sotto

BY OGENTICAI

PUBLIC RECORDS / FIELD GUIDE

Public Records AI Review Playbook

AI proposes. Your team decides.

A practical evaluation and release guide for records teams, legal reviewers, and IT. Includes a release checklist, fictional rehearsal, and readiness worksheet.



Human review governs release. Product scope and supporting references checked November 1, 2026.

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Start with a bounded evaluation

Start with one bounded records request, a named release owner, and an agreed test packet. Use this playbook to decide whether Sotto fits the work, make reviewer decisions explicit, and verify the files that will actually leave your organization.

For records officers, clerks, legal reviewers, IT teams, and other staff responsible for preparing public records. The workflow supports evaluation; your organization remains responsible for applicable rules, exemptions, deadlines, accessibility, and release approval.

The current evaluation boundary

Sotto describes a local workflow for proposed redactions and human review. The current evaluation supports text-based PDFs on macOS 15+. Its export includes redacted PDFs, a CSV withholding index, and a release manifest. Exported PDFs are flattened images without searchable text. Confirm accessibility needs before use. [1]

Treat scans, OCR, native Office and email files, and Windows deployment as separate readiness questions, not available capabilities. Confirm the installed build, supported formats, hardware, storage, and release availability before selecting a test. [1, 2]

Use the playbook in order

Work to complete	Page
Define the request and preserve the source set	3
Confirm the environment and data handling	4
Review each decision and resolve exceptions	5
Check the exported package before release	6
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This is operational guidance, not legal advice or a compliance guarantee. AI suggestions are inputs to review, not determinations of what may be withheld or released. Product scope checked November 1, 2026.

Define the request before review

A clean intake prevents a polished export from becoming the wrong release. The request owner should settle scope, identify the authoritative source set, and separate review copies from originals before any proposed redaction is accepted.

Record the minimum intake facts

Field	Record before starting
Request identity	Request reference, received date, requester channel, scope, and responsible office.
Applicable process	Governing records regime, relevant policy, required approvals, and the person who resolves legal questions.
Timing	Applicable deadline, extension or clarification status, and any approved delivery sequence. Use the organization's own requirements.
Source inventory	Custodian, filename or record ID, page count, date range, format, and any known missing or duplicate material.
Release expectations	Recipient, delivery method, accessibility needs, intended package contents, and any required explanation or index format.

Keep source and working copies distinct

- Preserve the collected originals under the organization's retention and access rules. Review from controlled copies; do not overwrite the source set with exported files.
- Assign stable record IDs. Maintain a simple inventory that lets another reviewer match every source record to its disposition and exported version.
- Identify files with missing pages, embedded attachments, password restrictions, mixed scans, or unreliable selectable text. Route them for a separate handling decision instead of assuming import means readiness.

Assign decisions to people

The request owner controls scope and completeness. Reviewers decide the proposed and manually identified redactions. A legal or policy owner resolves unclear authority and contested judgments. IT approves the environment. A named release owner approves the final package. One person may hold several roles, but each responsibility must be explicit.

Before continuing: the request owner can explain what is in scope, where the complete source set lives, who can resolve uncertainty, and who may authorize release.

Verify the working environment

Local processing does not remove the need for endpoint, storage, and access controls. Treat this as a practical IT review, not an assurance that the application already supplies every control below.

Questions for IT and the product team

Check	Evidence to retain
Build and device fit	Installed version, macOS version, supported hardware, installation method, approved permissions, and update owner.
Input compatibility	A representative text-based PDF opens correctly, all pages render, and selectable text corresponds to the visible content.
Data locations	Where originals, working state, temporary files, exports, logs, and backups reside; who can access them; whether folders sync elsewhere.
Network behavior	What, if anything, leaves the device during setup, use, updates, diagnostics, and support. Validate the approved configuration rather than inferring it.
Access and recovery	Device security, approved accounts, backup and recovery steps, retention rules, and a way to return to the original workflow.
Export usability	A recipient can open the files, reconcile the index and manifest, and use an approved accessible delivery route.

Separate website handling from app handling

Sotto's website privacy notice applies to inquiries and downloads, not documents processed in the desktop app. Website submissions are handled through Vercel, stored in HubSpot, and sent to a private team Slack channel. Do not submit confidential records or sensitive personal information through a website form. [3]

For the application, request the deployment and data-handling information needed by your organization. Do not use the website notice as evidence of desktop-app retention, telemetry, encryption, or contract terms.

Stop conditions

- Required formats or operating systems have not been verified for the selected build.
- Source handling, storage access, or network behavior is still unclear for the intended data.
- The required accessible release cannot be produced and checked through an approved route.

If a condition is unresolved, keep the evaluation on fictional records or pause it. Document the owner and evidence needed to reopen the decision.

Make each review decision explicit

Review the original record, the proposed redaction, and the surrounding context together. A detection label is not the governing rule. The reviewer must decide what is appropriate for this request and record the reason at the level the organization requires.

Decision	Reviewer action	Evidence to retain
Confirm	Verify the exact span and the applicable basis. Confirm only the necessary content.	Record ID and page, decision, basis, and explanation.
Keep visible	Check whether the suggestion is too broad, incorrect, or not applicable in this context.	Reason for retaining the information when required by the review process.
Redact manually	Review for sensitive content the proposals missed. Check the full span and surrounding context.	Location, basis, explanation, and reviewer identity.
Escalate	Separate an unresolved legal, policy, or factual question from completed decisions.	Question, owner, affected records, and resolution.

Read beyond highlighted text

- Inspect headings, footers, tables, margins, repeated identifiers, and context that could reveal the same information indirectly.
- Check both under-redaction and over-redaction. Unnecessary masking may remove material that should remain available.
- Review similar occurrences in context. Do not assume every repeated name, number, or phrase requires the same treatment.
- Check whether the required withholding explanation is accurate and useful without reproducing the very information being withheld.

Resolve disagreements before export

Use a second reviewer or escalation owner where the organization requires one, or where the record presents a material uncertainty. Keep an external decision log if the installed workflow does not capture a field you need. Do not assume a release manifest contains every reviewer rationale.

The public workflow offers confirm, keep visible, and manual redaction actions and says undecided records stay out of the release. [1] Still reconcile omitted and unresolved records against the source inventory; a completed export is not proof that the request is complete.

Before continuing: every record has a deliberate disposition, every unresolved issue has an owner, and the release owner can tell which material is ready and which is not.

Check the files that will be released

Run this check on the actual exported package, not only the application preview. Keep the checked package separate from working files. If any file or decision changes, repeat the affected checks and renew approval.

Release package checklist

☐ Scope and completeness. Match the export to the request inventory. Account for every expected record and page, including omissions, duplicates, and separately handled material.

☐ Visual redaction. Open each exported PDF in an independent viewer. Inspect every page at a useful zoom. Check redaction placement, surrounding text, headers, footers, and repeated identifiers.

☐ Residual content. Use the approved PDF inspection method to check for recoverable text, hidden layers, comments, attachments, and unintended metadata. A black rectangle alone is not proof of removal.

☐ Readable output. Verify orientation, page order, legibility, image quality, and that content intended to remain public has not been obscured.

☐ Withholding index. Open the CSV. Reconcile its entries to the approved decisions and corresponding records. Check explanations and identifiers for accidental disclosure.

☐ Release manifest. Open it and compare its contents with the files actually in the package. Record any required package identity or integrity evidence separately if not supplied.

☐ Accessibility. Confirm the approved delivery meets the recipient's and organization's requirements. Current Sotto PDF exports are flattened images without searchable text. [1]

☐ Package hygiene. Include only approved deliverables. Exclude originals, intermediate exports, internal notes, test files, and unrelated request material.

☐ Release authority. Record the approving person, date, request reference, checked package identity, delivery destination, and any conditions of approval.

Release approval record

Request reference _____ Package version _____

Checked by _____ Check date _____

Approved by _____ Approval date _____

Delivery method and recipient _____

Exceptions or required follow through _____

Do not treat an index, manifest, successful export, or local processing claim as a compliance certificate. The named release owner approves the package under the organization's applicable process.

Rehearse with a fictional packet

Use this exercise before moving to approved real records. It tests review discipline and package checks without creating an unnecessary disclosure risk. It is a proposed test design, not a report of product performance.

Construct a small text based PDF packet

Create three fictional records: a benefits letter, a vendor invoice, and a meeting note. Label every page FICTIONAL TEST RECORD. Use invented names, reserved example.com email addresses, and non-real account tokens such as TEST-ACCOUNT-001. Do not adapt a real confidential record by changing names.

Seeded test case	Expected reviewer behavior
A test-only personal contact field	Apply the exercise rule to the exact field and explain the decision.
A clearly public office contact	Keep it visible under the exercise rule, even if suggested for masking.
The same test account token in a footer	Find and review the repeated occurrence; do not rely only on proposals.
A line of context beside a masked field	Preserve the non-sensitive context and verify readability.
One intentionally ambiguous passage	Escalate it and keep the affected record outside the approved test release until resolved.
One missing or out of order page	Catch the completeness issue during source and export reconciliation.

Set the answer key before running the test

The test owner defines fictional exercise rules, expected decisions, page inventory, and the intended contents of the release package. These are test instructions, not assertions about any jurisdiction's law. Keep the answer key separate from the reviewer's initial pass.

Run the same release check

- ☐ Every seeded case has a recorded decision and rationale.
- ☐ The ambiguous case is resolved before the test package is approved.
- ☐ The exported PDFs, CSV index, and manifest reconcile with the answer key.
- ☐ A second person can identify the exact checked package and explain the result.

Capture misses, unnecessary masking, unclear controls, manual work, and output defects. A clean fictional exercise supports the next evaluation step; it does not establish real-world detection accuracy or readiness for every records class.

Record the readiness decision

Complete this worksheet with the request, IT, review, and release owners. Use evidence, not an overall confidence score. Any unresolved requirement can block the specific evaluation or release it affects.

Organization or team _____ Date _____

Evaluation owner _____ Build _____

Proposed records class and scope _____

Mark each row Ready, Unresolved, or Not applicable. For any Not applicable response, record why. Put evidence references and open actions in the fields below.

Readiness requirement	Status	Evidence or owner
Request scope and authoritative source set defined	_____	_____
Rules and escalation owner identified	_____	_____
Named reviewers and release approver assigned	_____	_____
Device, build, inputs, and installation checked	_____	_____
Storage, access, network, and retention reviewed	_____	_____
Export and accessibility route accepted	_____	_____
Fictional rehearsal completed and issues resolved	_____	_____
Real-data authority and test scope approved	_____	_____

Open requirements

Requirement _____

Evidence needed _____

Owner _____ Recheck condition _____

Decision and approval

☐ Proceed with the defined evaluation scope.

☐ Continue on fictional records only while requirements are resolved.

☐ Pause or use the existing workflow.

Conditions and excluded formats _____

Decision owner _____ Approval date _____

Keep this worksheet with the evaluation record. Revisit it when the build, input types, data-handling configuration, rules, or release needs change. Evaluation approval does not authorize public release.

Evaluate the result before expanding

Agree the acceptance criteria before testing. Compare the same bounded work with the current process where practical. Record the sample, reviewer experience, input quality, and configuration so a result is not mistaken for a universal performance claim.

Measure	What to record
Review quality	Expected sensitive items missed, unnecessary proposed masks, reviewer corrections, and unresolved cases. Use the seeded answer key for the fictional exercise.
Release quality	Missing or incorrect files, residual-content findings, index and manifest mismatches, legibility, and accessibility issues.
Reviewer effort	Observed active review and QA time, manual fixes, and handoffs. Include export checking; do not equate proposal generation with work completed.
Repeatability	Whether a second reviewer can reconstruct the decisions and reconcile the same approved package.

Expand only when the relevant owners accept the evidence and the next scope. If requirements fail, record a remediation and retest condition or keep the existing process. Do not publish savings, accuracy, customer outcomes, or compliance claims from an unvalidated trial.

Choose the next conversation

Bring the completed readiness worksheet and a non-sensitive description of your records workflow. Ask the Sotto team to confirm the build, input formats, environment, output requirements, and unresolved questions. Keep confidential records out of inquiry forms.

Watch the public workflow or request a walkthrough

Related reading

The Sotto library includes A Compliance Officer's Guide to Evaluating AI Tools, Local-First AI Architecture, and Why Cryptographically Verifiable Audit Logs Matter. Use them for wider evaluation questions; they are not proof that every discussed control is available in the public-records app. [4]

Sources and scope notes

[1] Sotto for Public Records Current evaluation scope, workflow, export package, and flattened-output limitation. Checked November 1, 2026.

[2] Sotto team overview Overview source checked November 1, 2026. Planned availability is not treated as current support.

[3] Sotto website privacy notice Updated October 18, 2026. Covers website inquiries and downloads, not desktop-app processing.

[4] Sotto library Current 23-paper registry checked November 1, 2026.

Checklists and the fictional exercise are proposed evaluation practices, not documented application features.