



GDPR

Data Access Request Report and Data Management

To set up access the Data Access Report and Data Management function the user must have the 'Can use GDPR functionality' role set up in Maintenance - User - Roles.

Role Group	Role	Search Criteria Group	Assigned	Expires	Notes
GENERAL	Can use GDPR functionality		☒		

In addition, the user must have 'Can send CV as PDF and CV packs' ticked to enable the Data Access report to be generated correctly.

Group	Role	Assigned	Expires	Notes
WP	Cannot mail merge by text	☐		
WP	Can create and edit CVs	☒		
WP	Can send CV as PDF and CV packs	☒		Requires W

The report GDPR.rtm needs to be saved in the Reports folder. Please contact IQX for a copy of this report.

A report request is logged in Database Diagnostics- Audit trail.

Database Diagnostics									
IQX licences in use: 1									
Refresh Close									
Audit Type All Date 21/12/2017 to 21/12/2017 Count Export / Archive									
Audit Type Description When Login Name Old Values New Values RecordID Connection ID									
REPORT	C:\IQX\Reports\GDPR.rtm	21/12/2017 14:36	IVAN					6	
REPORT	C:\IQX\Reports\GDPR.rtm	21/12/2017 14:36	IVAN					6	

The delete and anonymising features in the Data Management tool will make recovery of accidentally anonymised/deleted information difficult and in some cases expensive to recover.

Use of this button and any actions in the subsequent view are audited and logged.

To check logging insert the following into SQLTool:

```
select * from datamanagementlog order by whenentered
```

Contact Events

The Contact Event type must be created in Agency Setup - Contact Event Types and identified in General Settings - Email/Telephony 128.



Maintenance - Agency Setup

[Save And Close](#) [Abandon](#) [Update](#)

Branches Add Delete Help

Divisions

Departments

Document Templates

Order	Code	Description	Email Signature (Blank for Default)	Combo Box Filter	Client Email Attachment(s)	Person Email Attach
608	GD	GDPR				

General Settings

Name or Notes: Search Group: Branch: [Get Colour](#) [Save and Close](#) [Abandon](#) [Update](#) [Help](#)

No	Group	Name	Value	Notes
128	E-Mail/Telephony	Contact Event Type Code for GDPR Report Sent	GD	

Obscuring Bank Account Number

To obscure bank account numbers go to Maintenance - General Settings - Privacy - Star start of Bank Account Number and set the values to 'Y'.

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