



# **Towards *General Data Protection Regulation* Compliance with SAP Business One.**

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EXTERNAL

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**It is the customer's responsibility to adopt measures that the customer deems appropriate to achieve GDPR compliance.**

# Agenda

## 1. GDPR – Regulation & Key Terms

§ Scope, relevancy, due 25<sup>th</sup> May 2018

## 2. What is available with SAP Business One

§ Authorizations, Data Ownership, Change Logs, Access Log

## 3. What is to come with SAP Business One 9.3 PL04

§ Personal Data Tools - Setup and Personal Data Management Wizard (Report, Natural Person, Cleanup)

§ Access log for sensitive personal data (Germany only)

§ Live demo

## 4. Summary + Q&A's

§ GDPR/DPP Sessions at SMB Innovation Summits in Barcelona and Orlando

# General Data Protection Regulation (GDPR)



The General Data Protection Regulation (GDPR), EU Regulation 2016/679, effective 25<sup>th</sup> May 2018, gives **individuals control** and **protection** of their **personal data**. Data controllers, who determine the purpose and means of processing personal data, and processors, who process for controllers, are affected.



**Penalties up to 4%** of annual global revenue or **€20 million** – whichever is greater.



## Who must comply?

Organizations that offer goods or services to, or monitor the behavior of, EU data subjects and those that process or hold the personal data of EU residents

## Applies to:

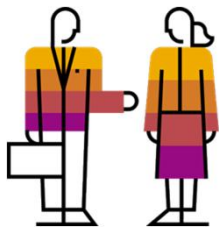
Natural persons, whatever their nationality or place of residence in the EU, in relation to the processing of their personal data

# What should be considered to comply with data privacy regulation?

## KEY MESSAGE

- § In general **no personal data** must be stored **without purpose and explicit consent** to it.
- § All **companies doing business in the EU** need rules which define which **personal data is needed**, how consent must be captured, what retention periods are needed for data, how data can be accessed, deleted and more.

Data Subjects



Natural persons e.g. retail customers, internal employees, contact persons etc.

Which data do you have?

- § Master & transactional data
- § Basic & sensitive personal data
- § ...

Who has access to my data?

- § Where is data stored?
- § Access authorization
- § Access log
- § ...

What is purpose of the data?

- § Explicit consent for data usage and storage
- § Deletion by request
- § Retention periods for data
- § ...



Data Controller

Your organizational rules



- § **Which data is needed** for which process?
- § How do business partners **give their consent** for data processing (e.g. contracts, marketing permissions...)?
- § How and how often is **compliance being audited**?
- § What happens in case of **data privacy requests** or violations?
- § ...more



Data Processor

Your business software



- § **Private customer** master & transactional data
- § **Service Agent** master & transactional data
- § **Employee** master & transactional data e.g. address, religion, time recording
- § **User** authorization & access control logging
- § ...more

Acquisition

Opportunity

Order/  
Contract

Execution

Invoicing



# GDPR at a Glance



## Demonstration of compliance

- § Compliance and accountability are integral to a data protection program.
- § Codes of conduct and policies can help ensure accountability.



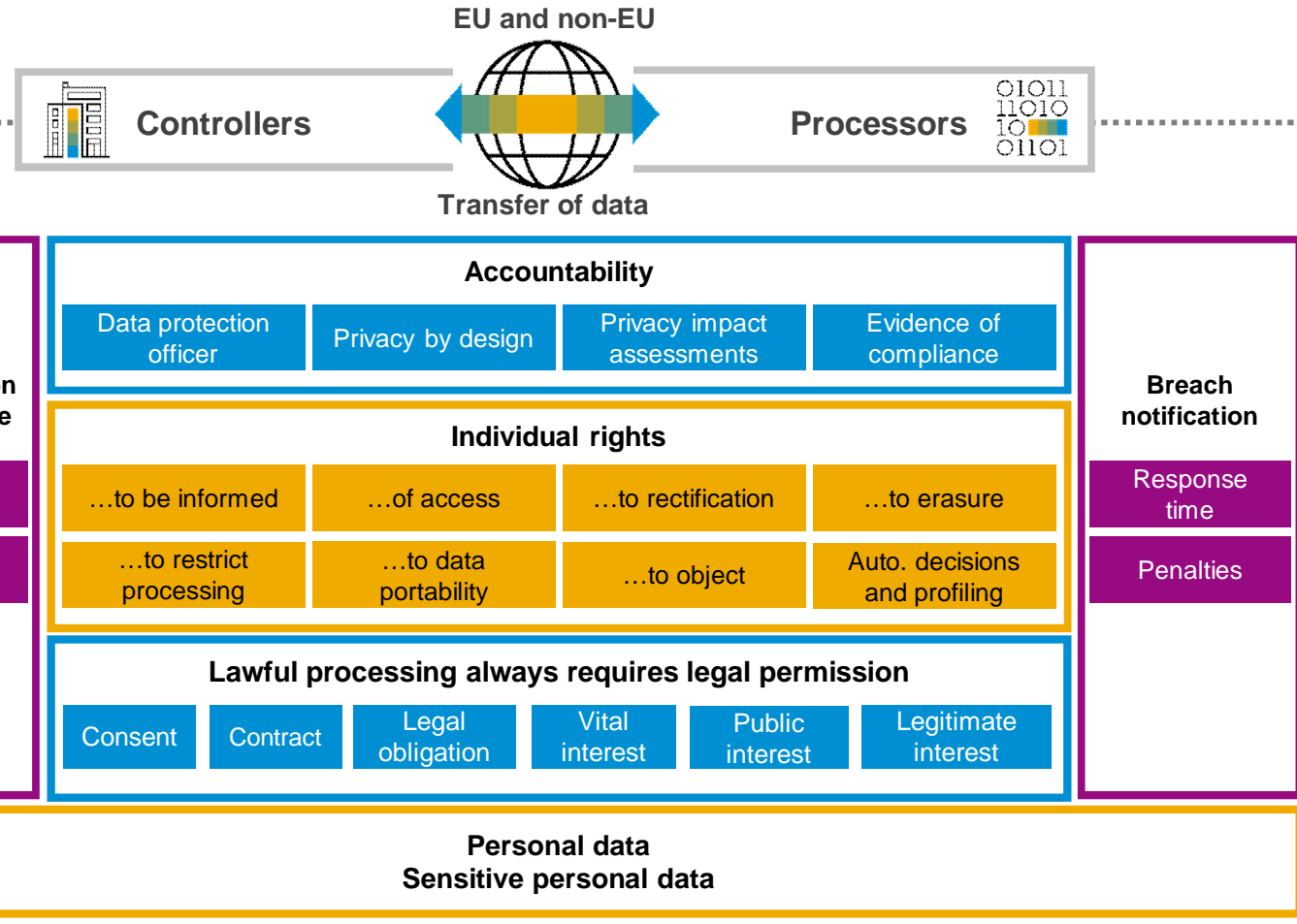
## Accountability

- § Produce and maintain evidence of compliance-supporting actions
- § Build data protection into product design and development
- § Appoint a data protection officer (DPO) if your company has large-scale processing requirements



## Lawful processing

- § Requires a legal basis, e.g. a contract, consent, or legitimate interest for the processing of personal data
- § Must keep such data accurate and stored only as long as needed



## Personal data



- § Includes online identifiers, mobile device IDs, IP addresses, and more; may include de-personalized data
- § Requires parental consent for children under 16 years



## Controllers and processors

- § Non-EU data controllers and processors must also comply when processing data of EU individuals.
- § Controller is accountable for failures of the data processor; both controller and processor are liable for breaches.



## Breach notification

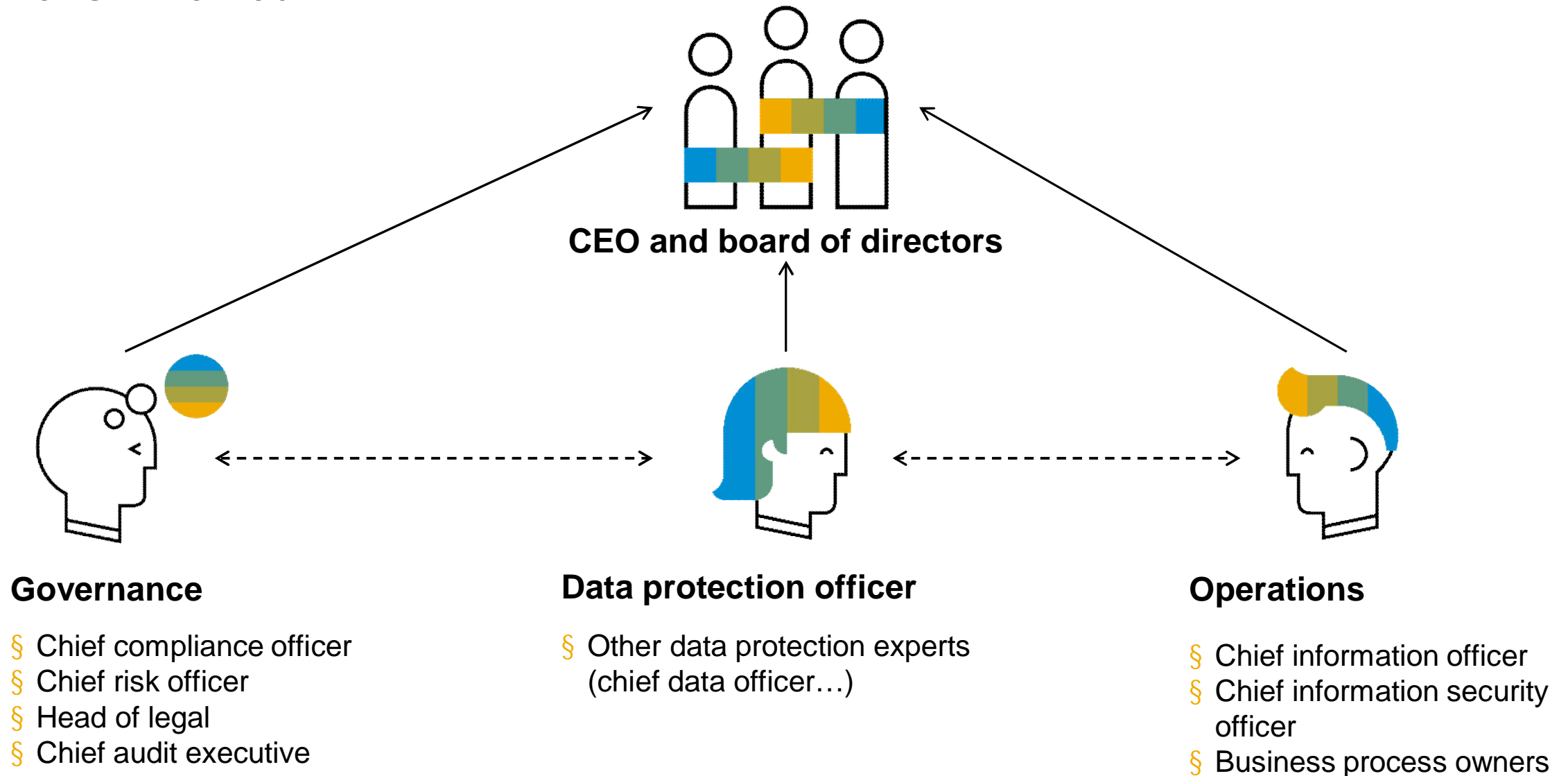
- § Mandatory notification to authority within 72 hours of becoming aware of breach
- § Communication to affected individuals without undue delay
- § Maximum fine can apply



## Individual rights

- § The GDPR suggests self-service apps for personal data-related information requests
- § Rights apply across all systems, including those of third parties.
- § Businesses generally cannot charge and must respond in <1 month.

# Who is involved?



# GDPR and **SAP Business One**





# Glossary – Good to Know Key Terms

- § **GDPR** – General Data Protection Regulation adopted by the European Union due on May 25<sup>th</sup>, 2018.
- § **Natural Person** – A real human being (as distinguished from a corporation, machine or robot).
- § **Personal Data** – Any data that can identify a natural person (name, date of birth, address, car license plate).
- § **Sensitive Personal Data** – Special category of data with stronger protection and special rules required (religion/confession, social security number, blood type).
- § **Data Subject** – A natural person for whom the system stores personal data.
- § **Data Controller** – Who determines the purpose and means of processing personal data and bears primary responsibility for compliance.
- § **Data Processor** – Who processes personal data on behalf of a controller.
- § **GDPR Objects** – SAP Business One objects which store personal data.

# Available GDPR / DPP Functions in SAP Business One



# Authorizations

Authorizations

Users Groups

AlertSvc  
alexande  
B1i  
B11  
bernhard  
bettina  
cathrin  
christia  
christin  
conrad  
daniela  
edith

Copy Authorizations

Find

Subject	Authorization
▶ General	Full Authorization
▶ Customization Tools	Full Authorization
▶ Administration	Full Authorization
▶ Financials	Full Authorization
▶ Opportunities	Full Authorization
▶ Sales - A/R	Various Authorizations
▶ Purchasing - A/P	Various Authorizations
▶ Business Partners	Various Authorizations
▶ Banking	Various Authorizations
▶ Inventory	Full Authorization
▶ Resources	No Authorization

Max. Discount - Sales 100,000 Expand Collapse

Max. Discount - Purchase 100,000

Max. Discount - General 100,000

☐ Max. Cash Amount for Incoming Payments

Full Authorization Read Only No Authorization

OK Cancel

## Feature

- § Authorizations allow users to view, create, and update documents that you assign to them, according to data ownership definitions.
- § By default, a new user has no authorizations. Each user can have only one manager who assigns permissions. You can define users as either regular users or superusers.
- § You can define approval processes for the purchasing and sales transactions in the system that override the standard permissions

## Benefits

- § Control and set which natural person (user) has access to which form, object or a single field in selected cases.
- § You can restrict user access to documents and/or personal data.

# Data Ownership (1/3)

General Settings

BP Budget Services Display Font & Bkgd Path Stock

Customer Activity Restrictions

☒ Credit Limit  
☐ Commitment Limit  
☐ Consider Deliveries Balance

☒ AR Invoice  
☐ Delivery  
☐ Sales Order  
☐ Pick List

Set Commission by

☒ Sales Employees  
☐ Items  
☐ Customers

Default Payment Method for Customer: Incoming BT  
Default Payment Method for Supplier: Outgoing BT  
Submit Credit Vouchers: Automatically  
Default Dunning Term for Customer: Standard

Payment Terms Pre: Default Payment Te  
Default Payment Te: Apply Changes

☐ Use Shipped Goods Account for Customer  
☒ Display Inactive Business Partners in Reports  
☒ Display Inactive Business Partners in Marketing Documents

☐ Apply IBAN Validation to Bank Accounts

☒ Enable Data Ownership  
Manage Data Ownership By: Branch

OK Cancel

## Feature

- § Data ownership allows the company to have control over data elements. With the data owner function, you can define the rightful owner of data and information.
- § Therefore, your company's data can be secured and protected by the predefined authorization. Information and data can be accessed by permitted roles and users only.
- § From 9.3 release, when managing multiple branches the user's branch assignment will automatically determine access to BPs and Documents when the BPs'/Documents' branch assignment matches the user's branch assignment.

## Benefits

- § Decide on activation of new functions to better control and contribute to GDPR compliance.
- § Restrict user access to documents which are relevant to their role/daily work.



# Data Ownership (2/3)

The screenshot displays two SAP windows. The top window, 'Data Ownership Authorisations', shows a table with columns for Document, Peer, Manager, Subordinate, Department, Branch, Team, and Company. The bottom window, 'Business Partner Master Data', shows fields for Code, Name, Foreign Name, Group, Currency, Federal Tax ID, and Owner. A 'List of Employees' dialog box is open, showing a table with columns for #, Last Name, First Name, and Employee No.

Document	Peer	Manager	Subordinate	Department	Branch	Team	Company
Business Partner	None	None	None	None	None	None	None
AP Credit Note	None	None	None	None	None	None	None
AP Down Payment	None	None	None	None	None	None	None
AP Invoice	None	None	None	None	None	None	None
AR Correction Invoice	None	None	None	None	None	None	None
AR Credit Note	None	None	None	None	None	None	None
AR Down Payment	None	None	None	None	None	None	None
AR Invoice	None	None	None	None	None	None	None
Delivery	None	None	None	None	None	None	None
Goods Receipt PO	None	None	None	None	None	None	None
Goods Return	None	None	None	None	None	None	None
Goods Return Request	None	None	None	None	None	None	None
Opportunity	None	None	None	None	None	None	None
Purchase Order	None	None	None	None	None	None	None
Purchase Order Confirmation	None	None	None	None	None	None	None

#	Last Name	First Name	Employee No.
1	Butler	Jayson	1
2	Shone	Bob	3
3	Thompson	Brad	2

## Feature

- § Data ownership management extended to business partners with SAP Business One 9.2.
- § Restrict access and visibility of:
  - Ø Business Partner Master Data
  - Ø Documents using Business partner with owners
- § Manage data ownership by:
  - Ø Documents Only:
    - Permissions are defined per document.
  - Ø Business Partners Only:
    - Permissions for documents are defined by whether users have permission to the business partner used in documents.
  - Ø Business Partners and Documents:
    - When Business Partners have owners, permissions for documents are decided by whether users have permission for the business partner used in documents.
    - When Business Partners have no owner, permissions are decided per document.

## Data Ownership (3/3)

[illegible]

**Data Ownership Sharing Options**

Documents Business Partner Windows

Define the data owners for listed documents; those affected by the owner of the business partner that is used in the documents.

Document	Owner
▼ Business Partner	Business Partner Owner
A/P Credit Memo	No Restriction
A/P Down Payment	Business Partner Owner
A/P Invoice	Business Partner Owner
A/R Correction Invoice	Business Partner Owner
A/R Credit Memo	Business Partner Owner
A/R Down Payment	Business Partner Owner
A/R Invoice	Business Partner Owner
Delivery	Business Partner Owner
Goods Receipt PO	Business Partner Owner
Goods Return	Business Partner Owner

Update Cancel

[illegible]

## Feature

- § Bypass Data Ownership by granting access at Company level.
- § Restrict system reports like Open Items List to reflect only results against specific Business Partners for specific users.
- § Exclude specific restrictions and enable read access.

## Benefits

- § Additional layer of authorization and security.
- § Enhanced usability as only relevant data is considered.
- § Safe guard company information against data theft.

# Change Log Cleanup Utility

**Change Logs Cleanup**

**Introduction**  
The change logs cleanup utility allows you to delete change logs of various documents and master data. Determine the range of change logs to be deleted by setting date into Logs Clean Up To.  
Select the documents/master data to clean up their change logs. Executing the cleanup will delete change log entries which were created on a date which is equal or smaller than the selected date.

**Warning:** Deleting the change log data is irreversible

Change Logs Cleanup:

Cleanup Scenario:

Cleanup Date:

Logs Clean Up To:

Remarks:

Select	Module	Document Name	Current Size (MB)	Status
<input type="checkbox"/>		Pick List		
<input type="checkbox"/>		Inventory Counting		
<input type="checkbox"/>	▼ Resources			
<input type="checkbox"/>		Resource Master Data		
<input type="checkbox"/>	▼ Production			
<input type="checkbox"/>		Bill of Materials		
<input type="checkbox"/>		Production Orders		
<input type="checkbox"/>	▼ Service			
<input type="checkbox"/>		Service Call		
<input type="checkbox"/>		Equipment Card		
<input type="checkbox"/>	▼ Human Resources			
<input type="checkbox"/>		Employee Master Data		

**Summary:**  
In total, %d log entries were deleted successfully

Utilities	Full Authorization	Full Authorization
Period-End Closing	Full Authorization	Full Authorization
Update Control Report	Full Authorization	Full Authorization
Check Document Numbering - Selection Criteria	Full Authorization	Full Authorization
▶ Data Archive Wizard	No Authorization	No Authorization
Master Data Cleanup Wizard	No Authorization	No Authorization
▼ Change Logs Cleanup	No Authorization	No Authorization
Execute Change Logs Cleanup	No Authorization	No Authorization

## Feature

- § New Change Log Cleanup Utility available.
- § Enables users to cleanup the change log to reduce the size of a company database.
- § Users have the ability to determine which objects from the change log entries should be deleted and restrict the deletion to a specific date range.
- § Utility subject to appropriate user authorisation.

## Benefits

- § Improved performance when running upgrades due to a reduced amount of data to be upgraded.
- § Companies running SAP Business One for a long time with a large change log are able to delete old changes that were registered.

# System Access Log

Access Log

Date

From

02/19/2018

To

03/19/2018

To view the access details of a user, double-click the relevant table row.

Details

User Code	User Name	Superuser	Locked	Latest Logon	Latest Access Status	Latest Logoff	Last Password Change	No. of Failed Access Attempts
jim	Jim Boswick	No	No		N/A		04/02/2007	0
john	John Peterson	No	No		N/A		04/02/2007	0
juan	Juan Peron	No	No		N/A		06/14/2009	0
julie	Julie Bowers	No	No		N/A		06/14/2009	0
keiko	Keiko Matsui	No	No		N/A		06/14/2009	0
keith	Keith Trahan	No	No		N/A		06/14/2009	0
leo	Leo Laporte	No	No		N/A		06/14/2009	0
linda	Linda Hudson	No	No		N/A		04/02/2007	0
manager	Jayson Butler	Yes	No	03/19/2018 14:03:04	Succeeded	03/19/2018 14:02:06	03/12/2018 16:21:00	0
maria	Maria Bridi	No	No		N/A		06/14/2009	0

[illegible]

## Feature

- § The Access Log window displays the access details of SAP Business One users who have logged on and logged off with one of the following:
  - § SAP Business One client
  - § DI API

## Benefits

- § Tracking and recording date, time and users logging into the system.
- § This is a very important prerequisite when fraudulent operations need to be analyzed and is a prerequisite for corporate governance.



# GDPR / DPP Enhancements for SAP Business One – Demo



# DPP Initialization Function – New with SAP Business One 9.3 PL04

The screenshot shows the 'Company Details' dialog box with the 'Basic Initialization' tab selected. The 'Enable Personal Data Protection Management' checkbox is highlighted with a red rectangle. Other visible settings include 'Chart of Accounts Template' (SKR03), 'Local Currency' (Euro), 'System Currency' (Euro), 'Default Account Currency' (All Currencies), 'Multi-Language Support' (checked), 'Use Perpetual Inventory' (checked), 'Item Groups Valuation Method' (Moving Average), 'Manage Item Cost per Warehouse' (checked), 'Use Purchase Accounts Posting System' (unchecked), 'Allow Stock Release Without Item Cost' (checked), 'Manage Serial and Batch Cost By' (Items Group Valuation Method), 'Enable Separate Net and Gross Price Mode' (unchecked), 'Default Bank Country' (Germany), 'Default Bank' (Deutsche Bank Privat und Geschäft), 'Default Account No.' (45679234709784567), 'Default Branch' (Berlin Filiale), 'Install Bank Statement Processing' (unchecked), 'Enable Intrastat' (unchecked), 'Enable Fixed Assets' (checked), 'Calculate Depreciation By' (Month), 'Enable Multiple Branches' (unchecked), 'Mask Credit Card Number' (checked), 'Enable Advanced G/L Account Determination' (unchecked), 'Allow Selection of Any Account Type for Revenue Accounts' (unchecked), and 'Enable Project Management' (unchecked).

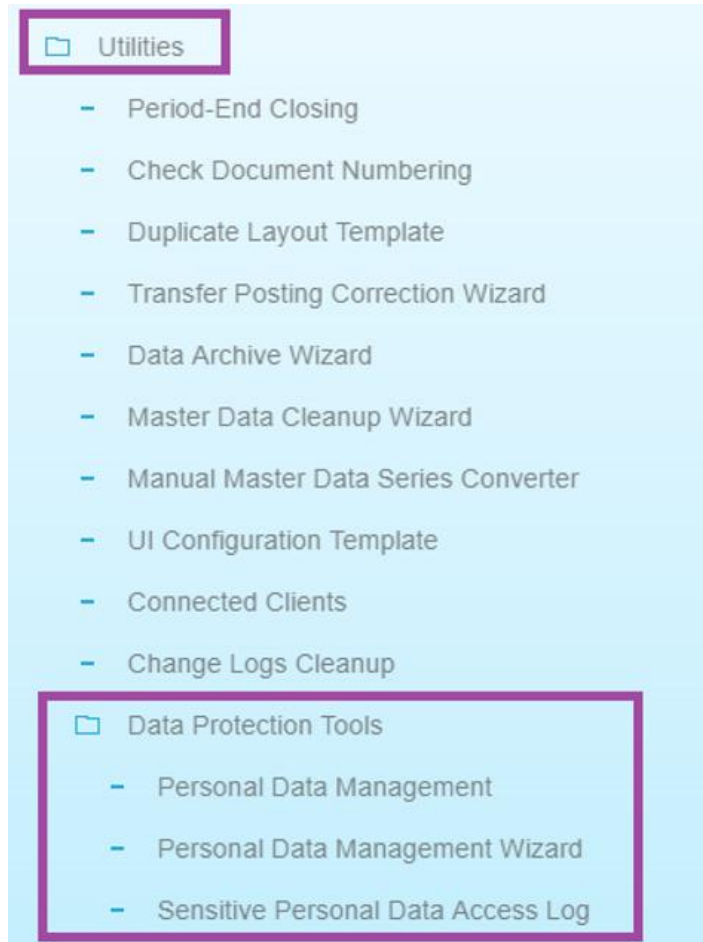
## Feature

- § Initialization setting on Company Details form to activate all new Data Privacy and Protection enhancements in SAP Business one.
- § Automatically activated for all localizations for EU countries, Norway and Switzerland after upgrade to 9.3 PL04. It can be turned off (not recommended) before any natural person is determined and/or any personal data erasure or personal data block is executed.

## Benefit

- § Decide on activation of new functions to better control and contribute to GDPR and Data Privacy Protection compliance.

# Data Protection Tools – Main Menu Entry



## Feature

- § Data Protection Tools are managed under Administration/Utilities.

## Benefit

- § Centralized location for managing personal data protection.



# Personal Data Management Setup

Personal Data Management - Setup									
#	Data Type	Data Subtype	Category	Group	Field Name	Descrip...	Database Reference	Default Data Classification	Data Classification
221	Time Sheets	Project Management Time Sheet - Header			Lastname		OTSH.Lastname	Personal	Personal
222	Time Sheets	Project Management Time Sheet - Rows			GPS Data		TSH1.GPSData	Personal	Personal
223	Incoming Payments	Incoming Payment			Address		ORCT.Address	Personal	Personal
224	Incoming Payments	Incoming Payment			Customer/Supplier Name		ORCT.CardName	Personal	Personal
225	Incoming Payments	Incoming Payment - Cheques			Account Number		RCT1.AcctNum	Personal	Personal
226	Incoming Payments	Incoming Pmt - Credit Vouchers			Credit Card No.		RCT3.CrCardNum	Personal	Personal
227	Incoming Payments	Incoming Pmt - Credit Vouchers			ID Number		RCT3.OwnerIdNum	Personal	Personal
228	Incoming Payments	Incoming Pmt - Credit Vouchers			Telephone		RCT3.OwnerPhone	Personal	Personal
229	Cheque Register	Cheque Register			Account Number		OCHH.AcctNum	Personal	Personal
230	Cheque Register	Cheque Register			BP/Account Name		OCHH.CardName	Personal	Personal
231	Marketing Documents	Mktg Docs - Row	Purchase A/P		Ship-To Description		DOC1.ShipToDesc	Personal	Personal
232	Marketing Documents	Mktg Docs - Row	Sales A/R		Ship-To Description		DOC1.ShipToDesc	Personal	Personal
233	Marketing Documents	Mktg Docs - Tax Extension	Purchase A/P	Bill To	Address Name 2		DOC12.Address2B	Personal	Personal
234	Marketing Documents	Mktg Docs - Tax Extension	Sales A/R	Bill To	Address Name 2		DOC12.Address2B	Personal	Personal
235	Marketing Documents	Mktg Docs - Tax Extension	Purchase A/P	Ship To	Address Name 2		DOC12.Address2S	Personal	Personal
236	Marketing Documents	Mktg Docs - Tax Extension	Sales A/R	Ship To	Address Name 2		DOC12.Address2S	Personal	Personal
237	Marketing Documents	Mktg Docs - Tax Extension	Purchase A/P	Bill To	Address Name 3		DOC12.Address3B	Personal	Personal

OK Cancel

You Can Also

## Feature

- § New control to define and categorize personal Data.
- § User Defined Fields in GDPR objects can be determined as personal data.
- § New entry under Data Protection Tools.

## Benefits

- § Centralized location for management and maintenance of Personal Data.
- § Structured and categorized location.



# Personal Data Management Authorizations

Connected Clients	No Authorisation
▼ Data Protection Tools	Various Authorisations
Personal Data Management	No Authorisation
▼ Personal Data Management Wizard	Full Authorisation
Personal Data Report	Full Authorisation
Personal Data Cleanup	No Authorisation
Determine Natural Person	Full Authorisation
View Sensitive Personal Data	No Authorisation
View Sensitive Personal Data Access Log	No Authorisation

## Feature

- § Extension of General Authorizations form to support authorizations for new Data Protection Tools.

## Benefits

- § Ability to restrict access and set authorizations to sensitive data.
- § Ability to restrict access to the various functions under Data Protection Tools.

# Personal Data – Change Log Enhancements

The screenshot displays the SAP Personal Data Change Log Enhancements interface, which is divided into three main sections:

- Activity:** This section contains form fields for defining an activity. The 'Activity' dropdown is set to 'Phone Call', and the 'Type' is 'General'. The 'Subject' is empty. The 'Assigned To' field is set to 'User' with 'Jayson Butl' selected. The 'Assigned By' field is 'Jayson Butler'. The 'Personal' checkbox is unchecked. Other fields include 'Number' (2), 'BP Code' (C20000), 'BP Name' (Maxi-Teq), 'Contact Person' (Max Teq), and 'Telephone No.' (555-0139).
- Change Log...:** This section displays a table of change log entries. The table has columns for #, Instance, Object Code, Object Code, Updated, Updated by, Created, and Created By. It shows two entries for the same object code (2) updated on 03/21/2018 by Jayson Butler.
- Differences:** This section displays a table of differences. The table has columns for #, Date, Changed Field, Previous Value, New Value, and User Name. It shows one entry for the 'Telephone' field, which was changed from 555-0137 to 555-0139 on 03/21/2018 by Jayson Butler.

## Feature

- § New objects supported in the Change Log: **Activities, Checks for Payments, Service Contacts.**

## Benefit

- § Logging changes (date, time, owner) to personal data is a critical requirement of GDPR.

# Sensitive Personal Data – Access Log (Germany only)

The screenshot shows two SAP windows. The 'Employee Master Data' window on the left displays fields for personal data, with a red box highlighting the 'Display Sensitive Data' button. The 'Sensitive Personal Data Access Log' window on the right shows a table of access records for various users, with the 'manager' user selected.

**Employee Master Data**

First Name: Bernhard  
Middle Name: Heinrich  
Surname: Heinrich  
Job Title: Vertrieb  
Position: Vertrieb  
Department: Vertrieb  
Branch: Haupt  
Manager: Leitner, Robert  
User Code: bernhard  
Sales Employee: Bernhard Heinrich  
Cost Centre:

Gender: Male  
Date of Birth:   
Country of Birth:   
Place of Birth:   
Marital Status: Single  
No. of Children:   
ID No.:   
Municipality Key:   
Tax Class:   
Income Tax Liability:   
Confession: \*  
Confession of Partner: \*  
Exemption: 0,00  
Additional Amount: 0,00

**Sensitive Personal Data Access Log**

Date: From 19.02.2018 To 19.03.2018

To view the access details of a user, double-click the relevant table row.

User Code	User Name	Superuser	Locked	Canceled	Latest Data Access
friedric	Friedrich Günthe	No	No	N	
georg	Georg Travnick	No	No	N	
gunther	Günther Zeiner	No	No	N	
gustav	Gustav Kilian	No	No	N	
hermann	Hermann Ludger	Yes	No	N	
hinrich	Hinrich Günter	No	No	N	
ingolf	Ingolf Müller	No	No	N	
isabel	Isabel Meißner	No	No	N	
johann	Johann Brugstall	No	No	N	
karl	Karl Salzberger	No	No	N	
kolman	Kolman Winfried	No	No	N	
konrad	Konrad Eberhart	No	No	N	
kora	Kora Adelheid	No	No	N	
manager	Robert Leitner	Yes	No	N	19.03.2018 00:15:30
maria	Maria Breil	No	No	N	
marianne	Marianne Wollong	No	No	N	
olaf	Olaf Böhm	No	No	N	
stephan	Stephanie Hofma	No	No	N	

**Personal Sensitive Data Access Log - manager**

Access Channel	Object Type	Key/...	Data Subject	Accessed Property	Access Time
UI	Employees	5	EMP 5	Religion	19.03.2018 00:15:30
UI	Employees	5	EMP 5	Religion of Partner	19.03.2018 00:15:30
UI	Employees	5	EMP 5	Religion	19.03.2018 00:15:30
UI	Employees	5	EMP 5	Religion of Partner	19.03.2018 00:15:30

## Feature

- § Control by log/record of any access to a special category of personal data – sensitive personal data.
- § In the core SAP Business One application it affects the Germany localization only.
- § Values are encrypted in the database.
- § Values are hidden by default on User Interface – special authorization and control needed to unhide and display the value.

## Benefit

- § Selected authorized users can view hidden sensitive personal data values.

# Determine Natural Person

Personal Data Management Wizard

**1 Wizard Run Selection**

**2 General Parameters**

**3 Selection Criteria**

**4 Report Results**

**5 Save Options**

**6 Summary Results**

**General Parameters**

Select this action when you wish to determine Business partners, Employees, Users and Contact Persons as Natural Persons (Set On the setting Natural Person in the related Master Data).

The wizard contains Personal Data Report and Personal Data Cleanup can be applied on natural persons only.

**Business Partner Master Data**

Code: Manuell, C99998, Customer

Name: Web Einmalkunde

Foreign Name:

Group: Kunden

Currency: Euro

Federal Tax ID:

Account Balance: 0.00

Deliveries: 614.52

Orders: 0.00

Opportunities:

Local Currency: 0.00

**Personal Data Management**

**General** | Contact Persons | Addresses | Payment Terms | Payment Run | Accounting | Properties | Remarks | Attachments

Tel 1:

Tel 2:

Mobile Phone:

Fax:

E-Mail:

Web Site:

Shipping Type:

Password:

Factoring Indicator:

BP Project:

Industry:

Business Partner Type: Company

Alias Name:

GLN:

Contact Person ID No. 2:

Unified Federal Tax ID:

Remarks:

Sales Employee: Verkaufler

BP Channel Code:

Technician:

Territory:

Language: German

Block Sending Marketing Content:

From: To:

Remarks:

**Personal Data Protection**

☒ Natural Person

Status: None

OK Cancel You Can Also

## Feature

- § New function under Personal Data Management Wizard which enables determining users, employees, business partners and contact persons as natural persons.

## Benefit

- § Helps to apply the natural person determination setting on a range of different data subjects.
- § Natural Person setting is essential to use certain functions of Personal Data Tools for GDPR.



# Personal Data Report (Driven by a person's request)

## KEY SCENARIO / GDPR REQUIREMENT

- § Natural persons are allowed to contact any organization to request details of which personal data the organization stores and processes about them.
- § The organization needs to provide a report on this.

The screenshot displays the 'Personal Data Management Wizard' interface. The left sidebar shows a navigation menu with six steps: 1. Wizard Run Selection, 2. General Parameters, 3. Selection Criteria, 4. Report Results, 5. Save Options, and 6. Summary Report. The main content area is divided into two sections. The top section, 'General Parameters', includes instructions on how to generate a report and a form with fields for 'Run Name' (Pdm20180319n2), 'Run Date' (19.03.2018), and 'Action' (Personal Data Report). The bottom section, 'Personal Data Report - Report Results', provides a detailed table of personal data for selected individuals, including users and business partners.

#	Natural Person	Natural Person Name	Natural Person Code	Data Type	Field Name	Database reference	Value
1	▼ Users						
2		▼ Alex Torres	19				
3				Users	User Name	OUSRJ_NAME	Alex Torres
4				Users	E-Mail	OUSRJ_E-Mail	alex.torras@oec.com
5	▼ Employee Master Data						
6		▼ Barrera, william	3				
7				Employees	[Home Address]	OHEM.[Home Address Kings Road, 1345, 5.7.8, AT, 94444	
8				Employees	Last Name	OHEM.lastName	Barrera
9				Employees	First Name	OHEM.firstName	william
10				Employees	Job Title	OHEM.jobTitle	HR
11				Employees	Mobile Phone	OHEM.mobile	57-99999
12				Employees	Home Phone	OHEM.homeTel	39-88888
13				Employees	E-Mail	OHEM.email	w.barr@adc.com
14				Employees	Name Positioning Set	OHEM.NamePos	Last Name, First Name
15				Employees	Religion	OHEM.Religion	
16				Employees	Religion of Partner	OHEM.RelPartner	
17				Employees	Deviating Bank Account	OHEM.DevBankOwner	No
18	▼ Business Partner Master Data						
19		▼ Maxi-Teq	C20000				
20				Business Partner	[Bill To]	OCRD.[Bill To]	4417 Stonebridge Rd, Suite 500, Northampton, Northampton County, 18067
21				Business Partner	[Ship To]	OCRD.[Ship To]	4417 Stonebridge Rd, Suite 500, Northampton, Northampton County, 18067
22				Business Partner	BP Name	OCRD.CardName	Maxi-Teq
23				Business Partner	Telephone 1	OCRD.Phone1	555-0110
24				Business Partner	Fax Number	OCRD.Fax	555-0111
25				Business Partner	E-Mail	OCRD.E-Mail	info@maxi-teq.sap.com
26				Business Partner	Default Account	OCRD.DFAccount	230-6789-456464
27				Business Partner	Credit Card No.	OCRD.CrCardNum	ujenKH06+1/52YLSH0g==
28				Business Partners - Addresses	[Ship To]/[Bill To]	CRD1.[Ship To]/[Bill To]	4417 Stonebridge Rd, Suite 500, Northampton, Northampton County, 18067, PA

## Feature

- § New option to generate Personal Data Reports for selected natural persons.
- § The report gathers personal data from master data and transactions.

## Benefits

- § Helps to follow up and execute natural person requests to retrieve any personal data which is held by the company.
- § Helps the company verify personal data correctness following natural person feedback on personal data reports.

## Reverse Natural Person Determination

Personal Data Management Wizard

1 Wizard Run Selection

2 General Parameters

3 Selection Criteria

4 Report Results

5 Save Options

### General Parameters

Select this action when you need to reverse the natural person determination (set Off the setting Natural Person).

This action cannot be applied on a natural personal whose personal data was already cleared (by Personal Data Cleanup).

Run Name	<input type="text" value="Pdm20180321n4"/>
Run Date	<input type="text" value="03/21/2018"/>
Action	<input type="text" value="Reverse Natural Person Determination"/>

[illegible]

## Feature

- § New function under Personal Data Management Wizard to reverse a natural person determination in case of user mistakes

## Benefit

- § Helps to reverse the natural person determination on a range of data subjects

# Personal Data Cleanup – Irreversible Erasure of Personal Data

The screenshot displays the 'Personal Data Management Wizard' in SAP. The 'General Parameters' step is active, showing instructions on when to use the erasure function. Below this, the 'Business Partner Master Data' window is open, showing various fields for a customer. The 'Status' field under 'Personal Data Protection' is highlighted with a red box and set to 'Erased'.

**Personal Data Management Wizard**

**1 Wizard Run Selection**

**2 General Parameters**

**3 Selection Criteria**

**4 Report Results**

**5 Save Options**

**6 Summary**

**General Parameters**

Select this action when you wish to erase personal data of a natural person. Erasing personal data might be needed when:

- The purpose for which the personal data is held by the company does not exist anymore (the natural person has no business relations with the company and any financial/legal process for which this data is needed were completed).
- The company is requested by a natural person to erase his personal data.

**Business Partner Master Data**

Code: Manuell | C20088 | Customer

Name: \*

Foreign Name: \*

Group: Einzelhandel

Currency: Euro

Federal Tax ID: \*

Account Balance: 0,00

Deliveries: 0,00

Orders: 0,00

Opportunities: \*

Local Currency: \*

**General** | **Contact Persons** | **Addresses** | **Payment Terms** | **Payment Run** | **Accounting** | **Properties** | **Remarks** | **Attachments**

Tel 1: \*

Tel 2: \*

Mobile Phone: \*

Fax: \*

E-Mail: \*

Web Site: \*

Shipping Type: \*

Password: \*

Factoring Indicator: \*

BP Project: \*

Industry: \*

Business Partner Type: Company

Contact Person: \*

ID No. 2: \*

Unified Federal Tax ID: \*

Remarks: \*

Sales Employee: -Kein Vertriebsmitarbeiter-

BP Channel Code: \*

Technician: \*

Territory: \*

Language: German

Alias Name: \*

GLN: \*

Block Sending Marketing Content: \*

From: \* To: \* Remarks: \*

**Personal Data Protection**

☒ Natural Person

Status: **Erased**

OK Cancel

You Can Also

## Feature

- § New and very important Personal Data function under Personal Data Management Wizard to erase all personal data (by setup in Personal Data Management) of selected natural persons from master data and transactions.
- § Erased data on all affected master data and transactions will be replaced with asterisks.
- § Status of natural person whose personal data was erased will change to *Erased*.
- § This action is irreversible and must be taken after proper consideration and checking that all data retention periods are over and there is no legal obligation to hold the data of natural person.

## Benefit

- § Helps to follow up and execute natural person requests to remove and erase personal data after legal periods to hold data have finished and there is no reason to block the data.



# Summary + Q&A's

## GDPR at SAP Business One 9.3 PL04





# Thank you.

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