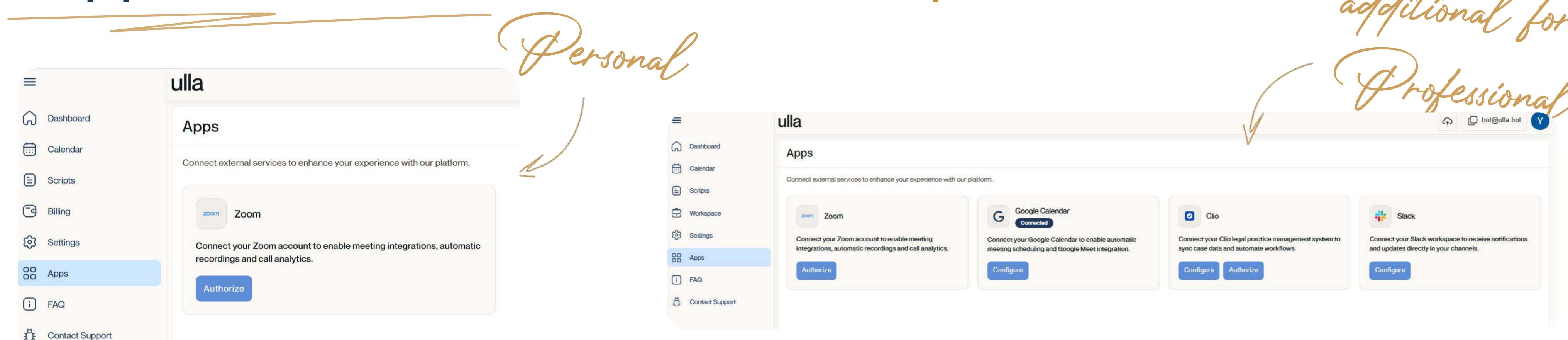
#### How it works:

- Admins manage notifications and templates for all users in the workspace
- Notification settings:
  - Email delivery, Recording notifications to participants, Send notes to Slack, Send notes to Clio CRM
- Summary templates:
  - Admins define the template format (General or Attendance Note) for meeting notes

#### What to do:

Admins set up defaults for the whole organisation Users follow the organisation's chosen settings

Apps (Personal and Professional plans)



#### What it is:

Personal - Integration settings for personal use.

Professional - Extended integration options for team collaboration

#### How it works:

Google and Microsoft integrations work by default (just invite Ulla). For Zoom, a quick integration is required

#### What to do:

If you use Zoom, click Authorise to connect your account

#### How it works:

Options include Zoom, Google Calendar, Clio, Slack (Google and Microsoft integrations work by default (just invite Ulla))

#### What to do:

Select Authorise or Configure (users with Workspace access and higher) for the service you want to connect

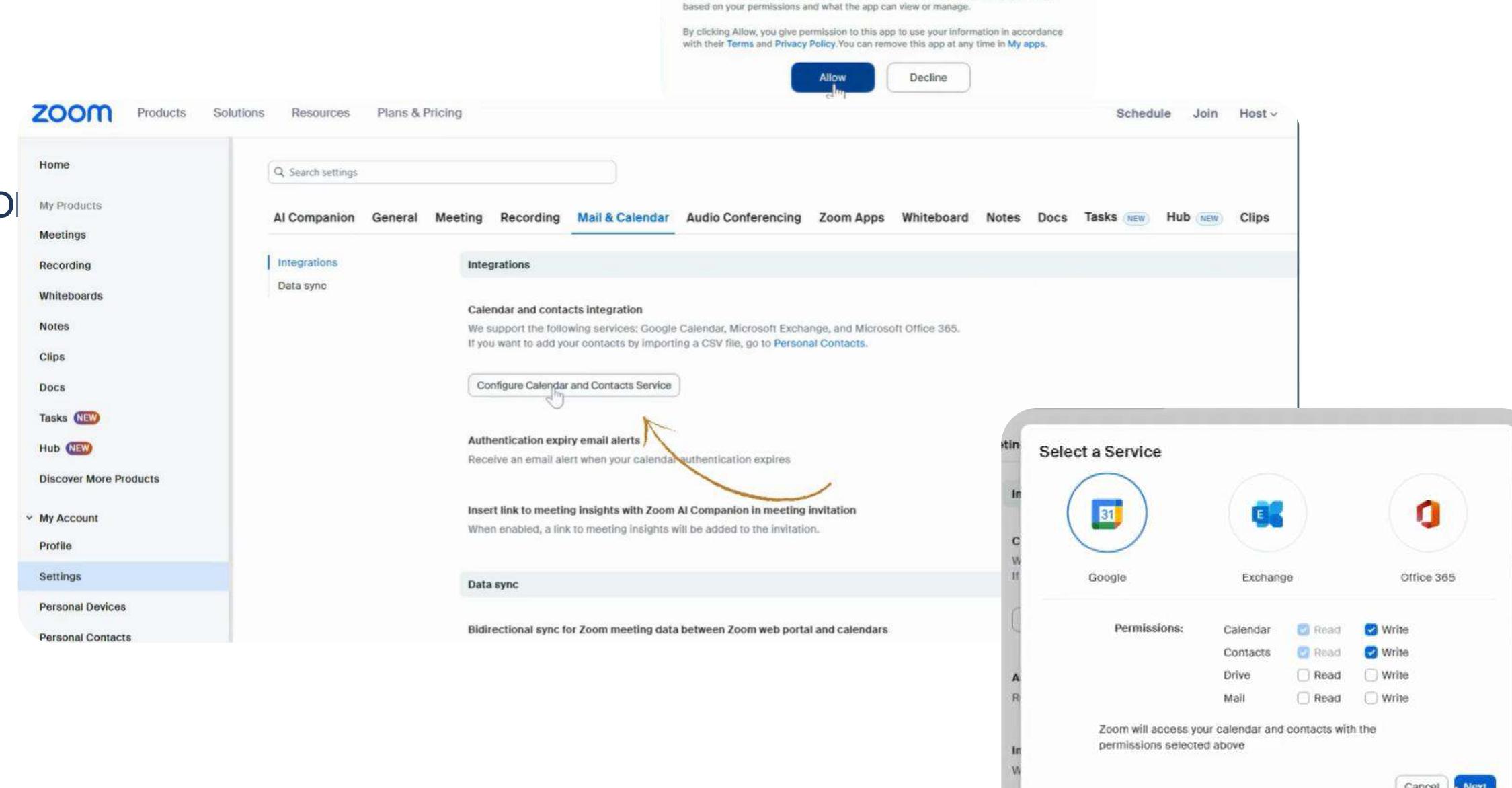
# Zoom Integration

#### What it is:

Connect Ulla with Zoom for automatic joining, recording, and smart summaries

#### How it works:

- 1. Go to Apps  $\rightarrow$  Zoom  $\rightarrow$  Authorise.
  - You'll be redirected to Zoom. Tick *Allow this app to use my shared access permissions* and click **Allow**.
- 2. In Zoom, schedule a meeting.
  - Add bot@ulla.bot as an attendee.
- 3. Make sure Zoom is connected with Calendar.
  - Zoom → Settings → Profile → Connected Apps → Cologle Calendar → Allow.



ZOOM

hompsonBenDaniel@gmail.com

« ulla

Connected Apps

Connect external services to enhance

Dashboard

Calendar Calendar

**★** Upload

Ulla would like permission to:

View a meeting local recording join token

Types of data Ulla will access:

(2x) (2)

Manage content and information generated in the

context of Zoom experiences, which may include

audio, video, messages, meeting or chat name,

agenda, transcriptions, and responses to polls and

Allow this app to use my shared access permissions. Learn more

√ View a user's Zoom Access Key

#### What to do:

Send the invite at least 10 minutes before the meeting Ulla will join automatically

# Change Speakers

#### What it is:

Two ways to manage and rename speakers for accurate transcripts and summaries

#### How it works:

#### 1. Transcript tab

Click on a speaker's name  $\rightarrow$  listen to the speech fragment  $\rightarrow$  assign the correct name  $\rightarrow$  press the  $\checkmark$  icon to save changes

#### 2. Speakers tab

See all detected speakers in one list → rename them directly → press the ✓ icon to save changes

#### What happens next:

- Voice recognition Ulla will remember the voice and recognise the speaker in future meetings.
- Updated content transcript and summary are regenerated with the correct names.
- Only the meeting organiser can edit speaker names

#### Why it matters:

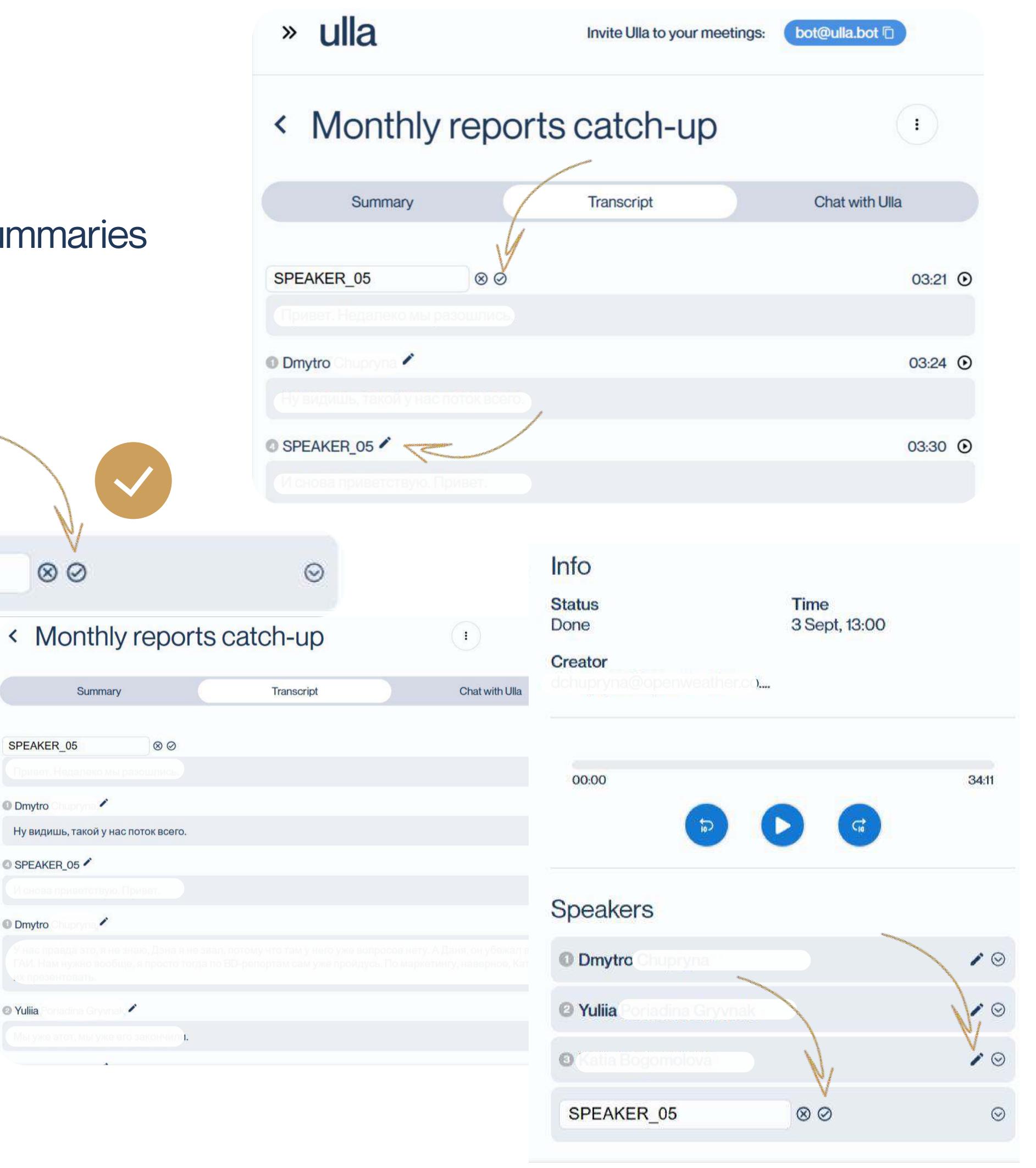
Correct speaker names are essential for Ulla's accurate functioning and for using other Ulla products effectively.

SPEAKER 05

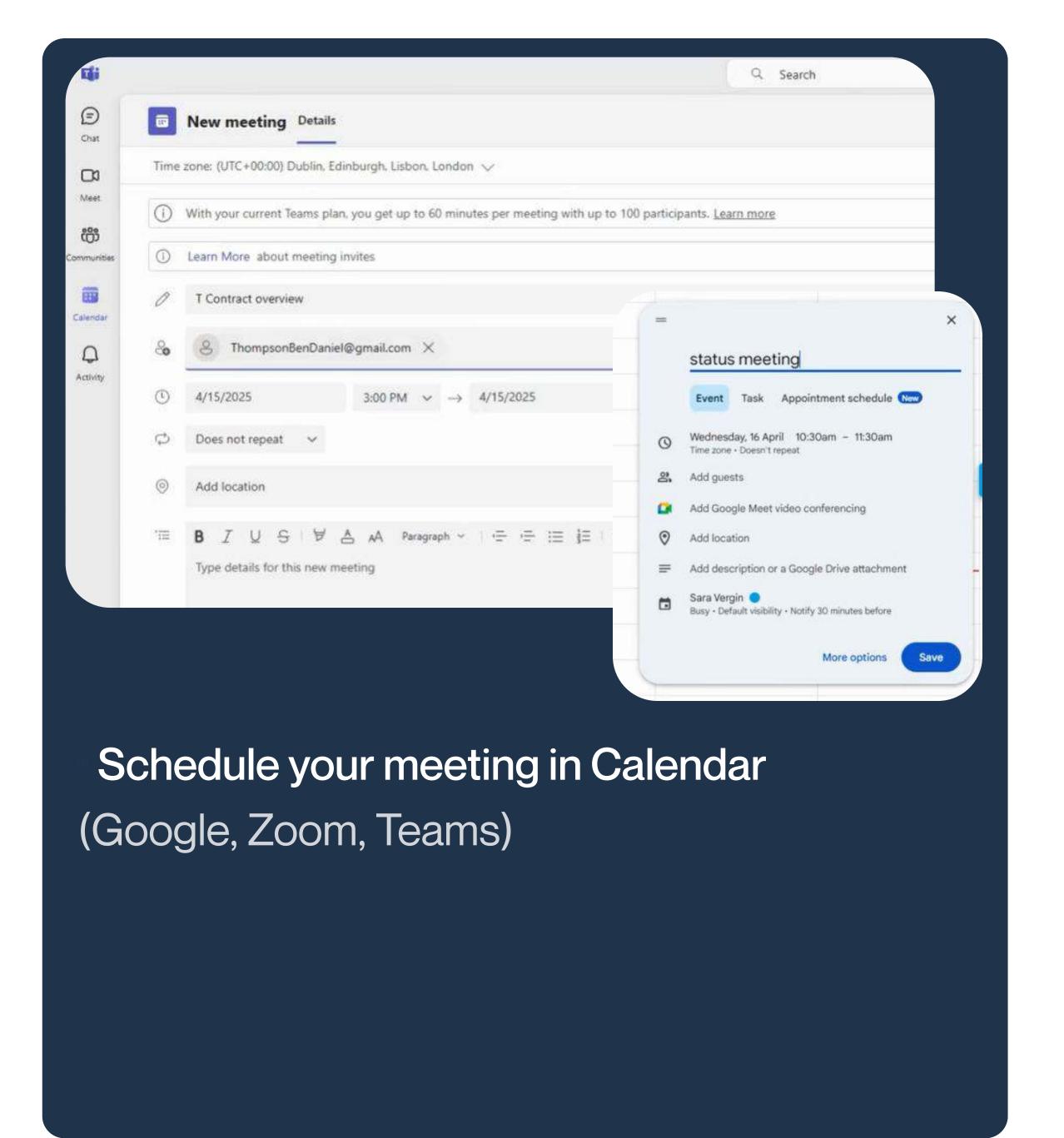
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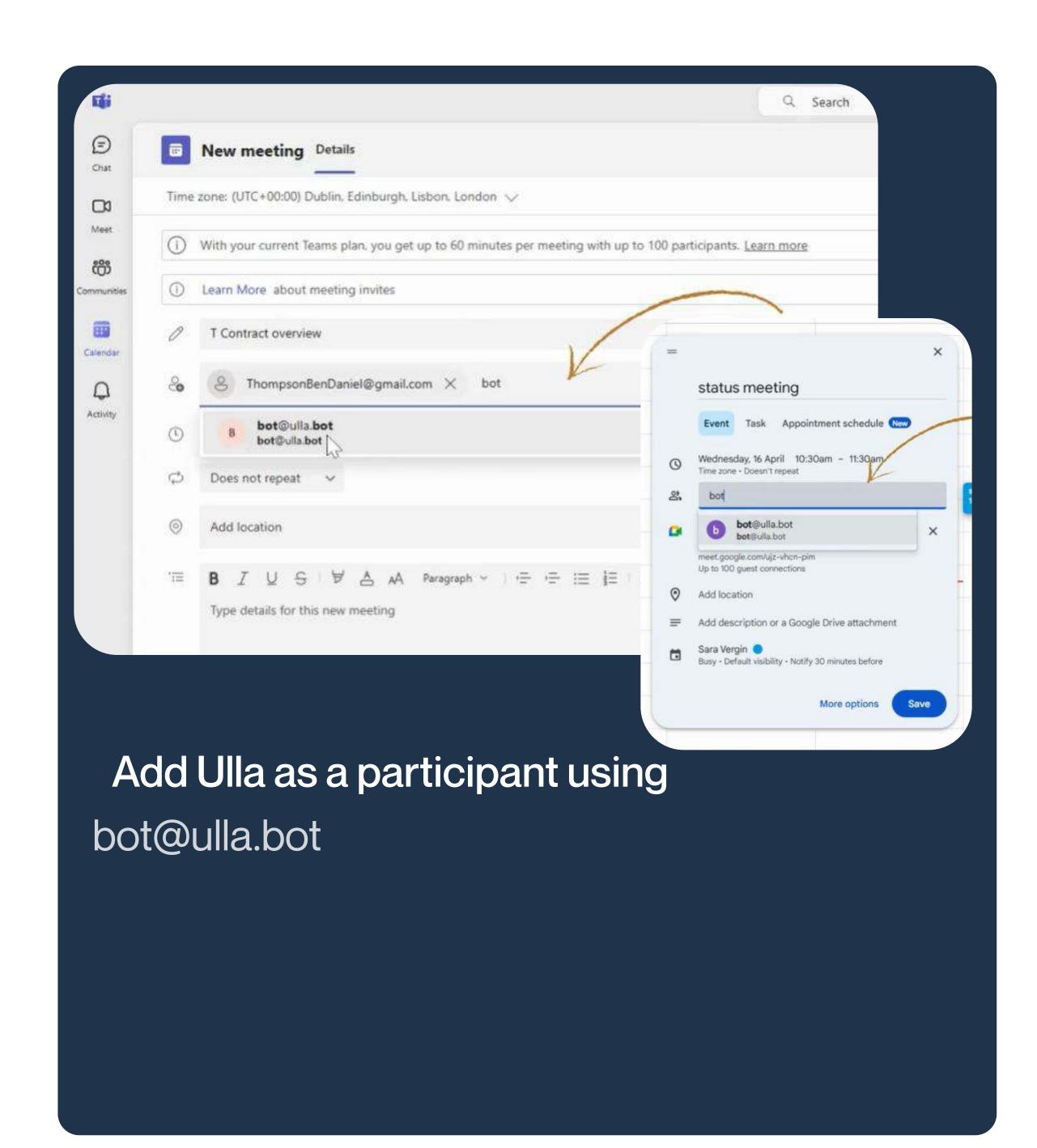
SPEAKER\_05

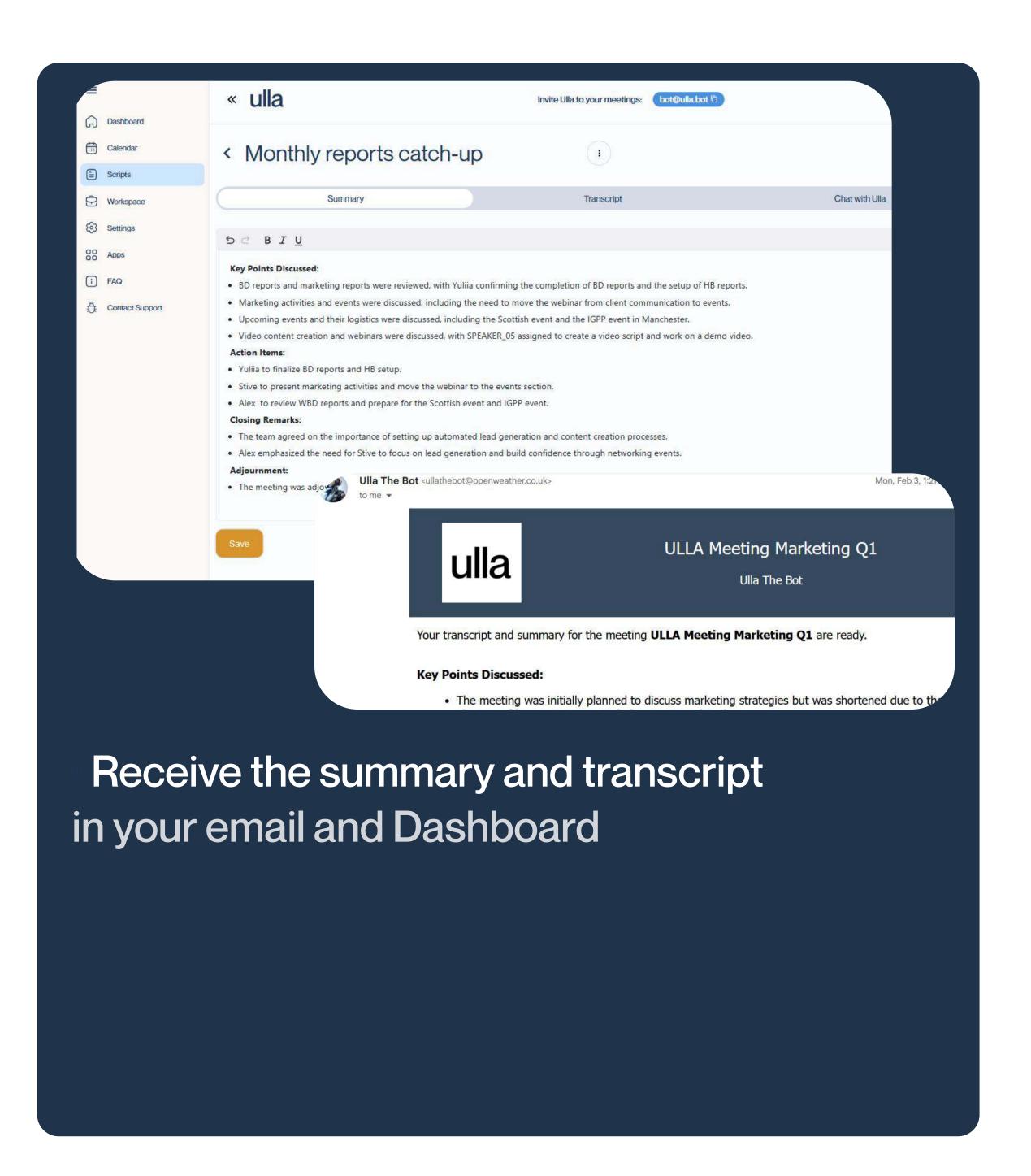
O SPEAKER\_05



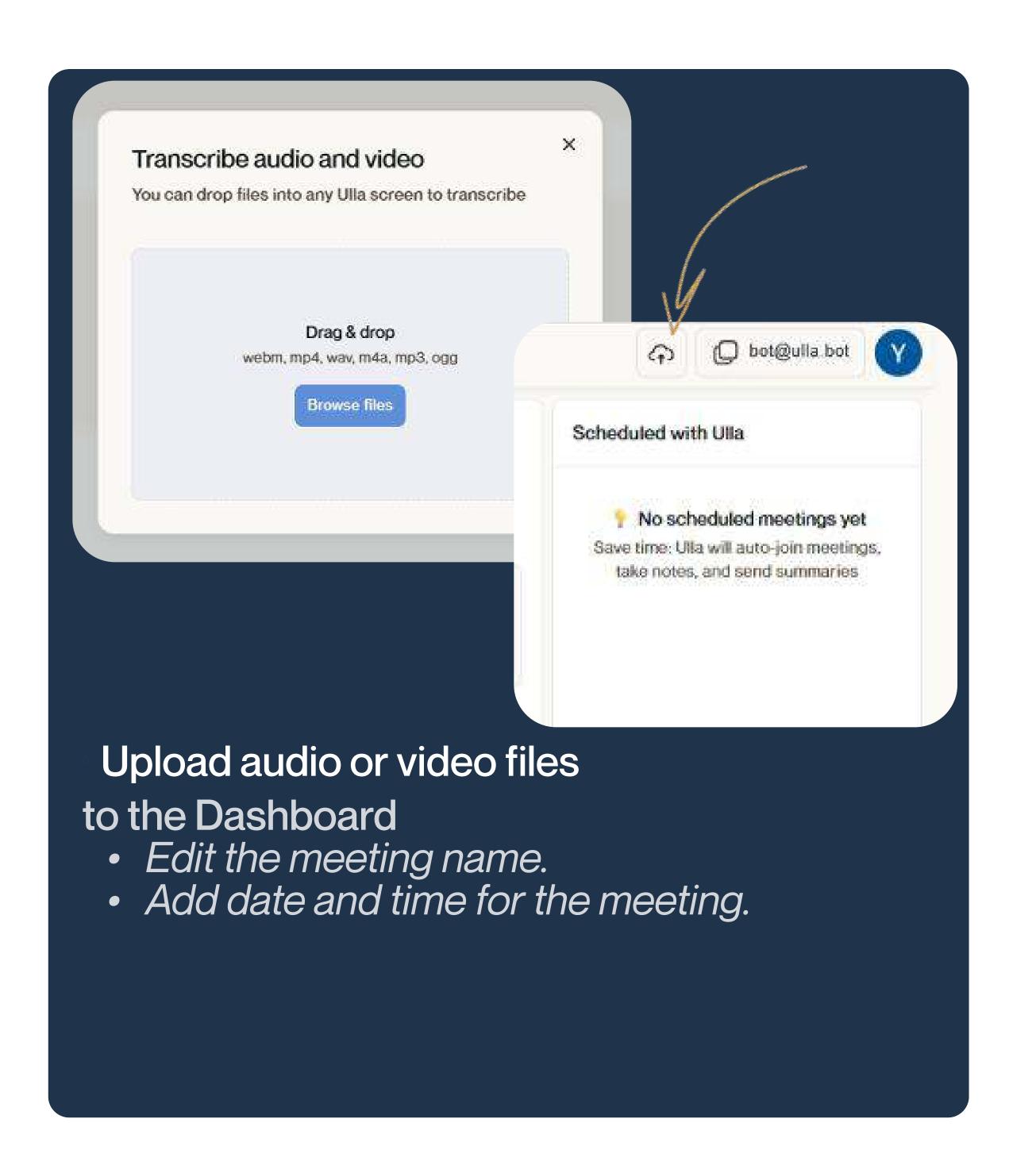


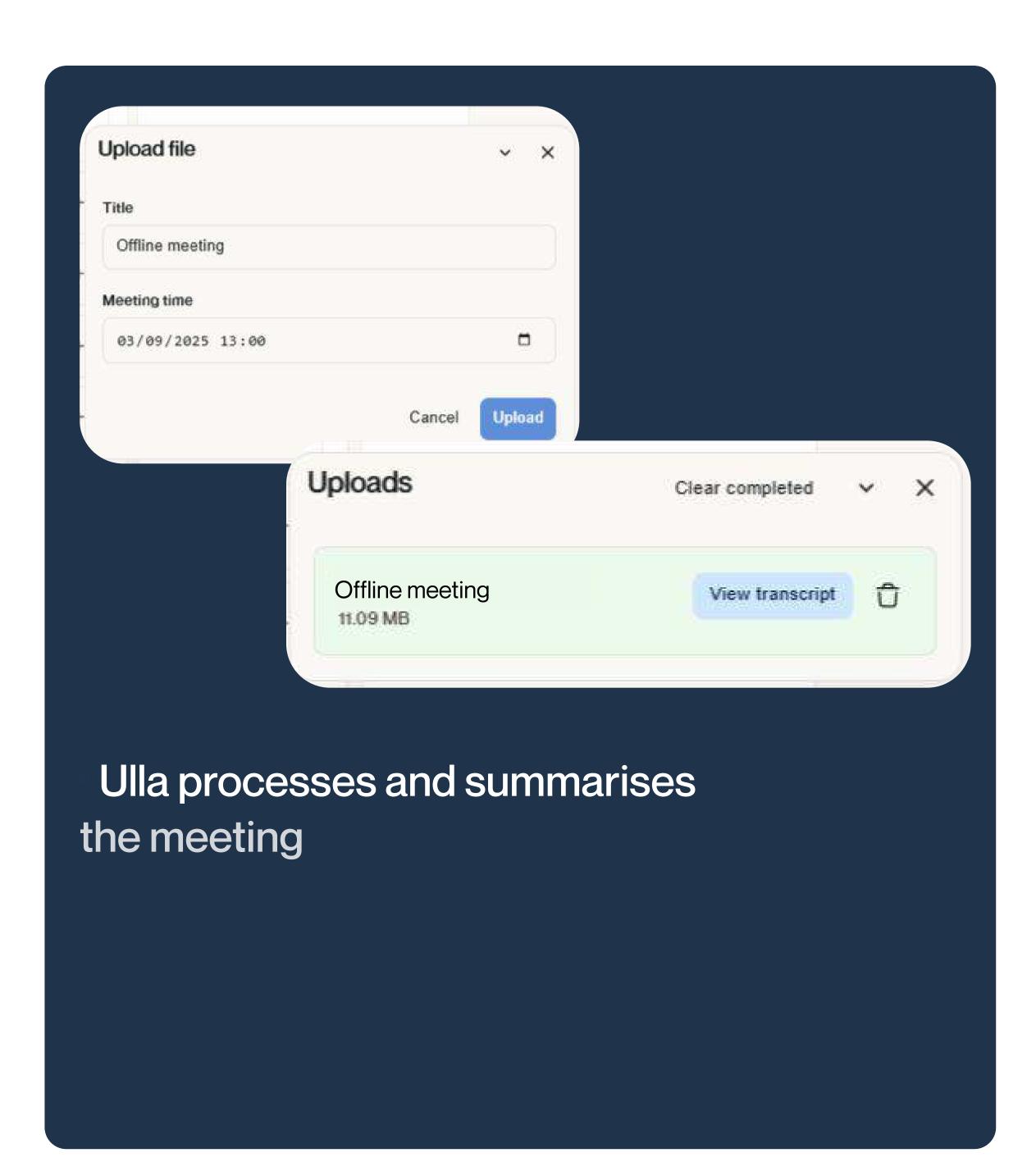


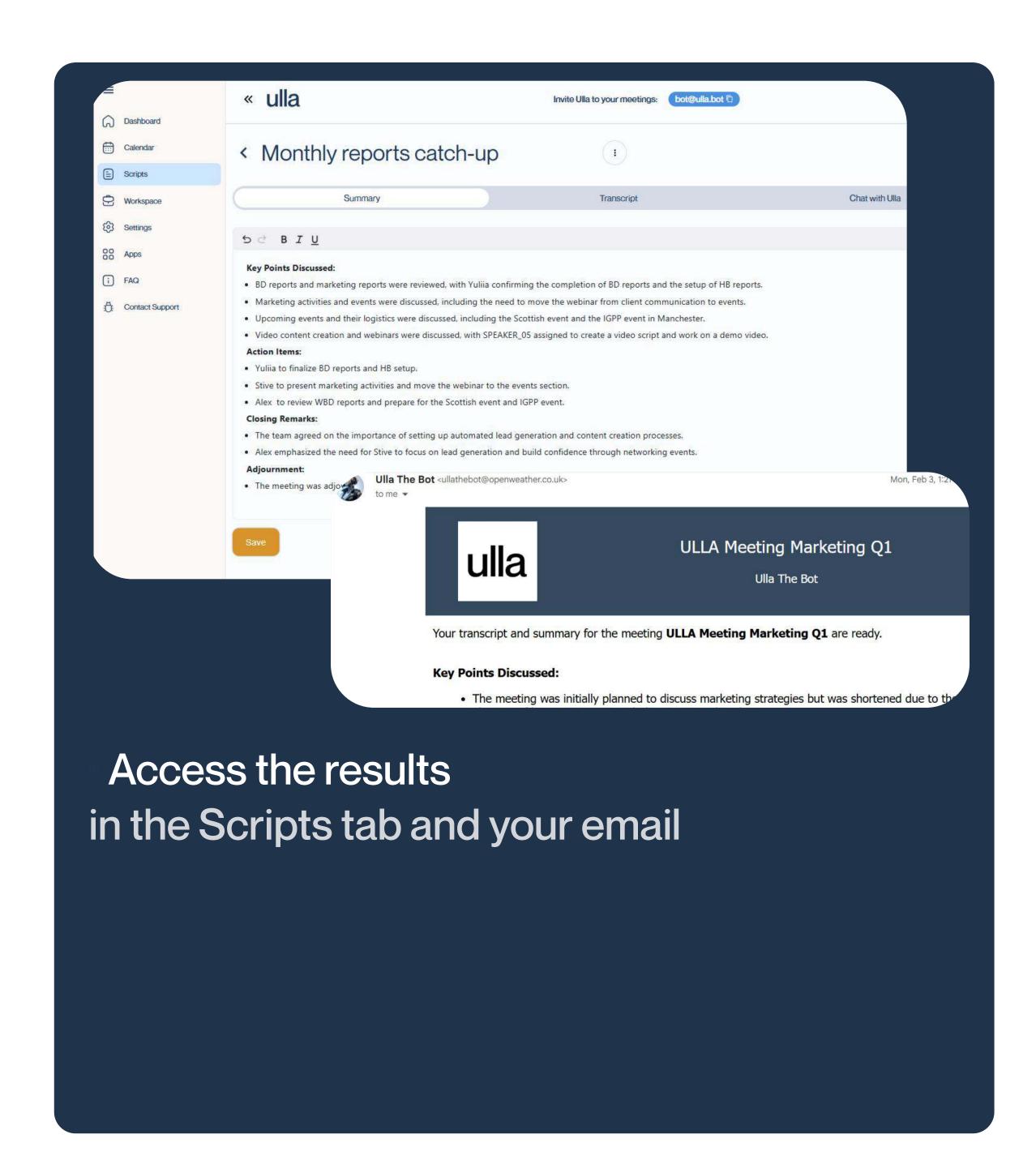








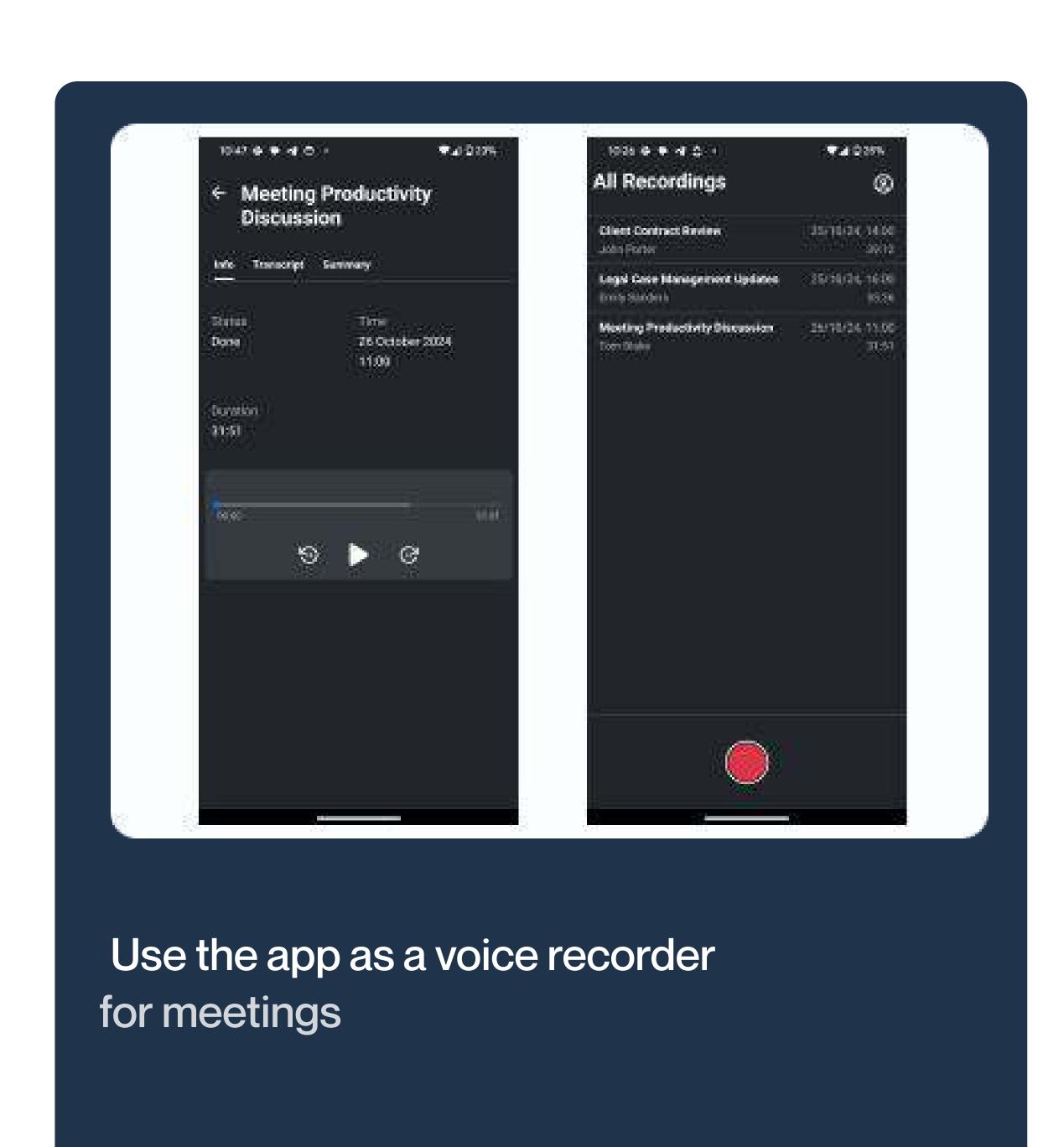


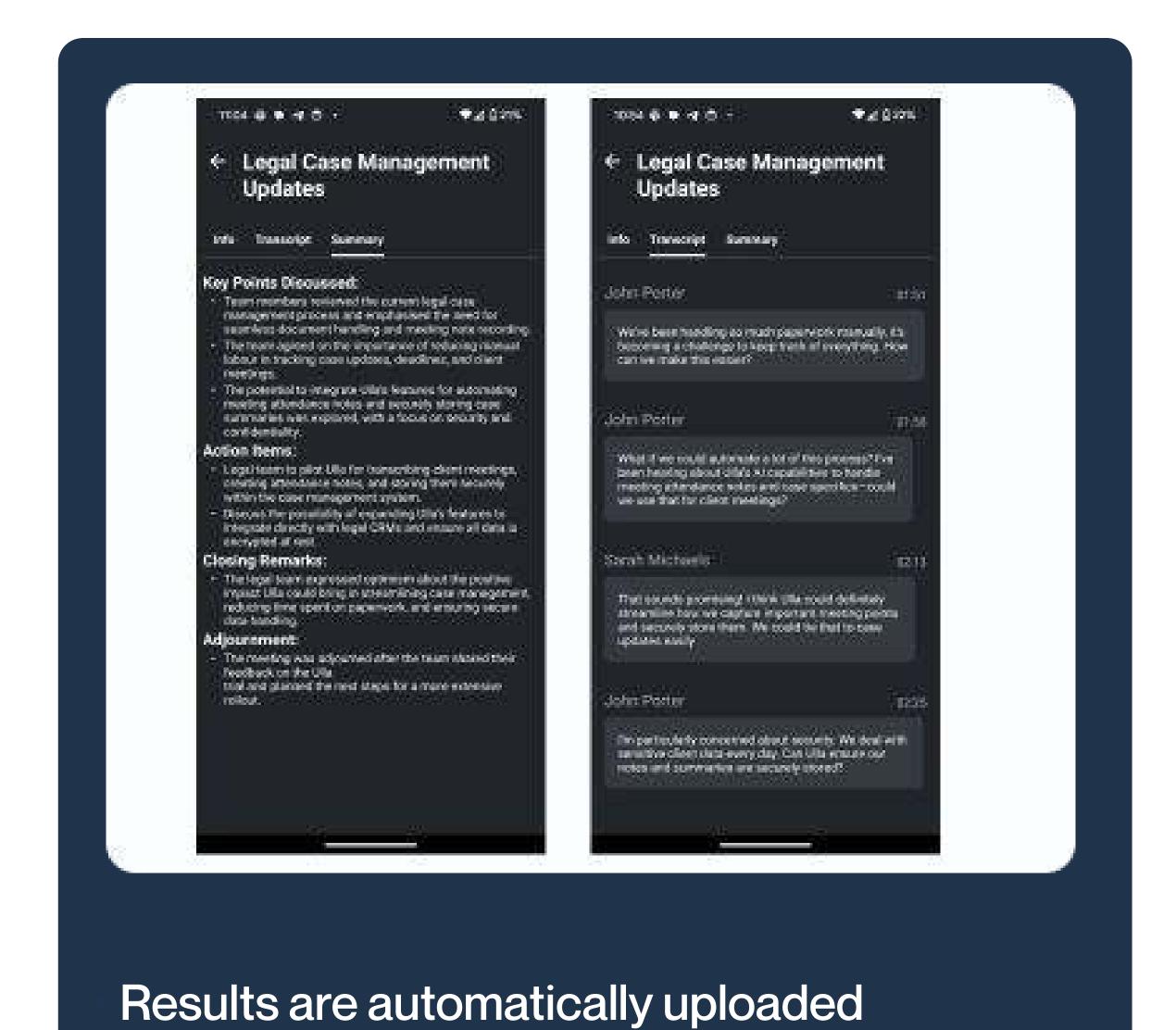






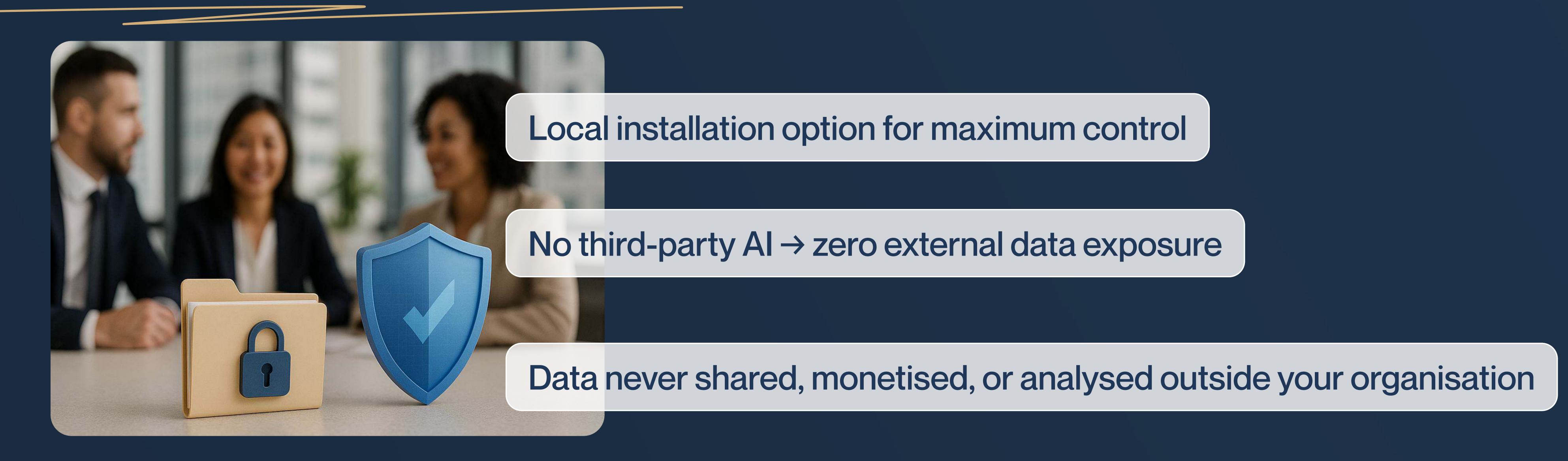
Download the app from the Apple Store or Google Market





to your Dashboard

### Security First



### Compliance & Privacy:

- Meets GDPR, HIPAA, SOC 2 & industry standards
- Enterprise-grade encryption at rest & in transit

- Audit logs & strict access controls
- Full user control over data access & storage