

Boomi's Legal Response Bot Requirements Document

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@Objective

Dell Boomi is a business acquired by Dell in 2010 that specializes in providing software as a service and integration platform as a service to customers, as well as products related to API management, Master Data Management, and data preparation. It is a wholly-owned subsidiary of Dell Technologies, an American multinational technology company headquartered in Round Rock, Texas, formed because of the September 2016 merger of Dell and EMC Corporation. A part of the Boomi mission is to provide an intelligent, flexible, and scalable platform quickly and easily across companies and their businesses to transcend and manifest the way they connect across a variety of social and civic purposes.

As part of this project, I coordinated with the Dell Boomi Legal team to spot issues and consider potential problems that new software could relieve. While the great Dell Technologies legal team consist of thousands of legal professionals, Dell Boomi legal team consist of approximately ten full-time in-house legal counsels whose chief responsibilities include providing overall leadership and legal support to Dell Technologies in general, but mainly to Dell Boomi Inc, a rapidly growing supplier of a cloud integration platform. The legal team handles a substantial volume of sales, inbound and outbound licenses, compliance matters, any disputes, all legal issues pertinent to a worldwide cloud services business.

With all of this in mind, the proposed system to Dell Boomi's legal department will be able to save time by providing quick automated responses to frequently asked questions in-house for Dell Technologies. This, in turn, will increase customer satisfaction and attract new customers due to the legal's team response times and priority of current business endeavors.

One key issue identified was that this legal department works within a budget and time constraints to resolve a wide range of problems to negotiate and close complicated transactions. Spending too much time answering important, although straightforward questions from the various departments and stakeholders outside of the legal group can take valuable time away from focusing on more complicated issues, particularly during the end of each fiscal quarter, when the business must focus on meeting revenue-generating goals. The proposed solution is to create an automated resolution "bot" that provides answers to commonly asked, straightforward, and easily answered questions in real-time, which will free up resources for legal department leaders to focus on more pressing – and more complicated – tasks. The goals are to develop an automated Q&A, available to various departments and stakeholders outside of legal, to reduce busywork, improve response times, create consistencies in answers and resolutions, advance customer interaction, and allocate resources to imperative deals.

Dell Boomi Inc. has multiple internal divisions within its business domain such as operations department, head of product management, finance department, marketing department, research and development department, information security, legal department, and human resources. With my focus on the legal department is it common that external entities ranging from all other Dell Technologies business and current customers of Boomi inc communicate any legal issues pertaining to Dell Technologies.

Success metrics

Goal	Metric
Provide consistent responses that convey up to date standards	All Boomi Personnel will have access to the same question/answer instead of receiving somewhat different responses from different legal counsels.
Reduce busywork	Legal counsels spend less time responding to common legal questions.
Improve response times	Legal counsels have more time responding to customer/department concerns rather than responding to commonly asked questions.
Advance customer interaction	Increased customer satisfaction and recommendation to others.
Allocate resources to imperative deals	The legal department can allocate more legal counsels to imperative deals.

Increased revenue due to the legal team's responsiveness to new and closing deals	Increased revenue to Boomi.
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Assumptions

- This software will only be used between Dell Technologies departments.
- Commonly asked questions will be gathered and set before the response bot is deployed. Those questions can be updated, and new questions added, periodically.
- The bot will not include out-of-the-scope questions, including those that do not lend themselves to straightforward and consistent answers. Those more complex questions will continue to be fielded and handled by the legal department.
- The software will be built on current systems used by the department to ease the transition.
- This software will be managed and updated from time to time by the Dell Boomi legal team, and only be used internally as a resource between Dell Technologies departments. (This is a HUGE assumption as to what will occur if the program crashes, has bugs, invalid entries within the database, etc. {This is a topic to be talked about later}).
- BLRB will only be used by Boomi personnel.
- BLRB will be written in one of three programming languages Java, C++, or Python.
- BLRB updates will occur during a certain time frame.
- BLRB will be used across all platforms.
- BLRB can be used on any device.

Milestones section with roadmap could have been added.

Requirements

User Stories -

Key	Summary	P
DB-20	As a Legal Counsel, I want the response bot to provide stakeholders with reliable answers to questions that would otherwise need to come from a lawyer so that more time-sensitive and critical issues could be dealt with.	↑
DB-19	As a Account Executive, I want a tool for quick legal information so that the legal team can focus on more substantive and critical issues.	↑
DB-18	As a Sales Engineer, I want quick access to legal information so that I don't need to communicate with the legal team in person.	↑
DB-17	As a Account Receivable, I want relatively available legal information to access and navigate on my own so that the business process is more efficient.	↑
DB-16	As a Sales member, I want quick access to legal answers so that I don't feel like I'm disturbing the Boomi legal team.	↑

5 issues

Requirements -

Key	Summary	P
DB-65	When the legal info database is updated, the BLRB shall mirror the update to the Boomi Legal info backup database in case of errors /corruption.	↑
DB-64	If a legal counsel clicks the edit question button, then BLRB shall display the edit mode page within 30 seconds.	↓
DB-63	The BLRB shall share the account information database with the Dell hub for single sign-on capabilities.	↑
DB-62	If the legal counsel submits a change to the list of legal questions without any issues, then the BLRB shall prompt the legal counsel to wait for other's approval.	↑
DB-61	If the legal counsel submits a change to the list of legal questions, then the BLRB shall prompt the legal counsel if a submission issue occurs.	↑
DB-60	The BLRB shall allow users to access the Dell Hub through the BLRB home page.	↓
DB-59	If the user does not provide the correct login information, then the BLRB shall prompt the user to enter valid login information.	↑
DB-58	Every three months, the BLRB shall prompt the user to update/change their password to maintain user security.	↑
DB-57	The BLRB shall allow users to search for third-party products involved with Dell Boomi to depict correct legal information.	↑

DB-56	The BLRB shall provide a disclaimer about the legal information.	↑
DB-50	While the user is logged in, the BLRB shall respond to any number of question entries.	↑
DB-49	When the user is logged in, the BLRB shall allow users to provide feedback to the BLRB to improve bot interaction.	↑
DB-48	The BLRB shall prevent unauthorized access.	↑
DB-47	BLRB shall permit legal counsels to remove legal answers to abide by current Boomi standards.	↑
DB-46	If the user clicks the view all questions button, then the BLRB shall display all current legal questions/answers.	↑
DB-45	When a legal question is not found, the BLRB shall display legal department contact information within 10 seconds.	↑
DB-44	When a legal question is entered, the BLRB shall display a correct legal response within 10 seconds.	↑
DB-43	BLRB shall permit legal counsels to update legal answers to avoid inaccurate responses.	↑
DB-42	When the user is not logged in, the BLRB shall display a login screen for username and password.	↑
DB-41	Once the user is logged in, the BLRB shall prompt the user within 6 seconds to input a question.	↓

20 issues

User interaction and design

Login page



Login

Username

Password

[Login](#)

New employ? [Create Account](#)

Create Account page



Create Account

First Name

Last Name

Email

Password



Password must be at least 8 characters long and at least one (special character, upper case, and lower case)

Boomi ID

☐ I understand that BLRB is for Boomi Personnel Only.

Create Account

Home/bot page



Hello, User

Enter a legal question...

Leave feedback

Log Out

View all legal questions

View questions page



BLRB

[Leave feedback](#)

[Log Out](#)

List of legal question

[go back](#)

Counsel question view page



BLRB

[Leave feedback](#)

[Log Out](#)

List of legal question

[Edit questions](#)

[go back](#)

Edit mode page

[Leave feedback](#)[Log Out](#)

List of legal question Edit/Remove

[go back](#)[Submit changes](#)

System design constraints:

- Passwords must have (at least one special character, at least one upper case letter, and at least one lower case letter) and at least 8 characters long.
- BLRB must be written using Java, Python, or C++.
- BLRB will only be used by Boomi personnel.
- The system can only go down for maintenance between (Undecided time frame).
- BLRB answers will be made by the legal department and not by developers due to expertise.
- BLRB's interface will be built using SceneBuilder (subject to change).
- The correction of answers provided by BLRB is to be handled by the legal department.
- Only legal counsels can create/update/remove legal questions.
- The BLRB must use the same password requirement from the Dell Hub interface.
- A legal counsel can only update/remove a maximum of 5 legal questions at a time.
- Users cannot only enter numbers when asking questions to the BLRB.
- BLRB databases architecture will be H2. (Subject to change)

Open Questions

Question	Answer	Date Answered
What will be the best way to express the BLRB to Boomi personnel for use?		
What programming language will be used to develop the BLRB?		
What database architecture will be used for the BLRB?		
Will there be a designated development team that will take care of updates?		

How would the legal/development team like feedback to be received?		
When accessing another third-party page will the BLRB open another window or leave the system?		
Will the legal team like to have edit's to the questions checked by other legal counsels or should they be pushed right away?		
Should the BLRB be capable of anything else? if so why?		

Out of Scope

- BLRB will not provide answers to complicated legal questions that need the legal team's confirmation.
- BLRB will not use Machine Learning techniques to learn from user input to improve questions as they are restricted to the legal team only, i.e. BLRB will not be able to learn from users. (Out of my knowledge)
- BLRB will not have a live meeting option but it will provide ways to contact the legal team if the question is too complicated. (Could be revisited later)
- BLRB will not be accessible to everyone, only to Boomi personnel.
- BLRB will not be analytical during the launch but is something I would like implemented to improve my understanding of the user's most common questions.