Configuration: GDPR – General Data Protection Regulation

Introduction

The Engage Process Suite is used by organizations for many different themes and management goals. They include Continuous Improvement, Risk management/ FMEA, digital and organizational transformation etc. Our consultants have a lot of experience in configuring the settings of the Suite for these different purposes.

All their experiences and a lot of wonderful input from many customers, has now been bundled in Standard Configurations. With these configurations our customers' key users can manage the settings of the Suite in an effective and efficient way aimed at these themes. Where needed, our consultants can provide guidance or help to complete the configuration.

GDPR Configuration: What and for whom?

The GDPR is in effect since the beginning of 2018. According to the regulation, organizations must have a Register showing for all activities (processes), which categories of personal data is being used, to what extent, for what purpose, and based on which legal justification.

The Engage Process Suite allows you to create such a register in an easy and effective way. A great advantage of creating the register within a process suite lies in the changes being made; the register will be updated automatically with every process change being made!

Engage Process Suite Modules needed (x) or preferred (*):

Name	Needed/Preferred
Modeler	x
Viewer	*
Authorisation	
Tables	*
Publisher	
Teamboard	
Feedback	
Brainstorm	

For which subscriptions?

- Suite Silver, with Publisher
- Suite Gold
- Suite Platinum
- Suite Enterprise

Base requirements:

It must be clear or inventorized which categories of personal data is collected or used by your organization and used in each of its processes or process steps. If a Privacy Register is available, then this should be used.
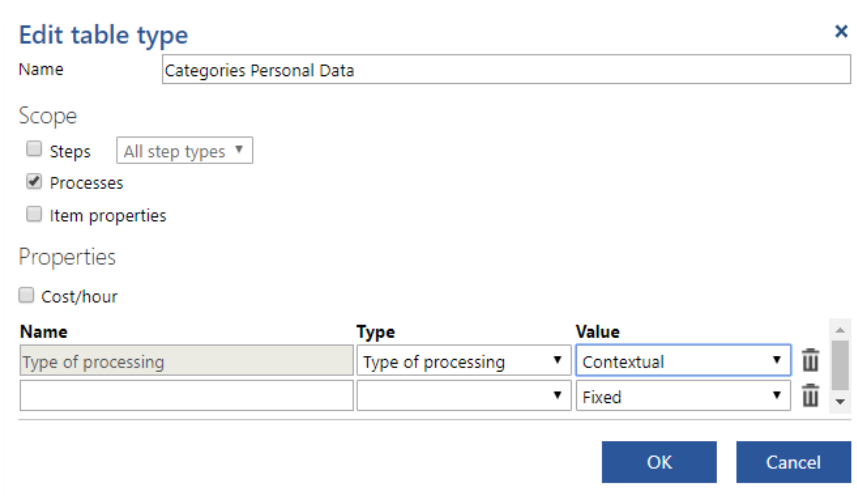
Creating the configuration per Module

This configuration is based on experiences by our customers. In many situations it is sufficient to highlight the use of personal data per process; further detailing per process steps is not always needed. In this document we focus on the first possibility; registering the use of such data per process.

Engage Process Settings – Tables

In Tables, create the following Tables:

- **Categories Personal Data**, scope: '**Processes'**. You may choose to make 3 subcategories: Standard, Special and Sensitive. Doing so, will result in 3 separate tables;
- **Legal Justification**, scope: '**Processes'**;
- **IT Systems**, scope: '**Processes'** and, if you wish, **Process Steps**;
- **Purpose**, scope: '**Processes'**;
- **Involved staff**, scope: '**Processes'**;
- **Receivers**, scope: '**Processes'**;
- **Length of use**, scope: '**Processes'**;
- **Type of processing**, scope: **Item Properties**. Select this table type at '**Categories Personal Data"** by setting '**Type**' to '**Purpose"** and setting '**Value**' to '**Contextual**' in this table.

Please note! *If you already have a table with such data, for example a table for '**IT systems**', there is no need to make a new separate one.*

Next, make sure that you add data to these tables. We do have some standard examples that we received from our customers and partners; please don't hesitate to ask Engage Process Support desk.

Engage Process Modeler

In the Modeler, use '**Get Table**' to load the appropriate tables to your project. Next, open an existing project or create a new one. Click in the window '**Project'** on the name of the project and go to '**Properties**' and select the Tables properties that we have just created on to this project. Repeat this for each Process in which you use Personal Data.

Please note! *Creating the process and loading the appropriate data from the tables to the process is sufficient for creating a rough Register. In a more detailed approach, you can omit loading the table data to the process, and instead load it to each and every process step where personal data is used. This would create a much more detailed Register.*
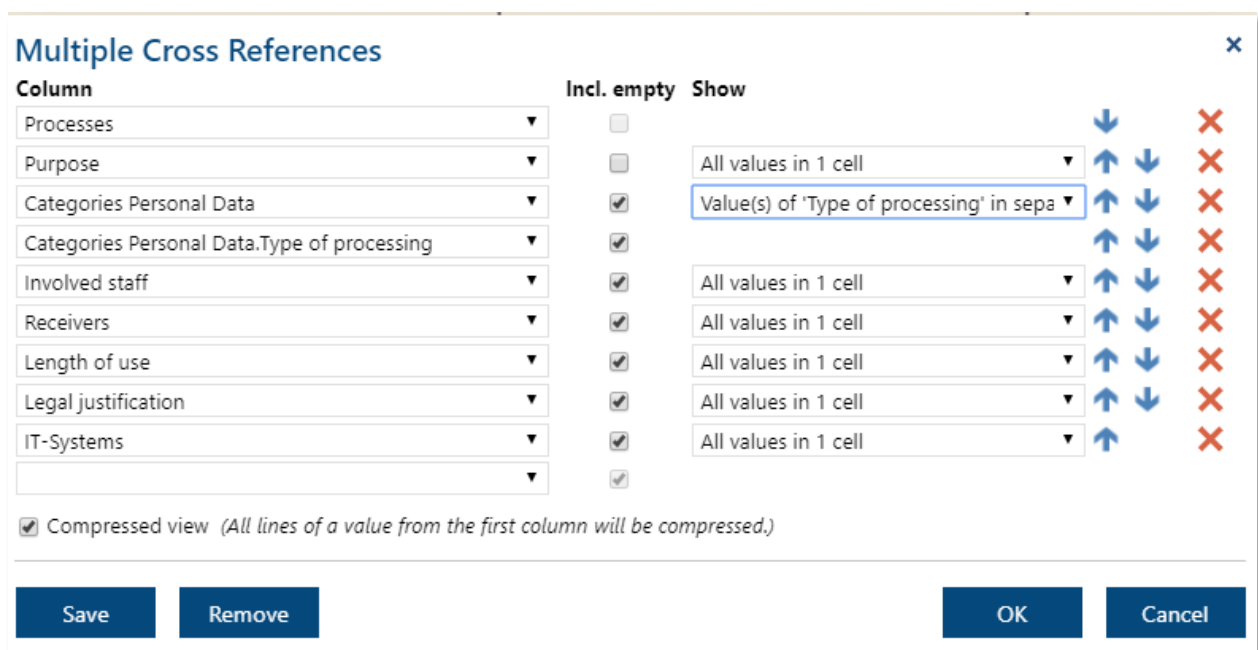
Creating the Privacy Register

With the following steps you can now create the Privacy Register:

- Use the tab '**Reports**' and click on '**Cross References**';
- Click on '**Multiple References**';

Under '**Column**' you can now select the information that you want to include in your Privacy Register. For example, include:

- Processes;
- Purpose;
- Categories of Personal Data;
- Type of Processing;
- Involved Staff;
- Receivers;
- Length of Use;
- Legal justification;
- IT-Systems
- Roles

Next, click on '**Compressed View**' in the lower left corner and set the View option to 'separate column' like shown below.

Please experiment for the report setting under '**Show**' that fits your needs best. Don't forget to Save the report that you have created in the window shown above.

Finally, at Engage Process we have only created a very rudimentary report as we don't want to spent resources on rebuilding Excel. Therefore, in the bottom left corner please use the button for Excel export and you'll end up with a wonderful Privacy Register in Excel.

Please note! *When creating the report in Modeler, it will include data from all processes in the project that you are working on. That will often include multiple iterations of the same process, like an ASIS and TOBE version. It is more correct to create your report in Viewer.*

Creating the report in the Engage Process Viewer

We have set up Tables to create all data that you need for your register. Next, we have use Modeler to link that data to processes, and if you wish, to process steps. Finally, we have created the report in Modeler.

There is a good logic for creating the report in Viewer. As an organization, your users will create processes in the Modeler. Those that are finalized will be send to the Publisher and there, after approval, the formal company handbook will be created in the Viewer. As a result, the Viewer includes all relevant processes, from multiple projects, for your organization. Therefore, it makes most sense to also create your privacy register from these processes.

In Viewer, you can use the same instruction as given above for creating the report.

If you only have the Modeler

Users who only make use of the Modeler will not have access to '**Tables'** (in Settings). The can make local tables within a single '**Project**' via the tab '**Home'**, selecting '**New'** and then '**Item Type'**. You can create the necessary tables in the Modeler in this way and use the '**Report**' function to create the Privacy Register.

As mentioned before, you will likely have multiple versions of the same process in the Modeler. In order to filter those out in the final report, you can also create a '**Table**' reflecting the Status of your processes. If you take this attribute along in your report, you can filter the column out in the final Excel report that you create.

Additional information

Please don't hesitate to contact us to inquire about ready to go tables that you can import, like Categories of Personal data, Legal Justification.