Delivery OS RAID MODULE

FOR YOUR IT AND INFORMATION SECURITY TEAM

What the RAID module is, and where your data goes

A one-page summary for whoever approves new tools. The short version: it's a set of files and written instructions that run inside the AI tool your organisation already uses. Nothing is installed, and no data comes to us.

What it is

- **Templates:** an Excel workbook and a Notion template for a RAID log.
- **Written instructions:** plain text a user pastes once into their AI tool, for example a ChatGPT Project.
- **A Microsoft Copilot agent:** text pasted into Copilot's own agent builder, plus a Word knowledge file stored in your OneDrive or SharePoint.
- **A Claude skill:** written instructions plus small scripts that build a review page, update the Excel log and draft the email, all inside Claude's own workspace.

No software to install, no servers, no accounts with us, and no new integrations beyond the AI tool you already approve.

Where data goes

- **Meeting content and log rows** are processed only by your organisation's AI tool (for example Microsoft 365 Copilot, Claude or ChatGPT), under that tool's existing contract and data processing terms.
- **The RAID log stays where you keep it:** Excel in your OneDrive or SharePoint, or your own Notion workspace.
- **Plexus Consulting receives no data:** no transcripts, no log contents, no usage data. None of the pack's files contact us or any other service.

Controls built in

- **Human review first.** Every route proposes changes and waits for the user to approve them. Nothing is written to the log before approval.
- **Nothing is sent.** The follow-up email is drafted for the user to send themselves.
- **Source-traceable records.** The instructions forbid invented owners, dates or commentary; updates must be dated and taken from what was said.
- **Existing permissions apply.** The Copilot agent runs in your Microsoft 365 tenant and can only see what the user can already see.

What IT may need to do

ROUTE	POSSIBLE SETTING
`Copilot`	Allow users to create agents in Microsoft 365 Copilot, if your tenant restricts it.
`Teams`	Transcription enabled, in line with your recording policy.
`Claude`	Code execution and custom skills enabled for the organisation.
`Notion`	Users can duplicate a public template into your workspace.
`Excel`	Nothing. No macros; standard formulas only.

Our recommendations for safe use

1. Use the organisation's approved, business-grade AI account, never a personal one, for client or confidential material.
2. Tell attendees when a meeting is transcribed, and follow your recording and AI-use policies.
3. Keep the human review step. The AI can misclassify items or misread a transcript.
4. Store the RAID log and knowledge file in locations with the right access controls.

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