



Redacting Documents

The Drooms Redaction feature is a very convenient and time-saving way to protect sensitive information and prepare documents in compliance to company and legal privacy policies, like the European GPDR.

- The Redaction feature can be tested for free in Drooms FREE projects, and is available upon request for all Drooms TRANSACTION projects and the Drooms LIFECYCLE 'Premium' offer.
- Administrators and users with at least download and full edit permissions can black-line document text search hits, selected areas in documents, or suggested terms matching specific categories detected in documents by our AI without having to leave the data room.
- Documents can be redacted one by one as well as per batch.
- A free redaction draft version for each document can be saved, and will be saved, when a user leaves the data room while redacting a document.
- The redacted document versions are treated as new documents on their own, and have to be placed in a new location in the index.
- Redacted document versions can be reverted, i.e., discarded, as long as the original still exists, but of course also be deleted any time on their own.
- Only documents can be redacted that have been successfully converted for online display in the document viewer and have passed our OCR.

- ① Following file formats are converted for online display within the data room, and can be redacted: standard .pdf, .png, .jpg, .tif, .tiff, .gif, .txt*, .rtf, .xls**, .xlsx**, .doc., .docx, .ppt, .pptx, .ods, .odt, .odp, .htm, .html.


Portfolio PDF files, standard office files with active features like macros, signatures, etc., as well as files with any other format cannot be converted for online display, such as files with 3D content like CAD files, or music files and videos, or compressed files like .zip. These files cannot be redacted and require download permissions to be actually reviewed.

* txt files with more than 400 pages will not be converted, as they are too large to be reviewed on the platform, but spike the page count and cause customers to ask for refunds. These files cannot be redacted and require download permissions to be actually reviewed.

** Excel files without set printing areas and proper formatting, which would be converted into more than 100 pages, will also not be converted, as they will in most cases not be split up reasonably for review, but spike the page count and cause customers to ask for refunds. These files cannot be redacted and require download permissions to be actually reviewed. We recommend to define printing areas in .xls, and .xlsx files, otherwise they may not always be correctly converted, and then cannot be redacted.

- ① Redacted document versions will be billed on their own, by page/GB in corresponding Drooms TRANSACTION pricing models.

To start redacting a single document, proceed as follows:

- Start Drooms and sign in, then select the project and in projects with multiple data rooms, the data room, respectively the asset, with the documents that you want to redact.
- Select 'Data Room' in the navigation menu on the left to access the data room index, and select the document that you want to redact.
- There are two options to open the right-hand redaction panel in the document viewer to start the redaction process:
 - Option 1: With a right-click on the document, which you want to redact, open the Index context menu and select option 'Redact' to view the document and open the right-hand Redaction panel:
 - Option 2: Select the document, which you want to redact, with a double-click (the document display opens), and click on the button for 'Redaction' on the right to expand the right-hand Redaction panel directly:



- In the opened panel, click on '**Start redaction**'. The redaction feature will offer three methods for redacting document contents (from left to right):



- 'Type a term' entry field: Document text search for selecting and redacting known, specific terms per batch-read about [redacting search terms](#)
- 'Lightning bolt' button: Opens a category search allowing to select all terms matching up to 25 different data categories for redaction - read about [redacting terms matching sensitive data categories](#)
- 'Fence line' button: Allows selecting specific areas on pages for redaction, like images, recurring page headers and footers, and all sorts of content that is not searchable - read about [redacting selected document areas](#)
- Each selected item, term, area, or category can be deselected again.
- Additionally you can also select and deselect any single term for redaction by clicking on it in the document display.

To preview, save redacted documents as drafts, and finish redaction, proceed as follows:

- While selecting the necessary search terms, category terms, and areas for redaction, the resulting document can be previewed any time using the 'Preview' toggle button in the top right corner of the redaction panel. All checked and currently selected redaction items in the document will be blacked out.



- A click on 'Save as draft' in the redaction panel will save all redaction selections for that document to continue redacting the document at a later point in time. The redaction draft version of a document is user-based and only visible for the user, who saved it. To continue redaction, simply select the document and select to redact it again.
- Should a user leave the redaction process without saving the work as a draft, or finishing redaction, a prompt appears asking the user to save it as draft.
- When all necessary search terms, category terms, and areas have been selected and marked for redaction, redaction is finished with a click on 'Finish redaction' in the redaction panel, and then selecting the intended place in the data room, respectively the index pop-up window, where the redacted document version should be saved to.



- The redacted document can be saved as a new file:

- 'to' an empty index point or a document that will be replaced by the redacted file. It is not possible to replace the original document itself with the redacted version.
- 'in' a folder
- 'before' a specific document index point
- 'after' a specific document index point
- Administrators have to select, whether group permissions should be inherited from the destination parent folder, or not, while group permissions will always be inherited for documents having been redacted by regular users.
- A click on 'Save' will save the document at the desired position the index.

To redact categories in multiple documents, proceed as follows:

- Alternatively you can also select one or more folders or multiple documents in the index, open with a right click the index context menu, and select the option 'Batch redact'.
- The modal dialog 'Batch Redaction' allows to select multiple categories for redaction. Matching hits in the selected documents will be redacted accordingly, but results cannot be previewed and edited like when redacting categories for single documents.
- -> read more about [batch redacting documents](#)

To continue work on original and redacted versions of documents, proceed as follows:

- Redacted documents can be identified in the index by their own document index icon.
- The index search filter option 'Original' allows to filter for all documents, for which redacted versions have been created, and the index search filter option 'Redacted' for all redacted versions.
- Also a specific data column 'Redaction' can be selected for display in the index, indicating the original documents as 'Original', and redacted versions as 'Redacted'.



- It is possible to create different redacted versions for a document, either by starting to redact the original again, or by selecting a redacted version, opening the redaction panel, and then clicking on 'Continue redaction'. A copy of the redacted version is created with all previously existing redaction items, which then can be unchecked or removed, or further redaction items be added to.
- Redacted documents can be 'reverted to original', as long as the original document, to which they are related, still exists. Either right-click and select one or more redacted documents in the index and select the option 'Revert to original' in the index context menu, or open the respective redaction panel on the right for each and then click on the 'Revert to original' button. In both cases a confirmation dialog asks to confirm the action, as result of which the redacted documents become identical to the original document, the redaction mark-ups having been removed.

- When selecting a folder or a root node and choosing the option to 'Revert to original', a message will show, how many of the selected documents cannot be reverted (all originals and redacted files, for which no original exists anymore).
- The Index history report will report and can be filtered for index actions 'Redact' and 'Revert to original'.