

Arctera InsightBooks

Turn your archive into a living source of knowledge.

You're Already Capturing Everything. Now Put It to Work.

Every regulated organization archives emails, chats, and meetings—because the rules require it. But when those archives are only used during audits or investigations, you're missing their real value.

Meanwhile, knowledge workers now spend nearly 30% of their time searching for information—often across disconnected tools¹.

InsightBooks changes that.

Built on Arctera Insight Personal Archive, InsightBooks is a GenAI-powered intelligence layer that transforms years of communications into curated, searchable insight—so your teams can move faster, stay aligned, and never miss a beat.

And when someone leaves the company? Their knowledge doesn't leave with them.

What InsightBooks Delivers

- **Instant context** – See what's been said, decided, or missed
- **Smarter handoffs** – Get new team members up to speed fast
- **Better oversight** – Track trends, issues, and key relationships
- **Real ROI** – Unlock new value from your existing archive

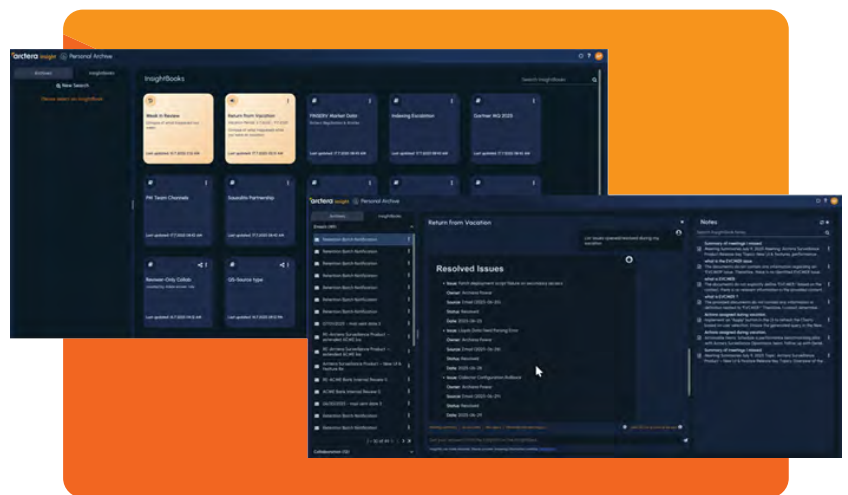


Figure 1. InsightBooks are AI-generated summaries that uncover hidden patterns, key decisions, and contextual insights from historical communications.

InsightBooks in Action

How teams use it to move faster, stay aligned, and reduce risk.

Account and Vendor Oversight

InsightBooks gives you a pulse on critical relationships. Track unresolved issues, summarize meeting outcomes, and maintain continuity across transitions. Remind yourself of actions/outcomes from the last interaction.

Monitor key accounts, vendor risk reviews, escalations

Reduce account ramp-up from 90+ days to near-instant insight²—with a full relationship trail at your fingertips. Share Insights across a workgroup via Shared InsightBooks.

Knowledge Transfer and Workforce Continuity

Preserve what your team knows—before it walks out the door. InsightBooks captures institutional knowledge around people, projects, and decisions. InsightBooks can be shared with cross-functional groups with insights shared via generated notes.

SME exits, leadership turnover, project wrap-ups

Keep institutional knowledge in play—even after key people leave.

Policy Rollout Monitoring

Rollouts don't fail for lack of effort—they fail from lack of feedback. InsightBooks helps teams understand how policies land across the organization and adapt quickly.

AML/KYC updates, ethics and compliance training, security initiatives

Spot rollout issues early and course-correct before compliance risks take root.

Domain Knowledge Curation

You've already done the work—don't lose it. InsightBooks builds long-term knowledge on the topics that matter, from regulations to R&D.

HIPAA research, ESG regulation, model governance

Stop reinventing the wheel—turn forgotten work into reusable insight.

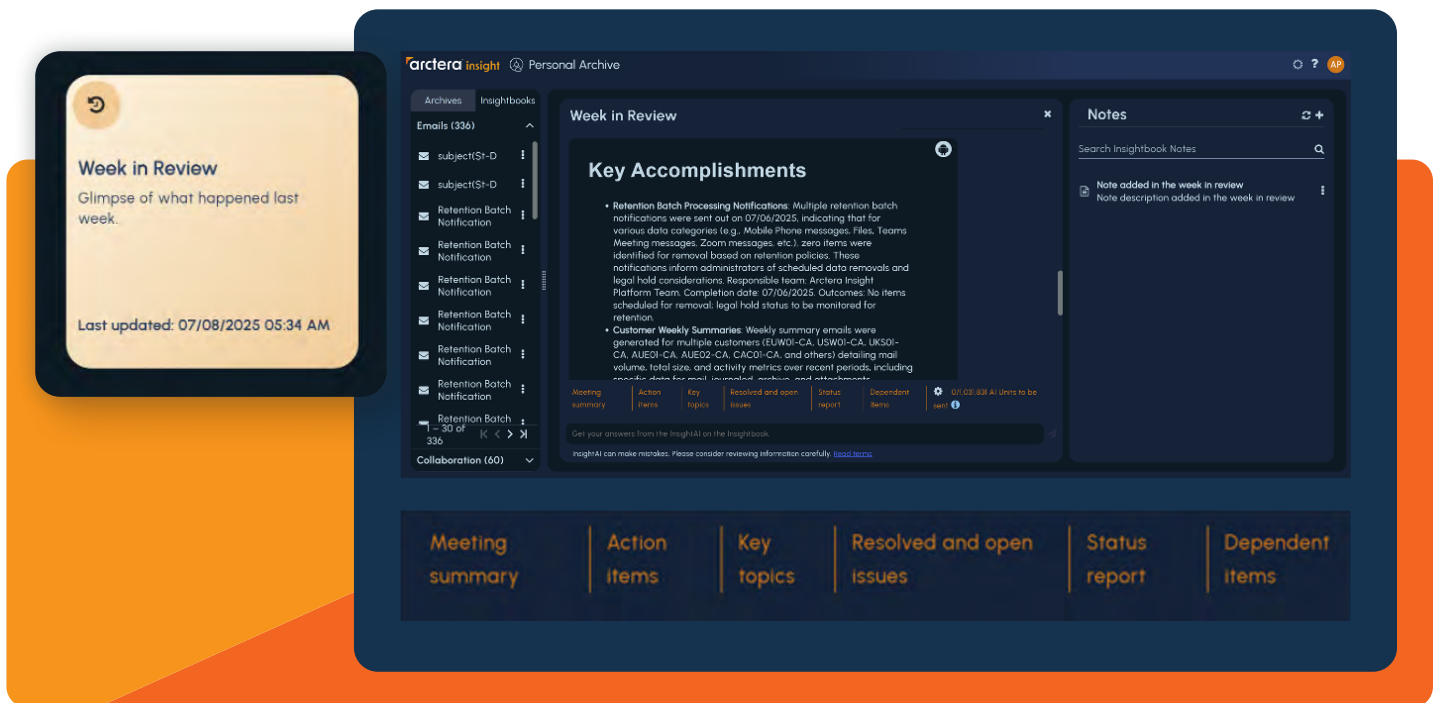


Figure 2. The “Week in Review” InsightBook is one of several default summaries—highlighting meetings, actions, follow-ups, and open issues to keep you aligned.

Core Capabilities

Feature	What It Enables
Custom InsightBooks	Curate around clients, topics, projects
Smart Filtering	Auto-ingest matching emails, chats, and meetings
GenAI Prompts and Summaries	Ask: "What happened last week?" or "What decisions were made?"
Notes and Team Sharing	Flag takeaways, add context, and share curated notes
Cross-Channel Coverage	Works across email, chats, Teams, Slack, and meetings
Governance-Aligned Access	Respects archive permissions, audit controls, and retention policies

How Customers Are Creating Value with InsightBooks

- **Fast start** - Built into Arctera Personal Archive. No new systems.
- **Zero risk** - Users only see their archive content
- **Roll out slowly** - Enable InsightBooks on a per-user basis
- **Compliance-ready** - Aligned with your existing data governance
- **Simple to scale** - Start with a few users, expand based on value

Get Started with Arctera InsightBooks

Your archive holds more than records—it holds knowledge, decisions, and critical context. InsightBook turns that knowledge into action. If your team already uses Arctera Insight Personal Archive, InsightBook is ready to go. No new tools. No disruption. Just smarter insight, right when you need it.

Already using Personal Archive?

Enable InsightBooks directly to start exploring curated insights.

Learn more about Arctera Insight Archiving at arctera.io/archiving

Sources:

- ¹ ProProfs
- ² Aberdeen Group

About Arctera

Arctera helps organizations around the world thrive by ensuring they can trust, access, and illuminate their data from creation to retirement. Created in 2024 from Veritas Technologies, an industry leader in secure multi-cloud data resiliency, Arctera comprises three business units: Data Compliance, Data Protection, and Data Resilience. Arctera provides tens of thousands of customers worldwide, including 70% of the Fortune 100 with market-leading solutions that help them to manage one of their most valuable assets: data. Learn more at www.arctera.io. Follow us on X [@arcteraio](https://twitter.com/arcteraio).



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