

GDPR Toolset

App for Microsoft Dynamics 365 Business Central

Process and hold personal data in compliance with the main rules of GDPR regulation.

How it works

The GDPR Toolset app for Microsoft Dynamics 365 Business Central allows you to manage personal data in order to be compliant with the main rules of the General Data Protection Regulation (GDPR).

The app allows you to manage these aspects of the regulation:

- Data discovery in Dynamics 365 Business Central
- Data reporting
(*The right to be informed*)
- Data exporting
(*The right to data portability*)
- Data erasure
(*The right to be forgotten*)
- Data rectification
(*The right to rectification*)
- Master data blocking
(*The right to restrict processing*)
- GDPR request Log (*Records of processing activities*)



Quick Guide:

1. Write all the GDPR requests in a list
2. Process the requests by printing / exporting data or deleting / blocking / encrypting data
3. Edit a specific setup for tables containing personal data



GDPR Requests List

Go to GDPR Requests in order to write the request (e.g. a customer wants information about her/his data in the Company database).



Press New:

ENTRY NO. ↑	TYPE	STATUS	REQUEST DESCRIPTION	SEARCH STRING	CREATED O
2	Information	Completed	Paolo	Milano	17/04/2019
3	Information	Pending	Info	Milano	17/04/2019
4	Encrypt	Initial	Encryption	mag	24/04/2019
5	Delete	Initial	Deletion	fioretti	24/04/2019
6	Information	Completed	Cannon Group	cannon	24/04/2019
7	Information	Initial	Cannon Group	Franco Verdi	24/04/2019

FIELD	DESCRIPTION
Entry No.	Number of the request
Type	Choose the desired option: <ul style="list-style-type: none"> Information (somebody wants information about her/his data in the Company database) Portability (somebody, e.g. a customer, asks for data export) Adjust (somebody asks for data adjustment) Delete (somebody asks for data erasure) Block (somebody asks for data block) Encrypt (somebody asks for data encryption)
Status	Status of the request (Initial/Pending/Completed)
Request Description	Insert a description of the request
Search String	Insert what you are searching for
user ID / Created On	These fields contain the user name and the date of the research. They are automatically filled in by the system
Total Matches	Number of matching results

By clicking on *Process->Execute* the system will show all the matches discovered, depending on the fields marked as containing personal information in the GDPR setup.

Click on Card:

...QUEST CARD | WORK DATE: 01/01/2022

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Report Show Attached

GDPR Report Print Export File

Type Information User ID EOSY NI

Status Initial Created On 24/04/2019 12:07

Request Description Canon Group Total Matches 20

Records Found Manage

Open Record Set To Process

PR...	TABLE POSITION	FIELD VALUE	STATUS	BY USER ID	DATE
<input checked="" type="checkbox"/>	Contact: CT000009	Sig. Franco Verdi	Initial		
<input checked="" type="checkbox"/>	Contact: CT000009	SIG. FRANCO VERDI	Initial		
<input type="checkbox"/>	Service Header: Order, SO000001	Sig. Franco Verdi	Initial		
<input type="checkbox"/>	Service Header: Invoice, SCI000...	Sig. Franco Verdi	Initial		
<input type="checkbox"/>	Service Header: Invoice, SCI000...	Sig. Franco Verdi	Initial		
<input type="checkbox"/>	Service Header: Invoice, SCI000...	Sig. Franco Verdi	Initial		
<input type="checkbox"/>	Service Header: Invoice, SCI000...	Sig. Franco Verdi	Initial		
<input type="checkbox"/>	Service Header: Invoice, SCI000...	Sig. Franco Verdi	Initial		
<input type="checkbox"/>	Service Header: Invoice, SCI000...	Sig. Franco Verdi	Initial		
<input type="checkbox"/>	Service Header: Invoice, SCI000...	Sig. Franco Verdi	Initial		

Select the lines to be processed, click on Report and choose the desired action (Print/Export File or Delete/Block/Encrypt).

By clicking Open Record you can adjust data if it is necessary.

Finally you need to change the Request Status with "Completed". Date and user ID are automatically written by the system.



NB

They are IRREVERSIBLE instructions. Once you write "Completed" you cannot reverse the Status.



Setup

In GDPR Setup you need to fill the setup for each table which contains personal data:

GDPR SETUP | WORK DATE: 01/01/2022

Search + New Manage Suggest Initial Setup Import GDPR Setup

Export GDPR Setup Suggest Related Table Show Attached Open in Excel Actions Import Data Fewer options

TABLE ID	TABLE NAME	FIELDS	ENABLE	ADD COMM... TO THE CHANGE
13	Salesperson/Purchaser	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>
18	Customer	29	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
23	Vendor			
36	Sales Header	39	<input checked="" type="checkbox"/>	<input type="checkbox"/>
37	Sales Line	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>
38	Purchase Header	32	<input checked="" type="checkbox"/>	<input type="checkbox"/>
39	Purchase Line	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>
81	Gen. Journal Line	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>
91	User Setup	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
110	Sales Shipment Header	29	<input checked="" type="checkbox"/>	<input type="checkbox"/>
111	Sales Shipment Line	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>
112	Sales Invoice Header	39	<input checked="" type="checkbox"/>	<input type="checkbox"/>
113	Sales Invoice Line	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>
114	Sales Cr.Memo Header	34	<input checked="" type="checkbox"/>	<input type="checkbox"/>
115	Sales Cr.Memo Line	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>



FIELD	DESCRIPTION
Suggest Initial Setup	The system suggests tables in order to create a setup
Import / Export GDPR Setup	It is possible to import a previous setup or export a setup (Excel file) by clicking on Import/Export GDPR Setup
Import Data	It is possible to import all previous data (setup + research) in case of migration from NAV to Business Central
Suggest Related table	The system suggests setup for other tables (e.g. custom tables)

By clicking on New it is possible to create a new table setup:

← ... SETUP FIELDS | WORK DATE: 1/1/2022

✓ SAVED

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Suggest Fields
Show Attached

General

Table ID

Table Name

Related Fields

Enable

Add comments to the...

Field Mapping

Manage

FIELD ID	FIELD CAPTION	ENABLE	ENCRYPT (***)	DELETE (- DELETE...)
1	No.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Search Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Name 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Address 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25	Vendor No.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
41	Capacity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
53	Post Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Fill in the table ID and then, by clicking on Suggest Fields, the system will show a field list containing personal data.

Select, click OK and the system will import the fields in the setup page.

For each field you can choose whether to encrypt or delete data.

Subscription

Some features of the app require a subscription:

- ✓ **FREE version:** possibility of searching in "Vendor" and "Purchase Invoice" tables
- ✓ **PRO version:** possibility of searching in all DB tables

