

Arctera InsightAI Assistant

Applying AI-driven understanding across investigation and surveillance workflows

Compliance and investigation workflows require teams to work across large volumes of email, collaboration messages, and files. While search and filtering can surface data, they do not explain what the data represents or how activity connects.

InsightAI Assistant introduces generative AI directly within eDiscovery and surveillance workflows to help teams generate context from that data. In eDiscovery, it enables natural language interaction, summarization, and pattern exploration. In surveillance, it applies AI-driven actions to streamline how programs are managed.

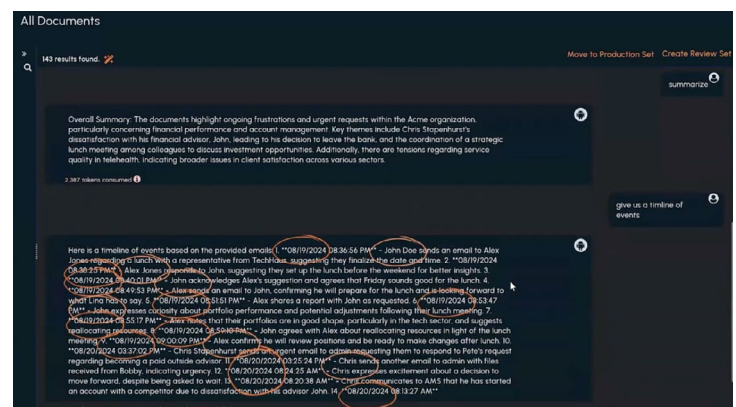
This reduces reliance on manual navigation and helps teams move from retrieving data to applying it with greater clarity, consistency, and control.

Applied across workflows

eDiscovery and investigation workflows

InsightAI Assistant enables teams to generate immediate context across search results, reducing the need for iterative queries and manual reconstruction.

- Summarize large result sets at the start of review
- Identify key topics across custodians and datasets
- Analyze sentiment and communication patterns
- Refine understanding before detailed review begins



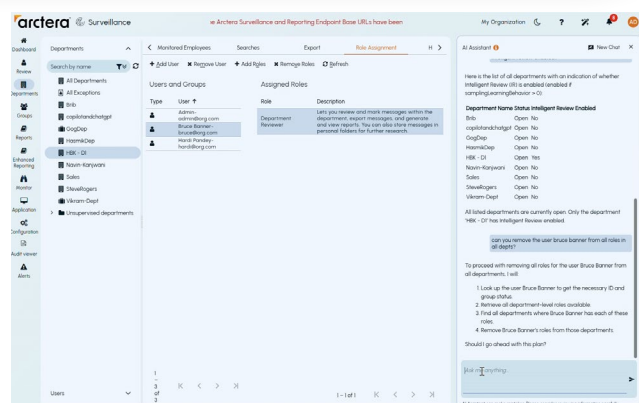
See InsightAI Assistant in eDiscovery workflows.

This allows teams to begin with context rather than building it through repeated search and review, with earlier visibility into key themes, sentiment, and participants.

Surveillance and compliance workflows

InsightAI Assistant provides a conversational interface to interact with surveillance data and configuration.

- Retrieve counts, summaries, and filtered views across departments, monitored employees, users, and roles
- Navigate departments, monitored employees, users, and roles using natural language
- Reduce reliance on manual UI navigation
- Maintain full auditability of all interactions



See InsightAI Assistant in Surveillance workflows.

This enables teams to access and act on surveillance data more efficiently while preserving control and oversight.

Search-integrated AI analysis

InsightAI Assistant operates directly within existing workflows. In eDiscovery, it runs against active and saved searches. In Surveillance, it interacts with platform APIs to return structured responses.

This ensures that AI-generated outputs remain connected to the underlying data and workflows, rather than existing as a separate experience.

Human-guided interaction

Users can combine predefined prompts with custom queries, allowing them to guide how data is analyzed based on their specific objectives.

This approach maintains flexibility while ensuring outputs remain consistent and grounded in the dataset being analyzed.

How the InsightAI Assistant works

InsightAI Assistant is designed to deliver fast and consistent responses across large datasets:



This reduces repeated processing and enables near-instant responses for ongoing analysis.

Governance and control

Controlled access

Enabled at the tenant and user group level, ensuring only authorized users can access AI capabilities.

Usage management

Token-based controls allow administrators to allocate and monitor usage across teams.

Auditability

All interactions are logged, supporting traceability and compliance requirements, and the ability to explain how decisions were informed.

Secure processing

Data is processed within the Arctera environment using Azure OpenAI services. Customer data is not used for external model training.

Supported data sources

InsightAI Assistant operates across:

- Email: Exchange, Outlook, PST, EML, MSG
- Collaboration: Microsoft Teams, Slack, WhatsApp, Zoom, LinkedIn
- Files: PDF, Word, Excel, PowerPoint

Scope and considerations

- Outputs are based on the data included in the query or workflow
- Responses are limited to supported modules and data types
- AI-generated insights are intended to support, not replace, review and decision-making
- Usage is governed by token allocation and tenant configuration

Platform integration

InsightAI Assistant operates within the Arctera Unified Platform and integrates with:

- eDiscovery search and review workflows
- Surveillance data and administrative controls
- Communication and file data sources
- Audit and governance systems

This ensures insights remain connected to downstream investigation, compliance, and review processes.

Explore how the Arctera InsightAI Assistant enables consistent, context-driven analysis across compliance workflows.

About Arctera

Arctera, a Cloud Software Group company, is the leading global provider of compliance and governance solutions that enable firms to unleash game-changing technologies into their organizations while minimizing risk. Created in 2024 from Veritas Technologies, Arctera helps the biggest companies in the world monitor and control exactly how their information is being accessed, used and shared. The Arctera Unified Platform is able to capture data from over 130+ different content sources, and more than 280 AI policies help firms streamline compliance and adapt to evolving regulations.



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