

ONBOARD

How OnBoard handles meeting recordings, transcripts, and AI-generated minutes
— answers for general counsel and governance officers.

How OnBoard Handles Meeting Recordings, Transcripts, and AI-Generated Minutes

Your board is ready for AI, but your directors have questions about recording. This document answers the most common concerns we hear from general counsel, governance officers, and board administrators.

The Short Version

OnBoard's AI can generate meeting minutes from a recording of your board meeting. The recording is a **temporary drafting tool**. It's used to create the minutes, then it can be deleted per your retention policy. Your board controls what stays and what goes.

If your board isn't ready for recording at all, OnBoard's AI still works. Book AI, Agenda AI, and Assist AI don't require any recording and work with the documents already in your portal.

Frequently Asked Questions

Does OnBoard record our board meetings?

No. OnBoard doesn't automatically record anything. Recording is an optional feature that your board administrator initiates. The OnBoard Recording Assistant joins your Zoom or Teams call as an

attendee, only when invited. If you don't invite it, there is no recording, no transcript, and no AI-generated minutes.

Where does the recording go?

You control the invitation — the OnBoard Recording Assistant only joins when your administrator invites it. The recording is captured from the meeting and transferred to OnBoard's secure infrastructure, where the source copy is promptly deleted once OnBoard takes custody. The recording is never sent to train a public AI model. Your organization controls access to the recording, its retention, and its deletion.

Can we delete the recording after minutes are created?

Yes. You control the recording and its management, and can set it up in accordance with your document retention policies. The typical workflow is:

1. The OnBoard Recording Assistant joins the meeting and captures the recording
2. The recording is transferred to OnBoard's secure infrastructure and transcribed
3. Minutes AI generates a first draft of the minutes
4. The board administrator reviews, edits, and finalizes the minutes
5. The recording, transcript, and outlines are deleted as a set per your retention policy

The finalized minutes become the official record.

Who has access to the recording?

Only the board administrator (or whoever your organization designates). Directors do not have access to the raw recording or transcript. Access controls follow the same permission model as all other board materials in OnBoard.

Is a recording discoverable in litigation or regulatory examination?

Any nonprivileged material relevant to litigation can be subject to discovery obligations — including meeting recordings, transcripts, and minutes. OnBoard gives you the tools to manage recordings in accordance with your document retention policies.

- **Your retention policy governs.** Work with your general counsel to establish a recording retention and deletion policy before enabling Minutes AI. Most organizations set a defined window (e.g., 7–14 days after minutes are approved) for deletion.

- **OnBoard gives you full lifecycle control.** You decide when recordings are created, who has access, how long they're retained, and when they're deleted.
- **The minutes are the official record.** Board minutes are the legal record of board proceedings in virtually every jurisdiction. The recording is a drafting input used to produce them.

Best practice: Adopt a recording retention policy before you start using AI minutes. Establish a defined deletion window, document the policy in your governance manual, and consult your general counsel on how it fits within your broader document retention framework.

What if our board doesn't want to record meetings at all?

That's completely fine. OnBoard's AI Suite includes features that don't require any recording:

| FEATURE | REQUIRES RECORDING? | WHAT IT DOES |
|-------------------|---------------------|--|
| Minutes AI | Yes | Generates draft minutes from a meeting recording |
| Book AI | No | Summarizes board book sections for director preparation |
| Agenda AI | No | Builds meeting agendas from documents and prior meetings |
| Assist AI | No | Answers questions about documents already in your portal |

Most boards start with Book AI and Agenda AI — features that save hours without touching the recording question. When the board is comfortable, they can add Minutes AI on their own timeline.

What about transcripts? Are those stored?

Transcripts are generated from the recording and exist within OnBoard's secure environment. They follow the same access controls, encryption, and data isolation protections as all board materials.

When you delete minutes artifacts — whether manually or through auto-deletion — the recording, transcript, and outlines are deleted together as a set. There is no scenario where the recording is deleted but the transcript persists.

As OnBoard's AI capabilities expand, features like cross-meeting insights may derive analytical outputs from transcripts before they are deleted. These derived insights would be stored independently, so

organizations can benefit from AI analysis without retaining the underlying recording or transcript long-term.

Can regulators compel access to our AI-generated minutes?

AI-generated minutes that have been reviewed, approved, and adopted by the board are legally equivalent to manually drafted minutes. They are the official record. The fact that AI assisted in drafting them does not change their legal status or create additional disclosure obligations.

The AI processed a recording to create a draft. A human reviewed and approved that draft. The approved minutes are the official record, regardless of how the initial draft was produced.

How is this different from using ChatGPT or another public AI tool?

| | ONBOARD AI | PUBLIC AI TOOLS |
|--|--|---------------------------------------|
| Data stays inside your system | Yes — contained architecture, private endpoints | No — data is sent to external servers |
| Recording accessible only to admin | Yes — permission-controlled | N/A — you'd paste content manually |
| Can delete recording and transcript | Yes — full lifecycle control | N/A — provider may retain data |
| Data used for model training | Never | Often (check provider terms) |
| Audit trail | Every interaction logged | No governance visibility |
| Compliance certifications | SOC 2 Type II, ISO 27001/27701; HIPAA and GDPR compliant | Varies widely |

The core difference is control. With OnBoard, your organization controls what's recorded, who sees it, how long it exists, and when it's deleted. Public tools offer none of those guarantees.

Recommended Actions for Your Board

1. **Discuss recording with your general counsel** before enabling Minutes AI. Frame it as: "We want to use AI to draft minutes. The recording is temporary and deletable. What retention policy should we adopt?"
 2. **Start with non-recording features.** Enable Book AI and Agenda AI immediately. Let directors experience AI value before the recording conversation.
 3. **Adopt a recording retention policy.** A simple resolution: *"Recordings used for AI-assisted minutes drafting shall be deleted within [7/14] days of minutes approval. The approved minutes shall constitute the sole official record of the meeting."*
 4. **Pilot with a committee meeting.** Don't start with the full board. Run Minutes AI on a committee meeting where the stakes feel lower. Let the administrator and committee chair see the output quality firsthand.
 5. **Communicate clearly to directors.** One sentence: *"We're using AI to draft minutes from a temporary recording. The recording is deleted after minutes are approved. Only the administrator has access to the recording during the drafting process."*
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Why This Matters

69% of directors are already using AI for board work. Without a governed option, many default to pasting board materials into public tools like ChatGPT.

OnBoard gives your board a choice: use AI with recording for the most capable experience, or use AI without recording for everything else. Either way, your data stays inside the system, your permissions are enforced, and every interaction is logged with a full audit trail.

This document is for informational purposes only and does not constitute legal advice. Recording laws, discovery rules, and governance requirements vary by jurisdiction. Consult qualified legal counsel before establishing recording and retention policies for your board.