



Setup guide

GDPR for Creatio

Dev labs

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Introduction

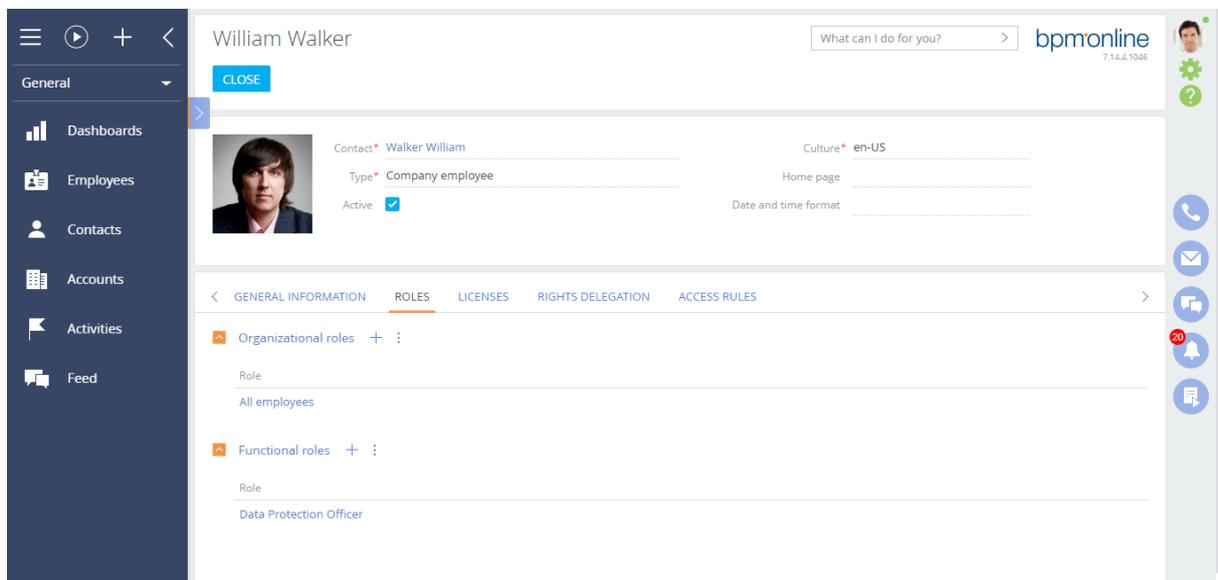
The **GDPR for Creatio** add-on is designed for implementing software-level compliance of Creatio applications with the General Data Protection Regulation (GDPR). The package contains functions for registering permissions and denials to process personal data from data subjects, such as the customers, and build further interaction with the data subjects based on the existence of the corresponding permission.

Setup

Steps to setup the add-on:

1. Installing the add-on will add a new "Data protection officer" functional role. By default, the role has access to system operations (access to view, edit, delete and export all data, duplicate search, access to the "Users", "Audit log" and "Process log" sections). To start using the add-on, assign the "Data protection officer" functional role to the responsible employees. To do this:
 - In the System Designer, click the "System users" link.
 - Open the corresponding user page (Fig. 1), go to the "Roles" tab.
 - Go to the "Roles" tab, click "+" in the "Functional roles" detail and select "Data Protection Officer" from the lookup.

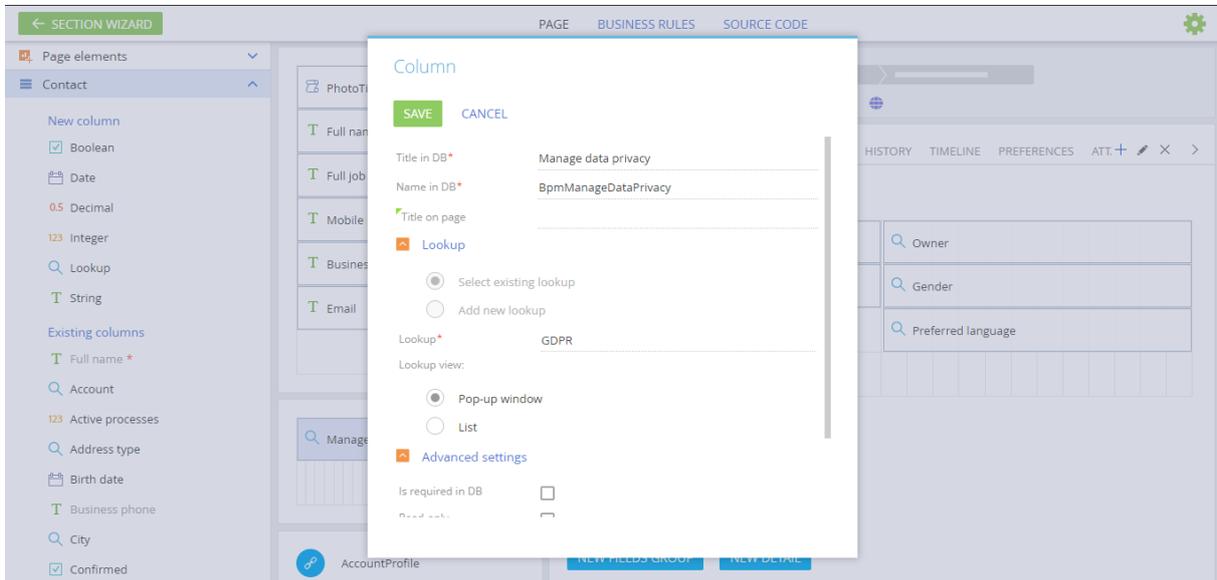
Fig. 1. User page



2. Identify the sections that contain personal data and add them to the "Data Protection Office" workplace. Base sections that contain personal data are: "Contacts", "Employees", "Users" and "Leads" (these sections are added to the "Data Protection Office" workplace by default). In some cases, personal data may be stored in other base sections, such as "Orders", "Contracts", etc. To add sections to a workplace:
 - In the System Designer, click the "Workplace setup" link.
 - Select "Data Protection Office" and click "Open".
 - Add sections that contain personal data to the list. The changes will be applied next time the user logs in.
3. The GDPR support in the "Leads" section is contained in a separate BpmLeadGDPR package. You can obtain the package from the marketplace support: marketplace@creatio.com. You can install packages from the "Installed applications" section of the System Designer.

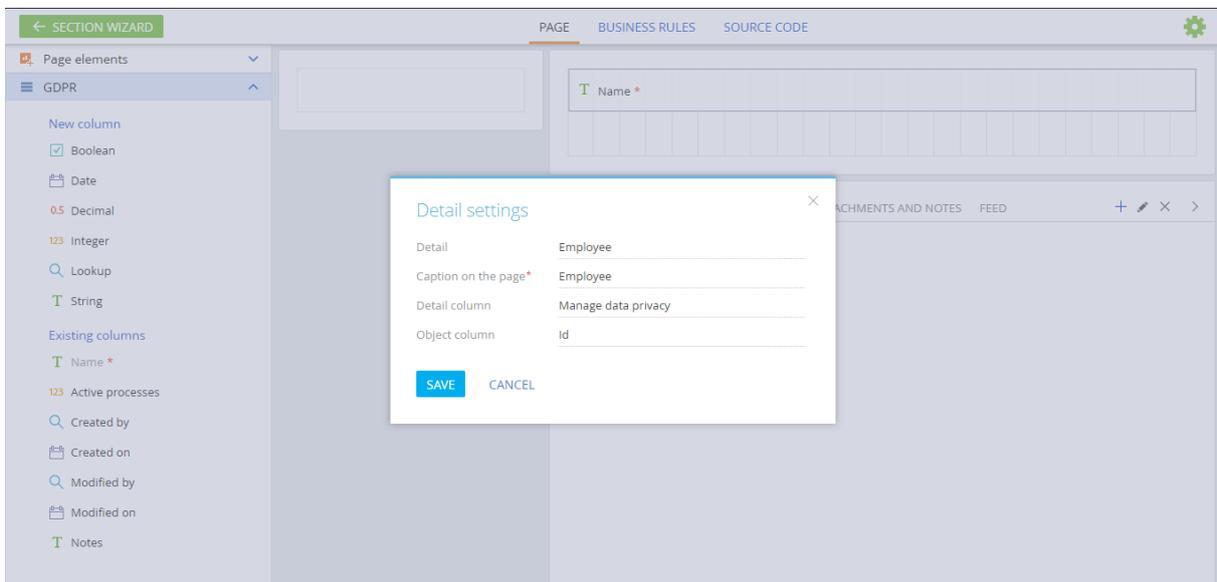
4. Use the section wizard to add the "Manage data privacy" field (Fig. 2) to other sections that contain personal data on the permission to store and process personal data from the corresponding data subject (lookup field, using the "GDPR" object as a lookup).

Fig. 2. "Manage data privacy" field settings



5. To display links to additional sections in the "GDPR" section, use the section wizard to add corresponding details to the "Connected to" tab (Fig. 3). For example, you can add "Orders" and "Contracts" fields to the "GDPR" section.

Fig. 3. "Connected to" detail settings



6. Each permission in the "GDPR" section has a validity term determined by its expiry date. The expiry date is populated automatically when permission is added. The date is calculated by adding the number of days specified in the system setting (code "PermissionDuration") to the date the permission was created on. The default value of the "PermissionDuration" system setting is 180 days. If necessary, you can change the default validity term.

7. Run the BpmUpdateContactsDoNotUse business process once. The business process will select all "Do not use" checkboxes on the "Communication options" detail for all contacts of any of the following is true:

- The contact has no addresses.
- Based on the contact's address, the contact is an EU resident. The list of countries is specified in the "tsp_UpdateContactDoNotUse" script.
- The contact has no currently active permissions (no permissions with the "OK" field set to "Yes" for "OK to Process" preference type).

When the process is run, Creatio will select the "Do not use email" checkbox to all contacts who have no current permission of the "OK to receive Newsletter" type.

You can set up the scheduler to run this business process automatically in the future. Creatio will check contacts in your database and select the corresponding "Do not use" checkboxes on the "Communication options" detail for contacts.

If you do not set up a schedule for running the process, you will need to run the process manually to update the permissions for sending emails and SMS for contacts who reside in a non-EU country or who do not have a country specified in their profile, and who have not yet given consent to process their personal data.

8. Obtain permissions to store and process personal data from employees and customers and add this information to the "Preferences" tab of the corresponding contacts in Creatio.