

# User Documentation

## *GDPR*

Functionality for Autoline Revision 8 - Version 9304C and above

**Date:**

May 2018

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## 1. General Information

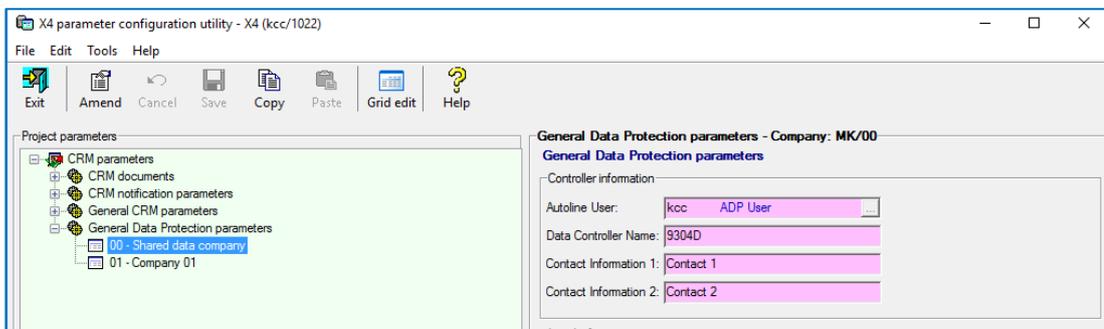
The following document outlines the key GDPR developments that are relevant to customers on versions **Autoline 9304C and above** and how to use them.

## 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.

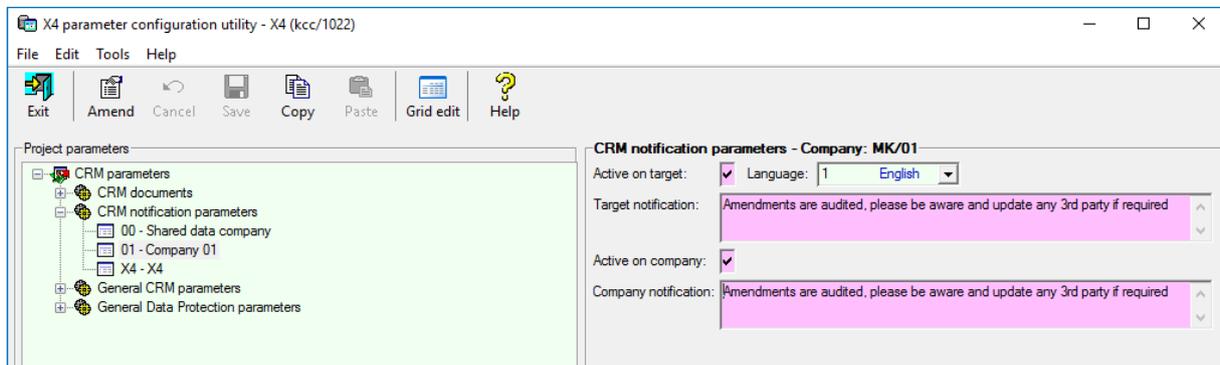


Data Controller’s user information fields

### 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 3<sup>rd</sup> 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.*

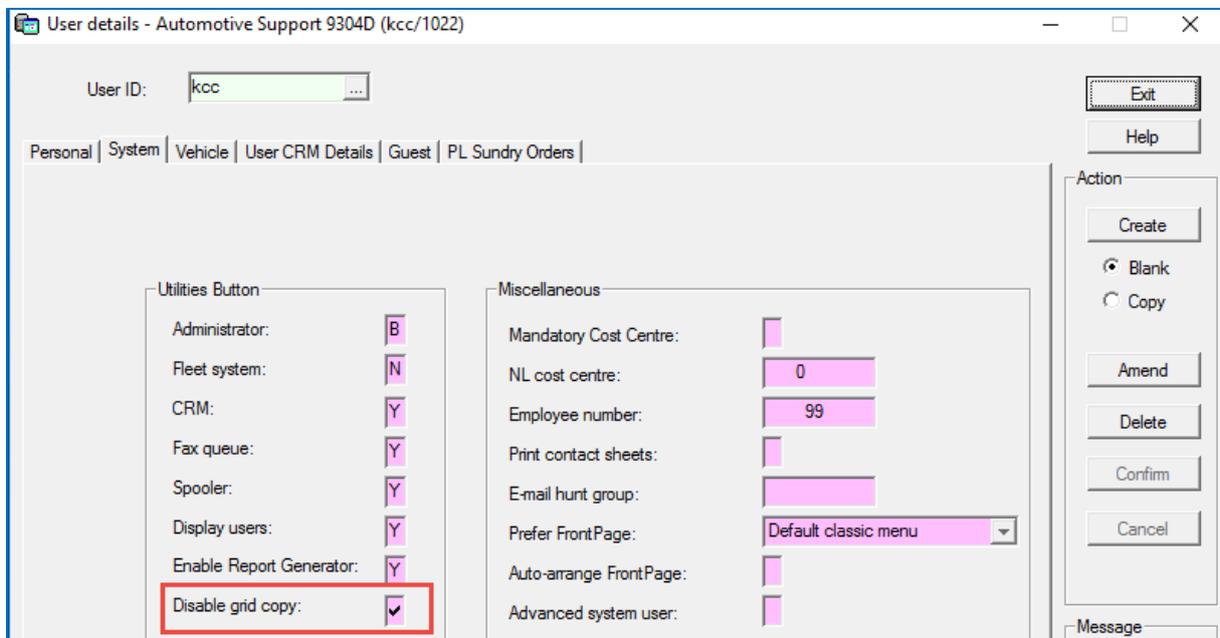


‘Activate’ fields for warnings to be shown before sharing personal information

## 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



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

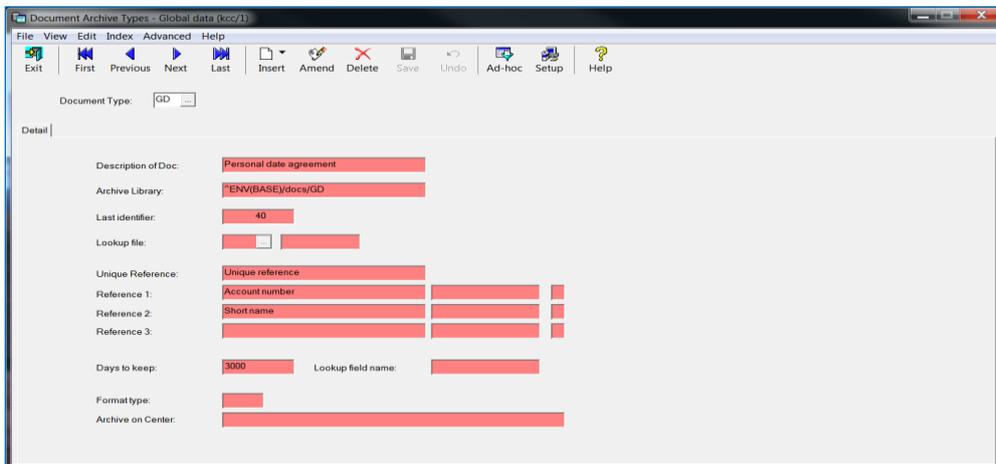
## 5. Consent

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

To do this navigate to:

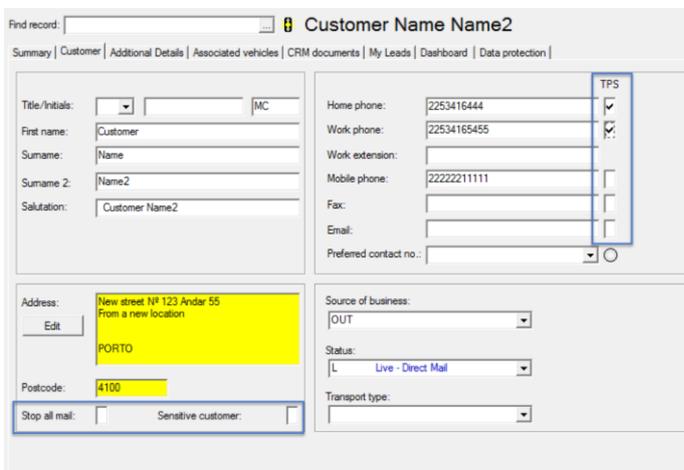
- Document Archive
- Select 'Company'
- Document Type

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



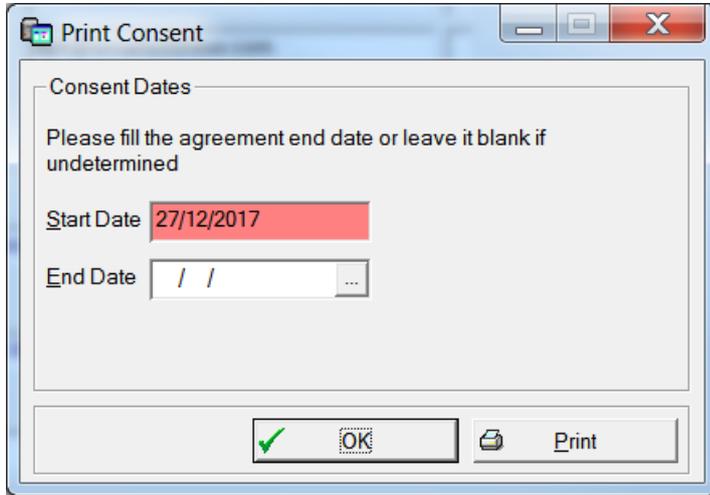
Document Archive set-up for printing a consent agreement

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.



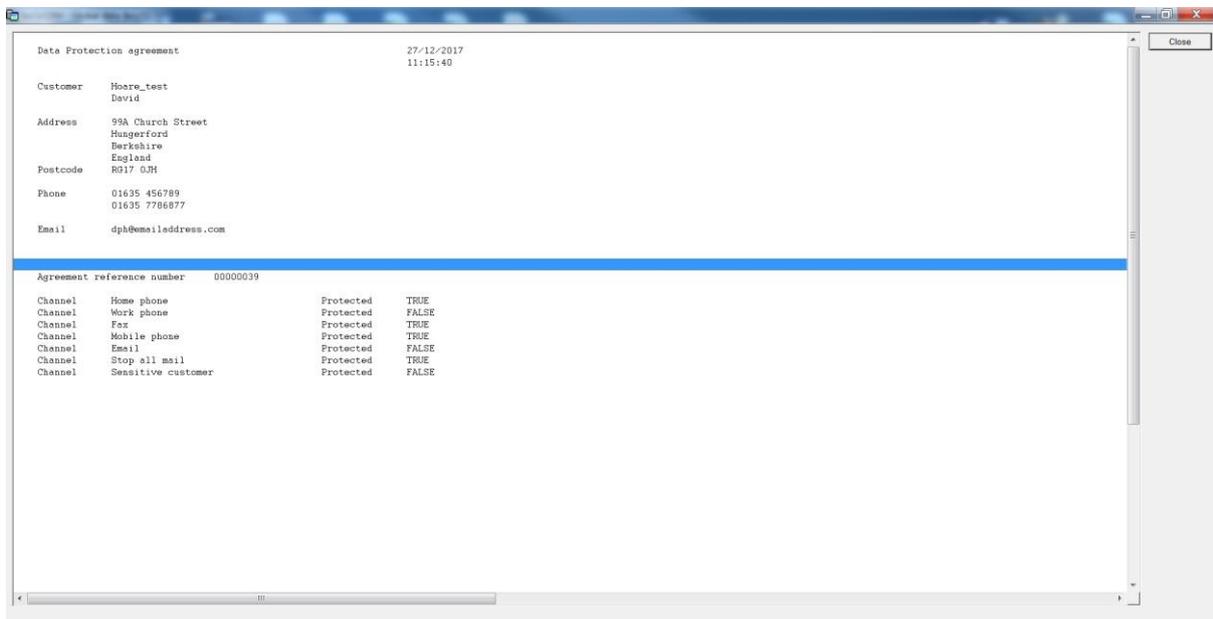
Current communication restriction functionality

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.



Date setting for consent agreements

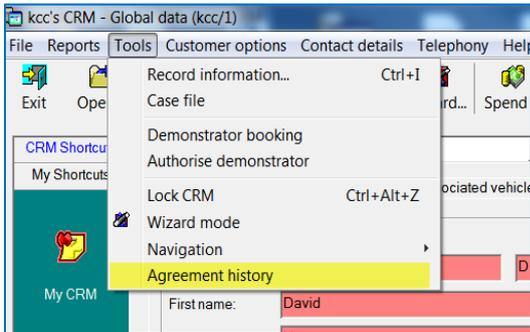
After filling the *End Date*, you can choose to print the agreement or not. If you choose to print the agreement a document showing the value of each channel is printed to your currently selected printer. The document should be completed with the consent proposal.



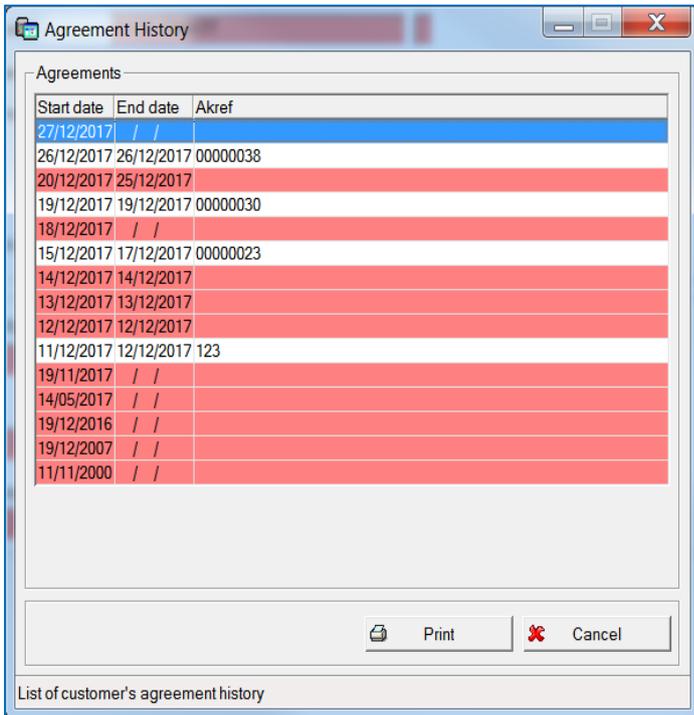
Example print output of customer's consent agreements

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'

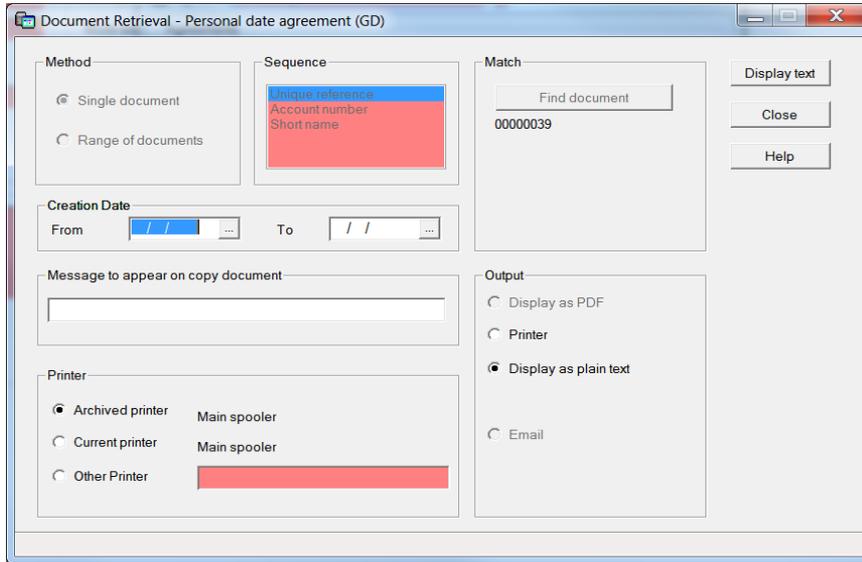


Agreement History



Agreement Audit History

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

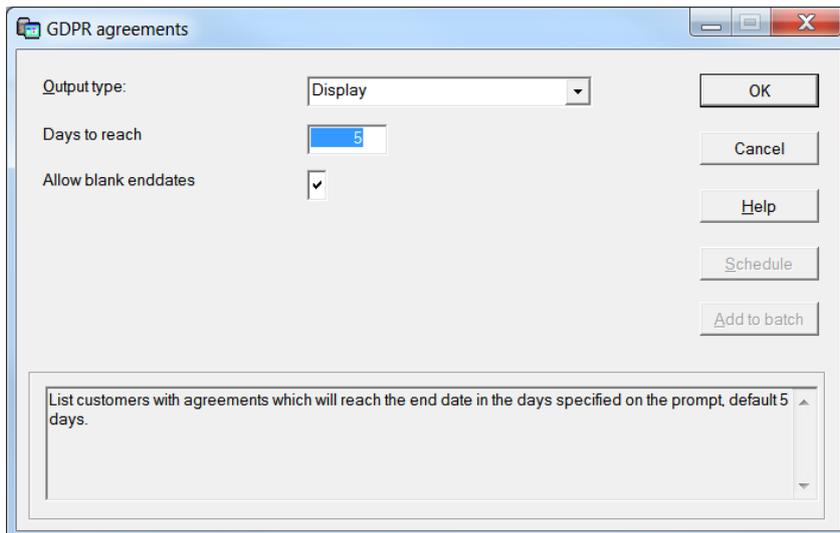


Print option for audit history

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.



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

The screenshot shows a CRM customer record form with a search bar at the top. The form is divided into several sections: 'Title/Initials', 'First name', 'Surname', 'Salutation', 'Address', 'Postcode', 'Stop all mail', and 'Sensitive customer'. The 'Mobile phone' field has a drop-down menu open, showing four options: 'N Not protected', 'Y Protected', 'M Calling only', and 'S Text messaging only'. The 'Mobile phone' field is highlighted in yellow. The 'Source of business' field is also visible, with a dropdown menu showing 'Live - Direct Mail'. The 'Status' field is set to 'Live - Direct Mail' and the 'Transport type' field is empty.

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:

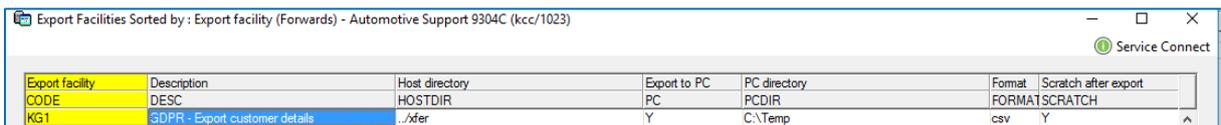
- CRM
- Reports & enquiries
- GDPR Reports Menu

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*



Export facility	Description	Host directory	Export to PC	PC directory	Format	Scratch after export
CODE	DESC	HOSTDIR	PC	PCDIR	FORMAT	SCRATCH
KG1	GDPR - Export customer details	./xfer	Y	C:\Temp	csv	Y

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