

QMATIC

MANUAL

PERSONAL DATA MANAGEMENT

230.01E

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1. What's new

Version	Chapter	Change
01.E	• General	• Manual for Personal Data Management as an extension

2. Installation

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2.1 General information

Personal Data Management is an application for handling customer information and retention policies. Staff can access data stored on a customer, and administrators can configure automatic deletion of personal data.

2.2 Prerequisites

If you are using Orchestra and running stat deployed on a separate server, *or* if you are using anything other than localhost as your Stat Server Address, there are a few manual steps that you need to follow before using the Personal Data Management application:

1. In Orchestra, go to **System Administration > Settings > Parameters > Statistics Settings**.
2. In the **Stat Server Address** and **Stat Server Port** fields, make sure that you have filled in the correct IP address or Fully Qualified Domain Name (FQDN) and port number for your stat server.
3. Locate the **Customer** parameters. Make sure that the parameters User retention policy for customer object and Delete customers, based on retention policy, at (hh:mm) are set to your liking.
4. Open the `<orchestra_install_dir>\conf\stat.conf` file, **on the Stat server**, and make sure that you have filled in the IP address or FQDN of the Central Orchestra server for the property `stat.personaldata.ip.filter`.

❗ If High Availability (HA) is used, two (2) IP addresses or FQDN for the different Orchestra servers should be added.

Example 1: `stat.personaldata.ip.filter = 127.0.0.1`

Example 2: `stat.personaldata.ip.filter = mydomainname.com`

Example 3 (using HA): `stat.personaldata.ip.filter = orchestra_1.example.com, orchestra_2.example.com,`

❗ If this is not set up correctly, you will get error messages, such as *“Unable to fetch data from stat. Check the connection to stat.”* or *“Request remote address is unauthorized.”* when for example trying to fetch Custom field options in the Settings page, or trying to fetch customer information when exporting customer information.

2.3 Access rights

There are two access modules that give you access to the Personal Data Management application:

- With the *Personal Data access module* you only get access to the Handle customers functionality. This lets you:
 - see all data that is stored on a customer object,
 - export customer data to a JSON file.
 - set retention policies to specific customers
 - delete customers from the system
- With the *Personal Data Administration access module*, you get access to both the Handle customers and the Handle retention policies functionality. This lets you:
 - create, edit and delete retention policies
 - configure application settings

2.4 Installation

If you are not installing Personal Data Management from Xtend, follow these steps:

5. Copy personaldata-ui.war.war to
<Orchestra_install_dir>\system\custdeploy.
6. Add the file personalDataMessages.properties to
<Orchestra_install_dir>\system\conf\lang.
7. Add the content from the file commonMessages.properties in the Department Reception package to the file commonMessages.properties, located in <Orchestra_install_dir>\system\conf\lang.
8. To make the required changes to the qp_central database, execute update_central.sql from the sql folder.
9. Restart Orchestra Central.

2.5 Settings

To manage settings, click on the cogwheel at the top of the page.

Here you can make the following settings:

- Auto close time – sets the time (in seconds) of inactivity after which the application will automatically close.
- Custom field options – sets whether the system saves data stored in custom stat fields or not.

When done, click **Confirm**.

3. Using Personal Data Management

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3.1 Introduction

To open Personal Data Management, click on the icon in the Orchestra home page.

The application has two sections: one for handling customer data and assign retention policies to customers, and one for handling the retention policies.

3.2 Handle customers

On the left you can see information about a certain customer. To search for a customer, start typing their name in the search field and select it in the list.

Handle customers

SEARCH FOR CUSTOMERS

Q

Search by name, email or phone number

CUSTOMER DETAILS

First name	Last name
Anna	Johansson
Email address	Phone number
anna.johansson@mail.com	46745689293
Last interaction time	Deletion time
2023-01-18 19:41	2023-02-17 19:41

Edit

Delete

Export

Clear all

You will see the following customer information:

- First name
- Last name
- Email address
- Phone number
- Last interaction time – the last time that the customer had some kind of interaction with your organization, e.g. a visit or an appointment.
- Deletion time - the time that the customer information will be deleted, according to the retention policy.

The following actions are available:

- Edit the retention policy for the customer
- Delete customer data
- Export customer information to a JSON file

To clear the selection, click **Clear all**.

3.2.1 Edit retention policy for customer data

To change the retention policy used for the data of the selected customer:

1. Click **Edit**.
2. In the popup, select the retention policy that you want to apply to the customer information.
3. Click **Save**.

3.2.2 Delete customer data

To delete all available information about the customer:

1. Click **Delete**.
2. In the popup, click **Yes**.

 You cannot delete data for a customer with an appointment in the future. If you want customers to be deleted as soon as possible, you can select direct as retention policy for that customer. It will then be deleted as soon as there are no future events for that customer.

3.2.3 Export customer data

To export customer information to a JSON file:

1. Click **Export**.
2. In the popup, click **Yes**.
3. The downloaded file will have the name `<firstname>_<lastname>.json`.

3.3 Handle retention policies

On the right, you can create and edit retention policies.

There are four standard retention policies. The policies *appointment_days*, *default* and *visit_days* are active and used for certain types of data by default. The policy *direct* is not used until you tell the system to use it.

Name: ▾	Description:	Retention period:	Actions:
appointment_days	Default retention policy for appointment data.	90 days	
default	This retention policy is set for all customer objects before they are associated with any visits or appointments.	30 days	
direct	This retention policy should be used when a customer object should be removed as quickly as possible, i.e. when the visit or appointment is completed.	0 days	
visit_days	Default retention policy for visit data.	30 days	

3.3.1 Add retention policy

To add a new retention policy:

1. Click **Add policy** .
2. Enter the following information:
 - The name of the retention policy.
 - The description, e.g. what data the retention policy applies to.
 - The retention period, i.e. number of days that the data will be stored.
3. Click **Save**.

3.3.2 Edit retention policy

To edit an existing retention policy:

1. Click **Edit**  next to the retention policy you want to edit.
2. Change the description or retention period of the policy.
3. Click **Save**.

3.3.3 Delete retention policy

You can delete retention policies created by you. To delete a retention policy:

1. Click **Delete**  next to the retention policy you want to delete.
2. In the popup, click **Yes**.

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