



Manual

GDPR ToolBox for Microsoft Dynamics 365 Business Central

Content

Article

GDPR ToolBox for Business Central	1
GDPR ToolBox for Business Central - Installation	1
GDPR ToolBox for Business Central - Setup	3
GDPR ToolBox for Business Central - Operation	19

GDPR ToolBox for Business Central

The GDPR ToolBox for Microsoft Dynamics 365 Business Central helps you to meet GDPR requirements for documentation and reporting of your Microsoft Dynamics 365 Business Central processes - such as identifying personal data, classifying tables, and generating and processing deletion and anonymization proposals. Respond within the legal deadline, e.g. to requests from affected parties - document these and inform or export the personal data from Business Central if necessary. Check and document user logons and access rights in Business Central and reduce your documentation effort with integrated evaluations.

The solution was developed over several months and tested by certified data protection officers and NAV partners.

Depending on legal developments, the GDPR ToolBox is continuously expanded by our team of experts and we provide you with the relevant information relating to Business Central.

GDPR ToolBox for Business Central - Installation

This article describes the integration of the **GDPR ToolBox** based on Microsoft 365 Business Central and requires the corresponding GDPR ToolBox App for the respective Business Central version. These are available on the website www.tso.de/en/add-ons/business-central-add-ons/privacy-policy-gdpr-toolbox/user-login - via this link you can also download the updates.

App Publishing

Open Business Central Administration Shell as Administrator and enter the following command:

```
Publish-NAVApp -ServerInstance 'your BC Server instance' -Path 'Path to the TSO-DATA GmbH_GDPR ToolBox_1.10.**.app'
```

After publishing the app becomes available in the extension management page within Business Central.

Update an existing Installation

Open Business Central Administration Shell as Administrator and uninstall and unpublish the existing Extension with the following command:

```
Uninstall-NAVApp -ServerInstance 'your NAV Server instance' -Name 'GDPR Toolbox'
Unpublish-NAVApp -ServerInstance 'your NAV Server instance' -Name 'GDPR Toolbox'
```

After this publish and sync the new Extension version :

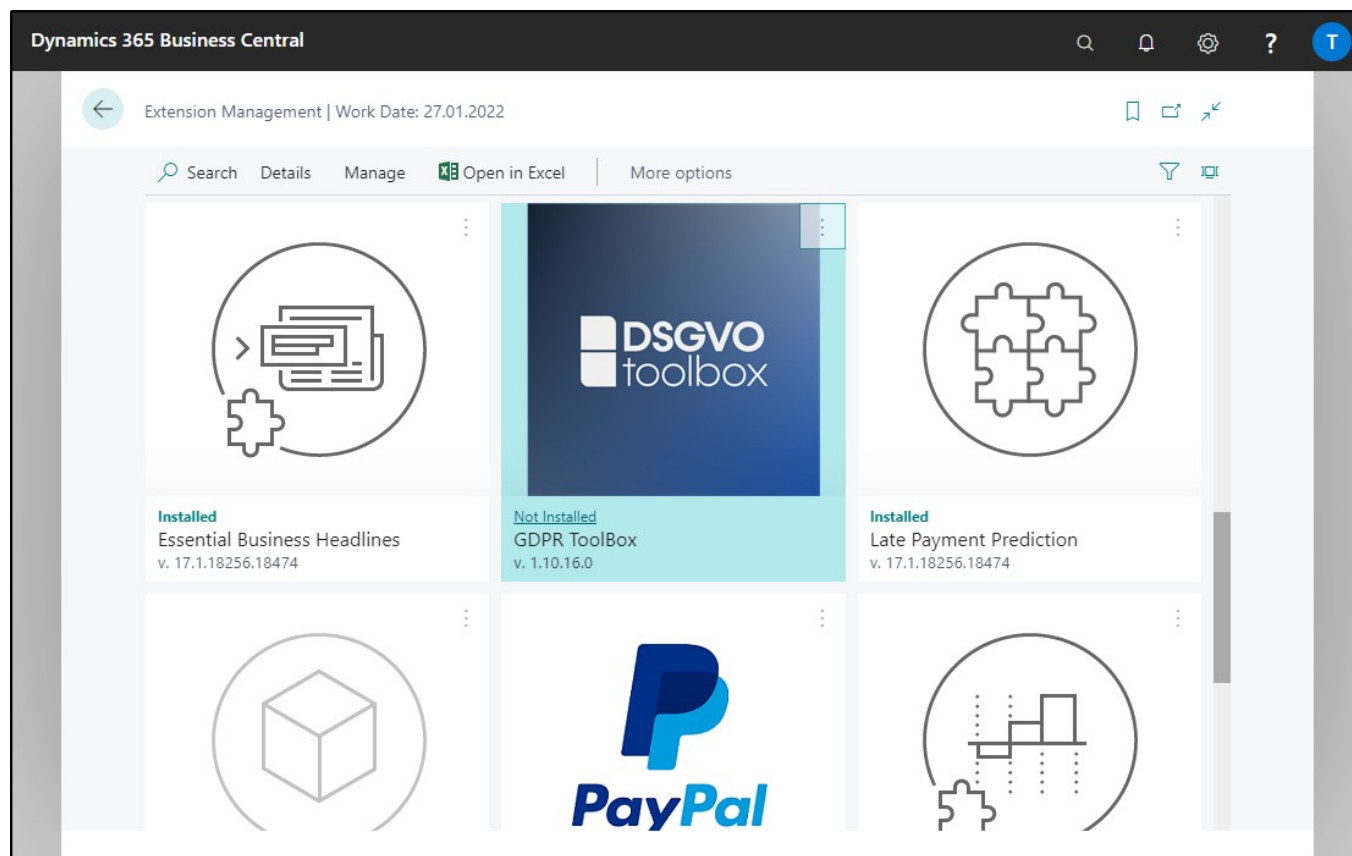
```
Publish-NAVApp -ServerInstance 'your NAV Server instance' -Path '.\TSO-DATA GmbH_GDPR ToolBox_1.10.**.app'
Sync-NAVApp -ServerInstance 'your NAV Server instance' -Name 'GDPR Toolbox'
```

Finally, install the new version by running the upgrade routine.

```
Start-NAVAppDataUpgrade -ServerInstance 'your NAV Server instance' -Name 'GDPR ToolBox' -Version 1.10.**
```

Installation

Open Business Central and navigate to *Extension Management*. The *GDPR ToolBox* application located there should not be installed. If it is already installed you can skip the following steps. To install the application, please click on the three dots in the upper right area of the app tile. Then select *Install*.



Then click Next. Accept the conditions and complete the installation by clicking Install.

Extension Installation

Install Extension

Extensions add new capabilities that extend and enhance functionality.

Name

GDPR ToolBox

Description

The GDPR Toolbox solution supports you in complying with the GDPR requirements with regard to documenting and reporting your Microsoft Dynamics 365 Business Solution processes – such as, e.g.,

Version

1.10.16.0

Publisher

TSO-DATA GmbH

App ID

a9c361c4-2af6-43f7-b792-70257327adfd

[Website](#)

[Help](#)

Next

Afterwards, you will need to log out and log back in all active users on the system to see the changes to the navigation.

GDPR ToolBox for Business Central - Setup

The **GDPR ToolBox** supports the special data protection requirements in Microsoft Dynamics 365 Business Central. The **General Data Protection Regulation (GDPR)** is a European Union regulation unified the rules governing the processing of personal data by private companies and public authorities throughout the EU. This should ensure the protection of personal data within the European Union on the one hand and the free movement of data within the European internal market on the other.

Setup assistant

The GDPR ToolBox has a setup wizard for sample setup data. After installing the GDPR ToolBox, this wizard can be started via the notification. In addition, the wizard can be accessed via the *Assisted setup* page.

Click on Setup now.

The screenshot shows the Dynamics 365 Business Central interface for CRONUS AG. A notification bar at the top states "GDPR ToolBox is not set up yet. Setup now...". The settings menu is open, showing options like Personalize, Design, My Settings, Company information, Assisted setup (highlighted), Advanced settings, and History. The main content area features a headline "Want to learn more about Business Central?" and a section titled "Activities" with various metrics for Sales Orders.

For Release		Sales Orders Released Not Shipped			
Sales Quotes - Open	Sales Orders - Open	Ready To Ship	Partially Shipped	Delayed	Average Days Delayed
0	20	6	0	14	7,5

Please select the language that matches your Business Central version.

GDPRToolBox Setup

At this point it is advisable to load the GDPR ToolBox configuration package. The configuration package provides a sample setup in the database.

Import Demo Setup ☒

Language

Back Next Finish

The GDPR ToolBox has a dedicated role center *GDPR ToolBox*. You can activate this individually under *my settings*.

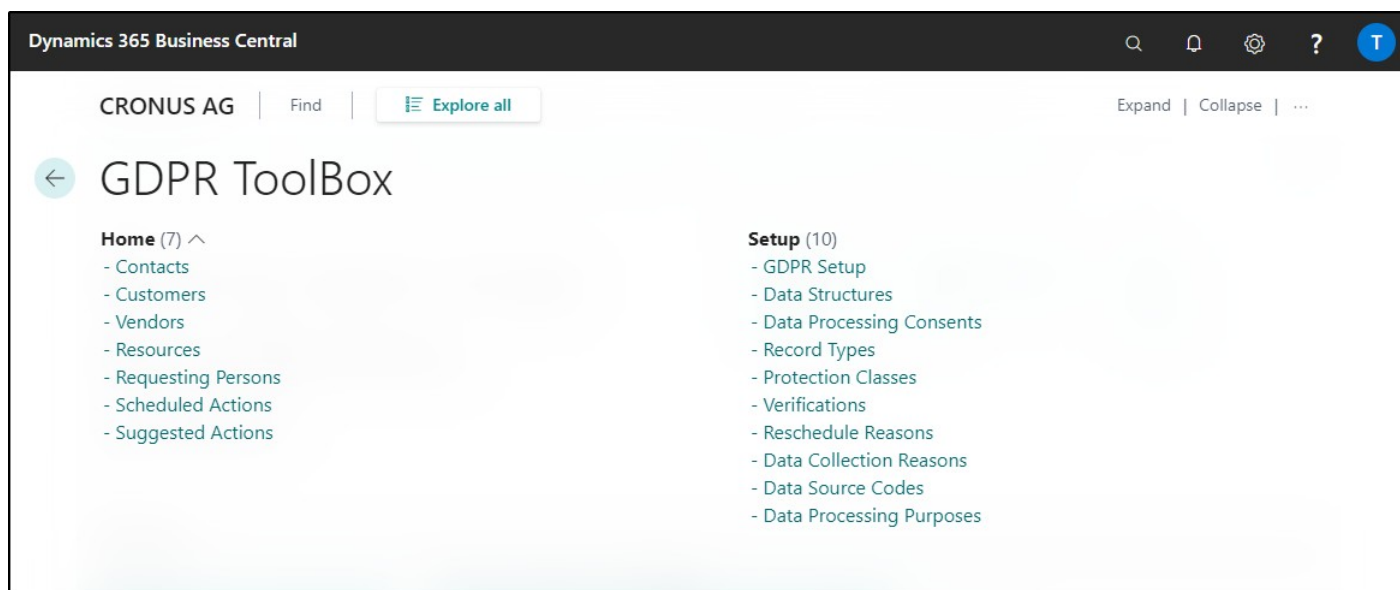
Available Roles

Search Open in Excel

Display Name
→ <u>GDPR ToolBox</u>
Company Hub
Accountant
Business Manager
Service Manager
Sales Order Processor
Manufacturing Manager
Project Manager
Sales and Relationship Manager
Administration of users, user groups and permissions
Inventory Manager
Shipping and Receiving - Warehouse Management System

OK Cancel

The entire GDPR ToolBox menu structure can also be found under *Explore all available business features in Business Central* in any other role center.



GDPR Setup

In this area the global settings for the GDPR ToolBox are defined. Please note that the screenshots and the data contained therein represent an example and do not claim to be complete. Each company stores personal data differently and elsewhere in Business Central, therefore all settings and definitions must be agreed and checked with the data protection officer and, if necessary, changed and supplemented. The content described here is merely a prerequisite for the GDPR ToolBox to be technically set up - this facility must be coordinated, adapted and thoroughly tested in a test system before it can be used in a production system.

GDPR Setup

Process | Job Queue | Actions | Fewer options

✕ Delete Modul Data | ⚙ Creating Actio...storical Data

General

Skip Links ☐

Reschedule Actions ☒

Job Queue for

Job Queue for Scheduled Activities ☒

Job Queue for Action Suggestion ☒

Job Queue for Action Suggestion ☒

Job Queue to Import Details and C... ☒

Max. Job Queue Retries

Segmentation

Update Exclude from Segment ☒

Update Contact Mailing Group ☒

Data Export

Append DateTime to Data Export File ☒

Requests

Request No. Series REQ	Process Status Code RQ-30
Initial Status Code RQ-05	Rejected Status Code RQ-40
Await Response Status Code RQ-10	Done Status Code RQ-50
Wait Status Code RQ-20	

The following table describes the individual fields of the registers.

Field	Description
Default Client Type	When data records are created in the tables with personal content, planned actions for deleting and anonymizing the data are inserted and links to the data records are also inserted. The advantage of displaying and referring to the planned actions in the form of links is that links are already available in a large number of pages and that the information can therefore be made available in many standard objects without having to make adjustments to standard objects. This field defines the form in which the link for the reference to the planned actions is created. If this setting is subsequently changed, the links in the database are also rebuilt.
Skip Links	With this option you activate that no links are to be created as a connection between created data records and the planned actions if they are not needed. This can have a positive effect on performance, especially when creating scheduled actions for existing data.
Reschedule Actions	If this field is activated, scheduled actions are moved with the standard reschedule reason when their origin data records are updated. The standard reschedule reason can be defined in the reschedule reasons.
Scheduled Activities	You can use this indicator to specify whether the planned actions are not to be created immediately when the data record is created, but afterwards via the job queue. If this option is activated, a job queue item is created and displayed for further processing. Please note that the job queue can be executed automatically ("Manual Scheduled Action").
Action Suggestion	You can use this indicator to specify whether the suggestions are to be created automatically via the task queue. If this option is activated, a job queue item is created and displayed for further processing.
Process suggested actions	You can use this indicator to automatically generate a job queue item that processes (deletes and anonymizes) the suggested actions on a time-controlled basis.
Import Details and Consents	You can use this indicator to automatically generate a task queue item that inserts the GDPR details and declarations of consent from the import transport table in a time-controlled manner.
Update Exclude from Segment	Defines whether the field "Update Exclude from Segment" in the GDPR details for the contact should be updated based on the planned processing purposes. For each planned processing purpose, you can define whether segmentation is allowed. Depending on the planned processing purposes, the system then checks whether at least one processing purpose allows segmenting, otherwise the field "Exclude from Segment" in the contact is activated. Note: Removing the "Exclude from Segment" flag is not removed if it was set manually by the user. For this purpose, there is a separate field in the GDPR Details in the background, which documents the manual setting of this indicator.
Update Contact Mailing Group	Activating this option updates the mailing group on the contact depending on the planned processing purposes. A distribution list can optionally be assigned to each processing purpose.
Append DateTime	This setting defines whether the date and time should be appended to the file names of the files created by data export.
Request No. Series	The request number series is defined here for the requests of concerned persons.
Initial Status Code	When the request is created, the initial processing status in the form of a code is defined in this data record. This field is also used for filtering the requests in the role center.
Await Response Status Code	If there are internal requests regarding the request of the person concerned, this status can be entered here. This field is used to filter the task cues in the role center accordingly.
Wait Status Code	The wait status can be used to classify external requests to the person concerned and display them accordingly in the task cue.
Process Status Code	If the request of the person concerned is processed, the status of the request changes to this corresponding status code.
Rejected Status Code	If the request of a data subject cannot be met (e.g. because legal provisions oppose the request for deletion), then this corresponding status code can be used.
Done Status Code	If the request of the person concerned is completely processed, the status of the request changes to this corresponding status code.

Record Type

The record types are templates with information and specifications that are used when new tables with personal data are defined in the data structures. In addition, the protection class and protection level for the information contained therein are stored in the data types.

For the following protection classes, they are part of the example setup and do not claim to be complete.

Code	Description
SK-1	Normal need for internal data
SK-2	High demand for confidential data
SK-3	Very high demand for particularly secret data

In addition, the following protection levels are available with the example setup.

Code	Description
1	General documents that are to be illegible or voided
2	Internal documents that are to be rendered illegible or voided
3	Sensitive and confidential data and personal data subject to increased protection requirements
4	Particularly sensitive and confidential data and personal data subject to increased protection requirements
5	Confidential information of existential importance to a person, a company or an institution
6	Documents to be kept secret if exceptional safety precautions are to be observed
7	Data to be kept strictly confidential and subject to the highest security precautions

Assignment of protection class and protection levels

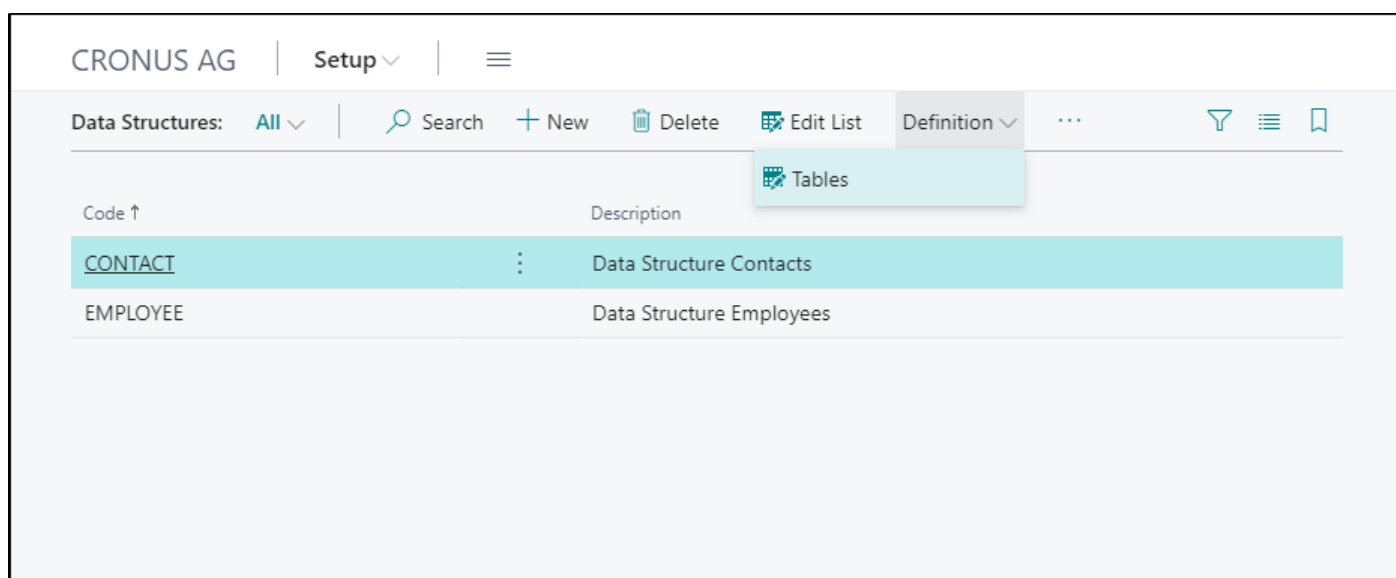
This assignment has already been proposed in the example data. Up to now, only data of protection class 1 and protection level 3 has been provided for the example data.

Request Status

With the request status, requests from concerned persons can be classified with regard to the processing progress and the processing result. This table contains the fields Code and Description and the entries are a prerequisite for the specifications in the GDPR institution.

Data Structures

The data structures contain the configuration for the tables with personal data and the links between the tables. In addition to the tables, the fields with personal contents are also defined here. The display is in a tree structure and the relations and filters for the corresponding tables can be stored on the respective table at the next higher level.



From the respective data structure, you can use the "Tables" action to branch to the setup of tables, fields, relations and specifications for the respective data structure.

CONTACT | Work Date: 27.01.2022

Table Structure Tables | Search | + New | Edit List | Delete | Process | Report | Indentation | Open in Excel | More options

Table Guideline | Table Fieldsetup | Output Field List | Relationships

Table No.	Table Name	Export Table Name	Table Relation Defined	Fields Def...	Out... Fiel... Acti...	Table Filter	Key No.	Table Guidline Exist	Data Type Code	Activity Type
→ 5050	Contact	Contact1	No	☒	☐		0	Yes	CONTACTS	Delete
5089	Contact Profile Answer	ContactProfileAnswer	Yes	☒	☐		0	Yes	CONTACTS	Delete
5092	Opportunity	OpportunityToCon	Yes	☒	☐		0	Yes	ENTRY2	Delete
5060	Contact Web Source	ContactWebSource	Yes	☒	☐		0	Yes	ENTRY2	Delete
5051	Contact Alt. Address	ContactAltAddress	Yes	☒	☐		0	Yes	CONTACTS	Delete
5077	Segment Line	SegmentLine	Yes	☒	☐		0	Yes	ENTRY2	Delete
5061	Rishp. Mgt. Comment Line	RishpMgtCommentLine	Yes	☒	☐		0	Yes	CONTACTS	Delete
5080	To-do	Todo	Yes	☒	☐		0	Yes	CONTACTS	Delete
5065	Interaction Log Entry	InteractionLogEntry	Yes	☒	☐		0	Yes	ENTRY2	Delete
36	Sales Header	SalesHeaderSellToCon	Yes	☒	☐		0	Yes	DOC10	Anonymize
36	Sales Header	SalesHeaderBillToCon	Yes	☒	☐		0	Yes	DOC10	Anonymize
5107	Sales Header Archive	SalesHeaderArchSellToCon	Yes	☒	☐		0	Yes	DOC10	Anonymize
5107	Sales Header Archive	SalesHeaderArchBillToCon	Yes	☒	☐		0	Yes	DOC10	Anonymize
5054	Contact Business Relation	ContactBusinessRelationCust	Yes	☐	☐	Contact Busin...	0	No		
18	Customer	Customer1	Yes	☒	☐		0	Yes	CUSTOMERS	Anonymize
287	Customer Bank Account	CustomerBankAccount	Yes	☒	☐		0	Yes	CUSTOMERS	Anonymize
222	Ship-to Address	ShiptoAddress	Yes	☒	☐		0	Yes	CUSTOMERS	Anonymize
21	Cust. Ledger Entry	CustLedgerEntry	Yes	☒	☐		0	Yes	ENTRY10	Anonymize
36	Sales Header	SalesHeaderSellToCust	Yes	☒	☐		0	Yes	DOC10	Anonymize
36	Sales Header	SalesHeaderBillToCust	Yes	☒	☐		0	Yes	DOC10	Anonymize
110	Sales Shipment Header	SalesShipHeaderSellToCust	Yes	☒	☐		0	Yes	DOC10	Anonymize
110	Sales Shipment Header	SalesShipHeaderBillToCust	Yes	☒	☐		0	Yes	DOC10	Anonymize

The corresponding tables are stored in the line structure. The hierarchy can be influenced by the actions "Indent" and "Unindent". In addition, this view provides an overview of the detailed facilities from the table specifications, the field list, the relations and the corresponding filters.

Table Guidelines

The table guidelines define the rules for which actions are to be performed with the personal data in this table. You can also define the record type and the data collection reason in the table specifications.

Table Guideline | Work Date: 27.01.2022

18 · Customer

Update Details

Settings

Table ID 18

Table Caption Customer

Record Type Code CUSTOMERS

Activity Calculation CY+10Y

Activity Type Anonymize

Dynamic Activity Type ☐

Requesting Selection ... ☒

Collection Reason Co... ORDER

Always allow Anonym... ☐

Execute Delete Trigger ☐

Reschedule Actions ☒

Scheduled Action (Fie... 54 ...

Scheduled Action (Fie... Last Date Modified

Scheduled Action

Manual Scheduled Ac... ☐

Action Indicator (Fiel... ...

Commit per no. of re... 0

The following fields can be stored in the table specifications:

Field	Description
Table ID	Number of the table from the data structure
Table Caption	Name of the table from the data structure
Record Type Code	Select the data type from the Data Types table. The specifications contained in this table are copied to this table and can be overridden here.
Activity Calculation	The Activity Calculation refers to the action type and determines how long it is intended to store the data in this table and thus determines the time when the corresponding action type is to be executed for the data records.
Activity Type	The action type defines how the data in this table is to be handled if the reason for saving the data is no longer given. Here you can distinguish between deleting and anonymizing.
Dynamic Activity Type	This controls whether the activity type can subsequently be changed to "Anonymize" for an action type "Delete". This can be useful, for example, if you create a sales activity and do not want to delete it in any other transactions with the sales activity within the defined period. In the case of contacts from which, for example, a customer is created and sales transactions take place, the contact should be anonymized. The dynamic activity type is only used in conjunction with the action type "Delete" and is checked when proposals for deletion/anonymization are created. For data in underlying data structures, the action type with the indicator activated is set from "Delete" to "Anonymize".
Requesting Selection Allowed	You can use this indicator to define that this table is permitted for selecting and assigning the link between the requester and the corresponding master data record.
Collection Reason Code	The specification in this field determines the standard data collection reason for the generated data records in this table. This information is not copied into the individual data records of the table, but is defined here as a global default.

Always allow Anonymization	Regardless of the activity type defined for the table, you can use this setting to define that anonymization of the data in this table is always permitted.
Execute Delete Trigger	This indicator defines that the deletion trigger of the corresponding table and thus the business logic for deletion is to be taken into account. This field is preset with "Yes" for new data records.
Scheduled Action (Field No.)	With this field you can select a date field from the corresponding table which is used for the subsequent creation of "Scheduled Actions" to determine the date on which the activity type for this table is to be executed in combination with the "Activity formula" field.
Scheduled Action (Field Name)	This field displays the field name for the selected field according to the "Scheduled action (field no.)".

Field List

The field list defines the fields of the table that can contain personal data.

←

Field List | Work Date: 27.01.2022

✎

+

🗑

✓ Saved

🔗

Customer

General

Data Structure Code

CONTACT

Table Name

Customer

Table No.

18

Fields

Manage

+ Add

✕ Delete

⬆ Move Up

⬇ Move Down

🔄 Renumber Line No.

	Field No.	Field Name	Field Type	Field Class
→	1	No.	Code	Normal
	2	Name	Text	Normal
	3	Search Name	Code	Normal
	4	Name 2	Text	Normal
	5	Address	Text	Normal
	6	Address 2	Text	Normal
	7	City	Text	Normal
	8	Contact	Text	Normal
	9	Phone No.	Text	Normal
	10	Telef. No.	Text	Normal

The "Add" actions can be used to add new fields and the "Move Up" and "Move Down" actions can be used to change the order of the fields in the list.

Relations

The relations define the connections to the table on the next higher data level. The "From Table" and "To Table" are displayed in the view. The corresponding fields are defined in the line-oriented view of the window.

Edit - Data Structure Relations - Customer

Manage
Page

General

From Table

No. 5054

Name Contact Business Relation

To Table

No. 18

Name Customer

Relationships
Manage

	From Field No. ↑	From Field Name	To Field No. ↑	To Field Name
→	4	No.	1	No.

Close

In this example, the relations from the "Contact Business Relationship" and "Customer" tables are displayed.

Table filter

In the Table Filters column of the Data Structure view, you can define fixed table filters in the form of a table using the AssistEdit button.

Edit - Table Filter - Contact Business Relation

Search
+ New
Edit List
Delete
Open in Excel

	Field Number	Field Caption	Field Filter
→	3 ...	Link to Table	Customer

Close

In the Table Filter column of the Data Structure Tables view, you can use the AssistEdit button to call a table in which the fixed fields between the current table level and the table level above it are defined. In this case, a fixed filter is created between the Contact and Contact Business Relation table. Since the customer is to be considered in this

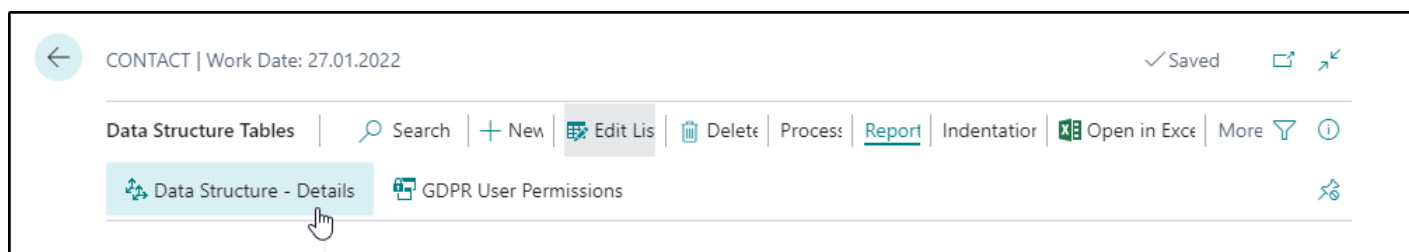
branch of the data structure tree, the filter is defined here as a fixed value for the customer.

Multiple entries of a table

Tables can be inserted several times in the data structure. Different relations/filters and field lists can be used. If, for example, you want to filter the sales invoices once according to the "Sell-to Cust. No." and according to the "Bill-to Cust. No.", you can consider these filters/relations in two different rows. In addition, you can define the field lists for the export, the information and the anonymization of information per row, so that there are separate field lists with the "Sell-to" fields for the relation on "Sell-to Cust. No." as well as a separate field list with the "Bill-to" fields for the relation can be mapped to "Bill-to Cust. No.".

Report data structure details

The configuration of tables and fields with personal content can be evaluated with the help of the provided report "Data structure details". This report can be called directly from the view of the tables for the respective data structure.



Data Structure - Details

CRONUS AG (EN)

11.07.2018 11:39

Page 1 of 40

Printed on: 11.07.2018 11:39

Data Structure: Code: CONTACT

Code CONTACT
Description Contact

Table with personal data

Table No.	Table Name	Level	Fields defined	Table Guideline exists	Scheduled Action Date	Anonymization always allowed
5050	Contact	0	No	No		No

Table Guideline

Record Type Code	Activity Calculation	Activity Type	Collection Reason Code	Request selection allowed	Always allow anonymization	Execute delete trigger
CONTACTS	2Y	Delete	ORDER	Yes	No	Yes

Field List

Field No.	Field Name	Field Type
1	No.	Code
2	Name	Text
3	Search Name	Code
4	Name 2	Text
5	Address	Text
6	Address 2	Text
7	City	Text
9	Phone No.	Text
10	Telex No.	Text
15	Territory Code	Code
84	Fax No.	Text
85	Telex Answer Back	Text
86	VAT Registration No.	Text
91	Post Code	Code
92	County	Text
102	Email	Text
103	Home Page	Text
5054	First Name	Text
5055	Middle Name	Text
5056	Surname	Text
5058	Job Title	Text
5059	Initials	Text
5060	Extension No.	Text
5061	Mobile Phone No.	Text
5062	Pager	Text
5063	Organizational Level Code	Code
5101	Salutation Code	Code
5102	Search Email	Code
5105	Email 2	Text

Data Collection Reason

The legal reasons for the collection of the data can be stored in this table of institutions. The legal reason can be used as a template in the table definition for the personal data.

CRONUS AG Setup ▾ ☰	
Data Collection Reasons: All ▾ 🔍 Search + New 🗑 Delete 📄 Edit List 📄 Open in Excel 🔍 ☰ 📄	
Code ↑	Description
<u>ECOM</u>	OnlineShop/Marketplace
FAIR	Fair
INTERNAL	InternalProcesses
NEWSLETTER	NewsletterSubscription
ORDER	OrderProcessing

The data collection reasons can be defined in the form of a code and a description and are a prerequisite for the specifications in the data types.

Verifications

The verifications are used in the module area for the inquiries of persons concerned and define the verification of the inquiring person, i.e. by using default values it can be documented how it was checked that the inquiring person is actually the person who claims to be. This verification process is currently not supported by a procedure within the GDPR -Toolbox, but only by documenting the result of a verification.

CRONUS AG Setup ▾ ☰	
Verifications: All ▾ 🔍 Search + New 🗑 Delete 📄 Edit List 📄 Open in Excel 🔍 ☰ 📄	
Code ↑	Description
<u>EMAIL</u>	ByE-Mail
FACE	Face-To-Face
ID	IDCard
PHONE	ByPhone
POST	ByPost

Reschedule Reasons

These reschedule reasons are used to document the manual or automatic shifts of planned actions.

CRONUS AG Setup ▾ ≡		
Reschedule Reasons: All ▾ 🔍 Search + New 🗑 Delete 📋 Edit List 📄 Open in Excel 🔍 ≡ 📄		
Code ↑	Description	Default
<u>GDPR PRO</u>	GDPR Toolbox Process	☒
LITIGATION	Litigation	☐
ORDERPROC	Order Processing	☐

Data Source Codes

The origin of a data record, such as a contact, can be documented when the data record is created. This allows you to answer the question about the origin of the data when an enquiry is made by a person concerned. The corresponding table "Data Source Codes" defines the possible selection of origin codes with the values Code and Description. In addition, a flag can be activated in the "Campaign" field that activates the additional Source Campaign Field in the GDPR Details view, e.g. for the contact. In this field you can specify then the specific campaign through which the contact was made.

CRONUS AG Setup ▾ ≡		
Data Processing Consents: All ▾ 🔍 Search + New 🗑 Delete 📋 Edit List ... 🔍 ≡ 📄		
Code ↑	Description	
<u>DPOTIN NL</u>	Double Opt In Newsletter	
OPTIN	Opt In	
WRITTEN	Written	

Data Processing Consents

The GDPR requires the consent of the data subject for the collection and processing of the data. This table defines the possible declarations of consent that the user can select when creating or editing master data.

CRONUS AG Setup ▾ ☰	
Data Processing Consents: All ▾ 🔍 Search + New 🗑️ Delete 📝 Edit List ...	
Code ↑	Description
<u>DPOTIN_NL</u> ⋮	Double Opt In Newsletter
OPTIN	Opt In
WRITTEN	Written

The consents can be filed for contact and used for inquiries from data subjects and can be used for the answers to the question "When and in what form did I give my consent to the processing of the data".

Process Purposes

In addition to the Data Processing consents, the planned processing purposes are also deposited. These are defined in the respective declaration of consent and added to the contact when the declaration of consent is issued. This view defines the possible processing purposes.

DPOTIN_NL · Double Opt In Newsletter Work Date: 27.01.2022		✓ Saved	📄
Process Purposes 🔍 Search + New 📝 Edit List 🗑️ Delete 📄 Open in Excel		🔍	☰
Processing Purpose Code ↑	Description		
→ NL_MEN ▾	Newsletter Men		
NL_WMN	Newsletter Woman		

These processing purposes can be included in the consent forms and are automatically added to the contact when the consent is documented. The following view shows the guidelines for the processing purposes for the e-mail declaration of consent.

If, for example, a contact withdraws its Data Processing consents, the corresponding processing purposes will also be removed.

Import GDPR details and declarations of consent

Existing or historical declarations of consent, as well as GDPR details can be imported via two separate tables. This data is maintained in the GDPR setup under *Actions > Import GDPR Details* or *Actions > Import Consent*. The processing takes place by a further task queue. This can also be achieved in the GDPR Setup under *Action > Process Import Details and Consents*

User Permissions

The user permissions for the users of the GDPR ToolBox are defined in three groups. These groups and the corresponding authorization records define a proposal for the authorizations to map typical tasks of the different user groups of the GDPR ToolBox. The definition of the task area for the respective user group can vary depending on the company, so that extensions and adjustments must be made to the authorizations described here and this institution is not legally binding and does not claim to be complete.

Basic User

For this user there is an authorization set "GDPR-BASIC" - this is assigned to all users who have to access tables with personal contents or read the setup of the GDPR ToolBox and is comparable to the standard authorization set "BASIC".

In order to set up a user in the Order Entry area to the extent that they can perform functions such as contact creation, customer creation, order entry and posting, a Standard Business Central database must have at least the following authorization record setup for this user.

Permission Set	Name
BASIC	Basic User (All Inclusive)
DATAEXCH-SETUP	Data Exchange Setup
GDPR-BASIC	Basic User GDPR Toolbox
RM-CONT, EDIT	Edit contacts
S&R-Q/O/I/R/C, POST	Post sales orders, etc.
S&R-Q/O/I/R/C	Create sales orders etc.
S&R-CUSTOMER, EDIT	Edit customers
S&R-POSTED S/I/R/C	Read posted shipments, etc.

GDPR Officer

The authorization record "GDPR-OFFICER" has been provided for the officer who has to record and process the requests from the persons affected. To perform the usual tasks of the agent, the users must be assigned at least the following authorization records.

Permission Set	Name
BASIC	Basic User (All Inclusive)
DATAEXCH-SETUP	Data Exchange Setup
GDPR-OFFICER	Officer GDPR Toolbox
S&R-POSTED S/I/R/C	Read posted shipments, etc.

The rights to information and export can be mapped in this permissionset - not the rights, e.g. to data correction. To do this, it may be necessary to assign additional permission records from the standard authorization records.

GDPR Administrator

For users who have to set up the GDPR -Toolbox, the "GDPR-SETUP" permission set is provided, which enables full access to all relevant tables of the GDPR -Toolbox.

The users for setting up the GDPR -Toolbox must have assigned the following authorization records.

Permission Set	Name
BASIC	Basic User (All Inclusive)
DATAEXCH-SETUP	Data Exchange Setup
GDPR-SETUP	Setup GDPR Toolbox

GDPR ToolBox for Business Central - Operation

The **GDPR ToolBox** supports the special data protection requirements in Microsoft Dynamics 365 Business Central within the framework of the **General Data Protection Regulation (GDPR)**. In this part of the documentation, the operation of the GDPR ToolBox is presented using example processes. Since each company works individually and the characteristics of data protection are manifold, the documentation of these example processes is to be understood as a suggestion and basis for the possibilities. The processes presented here do not claim to be complete and must therefore be checked, revised and supplemented in cooperation with the data protection officer.

Contact Creation

If the user creates a new contact, the time for which the data for this contact is to be retained/saved is defined as soon as the contact is created. During creation, the table specifications from the data structure setup are interpreted and a planned action date as the action type (delete or make anonymous) are determined and inserted in the "Planned actions" table. In addition, a link is created with the reference to this entry in the table and displayed to the contact - this link establishes a connection between the contact and the planned action (in this case "Delete").

Contact Card | Work Date: 27.01.2022

KT000109 · TraxTonic Sdn Bhd

Process Report Open in Excel More options

Create Opportunity GDPR Details Apply Template... Create Interaction Create Sales Quote Sales Quotes Statistics

General Show more

No. KT000109 Type Company

Name TraxTonic Sdn Bhd Company Name TraxTonic Sdn Bhd

Communication Show more

Address

Address Sama Jaya Free Industrial Zo

Address 2

Country/Region C... MY

Post Code 93450

City KUCHING, Sarawak

Contact

Phone No.

Mobile Phone No.

Email traxtonic.sdn.bhd@contoso.

Home Page

Language Code ENU

Show Map

Foreign Trade > MYR

Profile Questionnaire >

Links (1) +

Delete on 03.11.2022

http://localhost:8087/BC170/?company=C...

Attachments (1)

Notes +

(There is nothing to show in this view)

The links are created for the client type defined in the GDPR Setup.

GDPR Details

The GDPR relevant contact details are provided as a separate page in the form of the "GDPR Details" campaign on the contact card.

Edit - Contact GDPR Details - GDPR-Details Contact KT000109 TraxTonic Sdn Bhd

Manage View Personal Data Change Log

General Show more

Contact No. KT000109

Type Company

Name TraxTonic Sdn Bhd

Name 2

Address Sama Jaya Free Industrial Zone

Post Code 93450

City KUCHING, Sarawak

Country/Region Code MY

Details

Data Source Code NEWSLETTER

Collection Reason Code ORDER

Exclude from Segment ☐

Campaign

Campaign No.

Campaign Description

Processing Consents Manage

Consent Code	Description	Consented	Consented Date/Time	Revoked	Revoked Date/Time
DPOTIN NL	Double Opt In Newsletter	☒	28.01.2021 11:02	☐	

Processing Purposes

Code	Description
NL_MEN	Newsletter Men
NL_WMN	Newsletter Woman

Close

This page shows some information about the contact itself (name, address,...). The "Exclude from segment" field is also displayed here and synchronized with the contact card. In addition, the origin of the data can be defined in the information register "Data origin" in the form of a data origin code and due to the setting in the data origin code campaign, also an origin campaign.

The data processing consents for this contact can be documented in the data processing consents register. The "Agreed" indicator documents the corresponding processing purposes in the "Processing purposes" info box. Should a contact revoke the data processing consent, the processing purposes will be removed automatically. If overlapping processing purposes have been defined in different consent declarations, the data record will only be removed in the Processing Purposes infobox if all corresponding consent declarations have been revoked.

With the action "View Personal Data" the personal data of the contact and the corresponding data structure, in which the table "Contact" is contained, can be called up directly from this view. If the change log is activated for the table "DSGVO-Details", you can use the action "Change log" to view the logged changes for this contact.

Customer Creation

The creation of the customer is entered according to the same principle as for the contacts link and a data record in the planned actions of the GDPR ToolBox. In this example, the function "Create as customer" was used for a company contact.

Scheduled Actions

With the link on the data set you can call up the scheduled actions for this data set - alternatively the planned actions can also be called up directly from the menu of the GDPR ToolBox.

CRONUS AG

Setup

Scheduled Actions:

All

Search

Process

Rescheduling

Open in Excel

More options

<

In this view, it is possible to reset the status "Suspended" to "Waiting" so that the check can be carried out again in "Create suggestions". You can also specify the postponement and a newly planned date for the "Delete/anonymize" action and a reason from the "New Reschedule Reasons" table.

Edit - Reschedule

New Reschedule Reason Code LITIGATION

New Scheduled Date 29.01.2021

OK

Cancel

This table also forms the basis for the creation of proposals to carry out the actions for deleting/anonymizing the data records. These suggestions are used in the GDPR ToolBox to monitor the planned actions and that the user has the possibility to check and override the results or the execution, based on the settings at the table defaults, before executing the action.

Automatically update scheduled actions

The scheduled actions can also be updated using the job queue. The entry and the call of the job queue item can be reached from the DSGVO-Toolbox setup. In addition to this activation, the subsequent update must be activated in the corresponding table defaults (tab "Scheduled action").

The indicator "Manual scheduled actions" defines that the planned actions are updated downstream. To be able to select this option, an integer field for the update (update progress) must exist in the respective table and be created if necessary. For details see GDPR ToolBox Customization.

Create an order / post a delivery and invoice

An order, a posted delivery and a posted invoice are created from the customer. For the tables of the posted documents, you have defined in the table specifications for the data structure that these documents are to be made anonymous.

CRONUS AG Setup									
Scheduled Actions: All Search Process Rescheduling Open in Excel More options									
Table ID	Table Name	Record Key	Action	Action Date	Action Date (Original)	Reschedule Reason Code	Inserted at	Status	Record Structure Code
21	Cust. Ledger Entry	Debitorenposten: 3071	Anonymize	31.12.2031			28.01.2021 11:50	Waiting	CONTACT
112	Sales Invoice Header	Verkaufsrechnungskopf: 103032	Anonymize	31.12.2031			28.01.2021 11:50	Waiting	CONTACT
110	Sales Shipment Header	Verkaufslieferkopf: 102043	Anonymize	31.12.2031			28.01.2021 11:50	Waiting	CONTACT
36	Sales Header	Verkaufskopf: Order,1001	Anonymize	31.12.2031			28.01.2021 11:49	Done	CONTACT

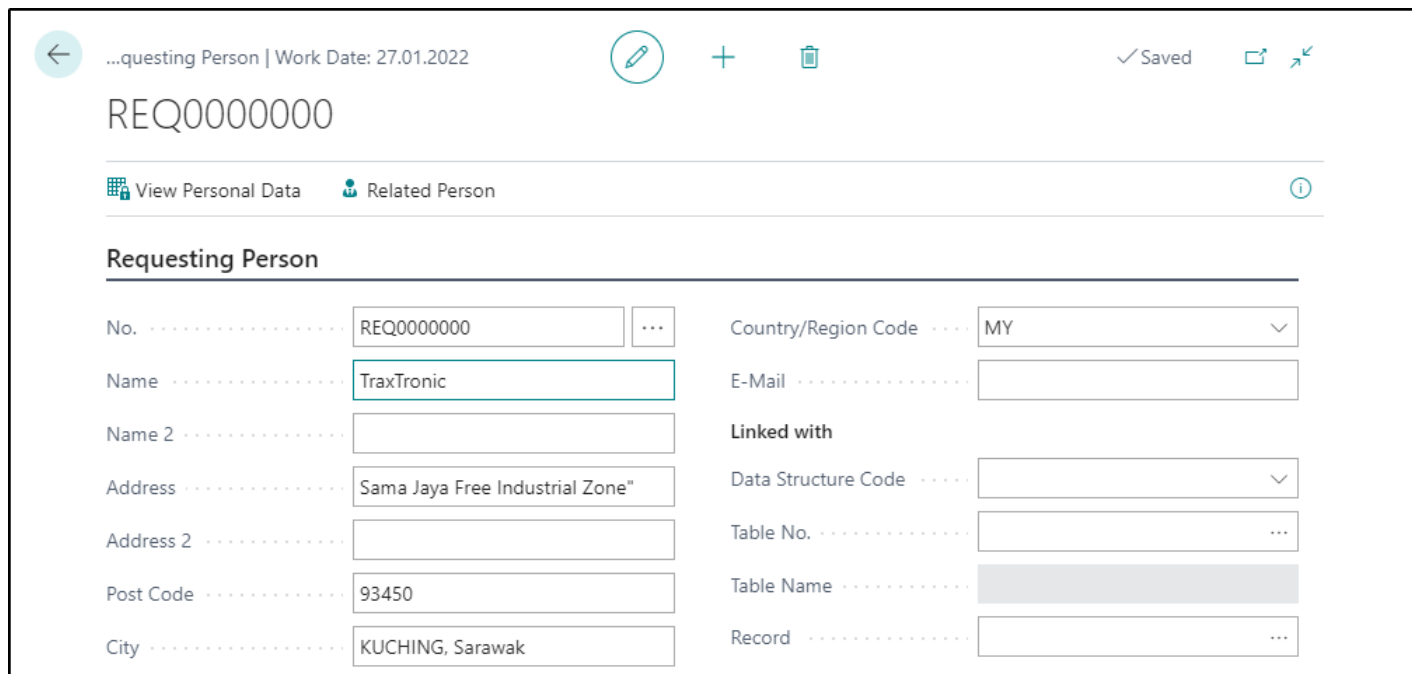
Request from concerned persons

With the GDPR, private individuals have more rights to the stored data and can make inquiries to companies and public authorities and request information about the stored information. The administration and documentation of these requests are supported by the GDPR ToolBox. The following rights of the data subjects are supported:

- Information - right to information
- Correction - right to correction
- Export - right to data transferability
- Delete - right to delete stored data

Creation of the requesting person

The inquiries of the persons concerned are filed in the "Requesting Persons" section. First, the name, address and communication information of the person making the request is recorded.



...questing Person | Work Date: 27.01.2022

REQ00000000

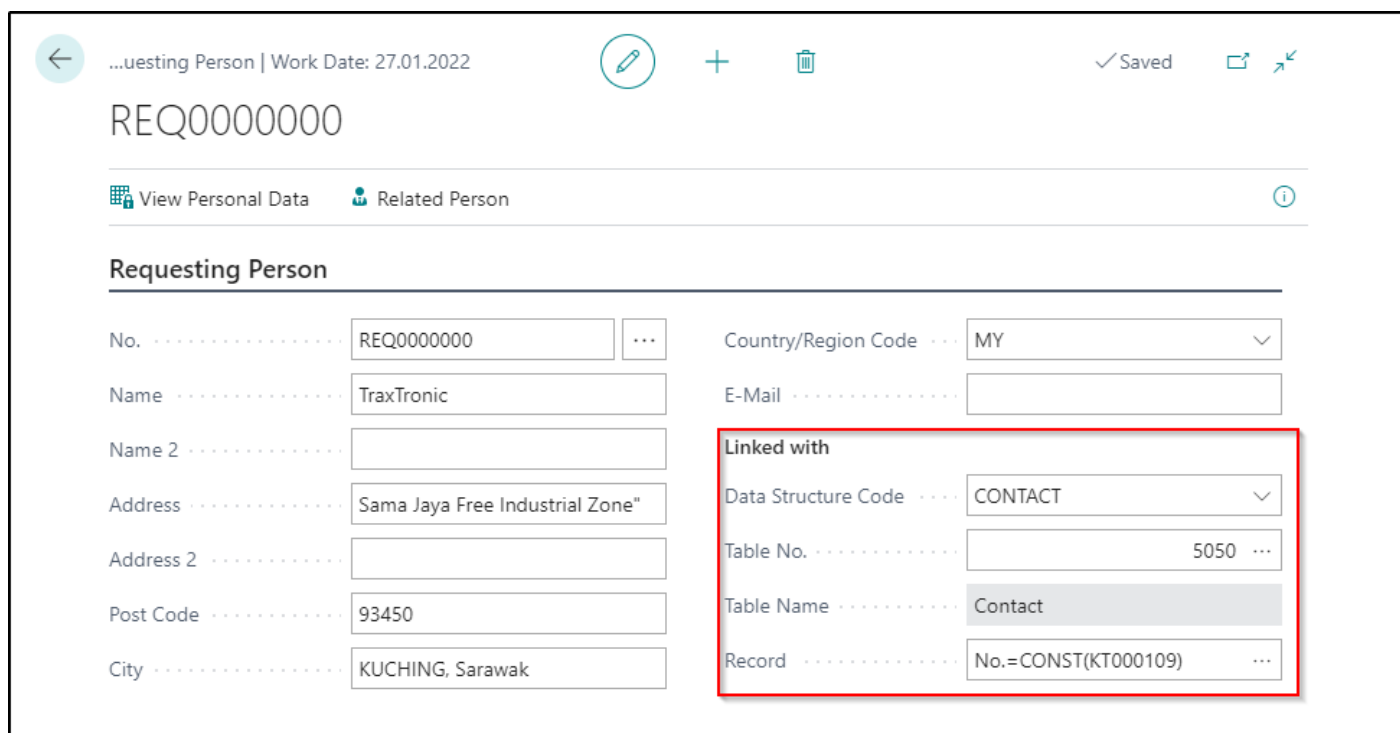
View Personal Data Related Person

Requesting Person

No.	REQ00000000	...	Country/Region Code ...	MY	▼
Name	TraxTronic		E-Mail		
Name 2			Linked with		
Address	Sama Jaya Free Industrial Zone"		Data Structure Code		▼
Address 2			Table No.		...
Post Code	93450		Table Name		
City	KUCHING, Sarawak		Record		...

Link to master data

In addition, a reference must be established between the requesting person and the respective master data record. For this purpose, the "Linked to" area is provided in the map view for the person making the request. First you have to decide for a data structure, based on this corresponding example structure you have to define whether the inquiring person is a contact, employee or a resource (e.g. a service provider). You can select the corresponding data structure and store it in the field *Data structure code*.



...uesting Person | Work Date: 27.01.2022

REQ00000000

View Personal Data Related Person

Requesting Person

No.	REQ00000000	...	Country/Region Code ...	MY	▼
Name	TraxTronic		E-Mail		
Name 2			Linked with		
Address	Sama Jaya Free Industrial Zone"		Data Structure Code	CONTACT	▼
Address 2			Table No.	5050	...
Post Code	93450		Table Name	Contact	
City	KUCHING, Sarawak		Record	No.=CONST(KT000109)	...

In the data structure, links can be defined at different levels, for example at contact, customer or vendor level. The tables allowed for selection are defined in the table specifications in the data structures ("Allow table for query" field). In the above example of a request, the "Contact" table was defined as a reference to the master data. In the field *Data set* the corresponding number of the contact can be selected.

Note: The assignment of the data level in the form of the table number is relevant for the subsequent processes such as information and export of personal data. Only data for the underlying tables of the data structure is taken into account, that is, if a query is to be linked and contacts are used, the contact table and the contact number must also be specified and access at customer level must not be selected, otherwise the contact data is ignored.

Once the links have been defined, you can use the "Personal data" action to obtain an overview of the stored information in accordance with the defined data structure and the initial table.

Table Content Work Date: 27.01.2022					
Open Source Record Open Scheduled Action Entry Anonymize Record Open in Excel					
Table Name	Record Key	Scheduled Action Date	Table Filter	Action Hints	
→ Contact	Kontakt: KT000109	03.11.2022	—		
Contact Profile Answer	Kontakt Profilantwort: KT000109.DEBITOR,2...	31.01.2024	—		
Contact Profile Answer	Kontakt Profilantwort: KT000109.DEBITOR,5...	31.01.2024	—		
Contact Profile Answer	Kontakt Profilantwort: KT000109.DEBITOR,9...	31.01.2024	—		
Contact Profile Answer	Kontakt Profilantwort: KT000109.DEBITOR,1...	31.01.2024	—		
Contact Profile Answer	Kontakt Profilantwort: KT000109.DEBITOR,1...	31.01.2024	—		
Contact Profile Answer	Kontakt Profilantwort: KT000109.DEBITOR,2...	31.01.2024	—		
Contact Profile Answer	Kontakt Profilantwort: KT000109.DEBITOR,2...	31.01.2024	—		
Contact Profile Answer	Kontakt Profilantwort: KT000109.DEBITOR,2...	31.01.2024	—		
Segment Line	Segmentszeile: SM10001.1520000	27.01.2024	—		
Segment Line	Segmentszeile: SM10004.1520000	27.01.2024	—		

Field Content					
Field No.	Field Name	Field Value	Field Type	Field Class	
1	No.	KT000109	Code	Normal	
2	Name	TraxTonic Sdn Bhd	Text	Normal	
3	Search Name	TRAXTONIC SDN BHD	Code	Normal	
5	Address	Sama Jaya Free Industrial Zone	Text	Normal	
7	City	KUCHING, Sarawak	Text	Normal	
15	Territory Code	AUSLAND	Code	Normal	
91	Post Code	93450	Code	Normal	
102	Email	traxtonic.sdn.bhd@contoso.com	Text	Normal	
5101	Salutation Code	MANDANT	Code	Normal	
→ 5102	Search Email	TRAXTONIC.SDN.BHD@CONTOSO.COM	Code	Normal	

Include request

In the lower part of the inquiry one or more requests of the inquiring person can be recorded. It can also be used to document whether and when the person has already made inquiries in the past. New calls can be entered via the "New line" button in the Requests group in the ribbon.

Edit - Request Details - REQ0000000 - TraxTronic -

Manage Process Set Status Related Person

General

Request Type Adjust

Status Code RQ-05

Verification Code EMAIL

Status Request Created

Verification Date 28.01.2021

User ID Request Handl... ..

Request Date 28.01.2021 11:54

Export File Name

Request Processed Date

Close

With the field Request type, the request type can be classified into a group for the rights of the requesting person. The request type also controls the executed "Process" function. With the verification code and the verification date, proof of the identity of the person making the request can be documented. In addition, a status for the status of processing can be selected from the "Request status" table. Depending on the selected status, the request is displayed in the corresponding stack of the role center.

Right to information

The Requesting person has a right to information about the stored data. This right is represented in the GDPR ToolBox by a report that determines and outputs the tables and field contents according to the data structure and this report can be made available to the inquiring person in the form of a PDF. If you want to override this standard setting - that is, you want to display even more data or, if necessary, less data - you can solve this problem with an additional field list "Output Field List" in the Data Structure Table. As soon as data is contained there, the standard is overridden. The change is displayed in the data structure using the "Output Fieldlist Active" indicator.

CONTACT | Work Date: 27.01.2022 ✓ Saved

Data Structure Tables | Search | + New | Edit List | Delete | Process | Report | Indentatio | Open in Exo | More

Table Guideline | Table Fieldsetup | **Output Field List** | Relationships

Table No.	Table Name	Export Table Name	Table Relation Defined	Fields Defi...	Output Fieldlist Active	Table Filter
→ 5050	Contact	Contact1	No	☒	☒	—
5089	Contact Profile Answer	ContactProfileAnswer	Yes	☒	☐	—
5092	Opportunity	OpportunityToCon	Yes	☒	☐	—
5060	Contact Web Source	ContactWebSource	Yes	☒	☐	—
5051	Contact Alt. Address	ContactAltAddress	Yes	☒	☐	—
5077	Segment Line	SegmentLine	Yes	☒	☐	—
5061	Rlshp. Mgt. Comment Line	RlshpMgtCommentLine	Yes	☒	☐	—

In the request for the person concerned, the request type "Information" is selected and the corresponding report is created using the "Process" action and a link to this report is provided in the field *Export file name*.

...est Details | Work Date: 27.01.2022 ✓ Saved

REQ00000000 - TraxTronic - KUCHING, Sarawak

Process ✓ Set Status Related Person

General

Request Type	Adjust	Status Code	RQ-50
Verification Code	EMAIL	Status	Done
Verification Date	28.01.2021	User ID Request Ha...	TSO\
Request Date	28.01.2021 11:54	Export File Name	Sent File to Client: REQ0000...
Request Processed ...	28.01.2021 11:55		

The file is then sent manually, e.g. by e-mail. In the view Request details you can set a manual status using the available actions "Set status" or branch to the assigned master data record via Linked person. The "Process" action has already automatically set the corresponding status from the field *Done Status Code* of the GDPR institution.

The report on the stored data on the person making the request contains the fields defined in the assigned data structure (field list).

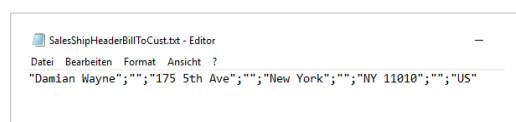
Personal Data - Request - List		Donnerstag, 28. Januar 2021	
CRONUS AG		Page 1	
		TSO	
Contact	Table Record ID	Field Name	Field Value
Customer	20339921	Address	"Sama Jaya Free Industrial Zone"
		City	"KUCHING, Sarawak"
		Contact	"Mrs. Rubina Usman"
		Country/Region Code	"MY"
		Name	"TraxTonic Sdn Bhd"
		No.	"20339921"
		Post Code	"93450"
		Search Name	"TRAXTONIC SDN BHD"
		Address	"Sama Jaya Free Industrial Zone"
		City	"KUCHING, Sarawak"
Contact	KT000109	Email	"traxtonic.sdn.bhd@contoso.com"
		Name	"TraxTonic Sdn Bhd"
		No.	"KT000109"
		Post Code	"93450"
		Salutation Code	"MANDANT"
		Search Email	"TRAXTONIC.SDN.BHD@CONTOSO.COM"
		Search Name	"TRAXTONIC SDN BHD"
		Territory Code	"AUSLAND"
		Line No.	120000
		Profile Questionnaire Code	"DEBITOR"
Contact Profile Answer	KT000109,DEBITOR,120000	Line No.	120000
		Profile Questionnaire Code	"DEBITOR"
Contact Profile Answer	KT000109,DEBITOR,160000	Line No.	160000
		Profile Questionnaire Code	"DEBITOR"
Contact Profile Answer	KT000109,DEBITOR,200000	Line No.	200000
		Profile Questionnaire Code	"DEBITOR"
Contact Profile Answer	KT000109,DEBITOR,200000	Line No.	200000
		Profile Questionnaire Code	"DEBITOR"
Contact Profile Answer	KT000109,DEBITOR,240000	Line No.	240000
		Profile Questionnaire Code	"DEBITOR"
Contact Profile Answer	KT000109,DEBITOR,280000	Line No.	280000
		Profile Questionnaire Code	"DEBITOR"
Contact Profile Answer	KT000109,DEBITOR,550000	Line No.	550000
		Profile Questionnaire Code	"DEBITOR"
Contact Profile Answer	KT000109,DEBITOR,900000	Line No.	900000
		Profile Questionnaire Code	"DEBITOR"
Segment Line	SM10001,1520000	Description	"Umsatz steigern"
Segment Line	SM10004,1520000	Description	"Arbeitsplatzeinrichtung, Debitor"

Right to transfer

The data subject is granted the right to transfer data under the GDPR. This right is represented in the query details by the query type "Export". When the request is processed, the data is exported in the form of a CSV file and all tables with the corresponding data and fields from the specified data structure are taken into account and stored as a zipped text file. Alternatively, the setup in the output field list is also taken into account here (see above). This data can then be made available to the inquiring person.

Name	Typ	Komprimierte Größe
Contact1.txt	Textdokument	1 KB
ContactAltAddress.txt	Textdokument	0 KB
ContactBusinessRelationCust.txt	Textdokument	0 KB
ContactBusinessRelationVend.txt	Textdokument	0 KB
ContactProfileAnswer.txt	Textdokument	0 KB
ContactWebSource.txt	Textdokument	0 KB
CustLedgerEntry.txt	Textdokument	1 KB
Customer1.txt	Textdokument	1 KB
CustomerBankAccount.txt	Textdokument	0 KB
DeliveryReminderHeader1.txt	Textdokument	0 KB
FinanceChargeMemoHeaderToCus...	Textdokument	0 KB
InteractionLogEntry.txt	Textdokument	0 KB
IssuedDelivReminderHeader.txt	Textdokument	0 KB
IssuedFinChargeMemoHeaderToC...	Textdokument	0 KB
IssuedReminderHeader.txt	Textdokument	0 KB

The format for exporting the data has not been defined yet in the GDPR, so the fields are exported as CSV in the order of the field list.



SalesShipHeaderBillToCust.txt - Editor
Datei Bearbeiten Format Ansicht ?
"Damian Wayne";";";"175 5th Ave";";";"New York";";";"NY 11010";";";"US"

The used file names are created according to the table name and can be adapted in the data structure in the column *Export table name*.

Right to correction

The concerned person also has the right, that the stored data will be corrected. This right is represented by the request type "Correction". The correction requests can be varied, so that the actual correction takes place, for example, via the master data. The possibility of changing posted documents does not exist and is also not permitted due to the guidelines for storage. The correction is supported by

- the call of the linked person
- manual correction of data
- the documentation of the correction by describing the changes in the notes and possibly links to the request details
- the status for processing the corrections

The action "Process" sets a corresponding information in the form of a PDF file and sets the status of the corresponding request. In this case, the report is to be understood as documentation and can be sent to the person concerned for correction.

Right to delete

The rights of the GDPR also provide for the deletion of personal data. In principle, you cannot always comply with this right, because there are different, competing requirements for this right, such as the retention periods for booked documents. The corresponding intervals and action dates are set up using the table specifications of the data structure. For this institution, the deadlines are to be chosen in such a way that both the requirements of the GDPR and the retention periods are met. In this demo scenario, we have therefore provided for the "Posted sales invoices" table to be stored for 10 years as a non-legally binding example. As an alternative to deletion, the function Anonymize can also be used in the GDPR ToolBox. In contrast to the deletion of data records, the defined fields are overwritten with anonymizing default values when data records are made anonymous.

If data records are to be deleted, not some selective data records are removed from the tables, but all data of the entire structure for a master data record is always deleted or made anonymous. The planned actions form the basis for checking whether deletion/anonymization is possible. If the date for the execution of the deletion/anonymization is exceeded in all planned actions, the corresponding deletions/anonymizations can be executed.

For the request of a person concerned, this means that the request for deletion can only be met if the corresponding date in all linked data records of the data structure also permits deletion/anonymization. Users of the GDPR ToolBox can call up the stored personal data of the inquiring person directly from the inquiring person ("View Personal Data" action) and determine whether deletion is already possible via the "Scheduled action date" column.

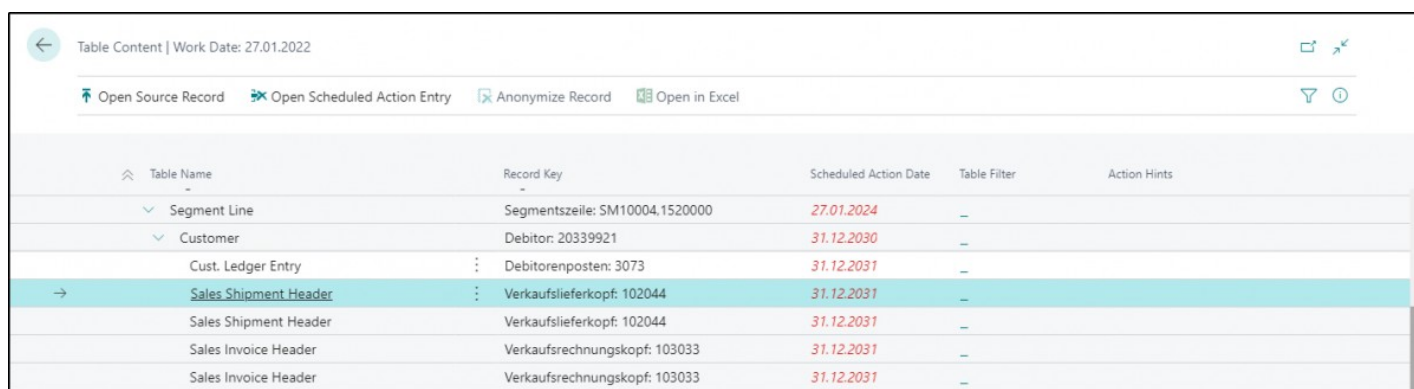


Table Name	Record Key	Scheduled Action Date	Table Filter	Action Hints
Segment Line	Segmentszeile: SM10004,1520000	27.01.2024	—	
Customer	Debitor: 20339921	31.12.2030	—	
Cust. Ledger Entry	Debitorenposten: 3073	31.12.2031	—	
Sales Shipment Header	Verkaufslieferkopf: 102044	31.12.2031	—	
Sales Shipment Header	Verkaufslieferkopf: 102044	31.12.2031	—	
Sales Invoice Header	Verkaufsrechnungskopf: 103033	31.12.2031	—	
Sales Invoice Header	Verkaufsrechnungskopf: 103033	31.12.2031	—	

If the detail data allows deletion, a corresponding entry is inserted in the proposed actions when you execute the "Process" action. If deletion is not possible, this can be stored in the notes and the person making the request can be informed.

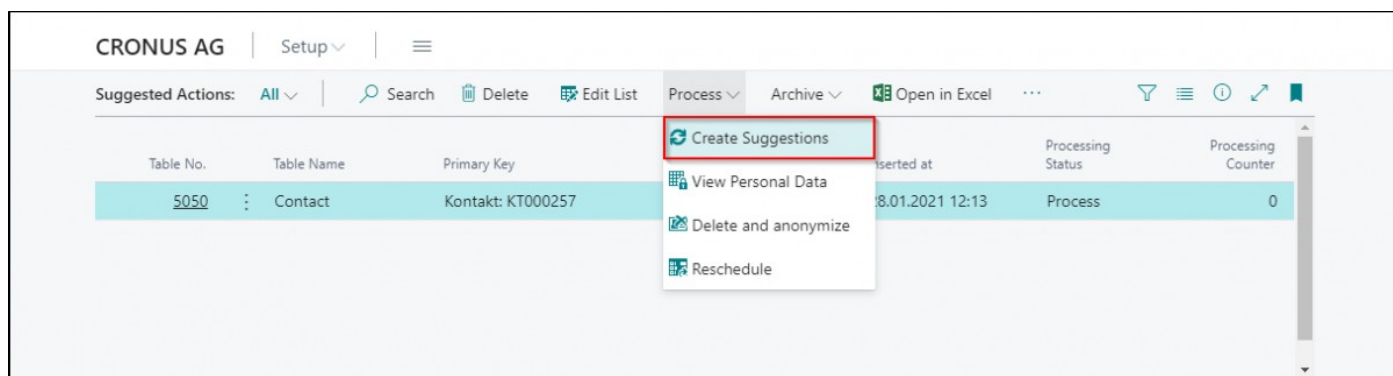
Suggestions for deleting/anonymizing

In the "Proposed actions" of the GDPR ToolBox, the master data intended for deletion or anonymization are inserted. The proposed actions are updated from this view with the action "Create proposals". A fully automated deletion is currently not yet planned and the deletion or anonymization of the corresponding data takes place in two phases:

1. Make suggestions for deleting and anonymizing
2. Execution of the proposed actions for delete/anonymize

Create Suggestions

The function of the same name for creating proposals checks whether the corresponding action date for deleting/anonymizing has been reached for an unchecked data record and then determines all associated data records based on the data structure and checks whether the corresponding action date has been reached or already exceeded. If all other data records are also allowed for deletion/anonymization, a corresponding master data entry according to the data structure at the highest level, e.g. contact, is proposed in the proposals.



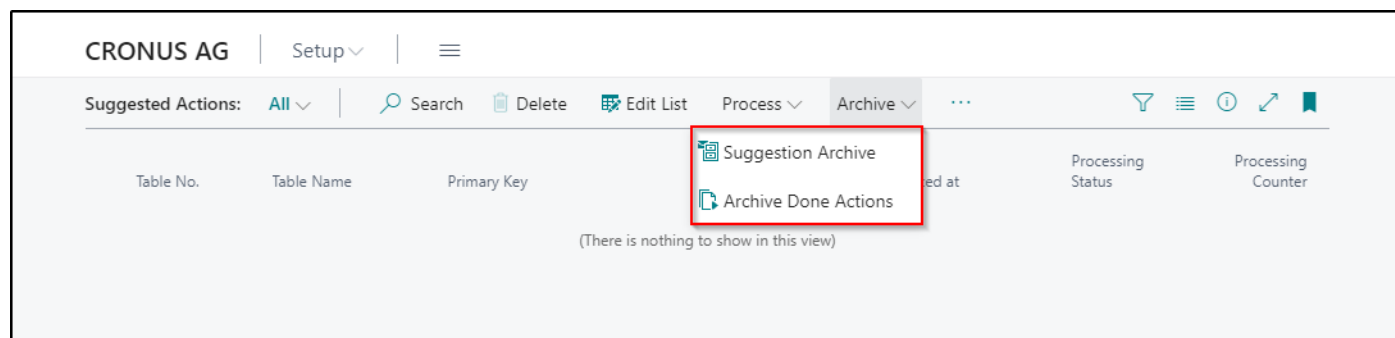
The corresponding proposals can be checked using the "Personal data" action or, alternatively, the corresponding date for the execution of the action can be postponed. To avoid unwanted deletions and anonymization, it is strongly recommended to check the proposals. The rules for deleting and anonymizing are defined in the data structure, the table specifications, the relations and the field list. If several data records are to be processed simultaneously, you can select the desired rows and then execute the action.

Delete and Anonymize

Based on the proposals created and the checks performed, the user can decide that the planned actions should be performed. The "Delete and make anonymous" action can be used to either delete the data records from the database or make the fields anonymous according to the defined field list. The following is an example of an anonymous sales invoice - the corresponding field contents are displayed with the field name and the reference to the primary key.

Archiving

If the suggested actions have been processed according to their settings, they are automatically archived and can be viewed via the menu item "Suggestion Archive". In case of an update of the GDPR -Toolbox from an older version, which did not contain this archiving yet, the archiving can be done manually via "Archive Done Actions".



GDPR actions for historical data

For the historical data you can create the planned actions with the help of the batch processing "Create actions from historical data" in the menu ribbon of the GDPR institution. Note that the determination of the action date must be created depending on the field contents of the respective tables - for example, a posted invoice with the posting date 03/15/2013 could be made anonymous as of 12/31/2023. The corresponding definition for the baseline date for calculating the action date is stored in the table specification in the field *Planned action date (field number)*. If no field is specified in the table specifications, field *Planned action date (field number)*, the current date is used as the base date for the cost estimate.

In the table specifications you can define whether the scheduled actions are to be created immediately, i.e. when the data record is created or alternatively downstream. The advantage of downstream creation, particularly for tables with many data records, is that the job queue data writes the transaction and the data to the database at defined intervals or depending on the number of data records processed using the "Commit by number of data records" parameter, closes the transaction and starts a new transaction. This avoids locks on tables. The batch processing described above creates the scheduled actions within a database transaction for all tables and all data records, which can lead to locks when processing many data records. Details of the setup for the downstream actions can be taken from the table specifications in the Setup area.

User Permissions

For the documentation of access rights in the course of the implementation of the GDPR, a report is available which evaluates user access to the tables with personal content across data structures. This report can be accessed directly from the GDPR -Toolbox role center.

GDPR User Permissions - List
CRONUS AG (EN)

Mittwoch, 1. August 2018
Page 1
TSO-DATA GmbH

Table No.	Table Name	User Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission
0		TSO\ADMIN	Yes	Yes	Yes	Yes	Yes
18	Customer	TSO\NAVRECHTE	Yes	Indirect	Indirect		
21	Cust. Ledger Entry	TSO\NAVRECHTE	Indirect	Indirect	Indirect		
23	Vendor	TSO\NAVRECHTE	Yes	Indirect	Indirect		
36	Sales Header	TSO\NAVRECHTE	Yes	Indirect	Indirect		
38	Purchase Header	TSO\NAVRECHTE	Yes	Indirect	Indirect		
110	Sales Shipment Header	TSO\NAVRECHTE	Indirect		Indirect		
112	Sales Invoice Header	TSO\NAVRECHTE	Indirect		Indirect		
114	Sales Cr. Memo Header	TSO\NAVRECHTE	Indirect				
120	Purch. Rcpt. Header	TSO\NAVRECHTE		Indirect			
122	Purch. Inv. Header	TSO\NAVRECHTE	Indirect				
156	Resource	TSO\NAVRECHTE	Yes				
167	Job	TSO\NAVRECHTE	Yes				
222	Ship-to Address	TSO\NAVRECHTE	Yes	Indirect	Indirect		
287	Customer Bank Account	TSO\NAVRECHTE	Yes				
5050	Contact	TSO\NAVRECHTE	Yes	Indirect	Indirect		
5051	Contact Alt. Address	TSO\NAVRECHTE	Yes				

The report evaluates the access rights based on the Users and Access Rights tables at the TableData level. The relevant tables are determined from the table specifications of all data structures.