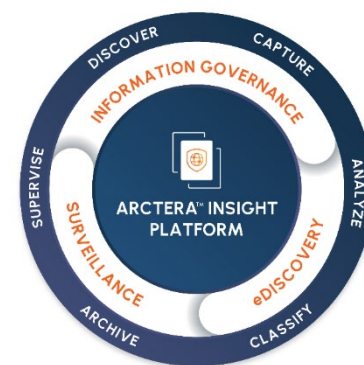


Arctera Insight™ Platform

RELEASE NOTES for October 2025
(Mahogany)



The latest release of Arctera Insight Platform is scheduled¹ to begin roll out in early October 2025. This release introduces new features for the Arctera Insight Platform.²

WHAT'S NEW

Arctera Insight eDiscovery

eDiscovery of AI: Microsoft Copilot Capture

- **Capture & Discover Microsoft Copilot Conversations:** Seamlessly capture, archive, and review AI assistant conversations to meet compliance, security, and regulatory needs.
 - Includes prompts & responses; displayed in Insight's Collaboration View
- **Extend Your Governance Reach to AI:** Apply existing communication data governance directly to AI assistant conversations, extending your compliance framework.

Upgrade to newer Azure OpenAI model

- eDiscovery Insight AI now leverages the Azure OpenAI GPT-4.1-nano model, delivering faster, more scalable insights by enabling the summarization of significantly larger document volumes.

Transcription support for email attachments

- With a transcription license, audio/video content in email attachments can now be transcribed.

Refined eDiscovery Case Status Page

- Refresh of the eDiscovery Case Status page, to include new landing page on login, remove completed cases from view, default to sort by created date, and display full case names.

Search by Message Direction

- Ability to filter and retrieve only those messages that are exchanged within the same organization.

User Access by Department

- Ability to restrict user access to data by organization's Department category (as opposed to Custodian)
- For Surveillance Users that are logging into eDiscovery and need to maintain similar restrictions.

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 Surveillance

Hotword Facets

- New Hotword facets in Review allow filtering items by individual hotword or hotword sets

Support of new content types

- Added support for surveillance of new content types: Verba, Cloud9, and Microsoft Teams audio and video. Support for search, sample and filtering.

Additional Audio/Video Support

- Audio/Video transcribed content is now supported for Intelligent Review Machine Learning
- Audio/Video transcribed content now also supports Hotwords Statistics

Transcription support for email attachments

- With a transcription license, audio/video content in email attachments can now be transcribed.

Shift Click Select Functionality in Review

- Shift+Click selection is now supported in Review for selecting multiple items in the item list grid

Limit preview on collaboration items

- In Review, the visible range of collaboration messages around the triggering message can now be limited per tenant. The default is 5 years. To change, please contact support

Improved Move to Next Logic

- New Go-to-Next toggle in the Customize section of the item list grid lets you enable or disable automatic selection of the next item after a review action

Review grid page size configurable based on tenant configuration

- In Review, the number of items shown in the Email item list grid can be configured per tenant. The default is 100 items. To change, please contact support

Auditing of login and logout

- In Audit Search, support for authentication auditing has been added, including user login and logout events

Report with collaboration items export

- Exports of collaboration items now include an export report

ItemID decryption support

- Older ItemIDs, created before July 2025, will now function with the advanced search filter. Replace the old ItemID with a newer one from the Item Preview screen

Arctera Insight Information Governance

Archiving and stubbing files in SharePoint Online to optimize storage and save costs

- Cull down files in SharePoint Online basis on file attributes like filename, last accessed, last modified, size and data classification tags.
- Export file metadata as CSV for custodian reviews.
- Archive files into Insight archive and replace with stub/ shortcuts at source.
- Prune historic versions of files after archive (configurable).
- End-user access to restore archived files from archive.
- Targeted collection of SharePoint online files for eDiscovery.
- Reclaim the storage space by archiving the latest copy and purging historic versions.

Arctera Insight Platform

Self-Service Reconciliation Report

- Reconciliation report can now be generated from the management console to validate the incoming and archived data. Improves transparency, reduces support dependency, and helps quickly spot and fix discrepancies

Storage Consumption Report

- Historical storage consumption is now available in the management console, presented through a clear, month-by-month graphical view to help you track usage trends. This transparent reporting enhances capacity planning, cost visibility, and optimization

Enhancements to Personal Archive

- Personal Archive advanced search now supports folder-specific queries, allowing users to refine results by searching within selected folders instead of the entire archive
- The new Advanced Search panel and Collaboration View in Personal Archive delivers enhanced filtering options, rich search capabilities to make finding and working with archived content more efficient.

Consolidated Usage Notification

- Configuration of notification for both User and Storage is now consolidated within the management console. By default, the notification is enabled with threshold set at 80%. The notification is delivered to all the admins and there is an option to add/remove recipients.

Enhancements to User Provisioning

- SCIM synchronization with Microsoft Entra ID now supports Azure Active Directory (AAD) Groups
- It is now possible to apply custom retention policies directly to Azure Active Directory (AAD) Groups for more flexible data governance.

Support for Exchange Server Subscription Edition

- Arctera Insight now supports Journaling from on-prem Exchange Server Subscription Edition.

Capture

- **Microsoft Copilot /NEW source/**
 - Capturing both prompts and responses. This helps with review, analysis, and improvement, and supports eDiscovery and surveillance scenarios where visibility into Copilot usage is required.
- **Zoom Phone (SMS) /NEW source/**
 - Sent and received SMS messages
 - Sent and received MMS (GIFs, images)
 - Group SMS (up to 10 recipients)
- **Department-based Filtering for Dubber Speik Recordings, collector Source configuration, supporting the following monitoring options:**
 - **Monitor all departments:** All departments will be monitored. No additional input is required.
 - Monitor all **except** selected departments: Monitoring will exclude specific departments. You can upload a CSV file listing the departments to exclude.
 - Monitor **only** selected departments: Monitoring will apply only to specified departments. You can upload a CSV file listing the departments to include

- **Zoom Chat, the following activities are now captured with the Zoom Chat collector:**
 - Edited messages
 - Deleted messages
 - Forwarded messages

Classification

- **Auto-Update for Department-Based Policies**
 - Policies based on Surveillance departments now stay automatically in sync with organizational changes, reducing manual updates and ensuring consistent coverage
- **Enhanced Analyze Feature for Policy Testing**
 - The Analyze feature provides a new option to include match details. This exports a richer, more detailed CSV for more efficient review and fine-tuning of results
- **Improved Text Extraction for Excel Files (Information Governance Feature)**
 - Along with several extraction related fixes, a new fallback custom parser boosts reliability when processing Excel files
- **Policy Updates**
 - This release supports **336 built-in policies** containing **1435 patterns** and **241 tags**
 - The following new policies are added
 - Disclaimers Policy
 - United States Minnesota Consumer Data Privacy Act (CDPA / "Minnesota Act") Policy
 - United States Maryland Online Data Privacy Act (MODPA) and Maryland Personal Information Protection Act (PIPA) Policy
 - United States Nebraska Data Privacy Act (NDPA) (LB 1074) Policy
 - The following existing Transparent Policies are updated along with the patterns:
 - Client Concerns Policy
 - Client Concerns - Communication Policy
 - Secrecy Policy
 - Off-Channel Signaling Policy

Direct Migrator

- **Archive Ownership Identification through Inbox Data**
 - Additional option for identifying archive ownership details if other methods are not applicable for some or all archives for the customer
- **Performance Improvement through Dynamic Thread Control**
 - Allows dynamic adjustment of the number of threads running for each agent, based on the EV server resource utilization. Customers will be able to perform exports and other actions in their EV environment during the migration, without compromising optimal resource utilization and migration speed