

Arctera Insight™ Platform

RELEASE NOTES for July 2025 (Teak)



The latest release of Arctera Insight Platform is scheduled¹ to begin roll out in late July 2025.

This release introduces new features for the Arctera Insight Platform.²

WHAT'S NEW

Arctera Insight Information Governance

Automated Data Remediation using Policy Framework

- A scalable and customizable policy framework to trigger email alerts and generate reports on policy violations.
- Preconfigured policy for sensitive data access governance: alert when watch listed users perform specified actions on sensitive data (e.g. data manipulations by leavers).
- Preconfigured policy to detect and alert when credentials, tokens or secrets are found in cleartext in documents.
- Preconfigured policy to alert on ransomware activity detection.

Data Ownership identification

- Identify data owners based on end user activity.
- Define data custodianship basis on inferred owners and leverage in-built data remediation workflows to let custodians take actions on data at source.

Visibility of SharePoint Online data permissions

- Gain visibility and review entitlements on data in SharePoint online.
- Report on overexposure: identify data that is widely exposed or externally shared.

¹ All future release dates are tentative and are subject to change at the sole discretion of Arctera. While the features and enhancements listed above are scheduled for the dates mentioned, Arctera makes no assurances that any or all these features and enhancements will be available at any time. Customers looking to purchase or renew their services with Arctera should do so solely based on the features of the service available at that time.

²Additional fees apply. Requires a concurrent number of qualifying Arctera Insight Platform products.

Arctera Insight eDiscovery

Compliance & Governance of AI: AI Assistant Capture

- **Capture & Discover ChatGPT & Microsoft Copilot Conversations:** Seamlessly capture, archive, and review AI assistant conversations to meet compliance, security, and regulatory needs.
- **Intelligent Data Masking for Responsible AI Adoption:** Safely embrace AI with browser plugin-based masking of sensitive data, managing risk while promoting adoption.
- **Extend Your Governance Reach to AI:** Apply existing communication data governance directly to AI assistant conversations, extending your compliance framework.

InsightAI Updates

- **Instant Insights & Summaries:** Rapidly generate summaries of large search results, identify key concepts, users, and now, event timelines, turning data into actionable intelligence.
- **Intuitive Natural Language Querying:** Pinpoint relevancy efficiently with user-provided natural language queries for document summaries.

Analytics Dashboard Update

- **Dynamic Keyword Cloud:** Visualize trending keywords in your archive, seamlessly linking to Advanced Search for immediate drilldowns.

Collaboration View: Teams Export to PDF

- Ability to export Collaboration Data (Teams) into near-native PDF format
- Metadata preservation in PDF format

Indexing Exclusion Functionality

- Ability to exclude a portion of text from indexing to remove false positives in search, now customizable from the Manage console

Search by Department

- Ability to search for data by Department (assigned by Arctera Insight Surveillance)

Search by Archive Date

- Ability to search by date email was archived by Insight eDiscovery

Hit Highlighting Improvements

- Improved search for stop words, special characters, proximity searches and highlight navigation.

Targeted Collections: Update to Exchange Collections

- Ability to reactively collect from M365 Exchange
- Updated APIs for faster & more efficient searches – specifically for broad Data Subject Access Requests (DSAR) – against Exchange Online for targeted eDiscovery collections

Arctera Insight Surveillance

Restrict Review Messages by Capture Date

- To improve overall performance, items in the item list GRID will display items captured by the last one year by default. To display items captured before one year, filter on Capture Date.

Search by Department

- Ability to search for data by Department in the Investigations/eDiscovery interface

Translation Support

- Translation of items in review can be enabled/disabled from the Management Console
- Translation supports both email and collaboration content.
- Translation now supports content with over 50K characters.
- To support multi-language content, users can select content snippets of text and use the partial translation button for precise translation of highlighted text only.

Improved Item Render Speed

- Items render faster on the screen during review.

Support for Index Exclusions in Management Console

- Text patterns uploaded to Index Exclusions in the Management Console will not be evaluated against search terms and hotwords for body and attachments, reducing false positives from irrelevant text.

Indexing Exclusion Functionality

- Ability to exclude a portion of text from indexing to remove false positives in search, now customizable from the Manage console

Enhanced Reporting Updates

- The following new API endpoints are introduced:
 - Item Details
 - Item Hotword Metrics
 - Reviewer Assessment Metrics
- Improvements were made to the following endpoints:
 - UserRoles API
 - Reviewer Mapping API
 - Monitored Employees API
- The IP restriction for the Reporting API endpoint is now configurable and can be enabled or disabled.

Enhanced Search Performance

- Performance Improvements enable searches to complete even when a large number of hotwords or hot phrases are used.

Custom Groups

- Users can now create and manage Custom Groups by manually adding members. Custom Groups can be used for role assignments, or as monitored employees.

Support For Propagation for Intelligent Review Label Predictions

- Intelligent Review Label Predictions now considers all labels for machine learning prediction, including labels created and propagated from other departments.

Export Support for All Content Sources

- Users can now export items of all types of content sources including Email, Collaboration and Audio/video. Collaboration and Audio/video content can only be exported in JSON format.

Item Preview Logged in History

- The system logs an item preview event in item history when an item is previewed by a reviewer. To enable this feature, please contact Arctera Support.

Preview Pane Improvements

- The following improvements have been made to the preview pane:
 - New Scroll to Top of button for quick navigation to the beginning of a message
 - Freeze Header Pane and Attachments persists visibility of metadata while scrolling
 - Option to change content body background to improve readability of low-contrast messages

Streamlined Label Workflow

- Labels update dynamically as you check or uncheck their boxes. The Apply and Remove buttons have been removed as they are no longer required.

Streamlined Review Page

- Review actions have been simplified to icon-only buttons with hover descriptions, reducing clutter and creating a cleaner, more efficient interface.

Text Preview of Image Attachments

- If OCR is enabled, Text Preview displays the extracted text along with hit highlight navigation. Hotword & Tag statistics pane will list the image files if the hit is found inside image attachments.

Monitor Page Enhancements: Pending Acceptance with Errors

- The Monitor tab now shows searches flagged as Pending Acceptance (Errors), making it easier to identify and address issues promptly.

Arctera Insight Platform

Arctera InsightBook

- Empowers your end-users and increases productivity by leveraging AI to connect fragmented information across messages, meetings, and transcripts. It intelligently surfaces patterns, decisions, and context that are often lost in communication sprawl. Curate your Personal Archive into specific topic areas for on-going GenAI driven insights.

- **“Week in Review” InsightBook** helps users reflect on their work week by automatically generating a weekly status update, highlighting key meeting moments, and creating a personalized to-do list for the upcoming week.
- **“Return from Vacation” InsightBook** accelerates your return to productivity by using GenAI to summarize emails, Teams chats, and meeting transcripts received during your time away. It even includes audio summaries of key updates to help you catch up faster and more efficiently.

Upgraded version of Insight AI

- Latest version of Insight AI with expanded data set offers better accuracy, relevance and faster response time..
- AI units consumed for Translation, Text-to-Speech, and GenAI are now unified into one simplified wallet offering clearer visibility, easier management, and streamlined billing for a hassle-free experience.

Personal Archive

- The web-based Personal Archive for mobile users now features a sleek, modern design with improved usability for a smoother, more intuitive experience with increased security.
- A new Collaboration View lets you search, and access content collected from Microsoft Teams directly within Personal Archive

Delegate Permissions

- Arctera Insight Platform now supports syncing of delegate permissions from Shared Mailboxes
- The sync is supported irrespective of where the user account is created (On-Prem Active Directory\Exchange or Azure Active Directory\Exchange Online).

Hit Highlighting

- Consistent Hit Highlighting of Keywords, Phrases and Special Characters across Personal Archive, eDiscovery and Surveillance.

CloudLink and Folder Sync

- Arctera Insight Platform now enables seamless user synchronization from on-prem Active Directory via CloudLink, ensuring up-to-date access control while reducing manual administrative efforts.
- Folder Sync functionality now supports on-premises mailboxes, enabling consistent folder structure and streamlined data organization across both cloud and on-prem environments for improved user experience and simplified management

Indexing Exclusion

- Email disclaimers can now be excluded from indexing, minimizing clutter and ensuring more focused, relevant results during eDiscovery and Surveillance searches.

Retention Management

- Configure alerts to get notified when items near their expiration date, helping you take timely action to avoid data loss or compliance risks

Microsoft Teams Reconciliation Improvements

- The Microsoft Teams Reconciliation report now includes a new column displaying the count of users whose data was not collected (for example if user is not found or they don't have an E5 license)

Capture

- **Verint Financial Compliance (VFC - formerly Verba) collector /NEW/**
 - NEW **VFC** collector, which captures and processes calls and meetings natively from VFC/Verba
 - VFC provides capture of Voice over IP, Zoom, Teams, Webex Calls.
- **Cloud9 collector /NEW/**
 - NEW **Cloud9** collector to capture Trader Voice (audio/video) captured on Cloud9.
- **Zoom Chat**
 - Capturing **activities** (join, add, leave, remove) with Zoom Chat collector
- **Viva Engage (Yammer) support updated API/Authentication**
 - Transitioned **Authentication** via the Yammer application to authentication via the Entra (AAD) application for the Viva Engage (Yammer) collector
- **Microsoft Teams via Export API**
 - Added a Region Support to Microsoft Teams via Export API collector, which will allow collecting from Global and **China** Tenants.
 - Enhanced the EML envelope header of the Microsoft Teams via Export API collector to preserve the HH:MM:SS **formatting**.
- **Symphony**
 - Integrated the patched **1.5.15 schema** (deactivate room, add/remove user) version into the Symphony collector
- **Upgrades**
 - Upgraded the Microsoft **Graph** package to v5.75.0
 - **BouncyCastle.OpenPgp** package has been updated to v2.0.01 for enhanced security.

Classification

- **New Audit feature**
 - Every action related to classification policies, patterns, and tags is now recorded in the audit log. Each entry captures the operation performed, the user responsible, and the specific changes made.
- **Improved Format Type Filtering in Policy Conditions**
 - Policy conditions based on Format Type will now display only the format types configured, instead of listing all available format types for selection.
- **Improved Language Detection Engine**
 - Improved Detection Accuracy: Updates to the detection model increase precision across a wide range of languages.

- Streamlined Chinese Language Handling: Chinese (Simplified) and Chinese (Traditional) have been consolidated into a single language label: Chinese
- **Policy Condition enhancements**
 - Users can now add parent Group to and remove Group from existing policy condition tree from existing policy condition groups, providing greater flexibility in managing policy condition tree structure.
- **Preset Tags**
 - Preset tags for identifying specific failure types (SENTIMENT-NOT-DETECTED, PROTECTED-DOCUMENT, PARTIALLY-CLASSIFIED) in classification can now be viewed in the UI. This update enhances the Test functionality of classification on the Policies and Patterns page, making it easier for users to analyze classification results effectively.
- **Support for Index Exclusions in Management Console**
 - Text patterns uploaded to Index Exclusions, under Policy Management, will not be evaluated during classification, reducing false positives from irrelevant text.
- **Improved Classification Console Navigation**
 - The first policy, pattern or tag is no longer automatically selected by default when navigating the classification console.
- **Policy Updates**
 - This release supports **332 built-in policies** containing **1417 patterns** and **237 tags**
 - The following new policies are added
 - Personal Email Domains Policy
 - Māori Te Mana Raraunga Policy
 - United States Florida Senate Bill 264 (SB 264) Policy
 - United States Kentucky Consumer Data Protection Act (CDPA) (HB 15) Policy
 - United States New Hampshire Consumer Data Privacy Act (CDPA) Policy
 - United States New Jersey Data Privacy Law (DPL) Policy
 - The following existing Transparent Policies are updated along with the patterns:
 - Off Channel Signaling Policy
 - Subscriptions Policy
 - Client Concerns - General Policy
 - Offensive Terms Policy
 - Client Concerns - Fees and Commissions Policy
 - Client Concerns - Communication Policy
 - Client Concerns Policy
 - Client Concerns - Negative Language Policy
 - Gifts and Entertainment Policy
 - Outside Business Activities Policy