

Learn the basics of the Innofactor GDPR solution

Manual

April 24, 2018

Innofactor AB <u>GDPRsolution@innofactor.com</u> Public

Version History

Responsible Person:

Supervisor: [Manager]

Version	Date	Author	Description	Reviewed by	Approved by
0.1	4.24.2018	EL & MS	Manual	PVa	SEn

April 24, 2018

Table of Content

1	Finding	the GDPR solution	5
2	Understa	anding the basics	6
3	Consent	ts	7
	3.1 Cre	eating a Consent Class	7
	3.2 Cre	eating a Consent Agreement	7
	3.3 Cre	eating a Consent	8
	3.3.1	Creating a Consent from a Contact	8
	3.3.2	Creating a Consent from the site map	9
	3.3.3	Creating the Consent	9
	3.3.4	Qualifying a Lead – What about the Consents related to the Lead?	10
	3.4 Cre	eating a Consent Activity	10
	3.4.1	Cancelling a Consent	11
4	The defi	inition of Personal Data	13
5	Persona	al Data Extraction	14
	5.1.1	Preparing the personal data	14
	5.1.2	Running the report	15
6	Data Po	ortability	16
7	Right to	be forgotten	17
	7.1.1	What gets deleted?	17
	7.1.2	Delete on	17
	7.1.3	Prevent Delete	18
	7.1.4	Recommended work process	19
	7.2 De	eletion of contacts	19
	7.2.1	Bulk Deletion Job	19
8	How to s	set up SharePoint-support in the solution	29
9	Troubles	shooting	31

Info.sweden@innofactor.com www.innofactor.se

INNOFACTOR°

Manual

April 24, 2018

Public

Info.sweden@innofactor.com www.innofactor.se

Manual

April 24, 2018

Public

1 Finding the GDPR solution

1. Sign in to Office 365. From the top menu, select the site map and then select the icon for **GDPR**.

Microsoft Dynamics CRM	M ≡	Sales 🗸 🗸	Dashboards 🗸						
Sales Sales S	Service		Marketing	4	GDPR	Settings	Ö	Help Center	?

2. This action unfolds the dropdown menu, displaying the various entities included in the GDPR solution.

Sales	Service	Marketing	GDPR Settings Help Center
Consent	Agreement	Configuration	Localization
Contacts	Consent Agreements	Personal Data Definiti	Languages
Consents	Consent Classes	Personal Data	A2 System Texts
Consent Activities		GDPR Configurations	Translations

Manual

2 Understanding the basics

Start here to onboard quickly and learn about the Innofactor GDPR solution, its user interface and how it can improve your business.

Every day, you will work with different contact records as you manage the different consent agreements available in the system. Here is a breakdown of the different entities available in the solution, and how they relate to each other.

- What is a Contact? A Contact is the standard Dynamics 365 Contact, equivalent of the record of a person.
- What is a Consent? A Consent is a record associated with a Contact, acting as a container with information regarding the nature of the Consent, status as well as start and end dates.
- What is a Consent activity? A Consent activity is the act of approving a Consent or cancelling a previously approved Consent.
- What is a Consent agreement? A Consent agreement is a container for general information regarding an agreement, associated with a Consent class. The Consent agreement contains the actual text that a Contact agrees to consent to.
- What is a Consent class? A Consent Class is a way of setting up the different types of Consents that are relevant to your business.
- What is a Personal Data Definition? A Personal Data Definition is the definition of personal data based on your specific business requirements. In the Innofactor GDPR solution, this is a highly customizable feature.

INNOFACTOR°

Innofactor AB

Manual April 24, 2018

Public

3 Consents

3.1 Creating a Consent Class

1. Navigate to **GDPR > Agreement > Consent Classes**.

Consent Agreement Co Contacts Consent Agreements Image: Consent Agreement agree	onfiguration	
Contacts Consent Agreements	Personal Data Definiti	
		Languages
Consents Consent Classes	Personal Data	A☆ System Texts
Consent Activities	GDPR Configurations	Translations

- 2. Select + New from the command bar. This will open a new record.
 - **Name**: Select a descriptive name for the Consent class, i.e "Direct Marketing".
 - Code: Select a unique code for the Consent class.
- 3. To save your changes, on the command bar, select Save.
- 4. The Consent class is now ready to be used when creating a Consent agreement.

3.2 Creating a Consent Agreement

1. Navigate to **GDPR > Agreement > Consent Agreements**.

•				3
Sales	Service	Marketing	GDPR Settings Help Center	9
Consent	Agreement	Configuration	Localization	
Contacts	Consent Agreements	Personal Data Definiti	Languages	
Consents	Consent Classes	Personal Data	At System Texts	
Consent Activities		GDPR Configurations	Translations	

Innofactor AB Drottninggatan 68, 5tr 111 21 STOCKHOLM Info.sweden@innofactor.com www.innofactor.se

tel.: +46 8 20 97 30 fax: +46 8 20 97 33

- 2. Select + New from the command bar. This will open a new record.
- 3. In the Consent Agreement form, make sure the status reason of the record is set to Draft while editing. Once the status reason is set to Active, you will not be able to make changes to the Consent text.
 - a. **Consent class**: Select the appropriate Consent class for your Consent Agreement.
 - b. Valid from: Select the start date of the Consent Agreement.
 - c. **Valid until**: Select the end date of the Consent Agreement, if this information is available to you.
 - d. **Status Reason**: While working on the Consent Agreement, the status should be Draft to be able to make changes. If the Consent Agreement is in Draft status, the record will not show when adding a Consent Agreement to a new Consent. When you are happy with your changes, set the status reason to Active and save the record.
 - e. **Owner**: The user who created the record.
 - f. Notes: Users can create notes regarding the Consent Agreement.
 - g. **Consent Text**: The text that a contact actually consents to. The value of this field can be used in various ways depending on your business requirements. I.e: "I consent to receiving direct marketing".
- 4. To save your changes, on the command bar, select **Save**.
- 5. The Consent Agreement is now ready to be used when creating a Consent for a Contact.

3.3 Creating a Consent

When creating a new Consent, you can choose to do this from a Contact or a Lead record, or you can create one from scratch from the Consents tab in the site map.

3.3.1 Creating a Consent from a Contact

- 1. Navigate to **GDPR > Consent > Contacts**.
 - a. When creating a Consent for a Lead, navigate to **Sales > Leads**. The following steps is the same when creating a Consent for a Contact as creating one for a Lead.
- 2. Open a Contact record.
- 3. Select Consents from the sitemap.



Manual

Innofactor AB April 24, 2018

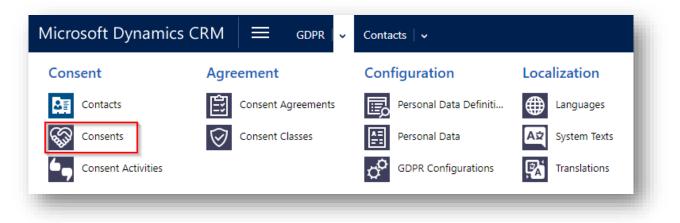
Microsoft Dynamics CRM GDPR 🗸 🗸 Contacts V Marica Söderstam Common Sales Service Activities Feedback Opportunities Cases Entitlements Consents Social Profiles Connections Documents Audit History

Public

4. Select + Add New Consent from the command bar. This will open a new record.

3.3.2 Creating a Consent from the site map

1. Navigate to GDPR > Consents



2. Select + New from the command bar. This will open a new record.

3.3.3 Creating the Consent

1. When creating a Consent from a Contact or Lead, the corresponding field is automatically populated with a look up to the chosen Contact or Lead.

Innofactor AB Drottninggatan 68, 5tr 111 21 STOCKHOLM Info.sweden@innofactor.com www.innofactor.se

- 2. When creating a new Consent from the sitemap, you have the option to select a Contact or a Lead, depending on your business requirements.
 - **Consent agreement**: Select the appropriate Consent Agreement for your Consent. To do this, click on the looking glass and select a record from the drop down or select Look up more values. This will allow you to search through records.
 - **Consent class**: Saving the record will automatically set this field, based on the value you picked in Consent agreement.
 - Opt in: The actual start date when the Consent is agreed to. This locked field is automatically set when managing a Consent activity, see Creating a Consent Activity.
 - Opt out: The actual end date when the Consent is cancelled. This locked field is automatically set when managing a Consent activity, see Creating a Consent Activity.
 - **Status reason**: The status of the Consent agreement is dependent on the associated Consent activities, see **Creating a Consent Activity**.
- 3. Select **Save** to enable other sections on the form.
- 3.3.4 Qualifying a Lead What about the Consents related to the Lead?

When **qualifying a Lead** all Consents created for the Lead will be **copied** to the created Contact and the Contents related to the originated Lead will be deac-tivated.

3.4 Creating a Consent Activity

The Consent activity is the actual act of approving (or cancelling) the Consent that you just created. This could have different meaning based on the nature of your business, but in general it means receiving that confirmation from a Contact or a Lead.

- 1. Add an Activity to the Consent by clicking the + by the Activities section. This will open a quick create form to a new record.
- 2. When creating a Consent activity, the From field is automatically populated with a look up to the Contact or the Lead, inherited from the Consent. The same goes for the Regarding field.
 - **From:** The Contact or Lead that the activity concerns.
 - Regarding: Lookup to the Consent agreement that the activity concerns. This name also contains the status of the Consent activity at the time.
 - **Consent status:** The status of the Consent activity, and by extension, the Consent. This field is by default set to Not approved.

INNOFACTOR°

Innofactor AB

Manual

April 24, 2018

Public

- Not approved means that the status of the Consent is pending.
- Approved means that confirmation has been received from the Contact or the Lead, that they actually consent to the agreement in question.
- Cancelled means that the Consent is no longer valid.
- **Origin:** The origin of the confirmation from the Contact or Lead, i.e phone or email.
- **Registered on:** The actual date that the Consent activity occurred.
- 3. Saving the record will return you to the Consent agreement form. Note: You may have to reload this page to see the changes.

^{consent} : INFORMATION Direct Marketing, Active =						
General						
Consent agreement * 🔒 Direct Marketing, Active	Activities					
Consent class 🔒 Direct Marketing	From	Regarding ↑	Consent status	Handled on	Registered on	Date Created
Contact* Image: Marica Söderstam Opt in Image: Alt/2018 Opt out Image: Alt/2018	Marica Söderstam	Ø Direct Marketing, Act	Approved	4/23/2018	4/1/2018	4/23/2018 12:46 PM
Status Reason 🔒 Active						_

Note that the Handled date from the Consent activity has now been inherited to the Opt in field. Also, having changed the status of the Consent activity to Active results in locking the form fields of the Consent.

3.4.1 Cancelling a Consent

In order to cancel an active Consent, we need to create another Consent activity.

- 1. Add a new Activity to the Consent by clicking the + by the Activities section.
- 2. This time, we set the Consent status to Cancelled.
- 3. Fill out the **Origin** of the cancelation.
- 4. Set the date that the cancelation was received in the field **Registered on**.
- 5. Save the record to return to the Consent agreement form. Note: You may have to reload this page to see the changes.

onsent: Information Direct Marketing, Canceled =	
General	
Consent agreement * Direct Marketing, Active	Activities
Consent class 🔒 Direct Marketing	From Regarding ↑ Consent status Handled on Registered on Date Created
Contact* Marica Söderstam	Marica Söderstam
Opt in 🖬 4/3/2018 Opt out 📾 4/23/2018	Marica Söderstam 😵 Direct Marketing, Ca Canceled 4/23/2018 4/23/2018 4/23/2018 10:27 AM
Status Reason 📓 Canceled	

Info.sweden@innofactor.com www.innofactor.se

INNOFACTOR®

Manual

Innofactor AB

April 24, 2018

Public

Note: Since the status of the latest Activity is now Cancelled, the status reason of the Consent has also been set to Cancelled. Also, the date that we input in the field Registered on has now been inherited to the opt out field.

April 24, 2018

Public

4 The definition of Personal Data

The Innofactor GDPR Solution makes it possible for you to customize the way that you work with personal information and tailor the definition of Personal data based on your business requirements.

The Personal data definitions will be used when extracting data by request of a person in your system, or for the use of data portability when transferring personal data to other external systems.

1. Navigate to GDPR > Configuration > Personal Data Definitions

- 2. Select + New from the command bar. This will open a new record.
- 3. You will want to create a record of Personal data definition for each entity that contains information that your business values as Personal data.
 - **Name:** The name that you want for this section in the data report.
 - Sort order: The sort order of the section in the data report.
 - Entity: The name of the entity from which we want to extract the personal data.
 - **Name Attribute:** The main attribute that you want to display as a heading in the data report.
 - **Scope:** This defines which GDPR-related features the data will be used for.
 - **Data Extraction** means that the data can be used in the Data Extraction Report.
 - **Data Portability** means that the data can be used to transfer to other external systems.
 - **List Documents:** If selected, the extraction will include Sharepoint documents related to the record in question.
 - **Delete Documents:** If selected, the Sharepoint documents related to the record will be deleted when the record is deleted.
 - **FetchXML:** The specific attributes that make out the Personal Data Definition. This fetchXML need to contain a filter with the Contact ID.
- 4. **Save** the record.

Public

5 Personal Data Extraction

5.1.1 Preparing the personal data

- 1. Navigate to **GDPR > Consent > Contacts.**
- 2. Open a Contact record that your wish to run a data extraction report on.
- 3. In the command bar, select "..." and choose Run workflow.
- 4. In the look up record dialogue frame, select the workflow named **GDPR: Data Extraction Prepare data** and click **Add**. This will immediately start the workflow that prepares the data for the data extraction report.

	ur search criteria.			
Look for	Process	🗹 🗆 Sh	ow Only My Records	
Look in	On Demand Workflows	~		
Search	Search for records	Q		
		I		
Pro	ocess Name	Category	Created On	Mod 🤁
✓ GD	PR: Data Extraction - Prepare data	a Workflow	3/20/2018 10:31	3/21/2018
<				>
_	f 1 (1 selected)		H H	► Page 1 ►
_	f 1 (1 selected)		H 4	_
_	f 1 (1 selected)		K d	-

5. Click **OK** in the following dialogue box.

Info.sweden@innofactor.com www.innofactor.se **INNOFACTOR**[®]

Innofactor AB

Manual

April 24, 2018

Public

Confirm Application of Workflow This workflow will be applied to 1 Contact.	×
You can monitor workflow jobs by opening each Contact and clicking Workflows. Are you sure that you want to continue?	
ОК	Cancel

Note: After running the GDPR data extraction workflow, you can view the personal data records that the workflow has prepared by navigating to **GDPR > Configuration > Personal Data**. These Personal data records are available for viewing in the system for up to one hour after running the workflow. After one hour they are automatically deleted, giving the user enough time to run the actual data extraction report that use these temporary personal data records.

5.1.2 Running the report

- 1. Navigate to **GDPR > Consent > Contacts.**
- 2. Open the same Contact record for which you prepared personal data.
- 3. In the command bar, select "..." and choose **Run report > GDPR Data Extraction**.



This will generate the **GDPR Data Extraction Report** based on the personal data records that was prepared by the workflow. Note that only data based on Personal data definitions with **Scope** set to **Data Extraction** (or **Extraction and Portability**) will be included in the Data Extraction report.

Info.sweden@innofactor.com www.innofactor.se Manual

April 24, 2018

Public

6 Data Portability

The Personal Data that is generated using the workflow GDPR: Data Extraction can also be used for Data Portability purposes.

There is a view for Personal Data named **Personal Data for Data Portability**. This view displays records tagged with Data Portability (i.e. Data Portability is checked on the records.). The idea is to start with that view and then get a comma separated file by using the standard functionality **Export to Excel** and **Save Excel** as a **comma separated** (.csv) file.

Go to the above described view and choose Export to Excel.

🕇 NEW 📋 DELETE 💌 🖘 EMAIL A LINK 🔻	🖹 RUN REPORT 🔻	EXCEL TEMPLATES 🔻	🔍 EXPORT TO EXCEL 🛛 🔻	🗊 IMF	PORT DATA	CHART PANE 🔻	唱 VIEW	•••
			🕰 Static Worksheet (Page	on				
🗯 Active Personal Data 🗸			🖏 Dynamic Worksheet					
			🖏 Dynamic PivotTable					

Save the Excel document. Open it and then choose to Save As -> *(.csv). Please note that there are a few extra columns in the Excel file other than those in the view. (Standard Dynamics 365 uses these in the case where data is re-imported.).

April 24, 2018

Public

7 Right to be forgotten

We have two functions connected to "Right to be forgotten" or data minimizing that is based on that we view Dynamics 365 for Customer Engagement to function as a right now system that holds the actual and relevant data for the users to be able to do their job most efficiently. Based on that we've included two fields on the contact to mark who should be deleted and when to minimize the amount of information in the system that is not current.

7.1.1 What gets deleted?

If you use the functionality of deleting a contact from the system following the steps below these records will be deleted:

- The Contact.
- All related information/entity that in Dynamics 365 CE has a relationship of type **Parental** from 1:N viewed from the **Contact.**
- All related information/entity that has **Cascade All** on the **Delete** section of the relationship.
- Potential SharePoint Sites if you have configured to use SharePoint.

7.1.2 Delete on

- 1. Navigate to **GDPR > Consent > Contacts.**
- 2. Open a Contact record that you want to mark for deletion.
- 3. Switch form to **Contact GDPR.**
- 4. Enter a future date for when the contact should be removed in the field **Delete on.**



Manual

April 24, 2018

Public

	ntact - gdpr ▼ NTuresson *=	
▲ GDPR RIGHT TO BE FORGOT	TEN	
Pelete on	4/15/2018	
Prevent deletion	No	

7.1.3 Prevent Delete

- 1. Navigate GDPR > Consent > Contacts.
- 2. Open a Contact record that you want to mark for deletion.
- 3. Switch form to Contact GDPR.
- 4. In the field **Prevent delete** enter either **Yes** or **No.**
 - Yes: The contact should be kept in the system.
 - If you set Prevent delete to Yes, then you cannot enter a date for when the contact should be deleted.
 - **No:** The contact can be removed.



Manual

April 24, 2018

Public

CONTACT : CONTACT - GDPR - Malin Turesson -=	1
▲ GDPR	
RIGHT TO BE FORGOTTEN Pelete on Prevent deletion Yes	J

7.1.4 Recommended work process

We recommend that you create a dashboard containing possible contacts that from a data minimizing view should be deleted. Then you set up a process where you systematically either mark them for deletion or mark that you need to keep them in the system. That way you always ensure that you have actual and relevant data in your system. It is also possible to bulk change these values or that you trigger on a certain event in the system to set the fields. However, a more manual process is recommended in the first stage.

7.2 Deletion of contacts

- 7.2.1 Bulk Deletion Job
 - 1. Go to Settings > Data Management > Bulk Record Deletion.



Manual

Innofactor AB

April 24, 2018

Public

Data Management	
What would you like to do?	
Duplicate Detection Settings	Duplicate Detection Rules
Seect default duplicate detection settings for your organization.	Create, modify and publish duplicate detection rules.
Create and monitor duplicate detection jobs.	Bulk. Record Deletion Manage bulk record-Office.
Data Maps	Imports
Create, import, and export data maps used during import.	Import data and view the status of imports in progress.
Templates for Data Import	Sample Data
Download a template for Data import.	Add sample data to the system, or delete existing sample data.

2. Here you will see a view with existing Bulk Record Deletion jobs. Click **New** to create a new job.

See how the interactive service hub can make you more	productive.	Experience it now			
ulk Record Deletion					
w: All Bulk Deletion System Jobs	\sim				
New 🛛 🖪 🕼 🗎 More Actions 👻					
System Job Name 个	Status Reason	Deleted	Failures		Owner (System Job)
Radera slutförda bearbetningssessioner för synkrona	Succeeded		0	0	SYSTEM
Radera slutförda bearbetningssessioner för synkrona	Succeeded		0	0	SYSTEM
Radera slutförda bearbetningssessioner för synkrona	Succeeded		0	0	SYSTEM
Radera slutförda bearbetningssessioner för synkrona	Succeeded		0	0	SYSTEM
Radera slutförda bearbetningssessioner för synkrona	Succeeded		0	0	SYSTEM
Radera slutförda bearbetningssessioner för synkrona	Succeeded		0	0	SYSTEM
Radera slutförda bearbetningssessioner för synkrona	Succeeded		0	0	SYSTEM



Manual

April 24, 2018

Public

3. This will open the Bulk Deletion Wizard. Click Next.

Bulk Deletion Wizard		(ℓ) <u>H</u> elp
This wizard helps you to delete selected records from selected entities/record typ	es in Microsoft Dynamic	s CRM.
You will be asked to:		
 Define deletion criteria for selected entity 		
 Select scheduling and notification options 		
To continue, click Next.		
	_	_
	de Neut	Cancel
Ba	ack <u>N</u> ext	<u>C</u> ancel

4. Here we have a view similar to Advanced Find, and we will be setting up a search criteria that gets all Contacts where **Prevent Delete = No** and **Delete on** is **"On or Before" Today's date**.



Manual

April 24, 2018

Public

5. Search for contacts.

Look for:	Contacts	. Vs	e Saved View: [r	new]	~
	Group AND]•[Group OR			
<u>Sel</u>	ect				
e <u>vi</u> ew Rec	cords				

6. Next, select "Prevent Delete" field from the dropdown.

elect search	criteria to identify records to delete.	
Look for:	Contacts Vise Saved View: [new]	•
Clear	Group AND Group OR	
Pre	ferred Day	
F F F F F F F F F F F F F F F F F F F	Pager ayment Terms Preferred Day Preferred Facility/Equipment Preferred Service Preferred Service Preferred User Prevent deletion Price List Record Created On Prevent deletion Role alutation iend Marketing Materials SLA pouse/Partner Name itatus Reason Prevent deletion Prevent delet	

Innofactor AB Drottninggatan 68, 5tr 111 21 STOCKHOLM Info.sweden@innofactor.com www.innofactor.se

tel.: +46 8 20 97 30 fax: +46 8 20 97 33



Manual

April 24, 2018

Public

7. Click the "..." button

LOOK IOI;	Contacts	۲	Use Saved View:	[new]	•
	Group AND			[]	
	ent deletion	Equals			
Selec	<u>t</u>		- L		ange the values for thi

8. Select **No** and click the ">>" button to add it to the Selected Values.

Select search cri	teria to identify records to delete. Select Values Select the values you want included.	×
Pre Se	Available Values No Selected Values Yes <	*
	OK Cancel	
Pre <u>v</u> iew Recor	ds Back Next	Cancel



Manual

April 24, 2018

Public

9. Click **OK**.

Innofactor AB

Look for: Clear	Select Values Select the values you want included.		×
Se		Selected Values No	
		OK Cance	21

ar Group AND Group OR Prevent deletion Equals No
Select
Decords
n Records
w Records
// Records



April 24, 2018

10. Similarly, select "**Delete on**" from the dropdown of fields, select "On or Before" and select yesterday's date.

LOOK IC	r: Contacts	▼ Use Saved V	iew: [new]	T
Clear	Group AND	Group OR		
¥ 1	Prevent deletion	Equals	No	
¥ 1	Deleted on	On or Before	4/22/2018	
	<u>Select</u>			

11. Select both rows by clicking on the left corner and **Select Row** on both conditions. Then click on **Group AND**. Click on **Preview Records button**.

Look for:	Contacts	•	Use Saved View:	[new]	•
🛅 Clear	Group AND	Group OR			
	vent deletion	Equals		No	
	elect Row	In On or Bef	ore	<u>4/22/2018</u>	
	lide in Simple Mode Delete	Select Row			



Manual

April 24, 2018

Public

Look for	: Contacts	Use Saved View:	Use Saved View: [new]		
📩 Clear	Group AND	Froup OR			
	Prevent deletion	Equals	No		
✓ AN	Deleted on	On or Before	4/22/2018		

12. Click Next.

✓ Full Name ↑	Business Phone 🥴
Marlene Malmqvist	
1 - 1 of 1 (0 selected)	4
	14 4 1090 19



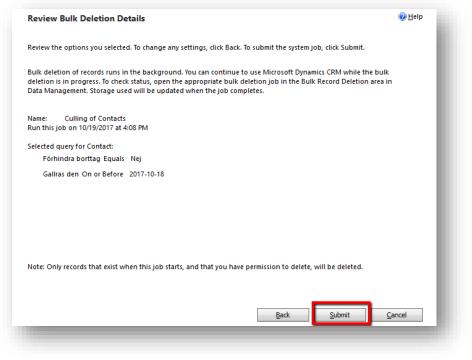
Manual

Innofactor AB

April 24, 2018

Public

13. Click Submit.



Microsoft Dynamics CRM	🗕 Settings 🗸 🗸	Data Management	
Bulk Record Deletion			
View: All Bulk Deletion System Jobs	T		
🖹 New 🛛 🖪 🚺 🛛 More Actions 👻			
✓ System Job Name ↓	Status Reason	Deleted Failures	Owner (System Job)
 Removal of Contacts 	Succeeded	1	0
Delete Plug-in Trace Log Records	Succeeded	0	0 SYSTEM
Delete Plug-in Trace Log Records	Succeeded	18	0 SYSTEM
Delete Plug-in Trace Log Records	Succeeded	0	0 SYSTEM

More actions menu item can be used to Cancel, Resume, Postpone or Pause the existing job.

INNOFACTOR°

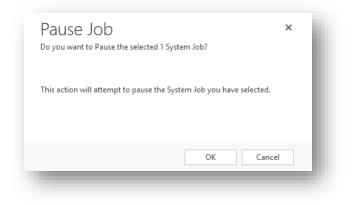
Manual

Innofactor AB

April 24, 2018

Public

Bulk Record De	eletion				
All Bulk Deletion S	ystem Jobs	•			
🕅 New 🖳 🕼 🚺	Nore Actions 👻				
System Job Name 🗸	Set View as Default View		Deleted	Failures	Owner (System Job)
Removal of Contacts	Modify Recurrence			1	0
Delete Plug-in Trace I	Cancel			0	0 SYSTEM
-	Resume				
Delete Plug-in Trace l	Postpone	լիդ		18	0 SYSTEM
Delete Plug-in Trace l	Pause			0	0 SYSTEM
Delete Plug-in Trace Log	g Records	Postpone Succeeded		0	0 SYSTEM
Delete Plug-in Trace Lo	a Records	Succeeded		2	0 SYSTEM



April 24, 2018

8 How to set up SharePoint-support in the solution

In the Innofactor GDPR solution we have included support for handling your documents when either removing a contact or when you want to extract personal data from the system.

Note that this instruction only describes how you set up the integration for this solution and not the standard integration between Dynamics CE and Share-Point. For more information on that, see: <u>https://msdn.microsoft.com/en-us/library/gg334768.aspx</u>

You need to have System administrator privileges in the Dynamics organization that you want to set up.

1. Navigate to **GDPR > Configuration > GDPR Configuration.**

licrosoft Dynamics	S CRM 📃 Sales 🗸	Dashboards 🗸	
Sales	Service	Marketing	gdpr
Consent	Agreement	Configuration	Localization
Contacts	Consent Agreements	Personal Data Definiti	Languages
Consents	Consent Classes	Personal Data	AI System Texts
Consent Activities		GDPR Configurations	Translations

2. Open the configuration that contains your license key.

				 ar of fArte	EMAIL A LINK 1	🔅 RUN WORKFLOW	•••
		<i>c</i>					
🗕 Acti	ve GDPR C	onfiguratio	ns y				

Info.sweden@innofactor.com www.innofactor.se

Public

- 3. Proceed to define the following:
 - **Deployment:** Here you enter if you want to integrate towards an On-Premise SharePoint or an Online SharePoint.
 - **SharePoint User:** Enter the credentials of the SharePoint user that should function as an integration user.
 - **SharePoint Password:** Enter the Password for the user that you entered as a user.

SHAREPOINT SETTINGS

Deployment +	Online
🔶 🕈 SharePoint User	ENTER SHAREPOINT USERNAME
🔶 🕈 SharePoint Passwon	ENTER SHAREPOINT PASSWORD

Note: Currently the Innofactor GDPR solution only supports SharePoint Online.

Note: The Innofactor GDPR solution allows the user to delete contacts and its related documents from the system (see chapter 6). However, sometimes your business may not allow documents to be deleted even if the contact is deleted. This can be customized in your system using the settings on **Personal Data Definitions** (see chapter 4, section about **Delete Documents**).

Note: In order for documents to be deleted from SharePoint when a Contact is deleted the user that deletes the Contact needs to have access to the GDPR configuration and the **SP settings** (username and password). However, you may not want the users to access that information. Instead you can set the plugin steps for plugin **ContactRemoveDocuments** to run as a specific user and then please make sure that specific user has access to the SP settings on the GDPR configuration. This step can be accomplished using the **XrmToolBox** and **Plugin Registration**.

Manual

April 24, 2018

Public

9 Troubleshooting

To perform a Personal Data Extraction, the user who triggers the workflow "GDPR: Data Extraction – Prepare data" must have read access to the entities that are included in the FetchXML of the Personal Data Definitions. If the user has insufficient privileges, the following error will appear when "GDPR: Data Extraction – Prepare data" is triggered.

	Affärsprocessfel
8	An error occurred in plug-in RuntimeTypeHandle. System.ServiceModel.FaultException`1 [Microsoft.Xrm.Sdk.OrganizationServiceFault]: Principal user (Id=f91fa716-1bd1- e711-82d9-000d3ab16577, type=8) is missing prvReadOpportunity privilege (Id=f7767f74-628d-48b3-a79f-9c6e24fedb69) (Fault Detail is equal to Microsoft.Xrm.Sdk.OrganizationServiceFault): Principal user (Id=f91fa716-1bd1- e711-82d9-000d3ab16577, type=8) is missing prvReadOpportunity privilege (Id=f7767f74-628d-48b3-a79f-9c6e24fedb69)
	Hämta loggfil OK

The issue is resolved by giving the user or Security Role read access to the entities that appear in the error message. In the example above, the user lacks read privileges on the Opportunity entity.