



GDPR accelerator for

Microsoft Dynamics 365 Customer Engagement

INSTALLATION & SET UP GUIDE



Change control

Version Control		Prepared By:	Reviewed by:	Change
1.0	05/10/2018	Jennifer Rozin	Ana Rodriguez	Initial version
1.1	28/01/2019	Ana Rodríguez	Jennifer Rozin	Include new features
1.1	16/08/2019	Emma Bush		AppSource version

Company Review			
Approved version:	Name:	Post:	Date:

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This user document is valid for the GDPR accelerator *version 1.1* based on Microsoft Dynamics 365.

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1 CONTENTS

2	Introduction	4
2.1	Objective	4
2.2	Application pack contents.....	4
3	Set up and Installation guide	5
3.1	System requirements	5
3.2	Installation of the package on Microsoft Dynamics 365	5
3.3	Upgrading to a new version.....	5
3.1	Security Roles	6
3.2	Module set up.....	6
3.2.1	Types of consent.....	6
3.2.2	GDPR Search	7

2 INTRODUCTION

2.1 Objective

GDPR is the current EU personal data protection regulation. In 2018 it replaced legislation in all EU countries and introduced new requirements and limitations for all companies.

User rights are considerably expanded under GDPR.

This accelerator helps companies to be compliance with the personal data they have in Dynamics 365 CE.

This accelerator includes two modules:

- > Consents database management.
- > Search GDPR: feature to help the data responsible to perform users' rights.

This accelerator plugs into Microsoft Dynamics 365 CE, and can be used for all Dynamics CEM modules: Sales, Customer Service, Field service, etc.

2.2 Application pack contents

The package should contain the following solutions:

- > GDPR
- > FrameworkIP

The solution includes following languages: English, French, German, Spanish and Hebrew.

- > Documentation is available in the accelerator section Corp Intranet SharePoint site at this address:

<https://prodwarecloud.sharepoint.com/sites/pww-ibs-public/SitePages/ProdwareSolutionCatalogue/CustomEngagment/accelerators/CEMGDPRAccelerator.aspx>

3 SET UP AND INSTALLATION GUIDE

3.1 System requirements

This accelerator can be installed on:

- > Microsoft Dynamics 365 Online

To be able to use this functionality your license must be up to date. If necessary, contact your reseller for more information about your license.

3.2 Installation of the package on Microsoft Dynamics 365

Be careful, the installation can be done only by a system administrator user.

1. Open your browser
2. Open your Dynamics 365 CRM environment
3. Navigate to Settings> Solution
4. Then click on Import
5. And Follow the assistant

For more details consult this page: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/import-update-export-solutions>.

3.3 Upgrading to a new version

Important: Before any installation and / or modification, you must create a backup of your solution you can restore if you encounter issues with your set-up.

When upgrading from a previous version, the actions are the same as for first installation, please refer to chapter 2.2.

All your previous data will be saved and no further action is needed.

3.1 Security Roles

The solution contains two security roles:

- > GDPR_User: Gives access to the GDPR Search and Consents.
- > GDPR_Administrator: Gives access to the GDPR Entities configuration and Consent types.

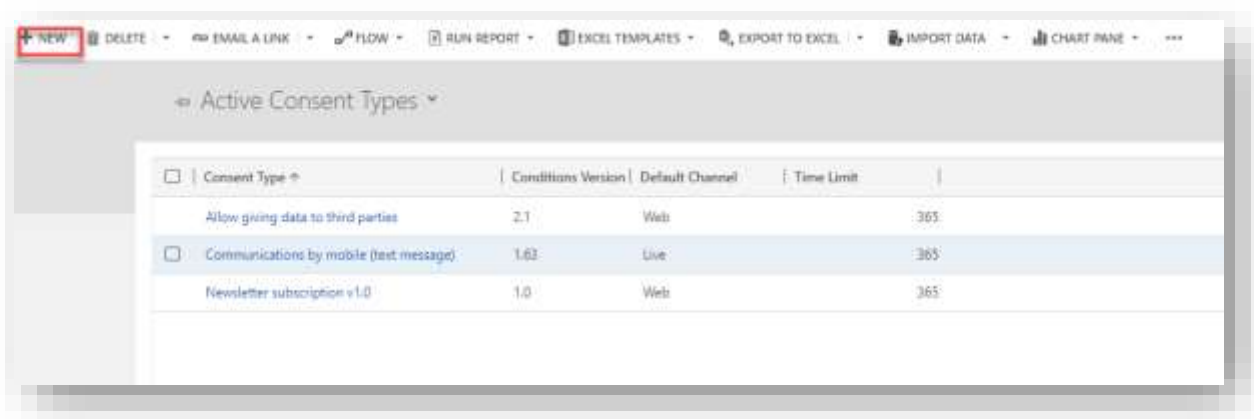
The GDPR_User Security Role should be granted to all users.

3.2 Module set up

3.2.1 Types of consent

You need to configure the Types of consent.

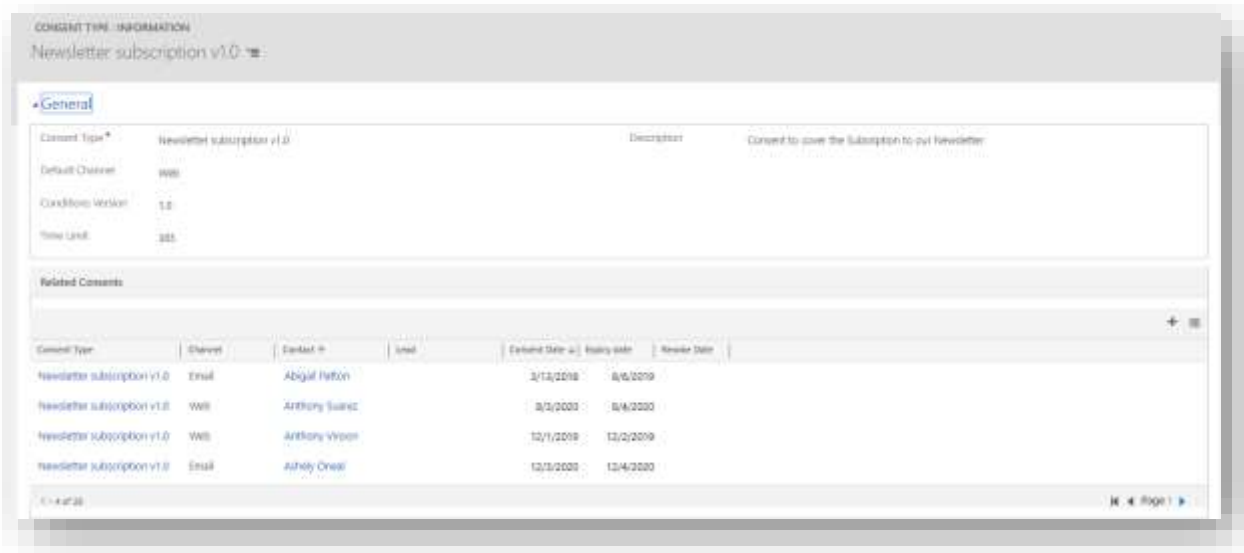
1. Go to menu → Types of consents and click on New.



2. You need to complete the following main information:

Field	Description
Consent Type	Name of this consent type.
Default Channel	Channel by default for this consent type. The channel can be set in the consent.
Conditions Version	Version of the Legal type of consent.
Time Limit	Limit of time that will set up the expired limit in the consent record. When the expired date arrives the consent will be automatically revoked. It means that the record will be inactive and the revoked date will be set.
Description	Description of this consent type.

This is an example of the Type of consent.



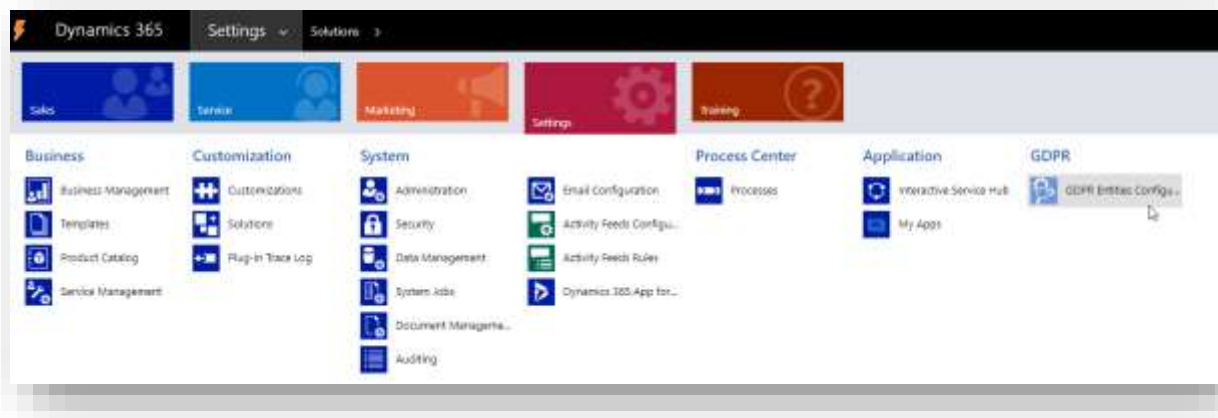
3.2.2 [GDPR Search](#)

Before starting to work with the GDPR Search tool you need to configure what entities this feature will be based on.

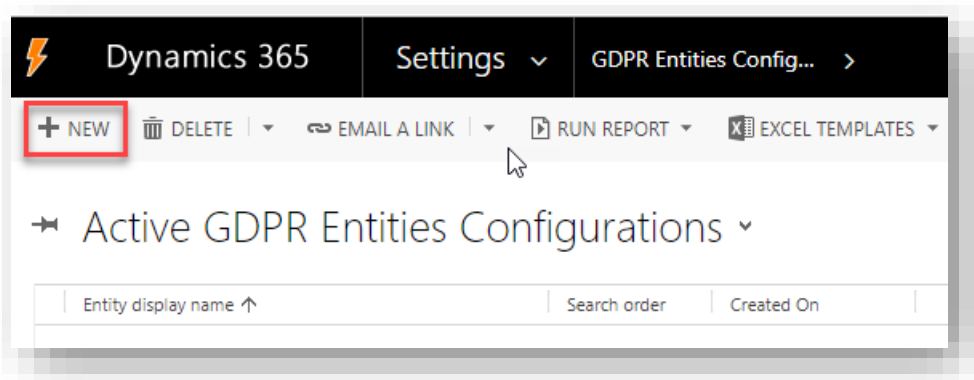
Only the users with the GDPR Administrator role can set up the configuration.

Create a new GDPR Entity Configuration

1. Navigate to Settings > [GDPR Entity Configurations](#).



2. Click on New.

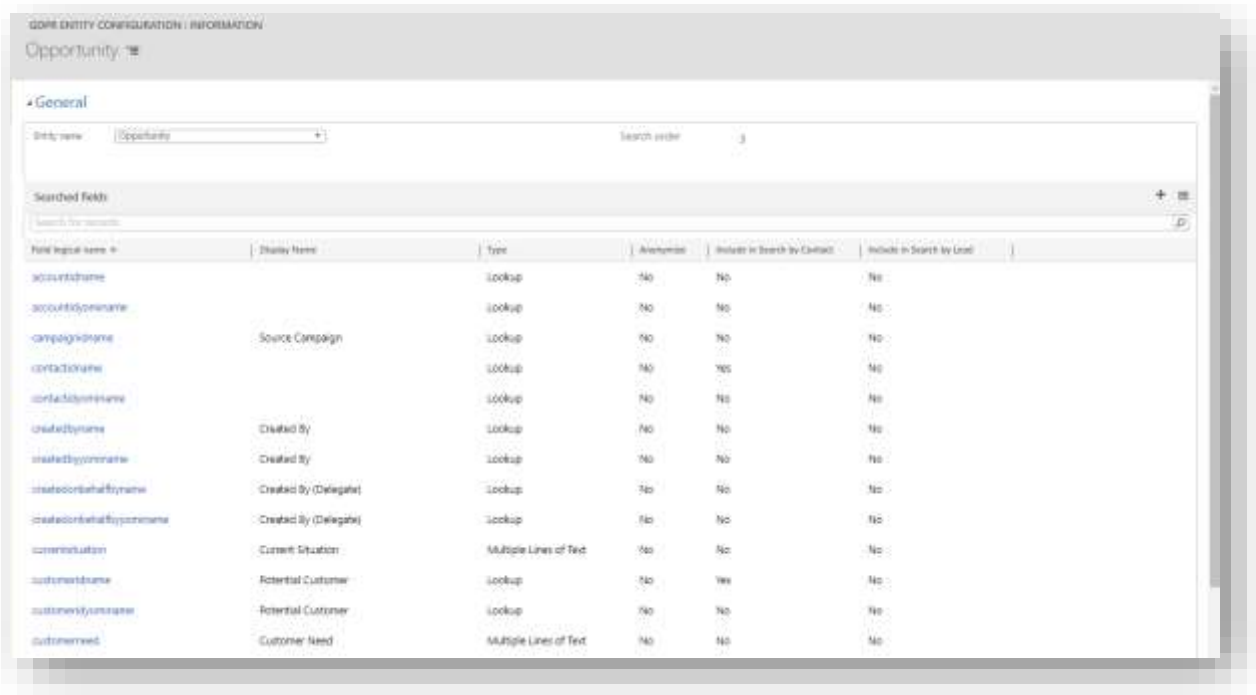


3. Fill the following fields:

Field	Description
Entity Name	Configure all the entities that contains personal information or information linked to personal data that you want to give to your client.
Search Order	Set when the entities will show in the results pane.

4. Click Save.

5. By default, all the Text / Memo / Lookup fields are added to the configuration.

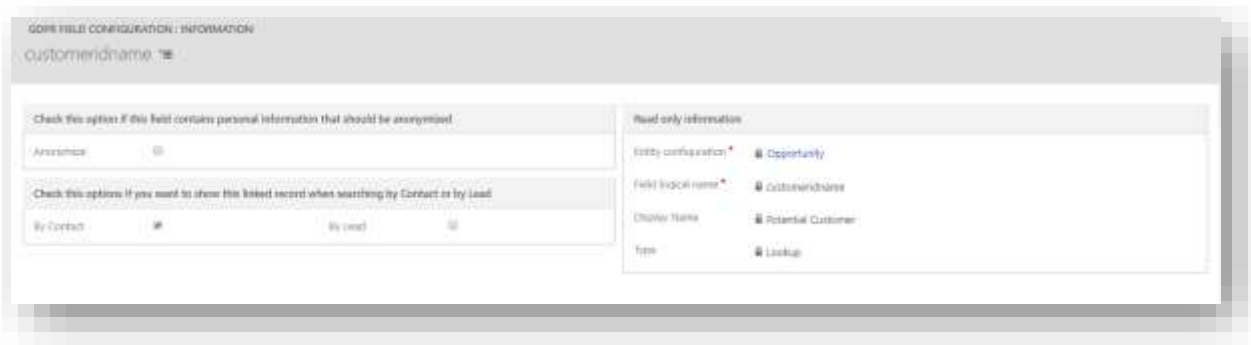


TIP: Reduce this list manually in order to increase search performance.

Search GDPR Fields Configuration

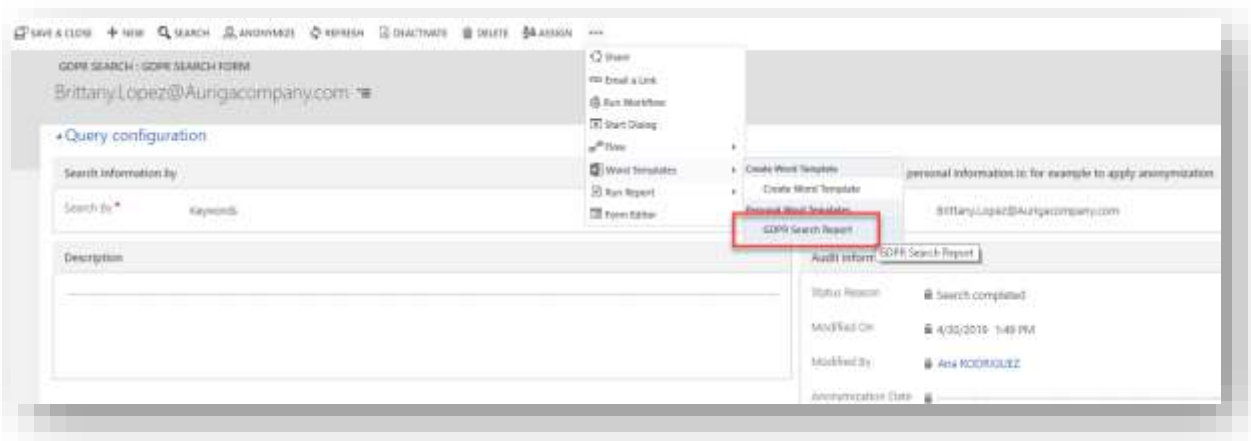
There are several parameters that can be set in the Fields configuration:

- > Anonymize: Check this option if this field contains personal information that should be anonymized. For example, in an invoice: contact name, identified code, contact data. It is unchecked by default.
- > By Contact or By Lead: Check this options if you want to show this linked record when searching by Contact or by Lead. It is checked by default.



GDPR Search Report.

We recommend you create a report to give to your customers when they ask for all their data in your database.



As standard Dynamics 365 Word templates cannot be moved between different environments, this report is not included in this package.

The consultant who is installing this product can configure it for the specific customer, including the company logo, text and all the information that comes from the GDPR Search.

<https://docs.microsoft.com/es-es/dynamics365/customer-engagement/admin/using-word-templates-dynamics-365>