

Working with the Aptify GDPR Utility Wizard

This topic describes the location and functionalities of the GDPR Utility wizard. The content of this topic is divided into the following sections:

- [Location of the GDPR Utility Wizard](#)
- [Working with the GDPR Utility Wizard](#)
- [Forgetting the Configured Personal Information Fields](#)
- [Configurations to Override the Person Unforgettable Conditions](#)
- [Best Practices while Working with Database Objects](#)

Location of the GDPR Utility Wizard

1. Log into Aptify Desktop Client with Administrator privileges.
 2. Navigate to the 'Wizards' service in the 'Framework' application.
 3. To locate the GDPR Utility, do any one of the following:
 - a. Search for 'GDPR Utility' in the 'Search in Wizards' option and click the 'Search' icon.
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- b. Create an 'All Wizards' view and find the 'GDPR Utility' wizard in the list.
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Working with the GDPR Utility Wizard



Forgetting a Person record is an irreversible operation and cannot be reverted unless it is within the scope of a transaction and that transaction is not committed. Execute the below procedure only if the Person record needs to be forgotten.

1. Log into Aptify Desktop Client with Administrator privileges.
 2. Navigate to the 'Persons' service in the 'Customer Management' application.
 3. Click the GDPR Utility Wizard icon located on the 'Persons' service toolbar to run the GDPR Utility Wizard.
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You can also run the GDPR Utility wizard from a view with the wizard icon located on the view toolbar.

4. Enter the Person record ID or name in the 'Persons' link field.
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If multiple records appear when you search for a record with a name, make sure you select the appropriate person record before you proceed further.

5. Click 'Next'.
6. In the HTML sub-tab, the selected person record's data will be displayed in the HTML format.



If you wish to export the person record in the XML format, click the 'Download XML' button.

7. In the XML sub-tab, the selected person record's data will be displayed in the XML format.
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8. If the person record **can** be forgettable:
 - a. Notice that the 'Person for Forgettable' check-box is check marked by default.
 - b. Checkmark the 'Forget Person' check-box.
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- c. Go to [Step 10](#).
9. If the person record **cannot** be forgettable:

a. Notice that the 'Person Is Forgettable' check-box is not check marked by default.

b. The 'Forget Person' check-box is not available.

c. In the Unforgettable tab, you can find the condition(s) that does not allow to forget a person record.



The 'Unforgettable' tab will be visible only when there are condition(s) that does not allow to forget the person record.

d. If it is mandatory to forget the person record, make sure you clear all the unforgettable conditions and re-run the GDPR Utility wizard again. See [Person Records Unforgettable Conditions](#) for more information.

10. Click 'Next'.

11. Checkmark the 'Confirm Forget Person' check-box.



Note concerning Aptify 5.5.4 version

If the 'Confirm Forget Person' check-box is not check marked before you click the 'Finish' button, the person record cannot be forgotten and the respective Person Information Utility Runs record will not be created.

12. Click 'Finish'. A pop-up message appears after the process has been completed successfully. See [About Person Record Information Post GDPR activity](#) to understand the updates carried out in a person record after the record has been forgotten.

13. On the pop-up message, click 'Yes' to repeat the process for other records or click 'No' to close the wizard.

14. On the 'Person Information Utility Runs' window identify the following:

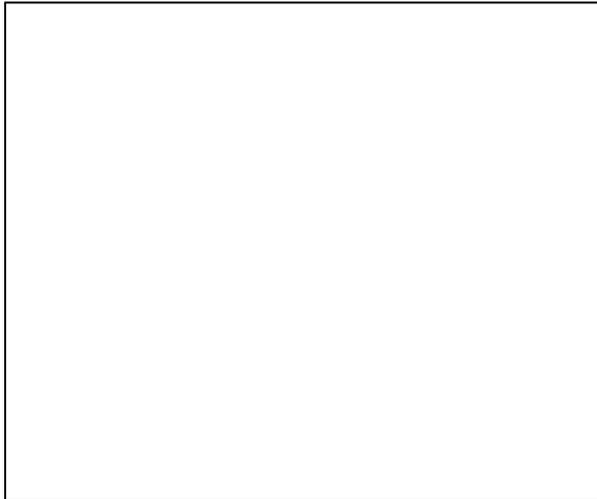


The Person Information Utility Runs record will get created only after successfully forgetting a person record.

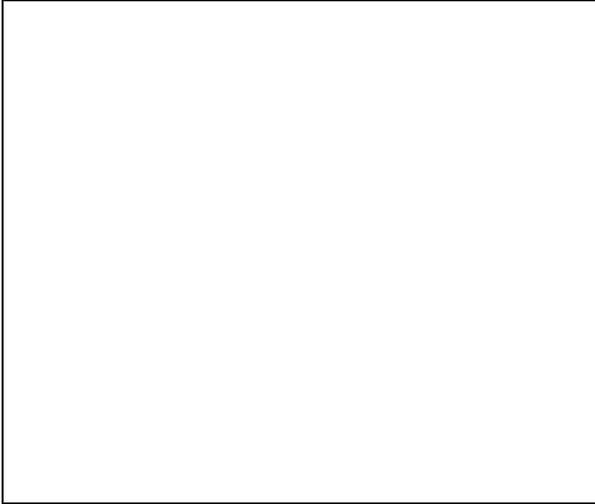
a. In the General sub-tab:

i. The person name changes to GDPR ID. For example '*GDPR-2571, GDPR-2571*'.

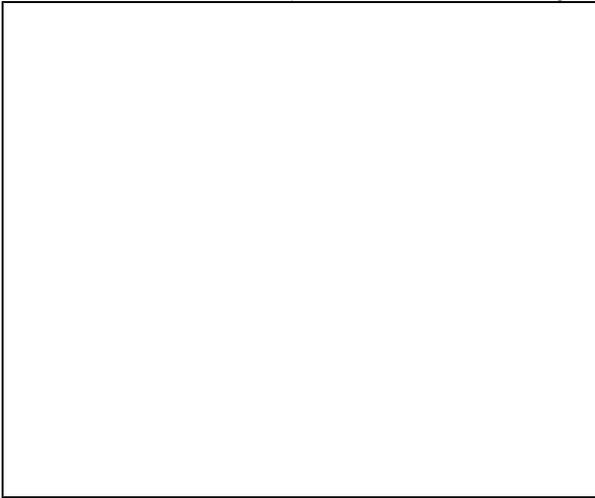
ii. The result field shows 'FORGOTTEN' status.



- b. In the Confirm Forget sub-tab, the 'Confirm Forget Person' check-box will be check-marked by default.



- c. In the Personal Info sub-tab, the personal information of the forgotten record will be blank.



15. If you open the person record after it is forgotten through the GDPR Utility wizard, the system level form will be displayed and it cannot be modified.
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Forgetting the Configured Personal Information Fields

If you have any personal information fields configured on the person form, they must be cleared with the GDPR Utility wizard. Follow the below step-by-step procedure to clear the information from these fields:



Best Practice

If you wish to modify the stored procedures as per the client requirements, it is recommended to create a copy of the stock SP instead of modifying it. Make sure you update the new SP name in the process flows of the GDPR Utility wizard. See [Best Practices while Working with Database Objects](#) for more information.

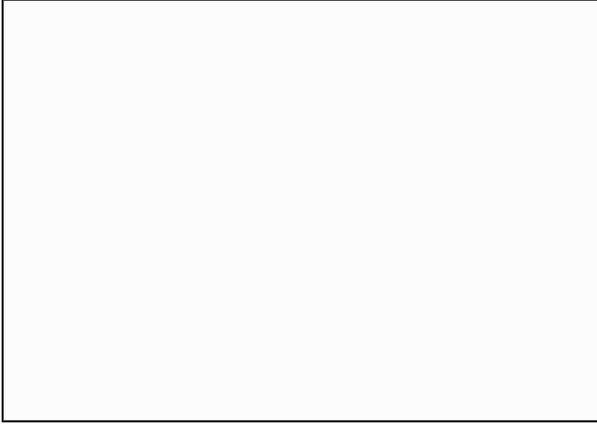


The procedure given below is an example of a configured field (Personal Data). This procedure is applicable to all the similar configured fields on a person record.

1. Log into Aptify Desktop Client with Administrator privileges.
2. Navigate to the 'Database Objects' service in the 'Framework' application.
3. Search and open the 'spGetPersonallInformation' database object.
4. In the stored procedure, add the 'Personal Data' field under the 'Select' Query related to the Persons entity.
5. Save and close the 'spGetPersonallInformation' database object.



Note that the 'Personal Data' field included in the 'spGetPersonallInformation' database object will now be considered as personal information field and will be made available for downloading in the XML format.



6. Search and open the 'spForgetPerson' database object.
7. In the stored procedure, add the 'Personal Data' field to the person's update query to clear the field data.



8. Save and close the 'spForgetPerson' database object.



Note that the 'Personal Data' field included in the 'spForgetPerson' database object will be considered as a personal information field and data will be cleared from the field.

Before GDPR Activity	After GDPR Activity

Configurations to Override the Person Unforgettable Conditions

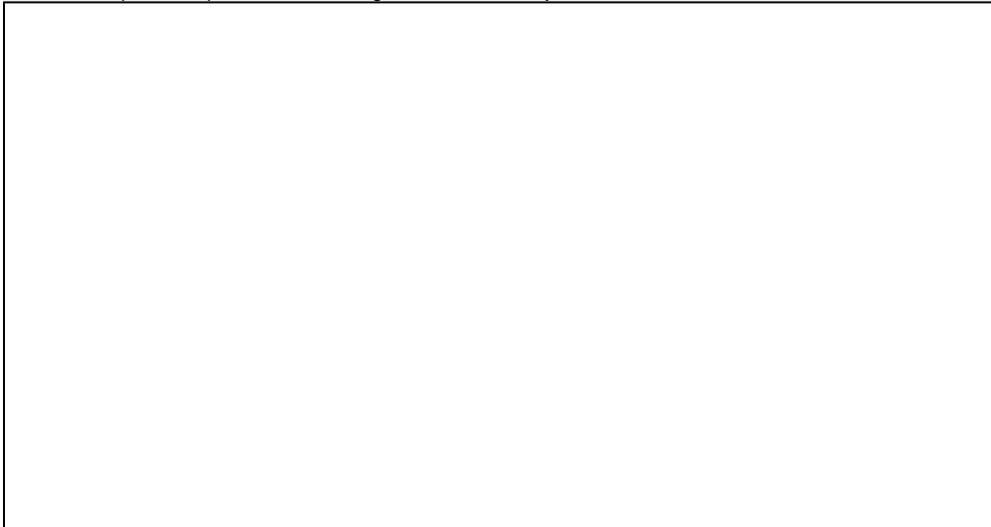


Best Practice

If you wish to modify the stored procedures as per the client requirements, it is recommended to create a copy of the stock SP instead of modifying it. Make sure you update the new SP name in the process flows of the GDPR Utility wizard. See [Best Practices while Working with Database Objects](#) for more information.

Follow the below step-by-step procedure if you wish to forget a person record by overriding the default [Person Unforgettable conditions](#):

1. Log into Aptify Desktop Client with Administrator privileges.
2. Navigate to the 'Database Objects' service in the 'Framework' application.
3. Search and open the 'spCanPersonBeForgotten' database object.



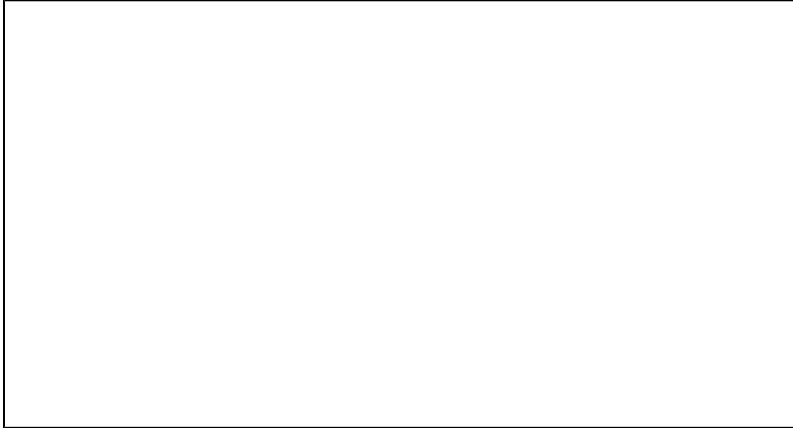
4. Locate the Person Record Unforgettable conditions and their 'select query' in the stored procedure.
5. To exclude the required person unforgettable condition, select and comment (add '--' at start) its 'select query' in the stored procedure.

Best Practices while Working with Database Objects

Follow the below procedure to create a copy of the database object and update the related process flows to apply the new database object with the client configured stored procedure:

1. Log into Aptify Desktop Client with Administrator privileges.
2. Navigate to the 'Database Objects' service in the 'Framework' application.
3. Search and open the 'spForgetPerson' database object.
4. Click the 'Clone' button to create a copy of the 'spForgetPerson' database object
5. Rename the 'spForgetPerson' database object to 'spForgetPerson_c' database object. The new database object name provided here is an example, you can use your format to rename the database object.
6. Save the 'spForgetPerson_c' database object.
7. Update the 'SQL procedure' name and 'Grant SQL' name with the 'spForgetPerson_c' database object name.
8. Navigate to the 'Wizards' service in the 'Framework' application.
9. Search for the 'GDPR Utility' wizard and open it.
10. Navigate to the 'Processor' tab and open the 'Finish Process Flow'.
11. In the process flow, navigate to the 'GDPR: Finish – Forget Person' process flow step.
12. Click and open the 'Sub-Process' flow.

13. Go to the 'Forget Person' step and change the input property stored procedure name to 'spForgetPerson_c'.



14. Save the process flows.

15. Save and Close the GDPR Utility Wizard.