

User Documentation

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GDPR

Functionality for Autoline Revision 8 - Version 9304C and above

Date:

May 2018



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1. General Information

The following document outlines the key GDPR developments that are relevant to customers on versions **Autoline 9304C and above** and how to use them.



2. Controller Identification

There is now the ability to record your Data Controller's information, so that you can restrict certain features and functionality to this role. To do this navigate to:

- Manufacturing systems Company X4
- ➢ Generic CRM parameters
- > Expand CRM parameters
- General Data Protection parameters

Here you are able to enter the Autoline User ID of the Controller or manually type in a Data Controller Name.

📾 X4 parameter configuration utility - X4 (kcc/1022)	– 🗆 X
File Edit Tools Help	
🛐 🖆 🗠 🔒 🗈 🖷 🤗	
Exit Amend Cancel Save Copy Paste Gridedit Help	
Project parameters	General Data Protection parameters - Company: MK/00
CRM parameters	General Data Protection parameters
CRM documents	Controller information
General CRM parameters	Autoline User: kcc ADP User
General Data Protection parameters	Data Controller Name: 9304D
01 - Company 01	Contact Information 1: Contact 1
	Contact Information 2: Contact 2

Data Controller's user information fields



3. CRM Notification

When a CRM customer record's personal data fields are modified, it is possible to warn the user that the amendment to the personal data may need to be shared with other 3rd parties with whom the data was previously disclosed. To do this navigate to:

- Manufacturing systems Company X4
- ➢ Generic CRM parameters
- CRM notification parameters
- Check 'Activate on Target' (Customers) and 'Activate on Companies' You are able to enter 128 characters of text as needed.



'Activate' fields for warnings to be shown before sharing personal information



4. Prevent copy & paste and data grid information

It is possible to prevent users from copy and pasting table and grid information from the system. To do this, navigate to:

- > System utilities
- Management menu
- User details
- Load the required user id
- Amend
- Check 'Disable grid copy'
- > Save

💼 User details - Automotive Support 9304D (kcc/1022) —						
Personal System Vehicle User CRM Details Guest PL Sundry Orders						
Utilities Button	Miscellaneous					
Administrator:	Mandatory Cost Centre:					
Fleet system:	NL cost centre:	0	Amend			
CRM:	Employee number:	99	Delete			
Fax queue:	Print contact sheets:					
Spooler:	E-mail hunt group:		Confirm			
Display users:	Prefer FrontPage:	Default classic menu 💌	Cancel			
Enable Report Generator: Y	Auto-arrange FrontPage:					
Disable grid copy:	Advanced system user:		Message			

'Disable grid copy' check-box to stop users from copying personal data from tables



5. Consent

In order for it to be possible to print an agreement, the document archive type needs to be configured.

To do this navigate to:

- > Document Archive
- Select 'Company'
- > Document Type

A new document type should be created as per the image below. The type should be entered as GD.

Document Archive Types - G	lobal data (kcc/1)
File View Edit Index Adva	inced Help
Exit First Previous N	▶ 🕅 D Y V X 🖟 C C C C C C C C C C C C C C C C C C
Document Type:	
Detail	
Description of De	oc. Personal date agreement
Archive Library:	^ENV(BASE)/docs/GD
Last identifier:	40
Lookup file:	
Unique Reference	ce: Unique reference
Reference 1:	Account number
Reference 2:	Short name
Reference 3:	
Days to keep:	3000 Lookup field name:
Format type:	
Archive on Cente	er.

Document Archive set-up for printing a consent agreement

Currently, within CRM, there are already a number of ways for restricting communications to a customer. These include the Customer Status drop-down, the 'Stop all mail' check box, and the TPS flags, as shown.

				TPS
itle/Initials:	▼ MC	Home phone:	2253416444	
first name:	Customer	Work phone:	22534165455	R
Sumame:	Name	Work extension:		
Sumame 2:	Name2	Mobile phone:	22222211111	
Salutation:	Customer Name2	Fax:		
	,	Email:		
		Preferred contact r	10.:	-0
Address:	New street Nº 123 Andar 55	Source of business		
Edit	From a new location	OUT	•	
	PORTO	Status:	inact Mail	
Postcode:	4100	Transport has		
Stop all mail:	Sensitive customer:		•	

Current communication restriction functionality



For the TPS check boxes, every time the value of any flag (as shown on the image above) is updated, an end date for the new agreement is requested. The start date is assumed as being the current (today's) date.

Print Consent	X
Consent Dates	
Please fill the agreement end date or leave it blank if undetermined	
Start Date 27/12/2017	
End Date / /	
✓ OK	

Date setting for consent agreements

After filling the *End Date*, you can choose to print the agreement or not.

If you choose to print the agreement a document showing the value of each channel is printed to your currently selected printer. The document should be completed with the consent proposal.

Data Protes	ction agreement		27/12/2017 11:15:40		î L
Customer	Hoare_test David				
Address	99A Church Street Hungerford Berkshire England				
Postcode	RG17 0JH				
Phone	01635 456789 01635 7786877				
Email	dph@emailaddress.com				-
hannel hannel hannel hannel hannel	Work phone Fax Mobile phone Email Stop all mail Sensitive customer	Protected Protected Protected Protected Protected	FALSE TRUE FALSE TRUE FALSE		
					-
	m				

Example print output of customer's consent agreements



Whether or not the agreement is printed, an audit of modifications is recorded and at any time the current agreement history can be viewed or reprinted. To do this:

- Select 'Tools' within the customer record
- Select 'Agreement history'



Agreement History

Agreements
Stat data Ead data Alvef
Start date End date Akter
27/12/2017 / /
26/12/2017 26/12/2017 00000038
20/12/2017 25/12/2017
19/12/2017 19/12/2017 00000030
18/12/2017 / /
15/12/2017 17/12/2017 00000023
14/12/2017 14/12/2017
13/12/2017 13/12/2017
12/12/2017 12/12/2017
11/12/2017 12/12/2017 123
19/11/2017 / /
14/05/2017 / /
19/12/2016 / /
19/12/2007 / /
11/11/2000 / /
🖓 Print 🖌 📽 Cancel
List of customer's agreement history

Agreement Audit History



All the historical records that have an archive reference can then be re-printed.

Method Single document C Range of documents Creation Date From //	Sequence Unique reference Account number Short name	Match Find document 00000039	Display text Close Help
Message to appear on copy doc	ument	Output C Display as PDF C Printer C Display as plain text	
Archived printer Main sp Current printer Main sp Other Printer	oooler oooler	C Email	

Print option for audit history

As the agreement has an end date, a report has been developed which can be found on:

- CRM «Company»
- > Reports & enquiries
- ➢ GDPR Menu
- ➢ GDPR Agreements

This allows you to find all records where the agreement is due to expire within a selected number of days and the view that list of customer records.

GDPR agreements		
<u>O</u> utput type:	Display 💌	ОК
Days to reach	5	Cancel
Allow blank enddates	v	Help
		<u>S</u> chedule
		Add to batch
List customers with agreeme days.	nts which will reach the end date in the days specified o	n the prompt, default 5

Example report settings for expiring GDPR agreements

In the above example all customers with agreements with 5 or fewer days until the end date of their agreement will be shown.



6. Separating mobile from SMS consent

As the Privacy and Electronic Communications Regulations (PECR) sit alongside Data Protection, we have developed separate channels to capture consent for both mobile phone and SMS.

For the mobile channel on a CRM customer record, we no longer have a drop-down that only lets you select from Y-Protected and N-Not Protected values. This has now been extended to allow you to manager consent more accurately for mobile phone use with the following options:

- N Not protected
- Y Protected
- M Calling only
- S Text Messaging only

Find record:	
	TPS
Title/Initials:	Home phone:
First name:	Work phone:
Surname:	Work extension:
	Mobile phone:
Salutation:	Fax Not protected
	Email: Y Protected
	Preferred contact no.: M Calling only
	S Text messaging only
Address:	Source of business:
	Status:
Postcode:	
Step all mail:	Transporttype:
Stop an man. Sensitive customer.	

Extension of mobile consent capture drop-down



7. Report Data

There is a suite of reports that are available to assist with GDPR compliance, which can be found in:

- ➤ CRM
- Reports & enquiries
- ➢ GDPR Reports Menu

The following reports are available:

- Export customer details provide a customer, upon request ,with an export file of the personal information you hold on them
- GDPR customer log provide a customer, upon request, with a report to show how their personal data is being processed
- GDPR agreements list customers with agreements which will reach the end date in the days specified in the report prompt

For the *Export customer details* report to run, an export facility needs to be created. To do this, navigate to:

- System utilities
- Management menu
- > Export facilities
- Right click to insert a row
 The export facility needs to be called KG1

ĺ	💼 Export Facilities Sorted by : Export facility (Forwards) - Automotive Support 9304C (kcc/1023) —							×
	0						O Service Co	onnect
	Export facility	Description	Host directory	Export to PC	PC directory	Format	Scratch after export	
	CODE	DESC	HOSTDIR	PC	PCDIR	FORMAT	SCRATCH	
	KG1	GDPB - Export customer details	/xfer	Y	C:\Temp	CSV	Y	~

Creation of an export facility for the 'Export Customer Details' report to run.