🤖 Auto Naming

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Search

Project team (contact people)

- PM Lead: @Johannes Graf
- BE Lead:
- FE Lead:
- KMS Lead:
- Semantic Lead:
- QA Lead:
- Design Lead:
- CS Lead:

Summary

The **Auto Naming** feature helps users quickly assign consistent and meaningful names to documents. Instead of relying on manual renaming, the system automatically generates name suggestions based on document content and metadata. This ensures clarity, prevents mislabeling, and speeds up the review process across large datarooms.

User Research

Problem Statement

In due diligence and asset management processes, users often need to upload and structure thousands of documents. Document names are frequently incomplete, inconsistent, or in different languages. This leads to inefficiencies in navigation and increases the risk of misidentification.

Key Findings

- **Manual burden:** Users reported spending significant time renaming and standardizing documents, especially when preparing large datarooms.
- **Inconsistency:** Inconsistent naming conventions across contributors caused confusion, especially when multiple external parties were involved.
- **Searchability:** Poorly named documents made searching and indexing harder, slowing down reviews.
- **Multilingual challenges:** Teams working across different geographies struggled with document names in multiple languages.

User Needs

- **Automation:** Users wanted an intelligent system to take over repetitive renaming tasks.
- **Consistency:** Ensure names follow standard templates to align with internal or regulatory requirements.
- **Flexibility:** Allow customization of templates to adapt to deal-specific naming conventions.
- **Transparency:** Retain the ability to override or manually edit suggestions.

How Auto Naming Addresses Them

- Automates repetitive naming tasks, reducing manual effort.
- Applies consistent templates to all documents, improving navigation and search.
- Works across multiple languages, enabling global teams to collaborate more effectively.
- Gives users control to confirm, reject, or adjust suggestions.

Features

- **Suggested Names:** Each uploaded document receives an automatically generated name suggestion that the user can confirm or reject.

- **Template Selection:** Users can choose from different naming templates based on available data points (e.g., document type, date, contract party).
- **Multilingual Support:** Auto Naming works across all languages, ensuring consistent naming in international projects.
- **Customization:** Admins can configure which templates are available to users to match corporate standards or project-specific requirements.

Workflows

Upload a document into the dataroom.

- The system analyzes its content and metadata.
- Suggested names are displayed to the user.
- The user can:
  - Accept the proposed name.
  - Select an alternative template-based suggestion.
  - Reject the suggestion and enter a custom name.
- Once confirmed, the new name is applied consistently in the index.

Technical Implementation

- **Extraction Layer**
  - The document text and metadata (title, creation date, author, file properties) are processed upon upload.
  - NLP models identify entities such as *document type*, *date*, *contract party*, etc.
- **Template Engine**
  - A template engine maps extracted entities into structured naming formats (configured in JSON/YAML).
  - Example:

```
{
  "templates": [
    "{contract_type} - {party} - {date}",
    "{party}_{contract_type}_{year}"
  ]
}

```

- **Multilingual Support**
  - Entity recognition is language-agnostic, using multilingual NLP models (based on transformer architectures).

    - Normalization ensures terms like “lease”, “Mietvertrag”, and “contrat de bail” are mapped to the same entity.
- **Confidence Scoring**
    - Each extracted entity is scored (0–1).
    - If confidence is below a threshold (e.g., 0.7), the system either leaves the field blank or prompts the user to confirm.
- **User Interaction**
    - Suggested names are shown in the document index panel.
    - Users can accept, reject, or edit suggestions inline.
- **Audit & Logging**
    - All renaming actions are logged for compliance.
    - Original file names are preserved in the audit trail.

FAQs

1. **How does Auto Naming generate suggested names?**

Auto Naming analyzes the document’s text and metadata using natural language processing (NLP) and machine learning models. It extracts relevant attributes (e.g., contract type, parties involved, date) and maps them to pre-defined templates.

2. **Can I choose between different naming formats?**

Yes, users can select from multiple suggested templates. For example:

- *Template A:* `[Contract Type] - [Party] - [Date]`
- *Template B:* `[Party]_[Contract Type]_[Year]`

3. **Does Auto Naming support multiple languages?**

Yes. The feature works across all languages supported in the Drooms platform. It can extract and normalize key terms (e.g., “lease” vs. “Mietvertrag”) consistently.

4. **Can I override the suggested name?**

Yes, you can always reject a suggestion and input a custom name manually.

5. **Who defines the naming templates?**

Templates are pre-configured by Drooms but can also be customized by project admins to match corporate or deal-specific naming conventions.

6. **What happens if Auto Naming cannot identify the document type?**

If confidence is low, the system provides a fallback suggestion (e.g., “Document_2025_01”) and prompts the user to enter a name manually.

7. **Is the feature mandatory?**

No, Auto Naming is optional. Users can always bypass suggestions and name documents themselves.

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, Market, Trend research Template	☑ QA ticket estimates	☑ All BE tickets completed
☑ 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