

Meeting Import Guide for Chorus

For administrators setting up Chorus Meeting Imports

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This guide is a companion to the [Chorus Integrations Guide](#) that describes the overall integrations of Chorus for your organization. Use this guide to integrate with supported conversation intelligence applications.

Meeting Import

What Is Meeting Import?

Meeting Import allows ZoomInfo to automatically retrieve recordings and transcripts from Zoom, Microsoft Teams, and Google Meet without a bot joining your call. When enabled, ZoomInfo works with your conference platform to record natively in the cloud, then retrieves and processes the recording once the meeting ends.

A note on timing: Recordings are not immediate. Your conference platform must finish processing the recording before ZoomInfo can retrieve it, and processing time can approach or exceed the length of the meeting itself. This is a platform-side delay and is expected. You will see this referenced in each platform section below.

A note on recording notices: Because Meeting Import records natively through your conference platform without a visible ZoomInfo bot, participants will not see a bot join as a signal that the call is being recorded. Your conference platform's own native recording indicator still appears. Meeting organizers are responsible for ensuring participants are notified that the call is being recorded, in line with your organization's policies and applicable law.

How Meeting Import Works

1. **Before the meeting starts**, ZoomInfo detects the upcoming meeting from your linked calendar and configures it for automatic cloud recording.
2. **The meeting records natively** through your conference platform. No ZoomInfo bot joins as a participant.
3. **When the meeting ends**, your conference platform notifies ZoomInfo via webhook. ZoomInfo downloads and links the recording and transcript to the calendar event.

Common Requirements (All Platforms)

These apply to Zoom, Microsoft Teams, and Google Meet alike. The per-platform sections below cover only what is unique to each.

- **A connected calendar in Chorus** (Google or Microsoft 365). Meeting Import works only on meetings scheduled and synced from your linked calendar. Without a connected calendar, ZoomInfo cannot detect meetings to configure, and nothing is imported.



- **Scheduled meetings (except Zoom).** For Microsoft Teams and Google Meet, Meeting Import applies to scheduled meetings synced from your calendar; unscheduled or ad-hoc calls are handled by the Notetaker bot instead. Zoom Meeting Import also covers unscheduled Zoom calls via post-call import.
- **Takes effect for new meetings only.** Enabling Meeting Import applies to meetings scheduled after it is turned on. It is not retroactive; meetings already on the calendar when you enable it are not reconfigured.
- **Chorus Admin access** to connect and configure integrations.

Meeting Import vs. the Notetaker Bot

	Meeting Import	Notetaker Bot
Recording method	Native cloud recording	Bot joins as participant
Bot visible in meeting	No	Yes
Works for	Scheduled meetings on supported platforms	Any meeting (scheduled or ad-hoc)
Admin setup required	Yes, per platform	Minimal

When the Notetaker Is Still Used

The Notetaker bot automatically handles cases Meeting Import cannot:

- Unscheduled or ad-hoc calls on Microsoft Teams and Google Meet. (Zoom covers unscheduled calls via post-call import instead, without a bot.)

Forcing the Notetaker onto a meeting: To manually force the Notetaker bot to join a meeting (for example, an internal meeting), add record@chorus.ai to the calendar invite.

This guide covers step-by-step setup for Meeting Import on Zoom, Microsoft Teams, and Google Meet via Chorus Admin Settings (chorus.ai/settings/integrations). For setup via the ZoomInfo Admin Portal, refer to the companion **Meeting Import Setup Guide for ZI Admin Portal**.

Platform Overview

Platform	Admin Roles Required	Calendar Required	Notetaker Fallback
Zoom	Chorus Admin, Zoom Admin	Yes	Not used (unscheduled calls covered via post-call import)

Platform	Admin Roles Required	Calendar Required	Notetaker Fallback
Microsoft Teams	Chorus Admin; Global or Teams Administrator; PowerShell	Yes	Unscheduled calls
Google Meet	Chorus Admin, Google Workspace Admin	Yes	Unscheduled calls; external-organizer meetings (attempted first, falls back if needed)

Zoom Meeting Import

How it works: ZoomInfo connects to Zoom via the native Zoom integration. When a meeting is about to start, ZoomInfo instructs Zoom to enable cloud recording. Once the meeting ends and Zoom finishes processing, ZoomInfo receives a webhook notification and downloads the recording and transcript directly from Zoom.

Prerequisites

In addition to the [Common Requirements](#):

- Zoom Admin account to authorize the Zoom integration
- Zoom Pro, Business, or Enterprise account (cloud recording is not available on free or basic Zoom plans)
- The following settings enabled at the user level in Zoom (note: these can be overridden or locked by group- or account-level settings managed by the Zoom Admin):
 - Cloud recording enabled
 - Transcripts enabled

Required Zoom privilege (most common cause of silent import failure). The Zoom Admin account authorizing the integration must have the **Recording content access** privilege, which allows the role to view, download, and share recording content. Set it at **Admin > User Management > Roles > [role] > Account Management** in Zoom. Without it, meetings will record but ZoomInfo cannot retrieve the files, and nothing appears in Chorus.

Step 1: Connect Zoom in Chorus

As a Chorus Admin, go to your Chorus integrations settings page. Under **Conference Integrations**, click **Connect** next to Zoom and authorize with your Zoom Admin account.



Step 2: Select Meeting Import as the Recording Method

After connecting Zoom, the two recording method options will appear under the Zoom integration (they may take a moment to load): **Meeting Import** and **Streaming**. Select **Meeting Import**.

Important: Meeting Import and Streaming are mutually exclusive. Enabling one disables the other. Only one recording method can be active at a time per account.

Setup complete. Once Meeting Import is selected, it will activate automatically for your next eligible scheduled Zoom meeting, provided the Zoom prerequisites above are met (in particular the **Recording content access** privilege). No further action is required.

What Happens During a Meeting

- **Before the meeting:** ZoomInfo detects the Zoom link from your calendar and sends a request to Zoom to enable cloud recording for that meeting.
- **During the meeting:** Zoom records natively in the cloud. No ZoomInfo bot joins.
- **After the meeting:** Zoom processes the recording and notifies ZoomInfo via webhook. ZoomInfo downloads and links the recording and transcript to the calendar event.

Important Notes

- Recordings are not immediate (see the timing note at the top of this guide).
- Recordings on Zoom Cloud are subject to your organization's Zoom data-retention settings. Recordings past that retention window are removed by Zoom and cannot be re-imported into ZoomInfo.

Troubleshooting

- **Recording not appearing:** Verify Zoom cloud recording is enabled in your Zoom account settings. Confirm Chorus is connected and Meeting Import (not Streaming) is selected under the Zoom integration.
- **Recording created in Zoom but not appearing in Chorus:** Confirm the authorizing Zoom Admin account has the **Recording content access** privilege (see Prerequisites). Without it, meetings record but ZoomInfo cannot retrieve the files. This is the most common silent-failure cause.
- If the meeting does not appear after 3 hours, contact support (see **Need Help?** at the end of this guide).



Microsoft Teams Meeting Import

How it works: ZoomInfo automatically imports recordings and transcripts from Microsoft Teams natively, without a bot joining the call. When a Teams meeting is about to start, ZoomInfo configures it for automatic cloud recording. After the meeting ends, Teams sends a webhook notification and ZoomInfo downloads the recording and transcript.

Prerequisites

In addition to the [Common Requirements](#):

- Global Administrator or Teams Administrator role in Microsoft 365 (required for the PowerShell steps)
- Windows or macOS system with administrative access
- PowerShell (Windows: pre-installed; macOS: install via Homebrew, see Step 3a)
- Teams cloud recording enabled: **Teams Admin Center > Meetings > Meeting policies > Recording & transcription > Meeting recording: On**
- Teams transcription enabled: **Teams Admin Center > Meetings > Meeting policies > Recording & transcription > Transcription: On**

Teams Admin required, PowerShell only. The Application Access Policy required for Meeting Import cannot be configured via the Azure portal. It must be set up using Microsoft Teams PowerShell. A Global Administrator or Teams Administrator account is required.

Step 1: Connect Microsoft Teams in Chorus

As a Chorus Admin, go to your Chorus integrations settings page. Under **Conference Integrations**, click **Connect** next to Microsoft Teams and authorize with your Microsoft 365 Admin account. Then enable the **Meeting Import** checkbox for Microsoft Teams.

chorus.ai/settings/integrations

Step 2: Configure Teams Admin Center

In your Teams Admin Center, verify the following settings are enabled for the meeting organizers who will use Meeting Import:

- **Meetings > Meeting policies > Recording & transcription > Meeting recording: On**
- **Meetings > Meeting policies > Recording & transcription > Transcription: On**

Step 3: Configure Application Access Policy via PowerShell

This one-time configuration grants ZoomInfo API access to your Teams meetings for recording and transcript retrieval. Run the following commands as a Teams or Global Administrator.



Canonical ZoomInfo AppId: `abcf80d7-7474-40ee-8a2b-fcf025af84dc`. This value appears in the create command, the verify step, and troubleshooting below. It must be identical in every place. If it is ever updated, update all occurrences in this section.

3a. Install PowerShell (macOS only; skip if on Windows)

```
None  
brew install powershell  
pwsh
```

Windows users: Search "PowerShell" in the Start menu, right-click, and select **Run as Administrator**.

3b. Install the Microsoft Teams PowerShell Module

```
None  
Install-Module -Name MicrosoftTeams -Force
```

If prompted about an untrusted repository, type `Y` to proceed.

3c. Sign In with Your Microsoft 365 Admin Account

```
None  
Connect-MicrosoftTeams
```

A Microsoft sign-in window will open. Sign in with Global Administrator or Teams Administrator credentials.

If the sign-in window does not appear, run the following command first, then retry

Connect-MicrosoftTeams:

```
None  
Set-ExecutionPolicy -ExecutionPolicy RemoteSigned -Scope CurrentUser
```

3d. Create the Application Access Policy

```
None  
New-CsApplicationAccessPolicy -Identity "MeetingsPolicy" `  
-AppIds "abcf80d7-7474-40ee-8a2b-fcf025af84dc" `  
-Description "ZI MSTEAMS APP Policy for Teams meetings access"
```

If the multi-line command above fails when copied (the ``` line-continuation character is sensitive to trailing spaces), paste this single-line version instead:



None

```
New-CsApplicationAccessPolicy -Identity "MeetingsPolicy" -AppIds  
"abcf80d7-7474-40ee-8a2b-fcf025af84dc" -Description "ZI MSTEAMS APP Policy for Teams  
meetings access"
```

Note: Only one Application Access Policy can be assigned per user at a time. A new assignment overrides any existing policy.

3e. Apply the Policy

Choose the scope that fits your tenant:

Option A — Specific users (safer for most tenants). Grant the policy per user by UPN. Repeat for each user who should use Meeting Import:

None

```
Grant-CsApplicationAccessPolicy -PolicyName "MeetingsPolicy" -Identity  
"user@yourdomain.com"
```

Option B — Entire tenant. The `-Global` flag applies the policy to all users in a single command:

None

```
Grant-CsApplicationAccessPolicy -PolicyName "MeetingsPolicy" -Global
```

Before running `-Global`: This applies the policy across your entire tenant. If your organization already uses Application Access Policies for other apps, `-Global` will override them, because only one policy can be assigned per user. Use Option A if you are unsure.

Either way, changes typically take 5 to 10 minutes but can take up to 60 minutes to propagate. Wait before testing.

3f. Verify the Policy Was Applied

None

```
Get-CsApplicationAccessPolicy | Select-Object Identity, AppIds
```

Confirm **"MeetingsPolicy"** appears with AppId `abcf80d7-7474-40ee-8a2b-fcf025af84dc`.

Setup complete. Once the policy is verified, Meeting Import will activate automatically for your next eligible scheduled Teams meeting. No further action is required.



Required Microsoft Graph API Permissions

These permissions are used by ZoomInfo to access recordings and transcripts. They are configured on the ZoomInfo side and unlocked by the Application Access Policy above.

Permission	Required For
<code>User.ReadBasic.All</code>	Look up meeting organizer details
<code>OnlineMeetings.ReadWrite.All</code>	Enable auto-recording on scheduled meetings
<code>OnlineMeetingRecording.Read.All</code>	Download meeting recordings after processing
<code>OnlineMeetingTranscript.Read.All</code>	Download meeting transcripts

What Happens During a Meeting

- **Before the meeting:** ZoomInfo detects the upcoming Teams meeting from your calendar and configures it for automatic recording.
- **During the meeting:** Teams records natively in the cloud. No ZoomInfo bot joins the call.
- **After the meeting:** Teams processes the recording. Once ready, Teams notifies ZoomInfo via webhook. ZoomInfo downloads and links the recording and transcript to the calendar event.

Important Notes

- Unscheduled calls (Chorus Live) continue to use the Notetaker bot.
- Meetings not configured for auto-recording: If a meeting is not configured for automatic recording (for example, the per-meeting recording toggle is turned off), Chorus treats it as unscheduled and Meeting Import will not fire. If your Chorus recording settings allow it, the Notetaker bot will join instead.
- Recordings are not immediate (see the timing note at the top of this guide). This is a Microsoft-side delay and is expected.
- Allow up to 60 minutes after applying the PowerShell policy before testing.

Troubleshooting

403 Forbidden or authentication errors

- Verify you used a Global Administrator or Teams Administrator account for the PowerShell steps.
- Confirm the AppId matches exactly: `abc80d7-7474-40ee-8a2b-fcf025af84dc`
- Note: this policy cannot be configured via the Azure portal. PowerShell is required.
- Wait up to 60 minutes after policy creation before retesting.

PowerShell sign-in window does not appear



- Switch to PowerShell Core (`pwsh`) instead of Windows PowerShell.
 - Run `Set-ExecutionPolicy -ExecutionPolicy RemoteSigned -Scope CurrentUser`.
 - Check for overriding policies: `Get-ExecutionPolicy -List`
-

Google Meet Meeting Import

How it works: ZoomInfo configures your Google Meet meeting space for auto-recording before it starts, then imports the recording and transcript from Google Drive once the meeting ends. No bot joins scheduled meetings that Meeting Import can configure.

Prerequisites: Google Workspace Requirements

Your Google Workspace admin must verify the following before completing setup.

Supported Workspace Editions

- Business Standard or Business Plus
- Enterprise Starter, Standard, or Plus
- Education Plus
- Teaching and Learning Upgrade

Note: Essentials editions do not support Meet transcription and cannot use Meeting Import.

Admin Console Settings

- Meet recording enabled: **Admin Console > Apps > Google Workspace > Google Meet > Meet video settings > Recording**
- Meet transcripts enabled: **Admin Console > Apps > Google Workspace > Google Meet > Meet video settings > Transcripts**
- Google Drive enabled for meeting organizers (Meet recordings are saved to Drive; import fails if Drive storage is full)

Google Meet setup involves **two different roles**. Steps 1 (and the prerequisites above) are done by your **Google Workspace admin**; Steps 2 and 3 are done by your **Chorus admin**. Each step below is labeled with who performs it.

Step 1: Install the ZoomInfo for Google Calendar App and Grant OAuth Scopes

Role: Google Workspace admin. Install the **ZoomInfo for Google Calendar** app from the Google Workspace Marketplace and grant all three Google Meet OAuth scopes during installation.

workspace.google.com/marketplace/app/zoominfo_for_google_calendar/635708537658



Note: If the app was previously installed for Google Calendar only, it must be reinstalled and re-authorized. The existing Calendar connection will not carry the Meet-specific OAuth scopes automatically.

Step 2: Connect Google Calendar in Chorus

Role: Chorus admin. Go to your Chorus integrations settings page. Under **Conference Integrations**, connect your Google Calendar if not already connected.

chorus.ai/settings/integrations

Step 3: Enable Meeting Import for Google Meet

Role: Chorus admin. On the same integrations settings page, enable the **Meeting Import** checkbox under Google Meet in the Conference Integrations section.

Required OAuth Scopes

All three scopes must be granted during app installation. If any scope is missing, recording and transcript import will not function.

OAuth Scope	Required For
<code>meetings.space.readonly</code>	Read meeting spaces, conference records, recordings, and transcripts
<code>meetings.space.settings</code>	Enable auto-recording and auto-transcription on a meeting space before it starts
<code>drive.meet.readonly</code>	Download the recording file from Google Drive after the meeting ends

If Meeting Import does not activate: The most likely cause is a missing OAuth scope. Reinstall the ZoomInfo for Google Calendar app and re-authorize, ensuring all three Meet scopes above are granted during installation.

What Happens During a Meeting

- **Before the meeting:** ZoomInfo detects the upcoming Google Meet link from your calendar and configures the meeting space for auto-recording and auto-transcription.
- **During the meeting:** The meeting records natively in Google Meet. No ZoomInfo bot joins the call.
- **After the meeting:** Google notifies ZoomInfo via webhook once the recording and transcript files are ready. ZoomInfo downloads them from Google Drive and links them to the calendar event.



Important Notes

Behavior

- **Meetings not configured for auto-recording:** If a meeting is not configured for automatic recording (for example, the per-meeting recording toggle is turned off), Chorus treats it as unscheduled and Meeting Import will not fire. If your Chorus recording settings allow it, the Notetaker bot will join instead.
- **Meetings organized by an external calendar owner:** ZoomInfo will attempt Meeting Import and fall back to the Notetaker bot if needed.
- **Transcript processing time:** Transcripts are only available after the meeting ends (see the timing note at the top of this guide). This is a Google-side delay and is expected.
- Recording captions are English only (per Google Meet API limitations).

Requirements

- **Supported Workspace edition:** The meeting organizer (not just the Chorus admin) must have a supported Google Workspace edition. See [Prerequisites](#).
- **Google Drive:** Recordings are saved to the meeting organizer's Google Drive. Import fails if Drive storage is full.

Troubleshooting

- **Meeting Import not activating:** Almost always a missing OAuth scope. See the callout under [Required OAuth Scopes](#) to reinstall and re-authorize with all three Meet scopes.
 - **Recordings missing:** Verify the meeting organizer has a supported Workspace edition. Check that the organizer's Google Drive is not full.
 - If issues persist after completing the self-serve steps above, contact support (see **Need Help?** below).
-

Verifying Your Setup

How to Confirm Meeting Import Is Working

Schedule a short test meeting and:

- **Include at least one external participant.** Internal-only meetings may not be captured by default depending on your Chorus recording settings, so an internal-only test can produce a false negative.
- **Include some spoken dialogue,** and let the meeting run for a few minutes.
- **End it naturally** without stopping the recording early.



Why dialogue matters: Chorus trims silence from recordings. If it detects no spoken dialogue, it may label the call as a no-show after processing, because trimmed silence leaves no content to show. This is expected behavior, not a failed import.

Check your Chorus account after the meeting ends. Recordings typically appear within 30 to 60 minutes. Processing time can approach or exceed the length of the meeting depending on the platform and recording duration.

If the meeting does not appear after 3 hours, contact support and include your domain and the meeting organizer's name.

What a Successful Import Looks Like

- Meeting Import shows as enabled in your Chorus integration settings for the relevant platform.
 - Recording appears in Chorus linked to the calendar event.
 - Transcript is available alongside the recording (may take additional time after the recording appears).
-

Common Questions

Does enabling Meeting Import capture meetings that are already on my calendar? No. Meeting Import takes effect for meetings scheduled after it is turned on. It is not retroactive, so meetings already on the calendar when you enable it are not reconfigured for import.

Can I use Meeting Import on more than one platform at the same time? Yes. Meeting Import can be enabled for Zoom, Microsoft Teams, and Google Meet simultaneously. The only mutual exclusivity is between **Meeting Import and Streaming within the Zoom integration** (see Zoom Step 2); it does not prevent you from running Meeting Import across multiple platforms.

Need Help?

Contact your ZoomInfo account representative or reach the support team directly at chorussupport@zoominfo.com.

Please include:

- The platform you are configuring (Zoom, Microsoft Teams, or Google Meet)
- Your organization domain
- The name of the meeting organizer experiencing the issue

