



AI ASSISTANT_1.1

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- Troubleshooting & Best Practices
- Auditing, Transparency & Compliance Reporting
- Future & Roadmap (FAQ-style)
- Meeting summaries
- Tasks
 - Project Completion Checklist
 - Project Specific Tasks
 - Tasks from Meetings
- Sub-pages

Important links

Resource	Link	Details
Jira Epic	↗ DBT-54819: AI assist ant 1.1 DONE	
Enablement	English: AI Assistant Awareness Training.pptx Training Data Room: ↗ Drooms Data Room A ccess Quiz: ↗ Please fill out t his form	
Meeting Notes	↗ AI Assistant ↗ Weekly Meeting Not es	
Launch Date	07.03.2025	
Marketing Release Plan	↗ Release Plan - AI As sistant	

Project team (contact people)

- PM Lead: [@Johannes Graf](#)
- BE Lead:

- FE Lead:
- KMS Lead:
- Semantic Lead:
- QA Lead:
- Design Lead:
- CS Lead:

Summary

The Drooms AI Assistant is designed to streamline the due diligence process, reducing manual effort by up to 50%. It allows users to chat with **an unlimited number of documents by selecting the root folder of a dataroom**. The AI Assistant can retrieve information via natural language, identify contractual risks, summarise documents, or explain complex terms.

Users can now also leverage the Assistant's **internet knowledge access**, combining information from both internal documents and trusted external sources.

Responses remain transparent: the Assistant highlights reference text snippets in the document viewer and links to its sources, enabling users to validate answers. Chats are stored in a chat history, allowing easy retrieval.

Access model: The AI Assistant is now available with limited use for free users. **Unlimited use is reserved for paying customers.**

Security remains a key USP. Integrated into the secure Drooms platform, there's no reliance on external providers when processing user requests. Unlike public platforms (e.g., ChatGPT), **customer data is never used to train the Assistant.**

User Research

Problem Statement

Data rooms play a crucial role in managing sensitive information, particularly during due diligence, mergers and acquisitions, and real estate transactions. However, as the volume and complexity of documents grow (+20% data volume on our platform from 2023 to 2024) manually reviewing and extracting key insights becomes increasingly time-consuming, labor-intensive, and prone to human error.

Information overload: Manually reading or searching documents for relevant information is time-consuming and causes cognitive overload. The AI assistant helps you to retrieve relevant information more efficiently.

Accessibility: the Incumbent search engine is syntactic and only works when searching for the right keywords (searching for "lease" will not provide results for "rent". The assistant relies on semantic search so that both terms will yield good results.

Complex document understanding: Legal, financial, and technical documents in real estate and M&A transactions can be difficult to understand. The AI assistant helps users by breaking down complex jargon, explaining clauses, and providing context, making documents more accessible to non-experts.

Remove language barriers: Currently, the users cannot search within documents in foreign languages they don't understand (Drooms translation is not searchable). The Drooms AI assistant is language-agnostic, so the user can ask a question in German even though the document is French.

Security and Compliance Concerns: Standard AI tools may pose risks when handling sensitive or confidential data. By being embedded in a secure data room environment, the AI assistant ensures that conversations and document interactions are fully compliant with legal and regulatory requirements, protecting sensitive information

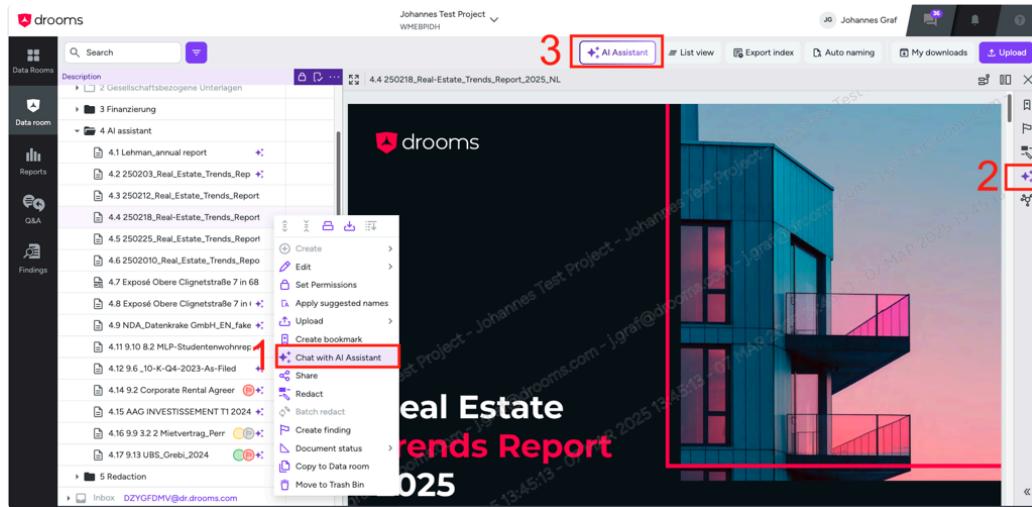
Why use AI?

- **Increased Data Volume:** Modern due diligence processes involve a significantly higher volume of data, often spread across multiple files, formats, and languages which leads to information overload.
- **Emerging AI Technologies:** The rise of advanced AI models (LLMs) provides new opportunities to automate and enhance information retrieval, ensuring faster and more accurate document reviews.
- **Data Security Concerns:** Existing AI assistants like Chat GPT are not suitable for analysing sensitive data and our clients are often not allowed to use them for compliance reasons.
- **Competitive Advantage:** Incorporating an AI-powered assistant into Drooms gives our platform a cutting-edge feature that improves user experience. As we are a first mover, it provides a competitive advantage over traditional data room solutions.
- **User Demand for Efficiency:** Clients are increasingly asking for tools that reduce the manual burden of navigating extensive documentation. Automation of such tasks addresses this pain point.

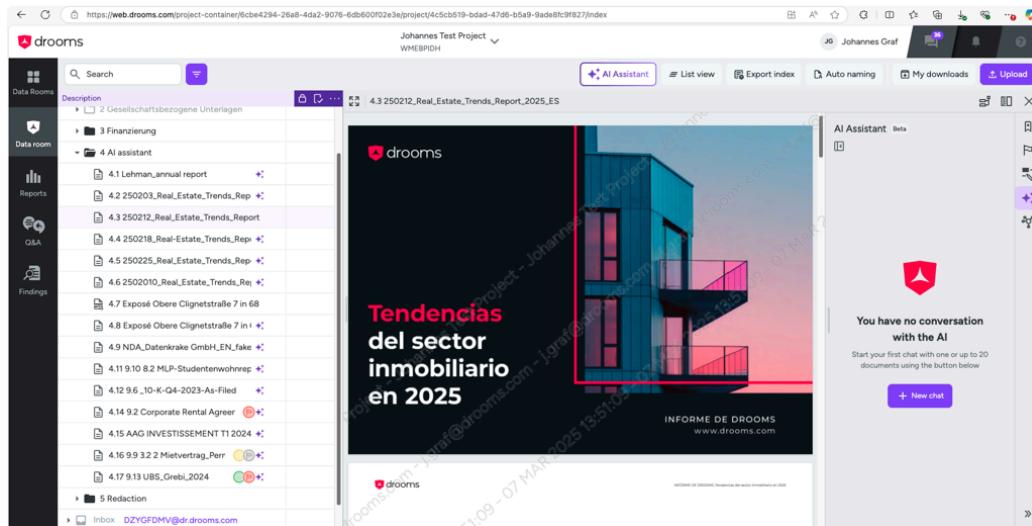
Features

Initiating a single document chat

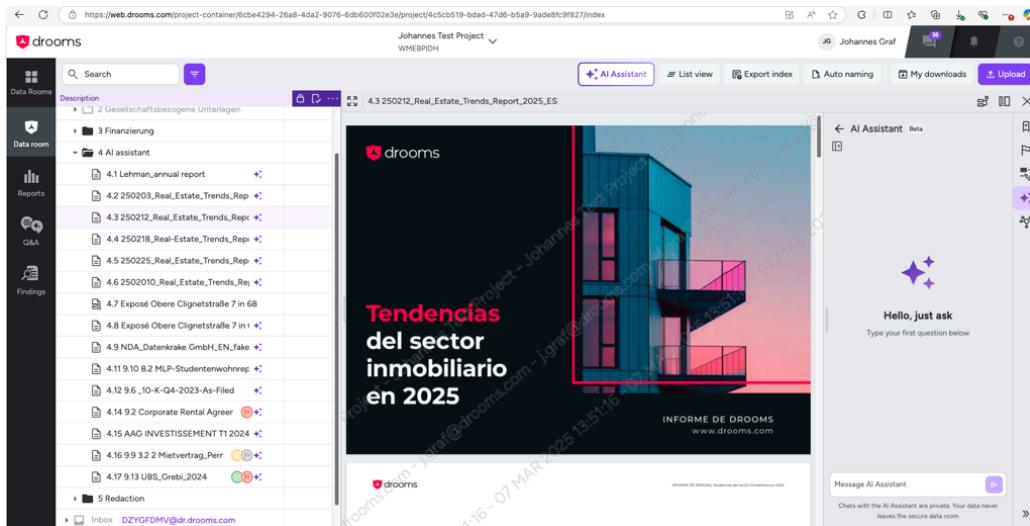
Users can start a access the AI Assistant by 1. selecting the document and clicking on the “Chat with AI Assistant” icon 2. clicking on the “three star” icon in the right side panel or 3. clicking the AI Assistant button on the top bar.



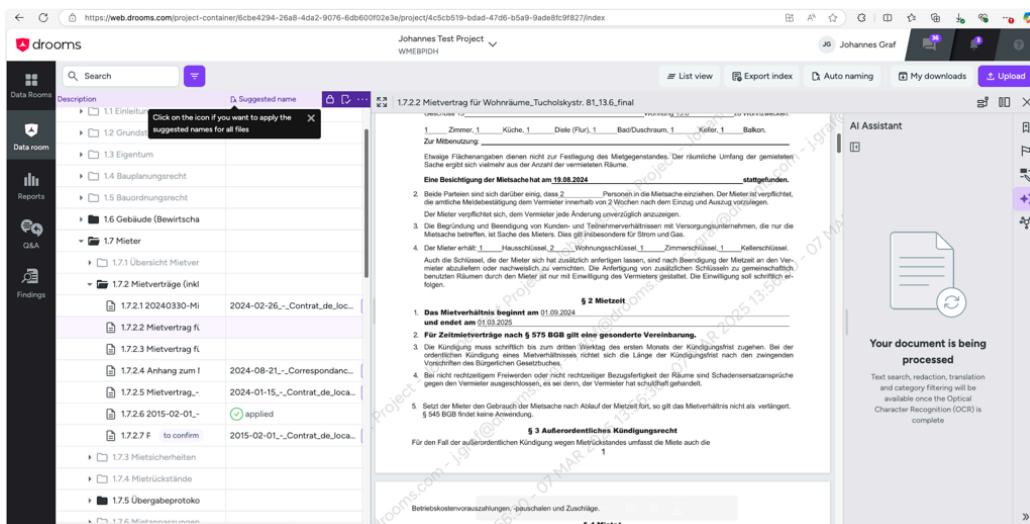
When the document has no existing chats, the users is asked to create a new chat pressing the purple “+ new chat” button.



When the user has clicked on the “+ new chat” button, they can start typing the first message in the text field “Message AI Assistant”. Questions can be confirmed either by “Enter” or clicking on the “send” button.



When a document is freshly uploaded, it first needs to be processed before it can be chatted with.

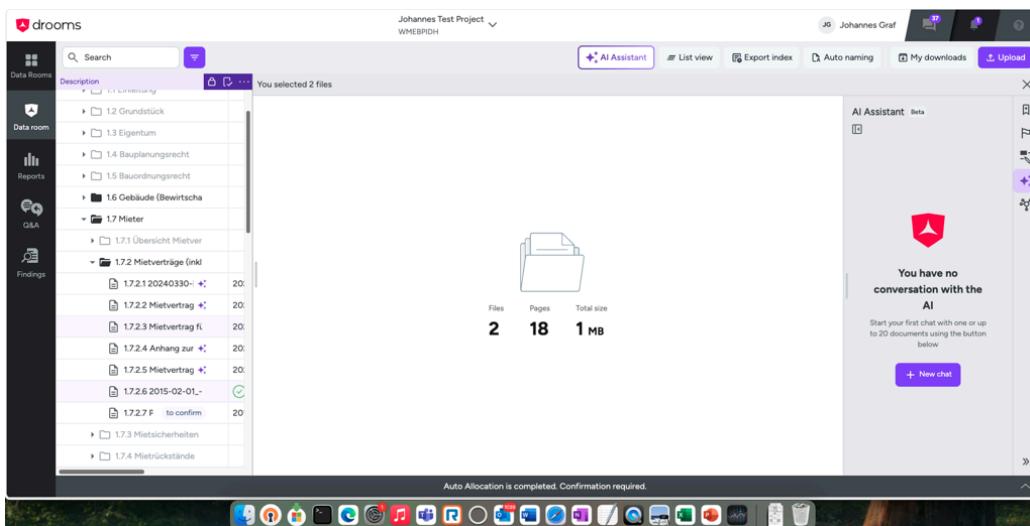


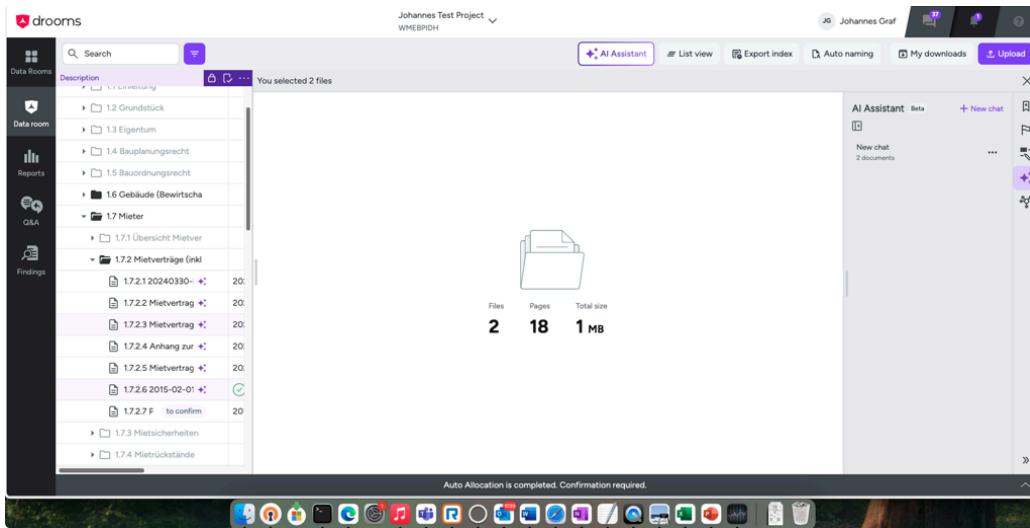
When the users send a prompt (a question) to the AI Assistant, it will search through the document to identify relevant sources. Based on the information from the document, it will generate an answer. Here, it found the relevant answer on page 4.



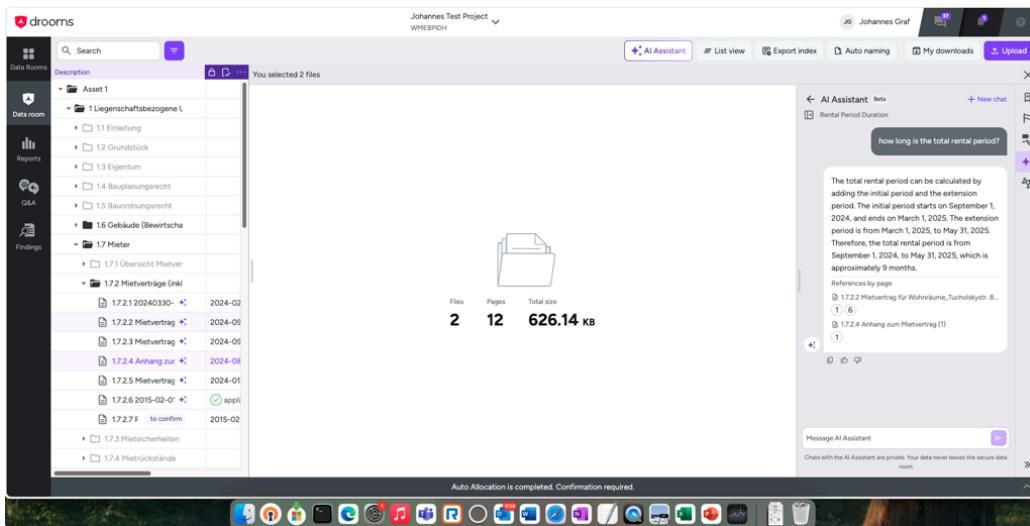
Initiating a multi-document chat

To prepare a chat with multiple documents, the user needs to select the documents in the index (holding control in windows or command with a Macbook) and then proceed with the “+ new chat” button in the middle of the AI Assistant (if this is the first chat with these documents) or the top right “+ new chat” button (when there are existing chats already).





Now you can ask the Assistant by typing a message in text field “Message AI Assistant”. The AI Assistant will now search through all selected documents (in this example two) to identify relevant sources. Based on the information from the document, it will generate an answer. You can select up to 20 documents for one chat. New documents cannot be added to existing chats, you need to start a new chat to consider a third document for example.



Johannes Test Project WMEBPOH

17.2.2 Mietvertrag für Wohnräume, Tucholskystr. 81, 136, final

3. Die Begründung und Beendigung von Kunden- und Teilnehmerverhältnissen mit Versorgungsunternehmen, die die Miete betreffen, ist Sache des Mieters. Dies gilt insbesondere für Strom und Gas.

4. Der Mieter erhält 1 Hausschlüssel, 2 Wohnungsschlüssel, 1 Zimmerschlüssel, 1 Kellerschlüssel.

Auch die Schlüssel, der der Mieter sich zusätzlich anfertigen lassen, sind nach Beendigung der Mietzeit an den Vermieter zurückzugeben oder nachweisen zu verpflichten. Die Übergabe von zusätzlichen Schlüsseln zu gemeinschaftlich benutzten Räumen durch den Mieter ist nur mit Einwilligung des Vermieters gestattet. Die Einwilligung soll schriftlich erfolgen.

§ 2 Mietzeit

1. Das Mietverhältnis beginnt am 01.09.2024 und endet am 01.03.2025.

2. Für Zeitmietverträge nach § 575 BGB gilt eine gesonderte Vereinbarung.

3. Die Kündigung muss schriftlich bis zum dritten Werktag des ersten Monats der Kündigungsfrist zugehen. Bei der ordentlichen Kündigung eines Mietverhältnisses richtet sich die Länge der Kündigungsfrist nach den zwingenden Vorschriften.

4. Bei nicht rechtzeitiger Freiwerdung oder nicht rechtzeitiger Bezugserfülligkeit der Räume sind Schadensersatzansprüche gegen den Vermieter ausgeschlossen, es sei denn, der Vermieter hat schuldhaft gehandelt.

5. Setzt der Mieter den Gebrauch der Mietwohnung nach Ablauf der Mietzeit fort, so gilt das Mietverhältnis nicht als verlängert. § 545 BGB findet keine Anwendung.

§ 3 Außerordentliches Kündigungsrecht

Für den Fall der außerordentlichen Kündigung wegen Mietrückstandes umfasst die Miete auch die

1 Betriebskostenvorauszahlungen, -pauschalen und Zuschläge.

1. a) Die Netto-Miete beträgt monatlich 950 € in Worten nach Hundertfünfzig EURO.
Betragsstellen im Sinne von § 556 Abs. 1 BGB (definiert durch die Betriebskostenverordnung in ihrer jeweils geltenden Fassung) sind, in der obigen Miete nicht enthalten und daher gesondert zu

Auto Allocation is completed. Confirmation required.

AI Assistant Beta

Rental Period Duration

how long is the total rental period?

The total rental period can be calculated by adding the initial period and the extension period. The initial period starts on September 1, 2024, and ends on March 1, 2025. The extension period is from March 1, 2025, to May 31, 2025. Therefore, the total rental period is from September 1, 2024, to May 31, 2025, which is approximately 9 months.

References by page

- 17.2.2 Mietvertrag für Wohnräume, Tucholskystr. 81, 136, final
- 17.2.4 Anhang zum Mietvertrag (1)

Message AI Assistant

Chats with the AI Assistant are private. Your data never leaves the secure data room.

Johannes Test Project WMEBPOH

17.2.4 Anhang zum Mietvertrag (1)

Ihr Ratgeber vereinbart hiermit, den bestehenden Mietvertrag vom 21.08.2024 für die Wohnung in der Tucholskystr. 81, 60598 Frankfurt am Main, Wohnung 13.6, über den 01.03.2025 hinweg bis zum 31.05.2025 zu verlängern.

2. Vertragsbedingungen

Alle weiteren Bestimmungen des ursprünglichen Mietvertrags bleiben unverändert und behalten ihre Gültigkeit.

3. Mietzahlung

Die Miete bleibt unverändert bei 950 € monatlich zugleich 100 € Betriebskostenvorauszahlung, somit insgesamt 1.050 € monatlich. Die Zahlung erfolgt weiterhin gemäß den im ursprünglichen Mietvertrag vereinbarten Bedingungen.

4. Schlüssel und Nutzung der Wohnung

Grütt Calissi bleibt als alleinige Mieterin verantwortlich für die Nutzung der Wohnung und bestätigt, dass sie alle Verpflichtungen aus dem ursprünglichen Mietvertrag übernimmt.

5. Kündigung

Die Kündigungsfrist bleibt gemäß § 2 des ursprünglichen Mietvertrags bestehen. Eine ordentliche Kündigung ist bis zum dritten Werktag eines Monats zum Monatsende möglich.

6. Sonstige Bestimmungen

Alle anderen im Mietvertrag vom 21.08.2024 getroffenen Vereinbarungen bleiben unverändert bestehen.

Ort, Datum: Frankfurt, 13.02.2025

Unterschriften:



Johannes Graf (Vermieter)

Auto Allocation is completed. Confirmation required.

AI Assistant Beta

Rental Period Duration

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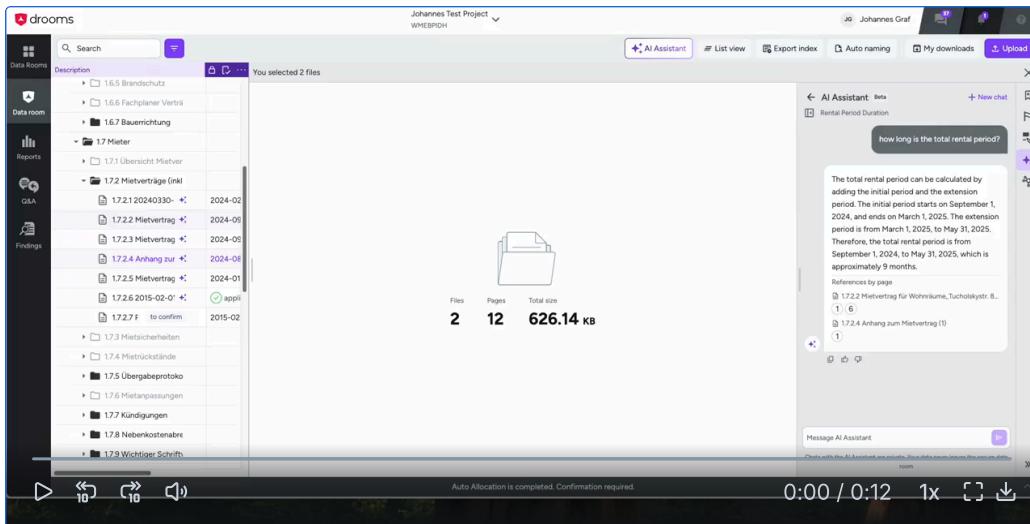
- 17.2.2 Mietvertrag für Wohnräume, Tucholskystr. 81, 136, final
- 17.2.4 Anhang zum Mietvertrag (1)

Message AI Assistant

Chats with the AI Assistant are private. Your data never leaves the secure data room.

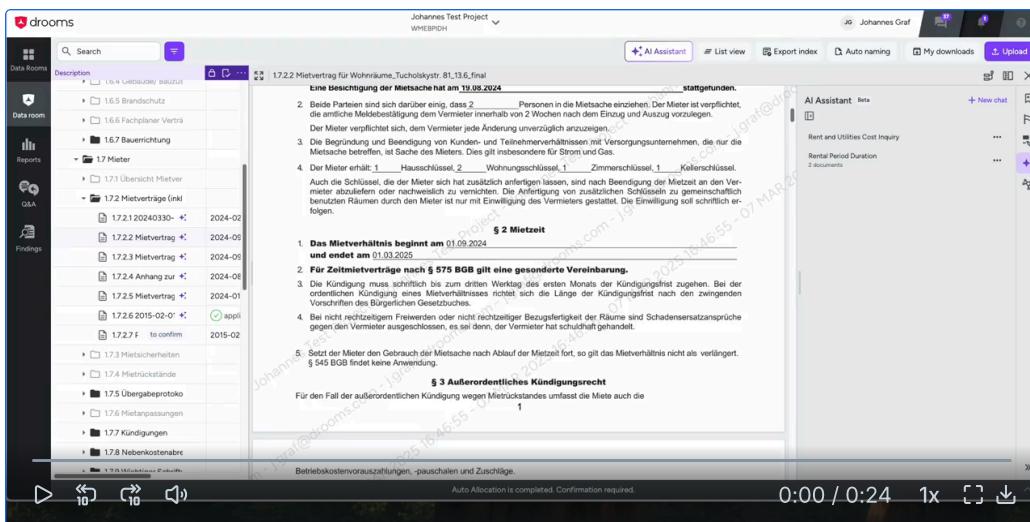
Referencing and highlights

The AI Assistant highlights all parts of the document(s) it used to generate the answer indicated with the purple fields in the document viewer. The bubble below the answer show the references, and the numbers indicate the page. If there are multiple documents, the Assistant will also show the document names and index points. Clicking on the bubbles links to the extracted text snippet and document.

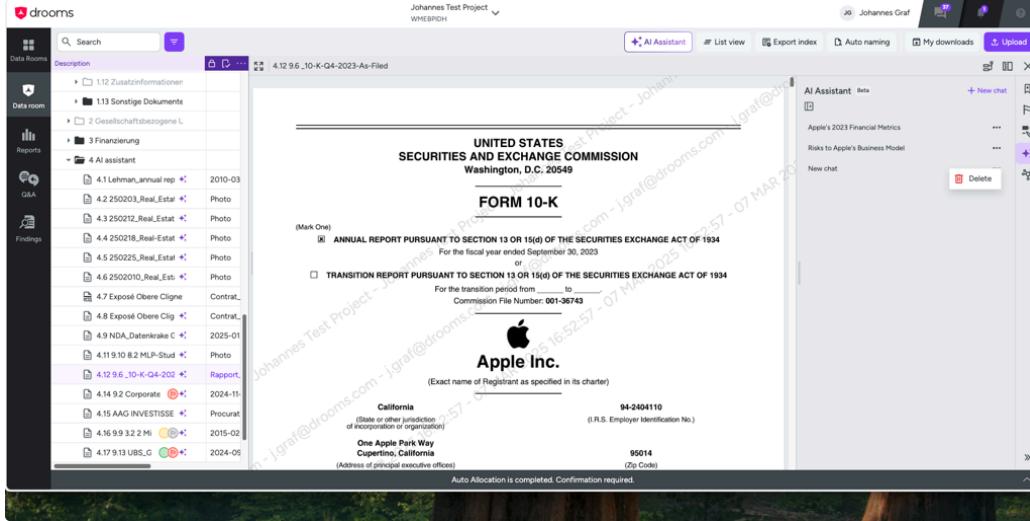


Chat history

The chat history keeps track of all chats connected to the selected document. The titles are AI-generated and depend on the conversation history, adding new questions to an existing chat can change the title. Multi-document chats can be distinguished by the shown number of documents (e.g. 2 documents). Empty chats are named “New chat”.

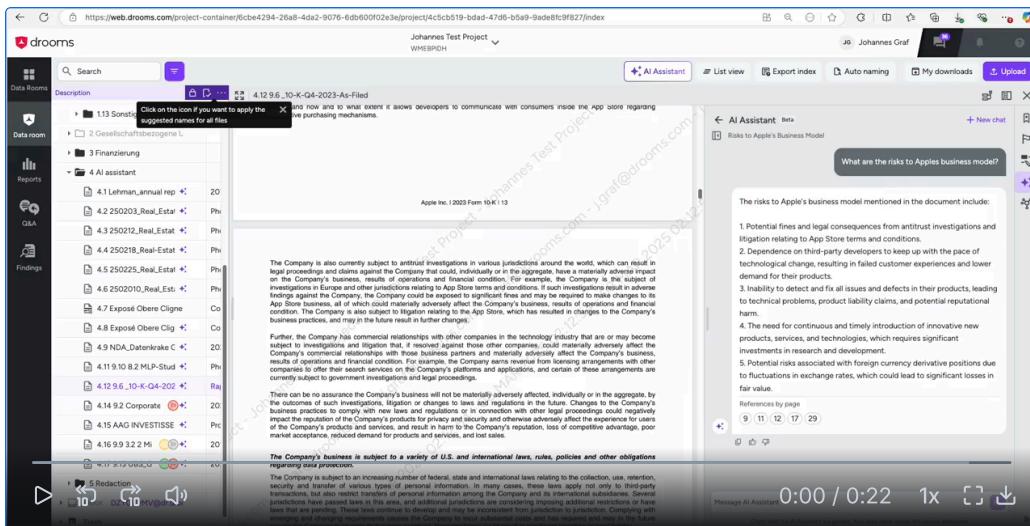


Users can delete the chats clicking on the three dots and the “Delete” button. In the future, users will also be able to rename their chats themselves.



Copying, Upvotes and Downvotes

Users can upvote or downvote the answers by the AI Assistant to provide feedback. We will use the feedback to improve the AI Assistant in the future, by seeing which question types perform well and which do not. The answer can also be copied and share via the Drooms Chat or pasted elsewhere.



Use Cases

User Personas

1. Real Estate Transaction Manager

- Role:** Manages commercial real estate transactions, overseeing the acquisition and sale of properties. This includes coordinating due diligence, negotiating contracts, and ensuring all legal and financial documentation is complete.
- Needs:** Requires quick access to large volumes of property-related documents, including contracts, title deeds, vendor agreements, and compliance reports. Must identify key

information that could impact the transaction, such as unfavourable terms or hidden liabilities.

- **Pain Points:** Manually reviewing long and complex documents is time-consuming, prone to missing critical details, and requires cross-referencing multiple documents (e.g., financial statements, environmental assessments, vendor contracts).
- **How the AI Assistant Helps:** The AI assistant automates the extraction of relevant information from property documents, highlights potential risks (e.g., renewal clauses or termination rights), and provides precise references to specific document sections. This significantly reduces the time spent on manual searches and ensures that no critical details are overlooked during due diligence.

2. M&A Analyst

- **Role:** Works in mergers and acquisitions, responsible for analysing financial statements, contracts, and reports.
- **Needs:** Requires fast, reliable access to key information across documents.
- **Pain Points:** Time-consuming document review, missed details, and high volume of data.
- **How the AI Assistant Helps:** Automates document search, provides context-aware answers, and extract financial metrics from large reports , reducing the time spent on manual search and minimising errors.

3. Legal Advisor

- **Role:** Provides legal oversight during due diligence or contract reviews.
- **Needs:** Requires detailed, precise information, often relating to specific clauses, legal terms, or obligations in contracts.
- **Pain Points:** Manually identifying relevant sections in dense legal documents is laborious and prone to misinterpretation.
- **How the AI Assistant Helps:** Provides references to specific text tokens and offers detailed legal insights based on previous queries, ensuring transparency and accuracy.

4. Asset Manager

- **Role:** Manages portfolios of assets, including real estate and financial investments, ensuring returns and compliance.
- **Pain Point:** Information like rent roll is scattered across multiple documents.
- **Need:** Quickly access and analyse financial, regulatory, and property documentation and ensure it aligns with other data sources (ERP systems)
- **How the AI Assistant Helps:** Retrieve key data, highlights compliance gaps, and provides actionable insights.

5. Compliance Officer

- **Role:** Ensures adherence to regulations, policies, and standards during transactions.
- **Pain Point:** Time-consuming manual cross-referencing of documents to check for regulatory compliance.
- **Need:** Identify and validate compliance terms efficiently.
- **How the AI Assistant Helps:** Summarizes and flags non-compliant terms across multiple documents.

6. Financial Auditor

- **Role:** Reviews financial records and statements to ensure accuracy and compliance.
- **Pain Point:** Manually identifying discrepancies or irregularities in financial data is error-prone.
- **Need:** Detect inconsistencies in financial reports across documents.
- **How the AI Assistant Helps:** Highlights anomalies and provides summaries of key financial metrics.

Industries

1. Finance and Investment

- **Use Case:** Mergers and Acquisitions (M&A), private equity transactions, venture capital due diligence.
- **Need for AI:** High-volume document reviews related to financial statements, risk assessments, and investment opportunities.

2. Legal Services

- **Use Case:** Contract review, legal due diligence, litigation preparation.
- **Need for AI:** Automating contract analysis, identifying key clauses, and ensuring the accuracy of legal documentation.

3. Real Estate

- **Use Case:** Property transactions, real estate due diligence.
- **Need for AI:** Extracting data from property contracts, regulatory documents, or financial statements related to asset evaluations.

4. Healthcare

- **Use Case:** Mergers, acquisitions, or partnerships between healthcare providers.
- **Need for AI:** Reviewing compliance documents, contracts, and regulatory requirements for healthcare laws.

5. Energy and Utilities

- **Use Case:** Mergers, acquisitions, or regulatory compliance in energy projects.

- **Need for AI:** Processing complex legal and environmental documentation, extracting critical regulatory clauses.

Use Cases

1. Contract Analysis

- **Scenario:**

A legal advisor needs to review and verify contract terms during a corporate transaction, ensuring all obligations and risks are identified.

- **Pain Points:**

- Contracts often contain complex language, making it hard to pinpoint specific clauses and risks.
- Manually comparing contract terms across multiple documents is time-consuming and error-prone.

- **How the AI Assistant Helps:**

The AI assistant extracts specific clauses, highlights potential risks, and cross-references similar terms across other documents. This ensures thorough contract review, reducing manual effort while minimizing the risk of missing critical obligations or inconsistencies.

2. Vendor Due Diligence

- **Scenario:**

A transaction manager is reviewing vendor contracts during a property acquisition to assess risks like service-level agreements and renewal clauses.

- **Pain Points:**

- Vendor contracts are lengthy and complex, with critical details often hidden in legal jargon.
- Manually reviewing multiple documents increases the risk of missing important terms.

- **How the AI Assistant Helps:**

The AI assistant extracts key contract details like termination rights and auto-renewal clauses, highlighting risks. This streamlines the review process, reduces manual effort, and ensures no crucial details are overlooked.

3. Buy-side Due Diligence Document Review

- **Scenario:**

An M&A analyst is tasked with reviewing thousands of pages of financial reports, contracts, and company records during a corporate transaction.

- **Pain Points:**

- Large volumes of documents make it difficult to manually find and interpret key financial data.

- Important information can be overlooked, increasing the risk of missing critical details.

- **How the AI Assistant Helps:**

The AI assistant quickly identifies and extracts relevant sections, highlights key financial terms, and provides explanations. This reduces the time spent on manual searches and ensures no critical details are missed, improving the accuracy of due diligence.

4. ESG (Environmental, Social, Governance) Analysis

- **Scenario:**

An asset manager is conducting an ESG analysis for a property portfolio, reviewing documents to ensure compliance with sustainability and governance standards.

- **Pain Points:**

- ESG data is scattered across various documents, making it difficult to gather and cross-reference.
- Ensuring compliance with evolving sustainability standards is time-consuming and prone to errors.

- **How the AI Assistant Helps:**

The AI assistant retrieves and summarises ESG-related information from documents, highlighting areas like energy efficiency and governance gaps. It identifies compliance issues and provides quick access to relevant sections, simplifying ESG reporting and ensuring up-to-date compliance.

Competitors

Intralinks is the only competitor that advertises a similar tool. However, the AI Assistant from IL only works in English and with PDFs.

Pricing & Availability

- **Free users:** Limited access.
- **Paying customers:** Unlimited access to all AI Assistant features.

Security & Compliance

- **AI Assistant is built within the secure Drooms data room environment.**
- No data leaves the platform, ensuring compliance with **EU data protection regulations**.
- No AI training on documents inside the dataroom, therefore no risk of leaking confidential information to third parties via knowledge spilling
- **Value:** Eliminates security concerns associated with third-party AI services.

Success metrics

1. User Engagement

- **Metric:** Number of queries made by users within the AI assistant.
- **Target:** A steady increase in user interactions with the assistant, reflecting that users are finding the tool valuable.

2. Time Saved on Document Review

- **Metric:** Average time taken to retrieve relevant information from documents compared to manual processes.
- **Target:** Reduction in document review times by 30–50% due to AI-enhanced information retrieval.

3. Answer Accuracy and User Satisfaction

- **Metric:** Percentage of correct responses generated by the AI, based on user feedback ratings (thumbs up/thumbs down).
- **Target:** Maintain a high user satisfaction score (above 80%) with the accuracy of the assistant's answers.

FAQs

General / Functionality

Q1 — What does the AI Assistant do?

It lets users ask natural-language questions about documents stored in a dataroom and receive AI-generated answers that reference the exact document snippets and (when relevant) external internet sources. Use cases include summarisation, contract clause extraction, risk flagging, multilingual question answering and cross-document comparisons.

Q2 — How many documents can I chat with at once?

You can chat with an unlimited number of documents by selecting a folder (including the dataroom root) or selecting any set of documents. There is no hard per-chat document cap for customers with the appropriate plan.

Q3 — Can I add documents to an existing chat?

No — once a chat is created its document set is fixed. To include additional documents you must create a new chat containing the desired set.

Q4 — How do I start a chat?

You can start a chat from a document (chat icon, side panel star, or top-bar Assistant button), by

selecting multiple documents in the index and pressing **+ New chat**, or by selecting a folder/root to include all documents under it.

Q5 — What file types are supported?

Common document types are supported, including PDFs (including scanned PDFs with OCR), DOCX, PPTX, XLSX, and plain text formats. Images containing text are supported if OCR is enabled. (Availability depends on your dataroom processing settings.)

Q6 — How does the Assistant show sources?

Answers include highlighted text snippets in the document viewer. For multi-document answers the UI shows document names, index points, and page numbers; clicking a reference navigates to the exact excerpt.

Internet Knowledge & Sources

Q7 — Can the Assistant use the internet?

Yes — when enabled, the Assistant may augment answers with information from the internet (trusted sources), combining internal document evidence with external context.

Q8 — Which internet sources are used?

Internet retrieval uses a curated set of trusted sources and domain allowlists managed by Drooms. Results include source metadata (title, URL, timestamp) and are shown alongside document references so users can validate the external content.

Q9 — Are external web queries sent with my documents?

No. Document contents are never uploaded to third-party web services. The web retrieval module processes the user's query (not raw documents) against the external index and returns candidate sources; the Assistant then composes answers combining internal evidence and retrieved web snippets.

Q10 — Can admins disable internet access?

Yes — internet retrieval is an optional capability and can be disabled at the tenant or dataroom level by administrators. When disabled, the Assistant answers only from internal documents.

Q11 — How fresh are web-sourced answers?

Each web citation includes a timestamp; freshness depends on the external source. The Assistant surfaces the source date so users can assess currency.

Q12 — How are web sources validated for trustworthiness?

Drooms uses a pre-curated allowlist and quality filters (domain reputation, HTTPS, metadata checks). If a source is deemed low-quality it will be deprioritised or excluded.

Accuracy, Transparency & Hallucination Mitigation

Q13 — How can I verify AI answers?

All assertions coming from documents include direct snippet references. Internet-sourced claims include the original URL and snippet. That makes it possible to verify each claim quickly.

Q14 — What if the Assistant is wrong (hallucinates)?

Users can upvote/downvote answers and flag incorrect replies. Flagged cases are logged for review. The UI surfaces confidence indicators and the source snippets so users can detect and dismiss inaccurate output.

Q15 — Does the Assistant fabricate citations?

No — citations shown are taken from the retrieval step (internal document snippets or indexed web snippets). If an answer lacks supporting references it will be marked as such.

Security, Privacy & Compliance

Q16 — Is my data sent to external providers?

No. All processing of customer documents is performed within Drooms' secure environment. Documents are not sent to third-party model training pipelines.

Q17 — Is any customer data used to train public models?

No. Drooms does not use customer document text to train external or public models. Internal telemetry (anonymous usage signals and aggregated feedback) may be used to improve product quality, per the tenant policy.

Q18 — What about internet retrieval — could sensitive text be exposed?

No document contents are transmitted to the web retrieval service. The retrieval uses query-level signals and a controlled retrieval pipeline; the originals remain inside Drooms.

Q19 — How are access rights enforced?

Access control is applied at query time: users only see snippets and results from documents they are authorised to view. Chats and results will not surface content from documents the user cannot access.

Q20 — Is usage auditable?

Yes — all Assistant interactions (queries, referenced snippets, external fetches, user feedback and chat deletions) are recorded in an audit trail accessible to administrators according to the org's logging and retention policy.

Q21 — Is the Assistant GDPR-compliant?

The Assistant is designed to operate within Drooms' secure, EU-compliant infrastructure and

adheres to privacy-by-design principles. Tenant admins control retention and deletion policies.

Admin Controls, Quotas & Billing

Q22 — Who can enable or disable the Assistant?

Tenant or dataroom administrators can enable/disable the Assistant and its internet-retrieval capability.

Q23 — What are the limits for free users?

Free users have a limited usage quota (number of queries or compute allowance). Paying customers receive unlimited or higher quotas per their plan. Exact quotas and upgrade options are defined in the pricing section of the admin console.

Q24 — Can admins set custom quotas?

Yes — admins can configure per-user or per-group quotas, rate limits, and throttling policies to manage consumption.

Q25 — How is billing handled for heavy usage?

Billing follows your organisation's Drooms subscription plan. High-volume enterprise customers can contact Sales for custom licensing and usage tiers.

Data Lifecycle, Retention & Deletion

Q26 — Are chats stored?

Yes — chats are saved in chat history and can be searched, exported or deleted by users (subject to retention policy). Administrators can set organisation-level retention and deletion rules.

Q27 — How to delete a chat and its data?

Users can delete chats from the chat UI; administrators can permanently delete chat logs and purge caches for compliance. Deletion requests follow the tenant retention policy and audit workflows.

Q28 — Is there an export function for chats?

Yes — chats and their referenced snippets can be exported (PDF/CSV) for audit or sharing. Export permissions are controlled by RBAC.

Technical & Performance

Q29 — How quickly are newly uploaded documents available for chat?

Documents are processed (OCR, text extraction, indexing) before they can be used. Processing

time depends on file size and server load; the UI shows the processing state and will enable chat once indexing completes.

Q30 — How does the Assistant scale for very large datarooms?

The indexing and retrieval stack is designed to scale horizontally. Performance and resource allocation are configurable for enterprise customers.

Q31 — Which model powers the Assistant?

The Assistant runs on self-hosted, fine-tuned language models within Drooms' secure environment together with a retrieval pipeline (internal index + optional web retrieval). Model updates and tuning are managed by Drooms; customer documents are not used to re-train external models.

Q32 — Is there an offline / air-gapped deployment option?

Enterprise customers requiring strict isolation can request dedicated, isolated deployments. Internet retrieval can be disabled entirely in air-gapped setups.

Troubleshooting & Best Practices

Q33 — The Assistant gives partial or low-confidence answers — what to do?

Check the highlighted snippets for evidence; upvote/downvote to provide feedback; if needed, open a support ticket with the referenced chat ID for investigation.

Q34 — How to get better answers?

Provide precise prompts, include context (e.g., “In contract X, what are termination clauses?”), and use folder-level chats for comprehensive coverage. If a document is scanned, ensure OCR completed successfully.

Q35 — Why didn't a document show up in results?

Verify the file is processed/indexed and that you have access rights. Also confirm the document is not excluded by filters (e.g., trashbin) or excluded by admin settings.

Auditing, Transparency & Compliance Reporting

Q36 — What information is recorded in audit logs?

Queries, timestamps, user IDs, referenced document IDs and snippet ranges, external fetches, and user feedback are included. Audit logs are accessible to admins per tenant policies.

Q37 — Can I get reports on Assistant usage and accuracy?

Yes — admins can extract usage metrics (queries, top users, satisfaction rates) and export them for compliance or reporting.

Future & Roadmap (FAQ-style)

Q38 — Will the Assistant support integrations with external business systems?

Planned: connectors to enterprise systems (ERPs, CRMs) are on the roadmap; such integrations will be opt-in and governed by tenant admin settings.

Q39 — Will chat editing and renaming be available?

Yes — chat renaming and improved chat management features are planned.

Meeting summaries

⌚ Meeting minutes recorded and tracked in below pages.

[AI Chatbot - SEMANTIC - Confluence \(atlassian.net\)](#)

Tasks

Project Completion Checklist

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

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

	<input checked="" type="checkbox"/> Add final links to the Epic and confluence project page (miro, figma...)		<input checked="" type="checkbox"/> Help Center article created or updated with CS
	<input checked="" type="checkbox"/> QA review of the tickets		<input checked="" type="checkbox"/> Marketing and relevant Design Material for Release announcements ready
	<input checked="" type="checkbox"/> Initiated pricing strategy with finance (when applicable)		<input checked="" type="checkbox"/> Pricing strategy is ready for release, finance articles created, contract updated
	<input checked="" type="checkbox"/> Initiated legal evaluation, impact and task (when applicable)		<input checked="" type="checkbox"/> Legal adjustment are ready for release like T&C adjustments
	<input checked="" type="checkbox"/> 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		<input checked="" type="checkbox"/> Website adjustment are ready for release
			<input checked="" type="checkbox"/> Included in release candidate: add <release candidate number> here
			<input type="checkbox"/> Finalize documentation and close relevant tickets (DBT, RICE)
			<input type="checkbox"/> 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