Drooms Help Center

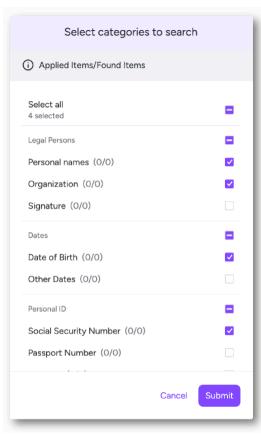# Redacting Terms Matching Sensitive Data Categories

The Drooms Redaction feature offers three powerful methods to find and select sensitive information for redaction, the second of which is the category search allowing to select all terms matching certain data categories for redaction.

- Following categories are available:
  - Legal Persons: Personal names, Organisation, Signature
  - Dates: Date of Birth, Other Dates
  - Personal ID: Social Security Number, Passport Number, Passport, Personal Tax ID
  - Organization ID: Organization Tax ID, Company Register Number, Legal Entity Identifier (LEI)
  - Banking: Monetary amounts, IBAN, Bank Account Number
  - Contact Information: Phone Number, Fax Number, Email, URL/Link
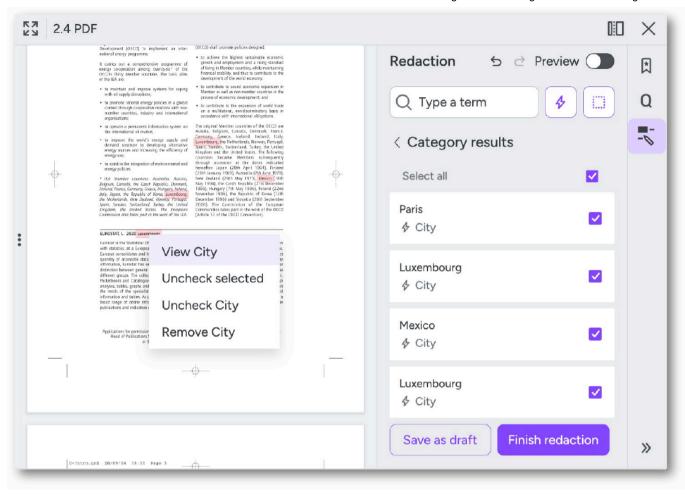 - Addresses: City, Zipcode, Street, Street Number, Suite, Floor, Other locations

To select terms matching specific search categories for redaction, proceed as follows:

- Select the document that you want to redact, and open the redaction panel on the right.

- After starting the redaction, click on the button with the 'thunderbolt' icon. A modal dialog listing all 25 available data categories will pop up.

- Select one or more categories and click on 'Submit' button. The dialog will close and all terms matching the selected categories will be marked and highlighted in the document with a red rectangle.and selected for redaction and be listed as 'Category results' in the redaction panel on the right. The list will show for each found term the respective category it matches.

- To deselect or reselect all found category matches again, uncheck the 'Select all' checkbox atop of the list on the right.

- To deselect or reselect all found matches for a certain category, either right-click on one of the respective matches, or on the three dots, that appear next to the match item in the list upon hovering the mouse over it, to open the respective redaction context menu and select the option 'Uncheck <category>', respectively 'Check <category>'.

- To remove all found matches for a certain category, either right-click on one of the respective matches, or on the three dots, that appear next to the match item in the list upon hovering the mouse over it, to open the respective redaction context menu and select the option 'Remove <category>'.

- To deselect or reselect a specific found match for a certain category, either right-click on it in the document, or on the three dots, that appear next to the match item in the list upon hovering the mouse over it, to open the respective redaction context menu and select the option 'Uncheck selected', or deselect it by unchecking it directly in the list on the right.

- To review only the found matches for a certain category, either right-click on one of the respective matches in the document, or on the three dots, that appear next to the match item in the list upon hovering the mouse over it, to open the respective redaction context menu and select the option 'Show <category>'. Only the corresponding category matches will be shown in the redaction panel list on the right, to either deselect or reselect all of them by unchecking or checking the 'Select all' check box, or using the redaction context menus or check boxes in the list to the right to otherwise uncheck or check any of them, or to remove them all.

  - ⓘ Once having made use of the 'Show <category' option, you can return in the redaction panel only to the overall, mixed list of marked redaction items, including document search terms, selected areas, and other category matches. To review the matches for other categories, select a respective match in the document, or in the list, and again use the 'Show <category> option.

- Click on 'Category results' or the category name on top of the list on the right to return to the overall list, where all types of redaction results are displayed.

  - ⓘ When returning to the overall list, where all types of redaction results are displayed, marked, but unchecked category results will not be removed.

- Once you have selected (checked) the correct category matches for redaction, you can consecutively search for more category matches, or further document search terms to add them to the list and select them for redaction, or select specific areas for redaction.

- Click on the 'left arrow' directly underneath the search entry field to view the overall list with all so far selected search hits, selected terms matching specific categories, and selected areas.

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*

https://drooms.zohodesk.eu/portal/en/kb/articles/redacting-terms-matching-sensitive-data-categories