GDPR User Manual

2024 January
Dynamics 365 Business Central

Table of Contents

1. User Setup

The user setup form is accessible via the search box:

Tell me what you want to do

GDPR User Setup

Go to Pages and Tasks

> GDPR User Setup   Administration

Didn't find what you were looking for? Try exploring pages and reports
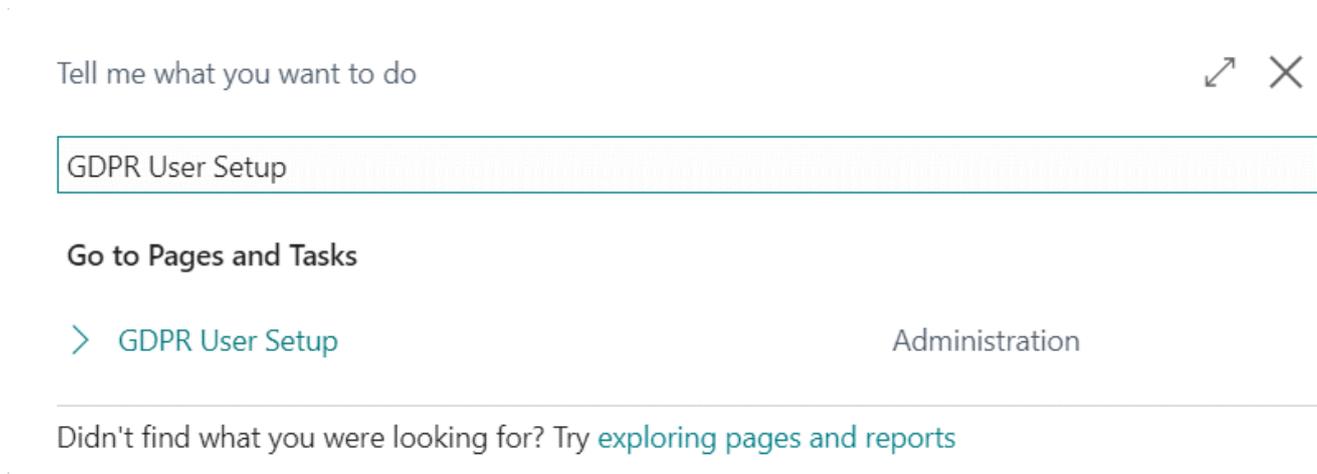
Picture 1 GDPR User Setup search box

When the GDPR User Setup form opens, enter/ edit GDPR User Settings:

CLT GDPR User Setup | Work Date: 25/01/2024

Search   + New   Edit List   Delete

USER ID ↑	GDPR Request Nos	Allow to process requests	Log Interactions
CLT\LAUR	GDPR	☑	☑
❶	❷	❸	❹
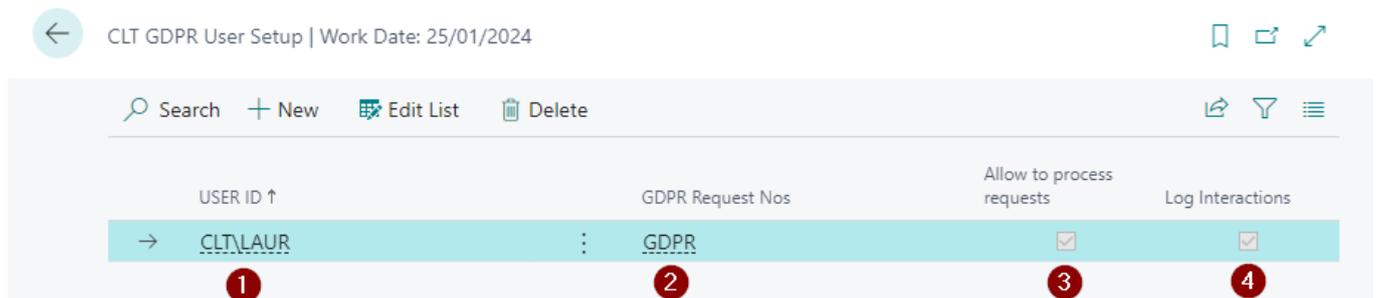
Picture 2 GDPR User Setup page

1. **USER ID** – enter/ select the User ID of the user who will be allowed to work with the GDPR solution.
2. **GDPR Request Nos** – select GDPR Request No. Series which will be used to assign GDPR Data Protection Requests.
3. **Allow to process requests** – this value identifies the users who will be able to execute GDPR Data Protection Requests.
4. **Log Interactions** – this value identifies the users whose actions have to be logged in the change log.

2. Creating/ editing Data Subject Templates

The Data Subject List form is accessible via the search box:

Tell me what you want to do

GDPR Data Subject List

Go to Pages and Tasks

> GDPR Data Subject List   Lists

Didn't find what you were looking for? Try exploring pages and reports
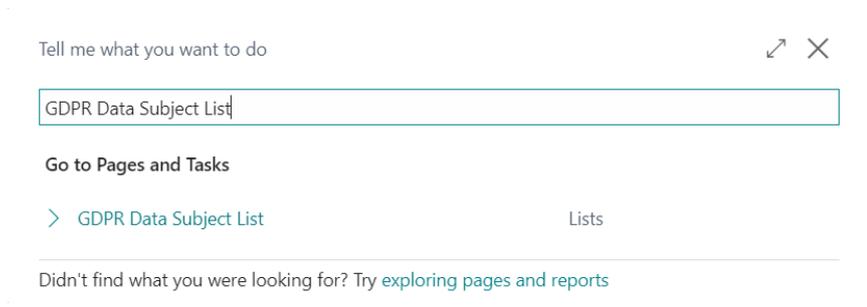
Picture 3 GDPR Data Subject List search box

When the Data Subject List form opens, select the Data Subject you want to edit and click "Edit". To create a new Data Subject, click the "New" button.

2.1.   Description of the data subject card

When the Data Subject form opens, enter/ edit the Data Subject Card fields:

CLT GDPR Data Subject Type | Work Date: 25/01/2024   ✓ Saved

CUSTOMER

New | Actions Fewer options

General

Code	CUSTOMER	❶	Primary Field	1 ···	❹
Description	Customer	❷	Table Caption	Customer	
Main Table	18 ···	❸	Primary Field Caption	No.	

❺

CLT GDPR Data Subject Field | Manage

⊕ New Line   ✕ Delete Line   🗎 Data Subject Field Setup   📋 Collect Table Fields

Table No. ↑	Table Caption	Field No. ↑	Field Name	No. of Setup Fields	No. of Table Fields	No. of Approved Fields
18	Customer	1	No.	108	108	72
18	Customer	33	Invoice Disc. Code	108	108	1
18	Customer	45	Bill-to Customer No.	108	108	1
21	Cust. Ledger Entry	3	Customer No.	79	79	4
21	Cust. Ledger Entry	21	Sell-to Customer No.	79	79	1
36	Sales Header	2	Sell-to Customer No.	192	192	1
36	Sales Header	4	Bill-to Customer No.	192	192	1
37	Sales Line	2	Sell-to Customer No.	186	186	1
37	Sales Line	68	Bill-to Customer No.	186	186	1
38	Purchase Header	72	Sell-to Customer No.	169	169	1
110	Sales Shipment Header	2	Sell-to Customer No.	130	130	1
110	Sales Shipment Header	4	Bill-to Customer No.	130	130	1

Picture 4 GDPR Data Subject card fields

1. **Code** – data subject code
2. **Description** – data subject card description
3. **Main Table** – linked main data subject card according to which the linked main table will be searched in the system. (Most often it will be Customer Table (ID18), Vendor Table (ID23), or Employee Table (ID5200))
4. **Primary Field** – if the linked table has only one primary field, then the value is filled in automatically. If the linked table has several primary fields, then the user has to specify the primary field of the table, which will be used to search linked tables during the execution of the Data Protection Requests
5. **Data Subject Fields**:
   a. In this sub-form, the system automatically collects and fills the rows of the tables that are linked to the main table specified in the Main Table field (No. 3)
      For example, a customer table is linked to the customer ledger entries table (ID21), and two fields in that table (ID3 and ID21)
   b. In some cases, if non-standard NAV tables are used, it may be necessary to manually add rows and specify the connection between the added table and the main table specified in the Main Table field (No. 3)

2.2. Editing the data subject card header

Picture 5 Data subject header

1. Enter the code of the Data Subject.
2. Enter the brief description of the Data Subject.
3. Select the main table of the Data Subject.
4. Specify the primary field of the main table specified in the Main Table field (No. 3)

2.3. Collecting the data subject rows

Picture 6 Data Subject field list

1. After filling in the header of the data subject, click "Collect Related Tables". The system fills the rows of the data subject according to the linked table specified in the header.
    a. To add a row manually:
        i. In the row specify Table No. and Field No.
        ii. Click the "Collect Table Fields" button above the rows.
2. Values of the rows:
    a. **Table No.** – table that is linked to the main table specified in the Main Table field
    b. **Table Caption** – linked table caption
    c. **Field No.** – linked table field no.
    d. **Field Name** – linked table field name
    e. **No. of Setup Fields** – informational type field showing how many setup fields have a specific line
    f. **No. of Table Fields** – informational type field showing how many table fields have a specific line
    g. **No. of Approved Fields** – informational type field showing how many approved fields have a specific line

2.4. Data Subject Field Setup

Table No. ↑		Table Caption	Field No. ↑	Field Name	No. of Setup Fields	No. of Table Fields	No. of Approved Fields
18	⋮	Customer	1	No.	108	108	72
18		Customer	33	Invoice Disc. Code	108	108	1
18		Customer	45	Bill-to Customer No.	108	108	1
21		Cust. Ledger Entry	3	Customer No.	79	79	4
21		Cust. Ledger Entry	21	Sell-to Customer No.	79	79	1
36		Sales Header	2	Sell-to Customer No.	192	192	1
36		Sales Header	4	Bill-to Customer No.	192	192	1
37		Sales Line	2	Sell-to Customer No.	186	186	1
37		Sales Line	68	Bill-to Customer No.	186	186	1
38		Purchase Header	72	Sell-to Customer No.	169	169	1

Picture 7 Data Subject field setup

1. To configure the specific line, select the line.
2. Click the "Data Subject Field Setup" button.

Picture 8 Data Subject field setup page

3. When the GDPR Data Subject Field Setup form opens, select the fields of the table by checking the "Approved" field.
   a. To close and save all selected fields of the table, click "Close".

Picture 9 Data Subject No. of approved fields

4. The "No. of Approved Fields" field has been updated

The process has to be repeated for all the lines of the data subject.

3. Request Type Setup

The request type List form is accessible via the search box:

Picture 10 GDPR Request Type list search box

When the Request Type List form opens, enter/ edit the Request Type fields.

Picture 11 GDPR Request Type list

1. **Request Type Code** – enter/ edit the Request Type Code.
2. **Request Type Description** – enter/ edit the Request Type Description.

The Request Type is the informational type field. It is for filtering purposes when processing GDPR Data Protection Requests.

4. Processing of the GDPR Data Protection Request

The GDPR Data Protection Request List form is accessible via the search box:
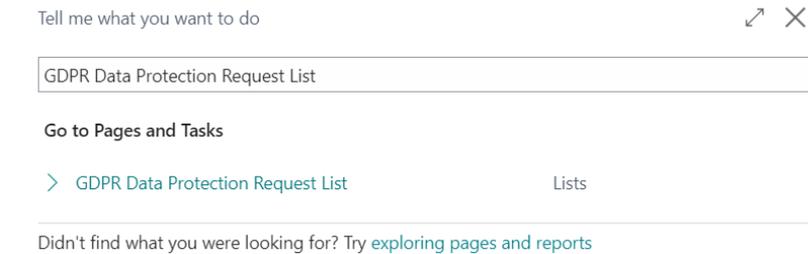
Picture 12 GDPR Data Protection Request list search box

When the GDPR Data Protection Request List form opens, select the request you want to edit and click "Edit". To create a new GDPR Data Protection Request, click the "New" button.

4.1. Description of the GDPR Data Protection Request

When the GDPR Data Protection Request form opens, enter/ edit the GDPR Data Protection Request Card fields:
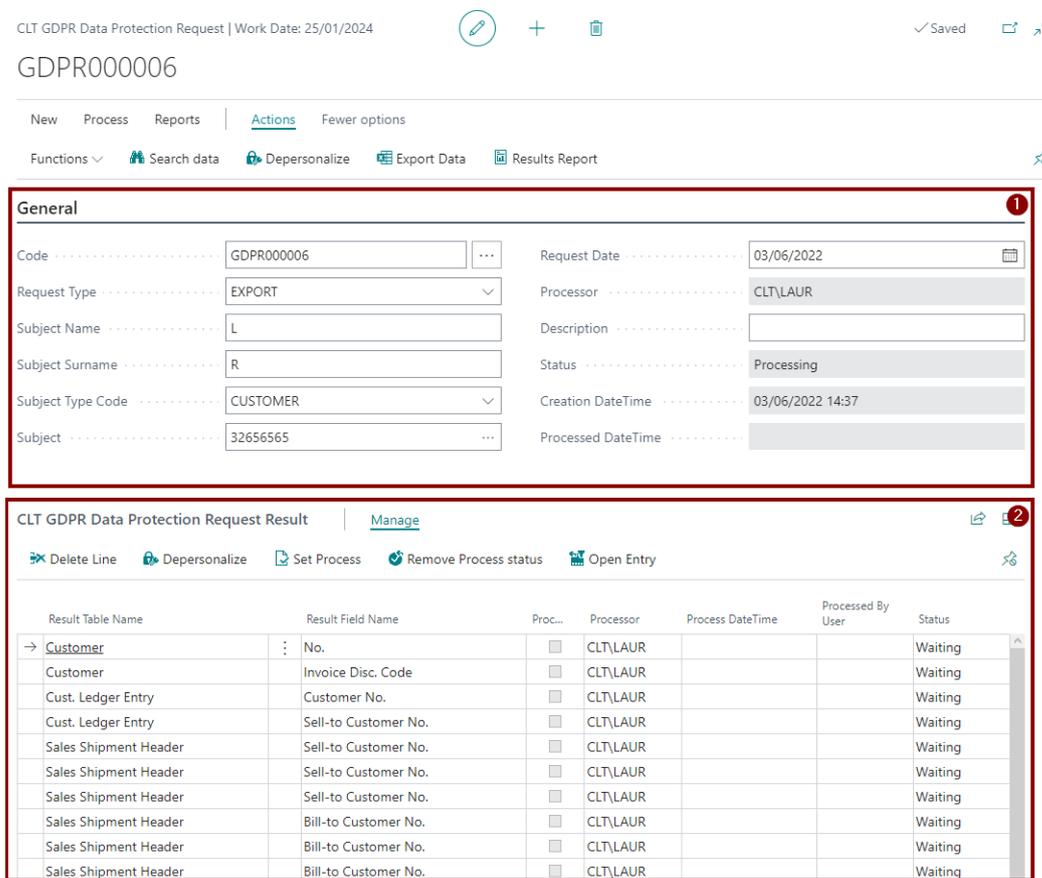
Picture 13 GDPR Data Protection Request Card

The following fields in the "**General**" section:

- **Code** – the value of the field is filled in automatically if the user has configured GDPR Request Nos in the GDPR User Setup. (For how to configure GDPR User Setup, see section: *GDPR User Setup*)
- **Request Type** – the informational type field indicating the type of request to be filled. (For how to create/ edit Request Types, see section: *Request Type Setup*)
- **Subject Name** – the name of the subject
- **Subject Surname** – the surname of the subject
- **Subject Type Code** – the Subject Type Code that will be applied to the GDPR Data Protection Request. The Subject Type Code could be selected from the list of the Data Subject Templates (How to create/ edit Data Subject Templates, see section: *Creating/ editing Data Subject Templates*).
- **Subject** – according to the selected Subject Type Code, select the card of a specific subject. For example, if the Subject Type Code is Customer, then the Customer card has to be selected.
- **Request Date** – the date of the request.
- **Processor** – uneditable field showing which user created the request.
- **Description** – the description of the request.
- **Status** – request status. The status can be as follows:
    - **Open**;
    - **Released**;
    - **Processing**;
    - **Processed**;
- **Creation DateTime**– the date the request was created.
- **Processed DateTime** – the date the request was processed.

The "**CLT GDPR Data Protection Request Result**" section displays a list of records linked with the subject. The following fields in the section:

- **Result Table Name** – the table in which the record linked with the subject was found
- **Result Field Name** – the table field in which the record linked with the subject was found
- **Process** – the editable field that marks the record being processed (records that need to be depersonalized/ included in a Results Report or Excel Document.
- **Processor** – the name of the user who performed the data search.
- **Process DateTime** – the date the request was processed.
- **Processed By User** – a field indicating which user processed the record.
- **Status** – record processing status. The status can be as follows:
    - **Waiting;**
    - **Processed;**

4.2. Editing the GDPR Data Protection Request

GDPR000006

Picture 14 GDPR Data Protection Request header

1. The code is automatically assigned from the No. Series.
2. Select the Request Type.
3. In the Subject Name field, enter the name of the Subject who submitted the request.
4. In the Subject Surname field, enter the surname of the Subject who submitted the request.
5. In the Subject Type Code field, select the Data Subject Template.
6. In the Subject field, select the Subject Card.
7. In the Request Date field, enter the date of the request.
8. In the Description field, if necessary, enter the details of the request.
9. After filling in the header of the request, click "Release".
   a. If there is a need to edit the submitted request, click "Reopen" and then adjust the request.
   b. Note: when the data search function is executed, the status of the request changes to "Processing". After this step, the request header can no longer be edited.

4.3. Performing a data search

GDPR000006
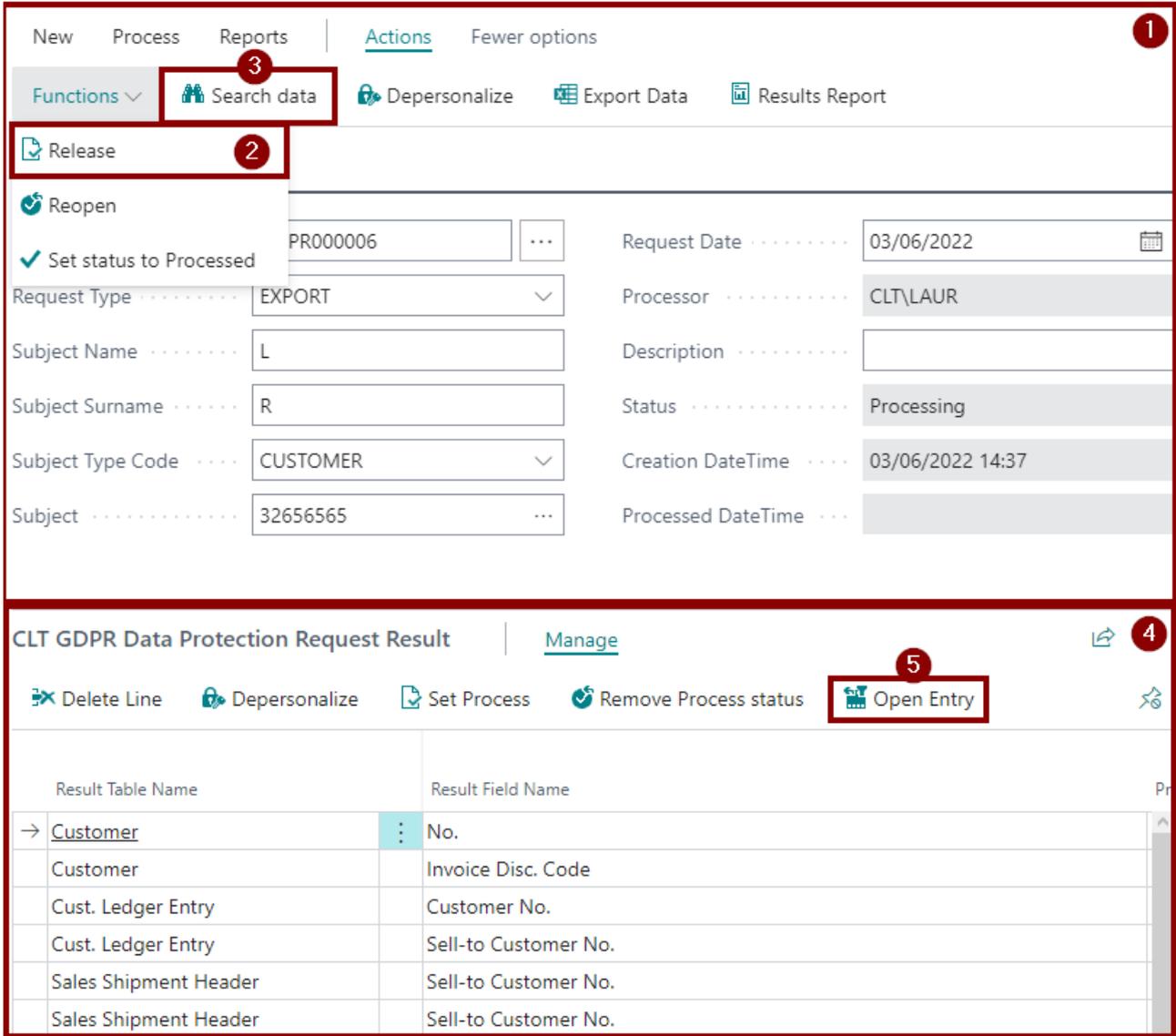
Picture 15 Execution of data search

1. Fill in the required fields in the request header. (More information about GDPR Data Protection Request editing)
2. After filling in the header of the request, change the status of the request to "Released" by clicking the "Release" button.
   a. To edit the released request, change the status of the request to "Open" by clicking the "Reopen" button.
3. Data search can only be executed if the status of the request is "Released". To execute a data search, click the "Search data" button.
4. After executing the data search, the system fills in the rows of the Data Protection Result form. The following fields in the section:

- **Result Table Name** – the table in which the record linked with the subject was found
- **Result Field Name** – the table field in which the record linked with the subject was found
- **Process** – the editable field that marks the record being processed (records that need to be depersonalized/ included in a Results Report or Excel Document.
- **Processor** – the name of the user who performed the data search.
- **Process DateTime** – the date the request was processed.
- **Processed By User** – a field indicating which user processed the record.
- **Status** – record processing status. The status can be as follows:
    - **Waiting;**
    - **Processed;**

5. To view a specific entry, click the "Open Entry" button.

4.4. Executing the depersonalization of the Subject Data

Picture 16 Depersonalization of the Subject Data

1. To depersonalize a Data Subject, select the entries to be depersonalized.
2. Click the "Set Process" button. Pressing the button will mark the entries being processed.
    a. To remove the mark, select the specific records and click the "Remove Process status" button.
3. After selecting the records to be processed, click the "Depersonalize" button. The depersonalization can be performed in two ways:
    a. Clicking the "Depersonalize" button in the request header will depersonalize all records that have the "**Process**" mark.
    b. Clicking the "Depersonalize" button in the request results section will depersonalize only selected records.

GDPR000007

Picture 17 Change of Data Protection Request status

4. After the depersonalization, additional information is filled in the depersonalized rows:
   a. **Process DateTime**
   b. **Processed By User**
   c. **Status -> Processed**
5. After processing the request, click "Set status to Processed".
   a. After this step, the request will become uneditable and will become a registry document.

4.5. Generation of the Results Report

GDPR000007
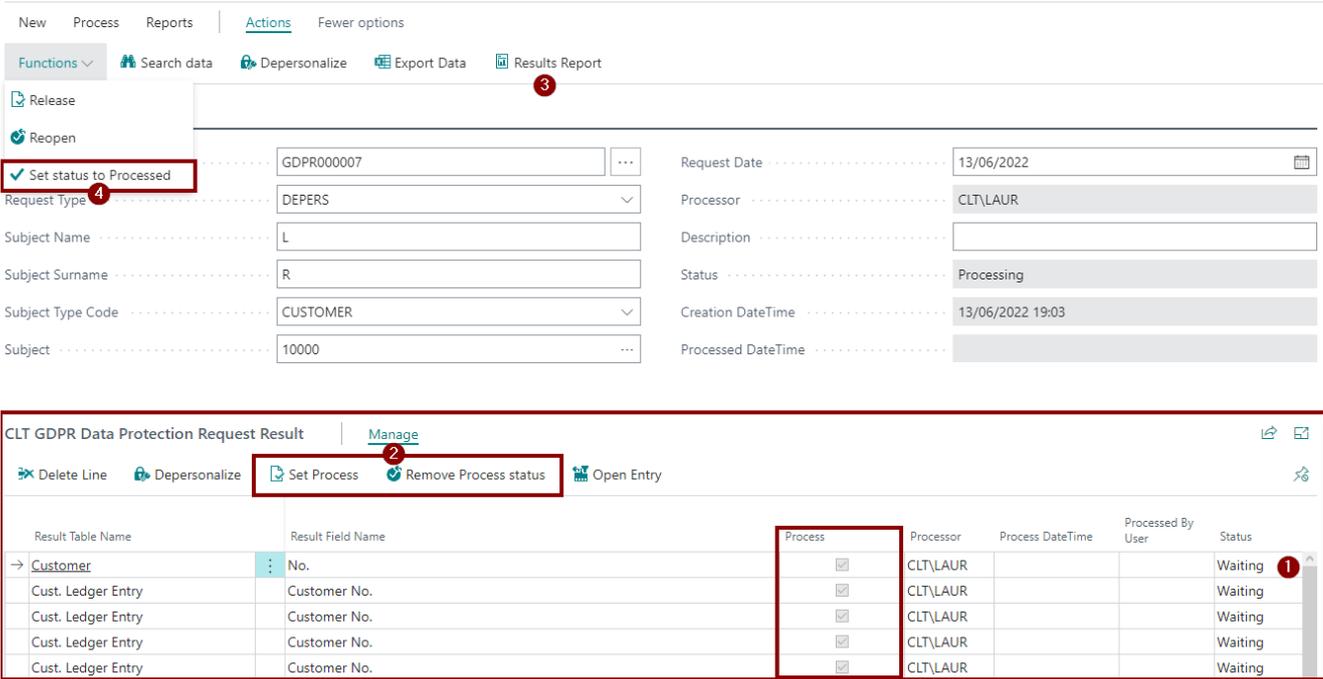
Picture 18 Generation of the Results Report

1. To generate the Results Report of stored data about the specific subject, select records that have to be included in the report.
2. Click the "Set Process" button. Pressing the button will mark the entries being processed.
   a. To remove the mark, select the specific records and click the "Remove Process status" button.
3. After selecting the records to be processed, click the "Results Report" button.
4. After processing the request, click "Set status to Processed".
   a. After this step, the request will become uneditable and will become a registry document.

Example of a generated report:

GDPR Data Request Results

Company:	CRONUS International Ltd.
Subject:	L R

Contract Gain/Loss Entry:1	
» Customer No.	10000

Contract Gain/Loss Entry:2	
» Customer No.	10000

Contract Gain/Loss Entry:6	
» Customer No.	10000

Cust. Ledger Entry:2431	
» Customer No.	10000
» Description	Opening Entries, Customers
» Customer Name	The Cannon Group PLC
» Currency Code	
» Sell-to Customer No.	10000

Cust. Ledger Entry:2435	
» Customer No.	10000
» Description	Opening Entries, Customers
» Customer Name	The Cannon Group PLC
» Currency Code	
» Sell-to Customer No.	10000

Cust. Ledger Entry:2445	
» Customer No.	10000
» Description	Opening Entries, Customers
» Customer Name	The Cannon Group PLC
» Currency Code	
» Sell-to Customer No.	10000

Picture 19 GDPR Data Request Results Report

4.6.   Export subject data in XLS format

GDPR000007

Picture 20 Export of Subject data in XLS format

1. To export stored data about the specific subject in XLS format, select records that have to be exported.
2. Click the "Set Process" button. Pressing the button will mark the entries being processed.
   a. To remove the mark, select the specific records and click the "Remove Process status" button.
3. After selecting the records to be processed, click the "Export Data" button.
4. After processing the request, click "Set status to Processed".
   a. After this step, the request will become uneditable and will become a registry document.

5. GDPR Change Log

The GDPR Change Log List form is accessible via the search box:

Picture 21 GDPR Change Log search box

The GDPR Change log list stores all user actions using the GDPR module.

Picture 22 GDPR Change Log

The GDPR Change log stores the following information:
1. **Entry No.**
2. **Date and Time** – the date and time the change was made.
3. **User ID** – the user who made the change.
4. **Table No.** – the number of the table in which the change was made.
5. **Table Caption** – the caption of the table in which the change was made.
6. **Field No.** – the number of the field in which the change was made.
7. **Field Caption** – the caption of the field in which the change was made.
8. **Type of Change** – the type of change. The types can be as follows:
   a. **Insertion**.
   b. **Modification**.
   c. **Deletion**.
9. **Old Value** – the old value.
10. **New Value** – the new value.
11. **Primary Key** – the primary key of the record in which the change was made.

6. Picture List