⏳ BATCH_REDACTION (Redaction 1.1)

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Important links

Resource	Link	Details
Jira Epic	[DBT-41280] Redaction v.1.1 (Non-Semantic) - Jira (atlassian.net)	
Figma design concept		

Miro board	Redaction 1.1 & agile Kickoff, Visual Workspace for Innovation (miro.com)	
Feature requests		RICE scored requests

Project team (contact people)

- PM Lead: @Johannes Graf
- BE Lead:
- FE: Lead:
- QA Lead:
- Design Lead:
- CS Lead(s):

Background & Research

Product Brief

The goal of this project is to release batch redaction - the redaction of multiple documents in one process

- Users will be able to select multiple files and folders and the process DBT-47236: Batch save redacted copies DONE will directly create redacted copies
- They will be able to apply AI categories DBT-46990: Batch redaction by categories DONE and multiple search terms DBT-46991: Batch redaction by search terms DONE
- The batch redaction process creates multiple redacted copies without user confirmation of individual documents or markups
- Users are informed via DBT-47237: Reports and Notifications DONE about
  - pre-redaction report: files that can/cannot be redacted before applying redaction
  - post-redaction report: files that were not redacted due to missing matches or technical errors
  - notifications: the current process

Problem Discovery

Why are we doing this? And why should we do this now?

Single document redaction is not sufficient when users need to redact a lot of files. Especially in M&A deals, users have to redact a ton of documents. There is also a need for NPL transactions, where there is less document variety but lot of quantity.

User Personas

User Persona - Junior Analyst M&A

Name: Justus

Age: 23-30

Job: M&A Analyst/Associate

Background:
- Business/Law graduate
- 2-5 years of experience
- ambitious

Pains:
- Working long hours (up to 100 h per week)
- Repetitive workflows

Needs/Wants:
- More efficient workflow
- Getting the deal done smoothly
- Getting promoted --> reduce time spent in datarooms
- Collaboration with colleagues

Quote:
"I spent 70% of my time in the dataroom with redaction"

Fears:
- Not meeting deadlines
- Making mistakes that infringe the deal (e.g. showing wrong information to wrong person)

User Persona - M&A Team Lead

Name: Jordan

Age: 30-50

Job: M&A Manager/Director

Background:
- Business graduate
- 5+ years of experience
- ambitious

Pains:
- Acquiring new clients
- Making decision with Incomplete information
- Supervising team

Needs/Wants:
- Getting concise reports out of datarooms

Quote:
"I don't spend time in the dataroom, I usually get all my information via email"

Fears:
- Making wrong decisions

User Persona - CS Manager Drooms

Name: Bet

Age: ?

Job: CS Team Lead

Background:
- Business/Law graduate
- 8+ years of experience
- ambitious

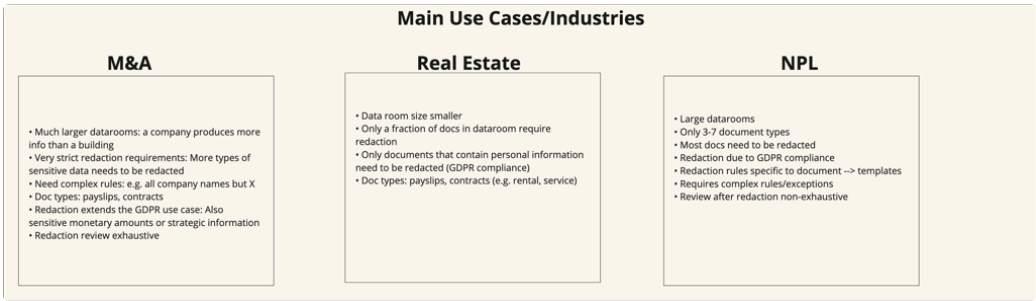
Pains:
- UI issues with Nymiz
- No way of editing redacted documents in Nymiz
- No review of uploaded documents

Needs/Wants:
- Bulk redact documents
- templates for specific docs (specifically NPL)

Quote:
"Once we have bulk redaction we can cancel the Nymiz subscription"

Fears:
- Deadlines for redaction as a service
- Missing to redact sensitive data

Industries



Solution Discovery

Goal and Value Proposition

> Like in with single-document redaction, the value proposition for batch redaction in a data room lies in its ability to streamline and enhance the security of document management processes. This feature ensures compliance with privacy regulations and confidentiality requirements, mitigating the risk of data breaches and legal liabilities.
>
> By employing batch redaction, users can efficiently hide sensitive information across multiple documents simultaneously, saving considerable time and effort compared to manual redaction and single-document redaction.

Impact

> Given that approximately 66% of our customers consider Redaction as a must-have (23%) or a nice to have (43%), redaction is very important for us. Unfortunately, our competitors were the first-movers with redaction. By offering, batch redaction, we can an advantage against our competitors and potentially regain lost customers

User Impact	**Company Impact**
This section explores how the software can address user needs, enhance efficiency, reduce costs, or provide any other positive outcomes that users are likely to encounter.	This may include factors such as increased revenue, improved operational efficiency, enhanced reputation, or market differentiation.

More efficiency on redaction process for multiple docs	More deals closed due to (batch) redaction
	USP against competitors
	More redacted documents → more revenue for Drooms

Success metric

List 3 Success metrics as draft for open discussion.

- Batch redaction adoption rate
- number of

Legacy information

REDACTION - PRODUCT-projects - Confluence (atlassian.net)

Discussion with CS/Sales/Users

Customer Success

- CS currently uses an expensive external tool (Nymiz) to handle batch redaction (specifically for NPLs)

1. Icon for draft documents not just redacted ones
    a. Also contnue redaction instrad of start redaction
2. Bulk redaction
    a. Batch apply to folder
3. Needs to be highlighted what categories were selected
4. Whitelisting
    a. Batch upload a list as excel/csv
5. Blacklisting
    a. Batch upload a list as excel/csv
6. Directly select word in doc viewer
    a. Add word to blacklist or whitelist
7. Select word to assign it to category
    a. Poisoning model
8. Excel doc
    a. Redaction excel

b. Also deleted data on excel viewer

9. Search not easy to find mistake with OCR
   a. With redaction you see OCR errors

Aimed Release

TBD

Price

Batch redaction is an individual module and can be priced individually

- Additional revenue due to more redacted pages
- Possibility to Price batch redaction separately or within a bundle of features

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Meeting summaries

Meeting minutes recorded and tracked in below pages.

Unable to render {children}. Not found: TEMPLATE_<PROJECT_NAME>_Meeting_notes.

Tasks

Project Completion Checklist

Before starting each project, make sure you have checked the below common tasks. Kick-Off Call preparation NOT RELEVANT DONE IN PROGRESS	**Research and Preparation Phase – Check all points below for completion** NOT RELEVANT DONE IN PROGRESS	**Ready for development Phase – Check all points below for completion (phase can be overlapped with previous one to speed up and be agile)** NOT RELEVANT DONE IN PROGRESS	**In Work – Check all points below for completion, this includes Rollout preparation by PMs** NOT RELEVANT DONE IN PROGRESS
☑ Create an Epic in Jira, link it to this project space	☑ Extend competitor research and complete Competitor,	☑ QA ticket estimates	☑ All BE tickets completed

	Market, Trend research Template		
☑ Set estimated Start and End dates of Epic for Research Preparation status	☑ Define clear project requirements for design and developers make use of Jobs to be done or simple user story framework	☑ QA testing ticket creation	☑ All FE Tickets completed
☑ Create Project Documentation page in Confluence	☑ Create User flows and link Miro board	☐ FE and BE Technical task creation was completed	☐ QA testing completed
☑ Add general background information	☐ Gather relevant data on time, define metrics in exchange with Developers and stakeholders	☐ FE estimated all User stories	☐ Marketing and Design briefing prepared (can be done earlier as well)
☐ Add all links, including feature requests	☐ User Journey and final flow (Lo-fi/Wireframes) finalized	☐ initial Release date estimate available	☐ Alignment and final plan for marketing activities and campaigns
☐ Complete the Product Brief Template	☐ Technical Research by developers completed	☐ Inform Help Center team enough time in advance, in case visual changes will happen that would affect their content.	☐ Feature announcement in Product announcement prepared and developed
☐ Plan a kick-off call including all features leads, CS Leads, and other relevant stakeholders (Marketing, Finance, Sales) and bring project docs and product brief as the foundation	☐ Hi-fi/final designs created	☐ have a regular status check and update exchange with stakeholders	☐ Effect on guided tours, updated or new one created, tested, code added from devs and released
☐ Plan recurring meetings with the core team and extended stakeholder team in the kickoff call	☐ Milestone meeting with all project involved people and relevant stakeholders and team leads		☐ Training material created and published in Confluence
☐ Get rough estimate by Design, BE, FE regarding project effort, feasibility and resource outlook and add it to corresponding Discovery page.	☐ All Assets created by Design		☐ Training session planned and completed with Sales and CS
☐ Create a project chat involving only key stakeholders (PM, BE, FE, QA, DES, CSM)	☐ Write all user stories		☐ Release notes prepared

	☐ Add final links to the Epic and confluence project page (miro, figma...)		☐ Help Center article created or updated with CS
	☐ QA review of the tickets		☐ Marketing and relevant Design Material for Release announcements ready
	☐ Initiated pricing strategy with finance (when applicable)		☐ Pricing strategy is ready for release, finance articles created, contract updated
	☐ Initiated legal evaluation, impact and task (when applicable)		☐ Legal adjustment are ready for release like T&C adjustments
	☐ Confident with Epic scope: Review epic for first release and evaluate value compared to effort, is MVP fine or do we need more value or iterations		☐ Website adjustment are ready for release
			☐ Included in release candidate: add <release candidate number> here
			☐ Finalize documentation and close relevant tickets (DBT, RICE)
			☐ Follow next iterations based on your priorities

Project Specific Tasks

Specific tasks you need to do in this exact project

☐ Task_1

Tasks from Meetings

⚠ Adjust “Task report” for your project. Click on “Task report”, click editing button (pencil), and from “Space(s) and page(s)” select your project/project meetings.

Task report

Looking good, no incomplete tasks.

Sub-pages

- Batch Redaction (1.1): Final Product Description