Data Subject Access Request (DSAR) User Manual v.1

Data Privacy Institute

Getting started with DSAR Manager

DSAR Manager is a web based application which means that you (admin) don't need to download or install any software on your computer to use it. This web application allows companies to take control of their data subject access requests.

The platform is built to reduce the time and cost of handling DSAR (data subject access requests) and improve your company's brand trust and loyalty.

This document provides helpful resources on how to use DSAR Manager to manage your company's DSAR using our website:

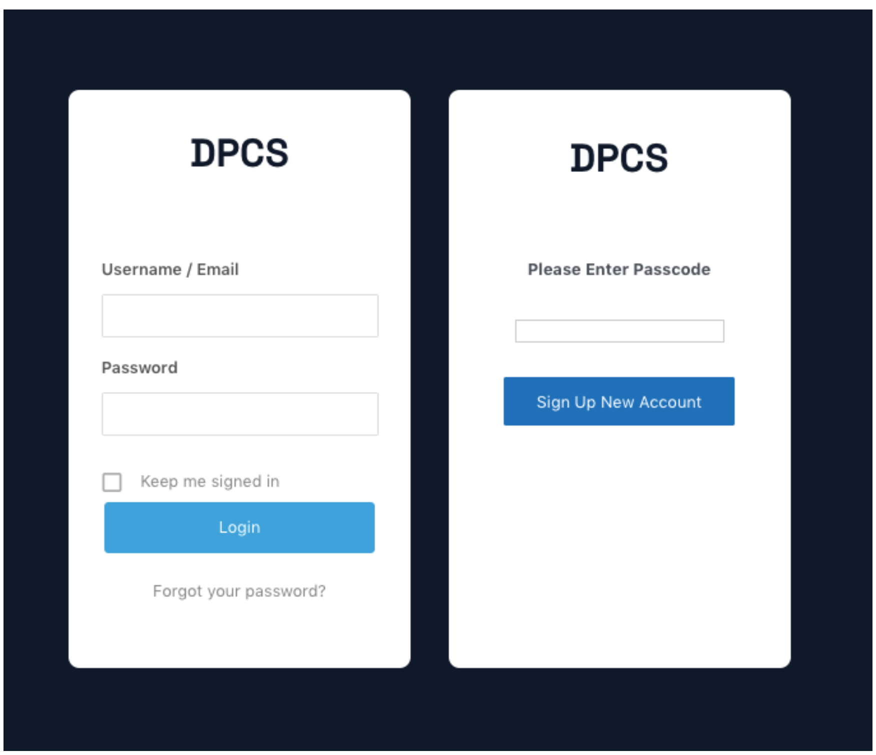
www.datacompliancepros.com

Setting up your account (by the client)

To create your company's DSAR account go to:

www.datacompliancepros.com

Click on "Log In" on the upper right corner of home page. You should see a screen with two windows. The left one is if you have already created an account and the right one is where you initially create your account. You need a passcode to create a free account. You can ask your DPI (Data Privacy Institute) salesperson for this info.

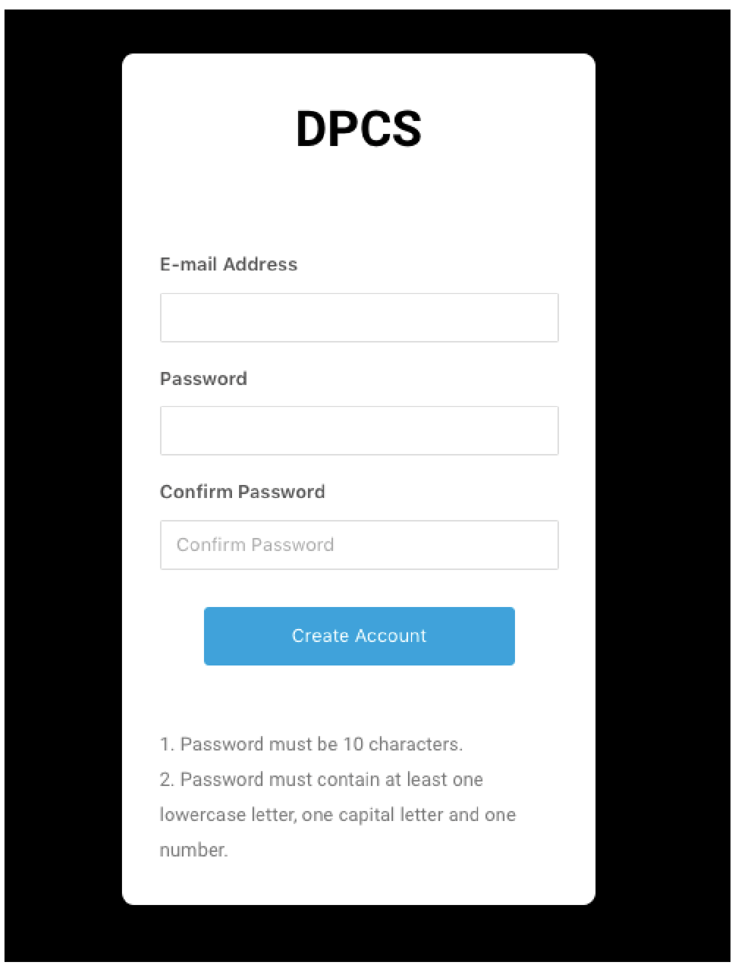


Setting up your account (by the client)

To create your company's DSAR account go to:

www.datacompliancepros.com

Once you have entered the passphrase, click on "Sign Up New Account". Now you should see a window where you can enter your email address and password. Once this info is entered correctly, click on "Create Account" to create your account.

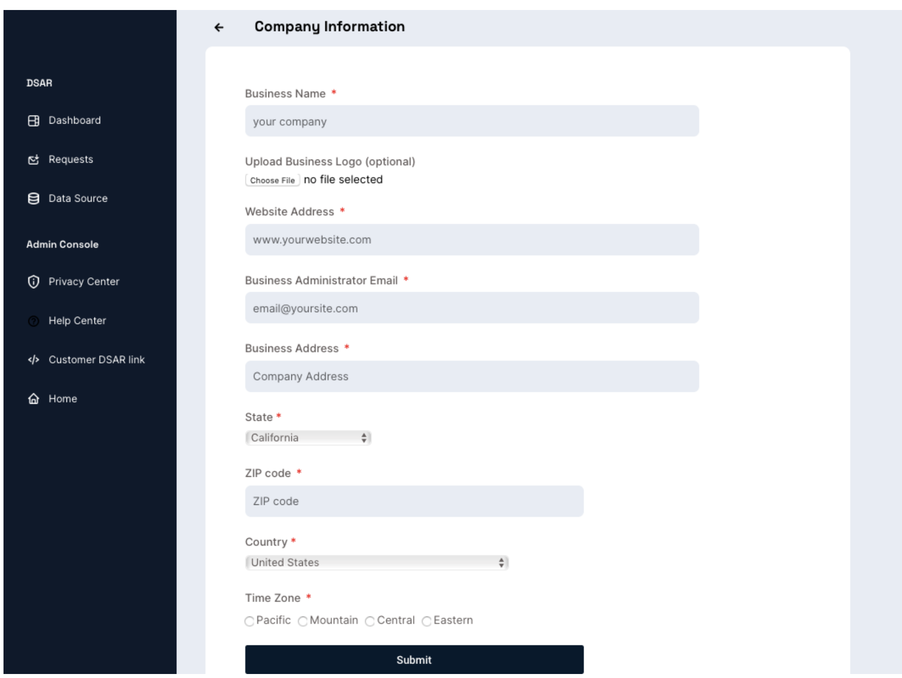


Setting up your account (by the client)

To create your company's DSAR account go to:

www.datacompliancepros.com

Now, it will take you to "Enter Company Information" screen where you will need to enter all the information to register this account. At this time, we only use Pacific Time Zone. Your "Business Administrator Email" is where the admin will be receiving all the emails for customers that have submitted DSARs. When this information is filled out, click on "Submit" to finish your registration.



Now you can click on any of the menu bar options on the left side in the black background to start using the DSAR platform.

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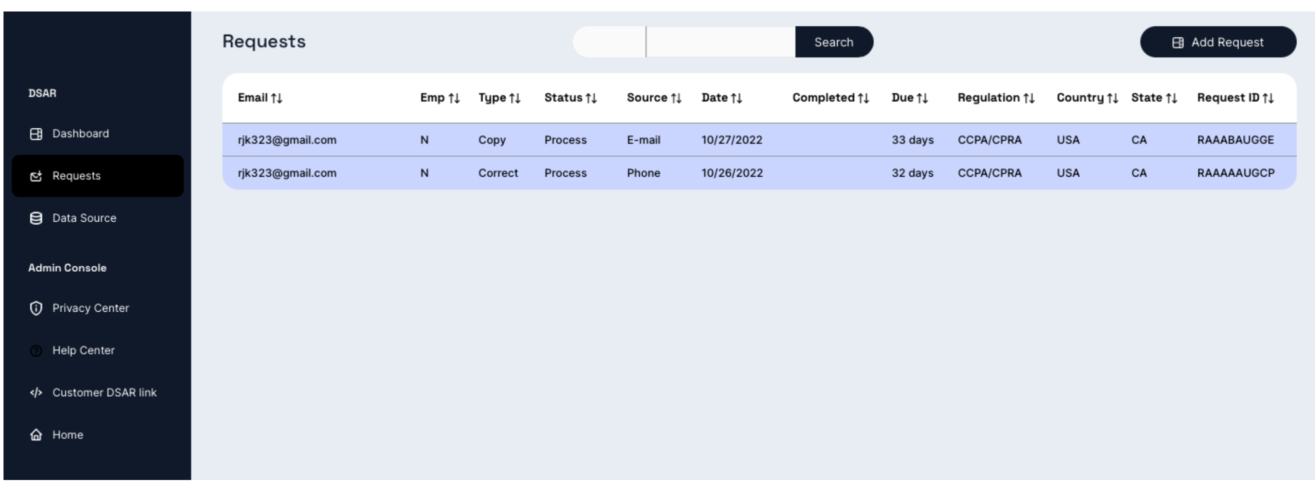
Getting familiar with your DSAR platform

As you get started with DSAR platform, it's important to understand how to navigate through the main pages using menu bar options:

On your requests page, you can review all incoming data privacy requests, including each request's status, type, source, and date of request.

Your request page is where you'll find all of your company's data privacy requests, including each request's status, as well as the option to sort those requests in accordance with their status.



Dashboard

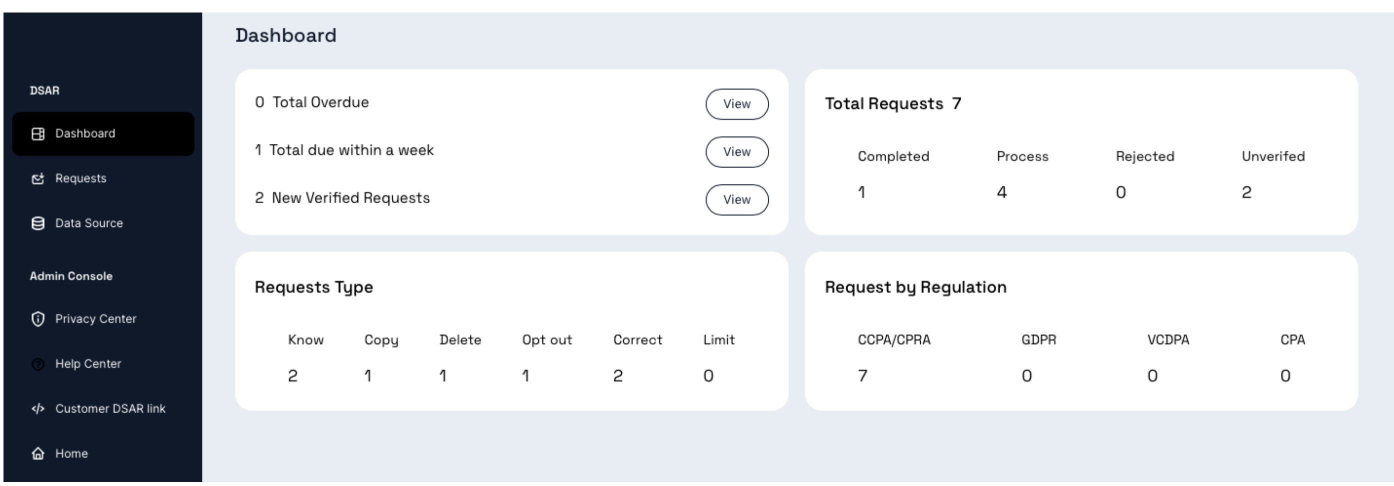
Show all the different status of all the data privacy requests as follows:

1. Total overdue, Total due within a week, New verified requests

2. Total Requests (completed, process, rejected, unverified)

3. Request Type Counts (know, copy, delete, opt opt, correct, limit)

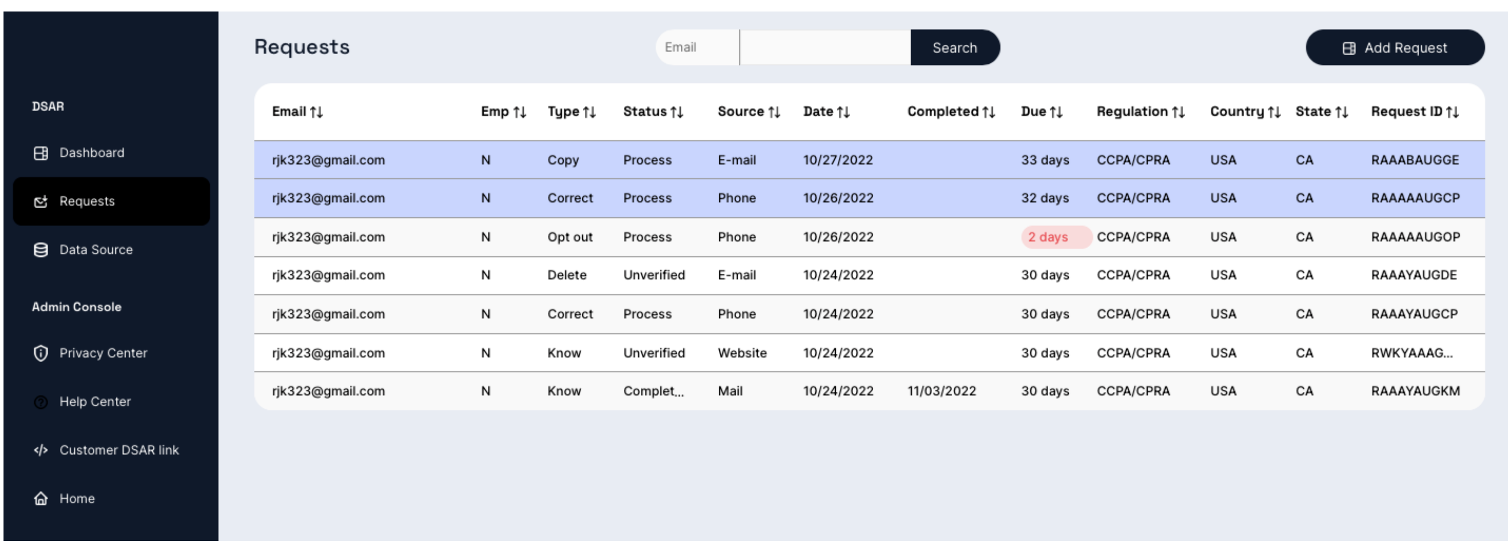
4. Request by Regulation Counts (CCPA/CPRA, GDPR, VCDPA, CPA)



Requests

Click on each request on your for more information.

You can sort this list ascending/descending by clicking on up/down arrow key on the column headers. You can select search criteria (email, type, status, source, regulation, country, state, request ID) by clicking on "Email" button on top line and entering/select criteria. Then click on "Search" to execute the search.

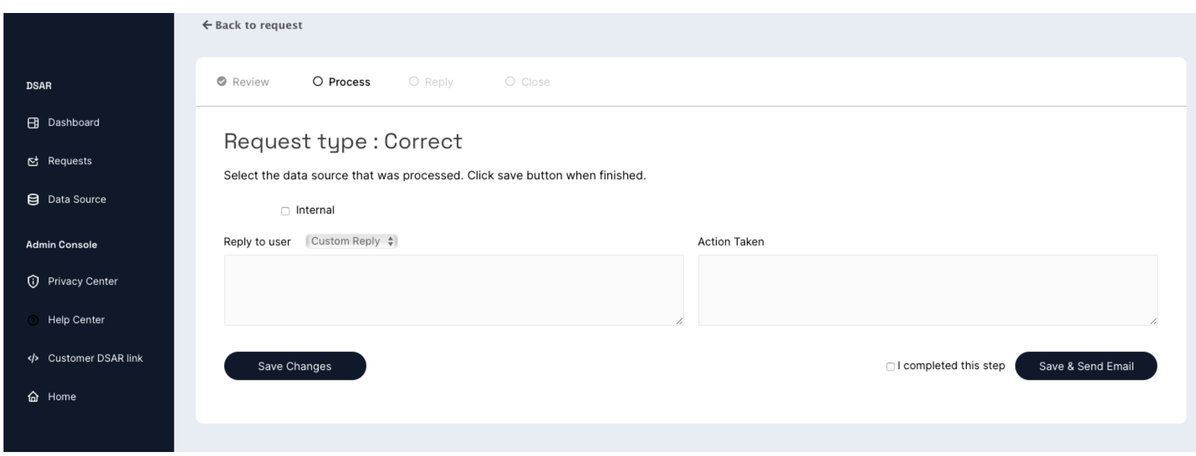


Requests

Each request page stores all Identifying details about the request such as the following;

1. User email
2. Employee Flag (Y or N)
3. Type of request (know, copy, delete, opt opt, correct, limit)
4. Status (Process, Unverified, Completed)
5. Source (data privacy request by email, mail, phone, or website)
6. Date (date of data privacy request submitted)
7. Completed (data of completion of data privacy request)
8. Due (due date of the completion of data privacy request depending on the regulation code)
9. Regulation (regulation code depending on which region data privacy request was submitted)
10. Country (country where data privacy request was submitted)
11. State (state where data privacy request submitted)

12 Request ID (Unique Record ID)



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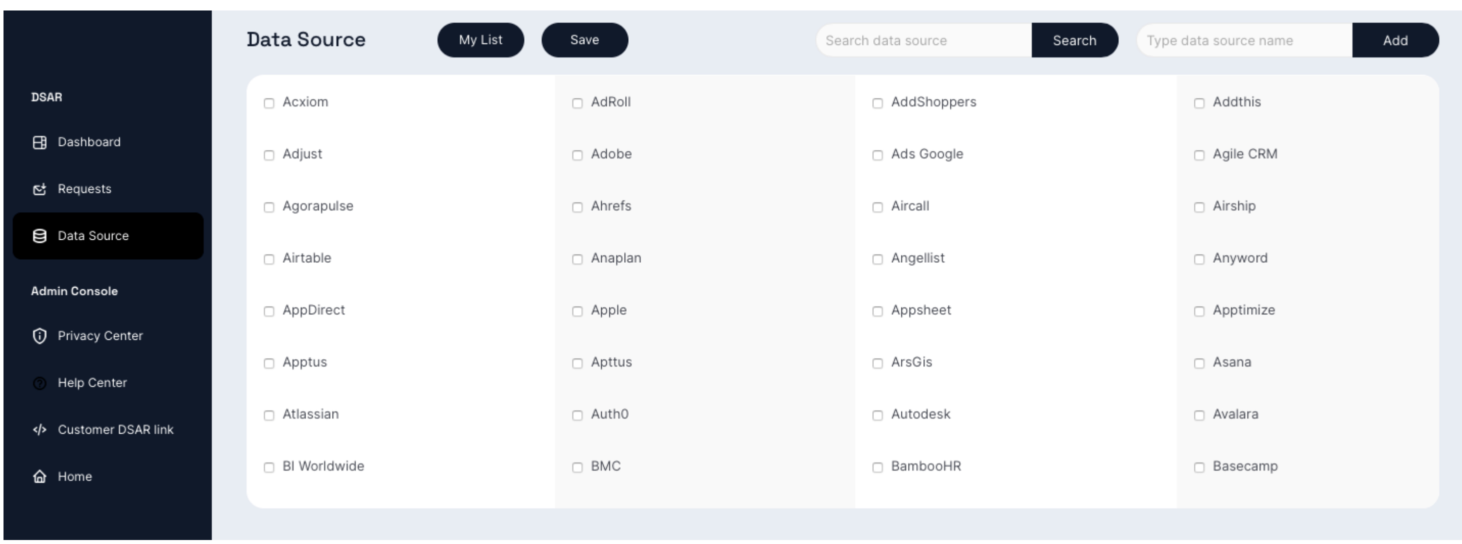
Data Source

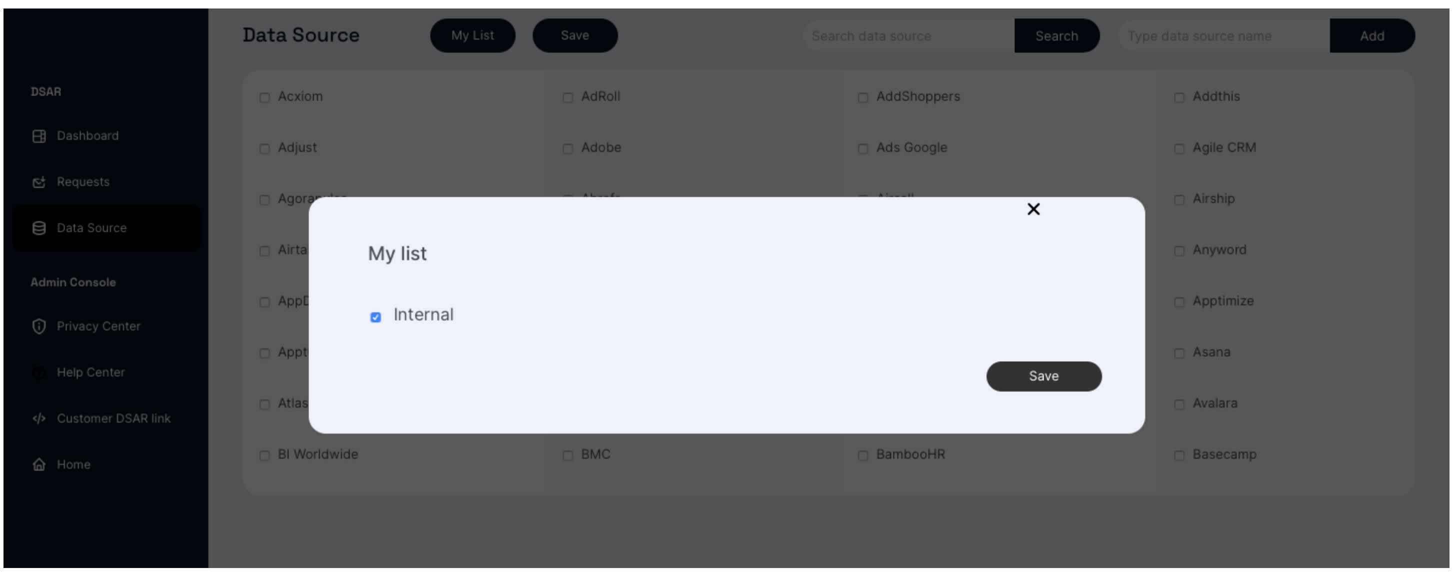
This list must be built so the information will help you identify and locate the customers/employees in your system, databases, and third-party services.

This list contains a list of many Apps that you can select if your system is using these Apps but it is not complete list. You can either click one that is listed or add one by clicking "Search" first to check if it exists. If not then it will be entered in the "Add" section which you can add. This data source list is the list that you will be using to check off all the requests so make sure you build a complete list of all your Apps that are used by your customers/employees.



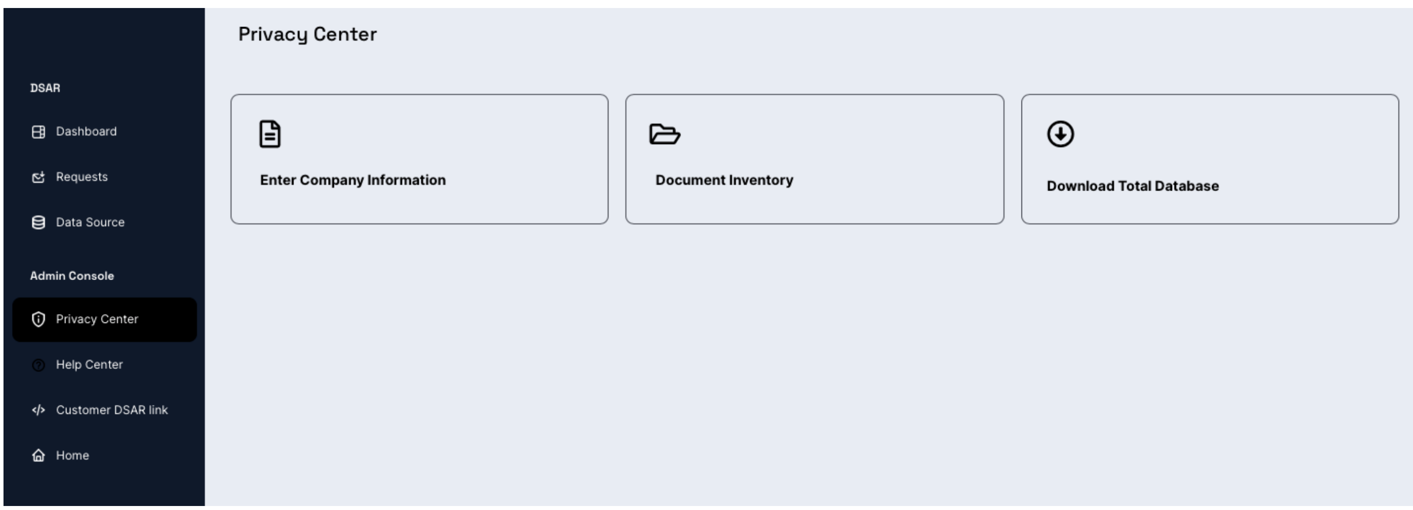
Data Source

Initially, "internal" data source is selected by default



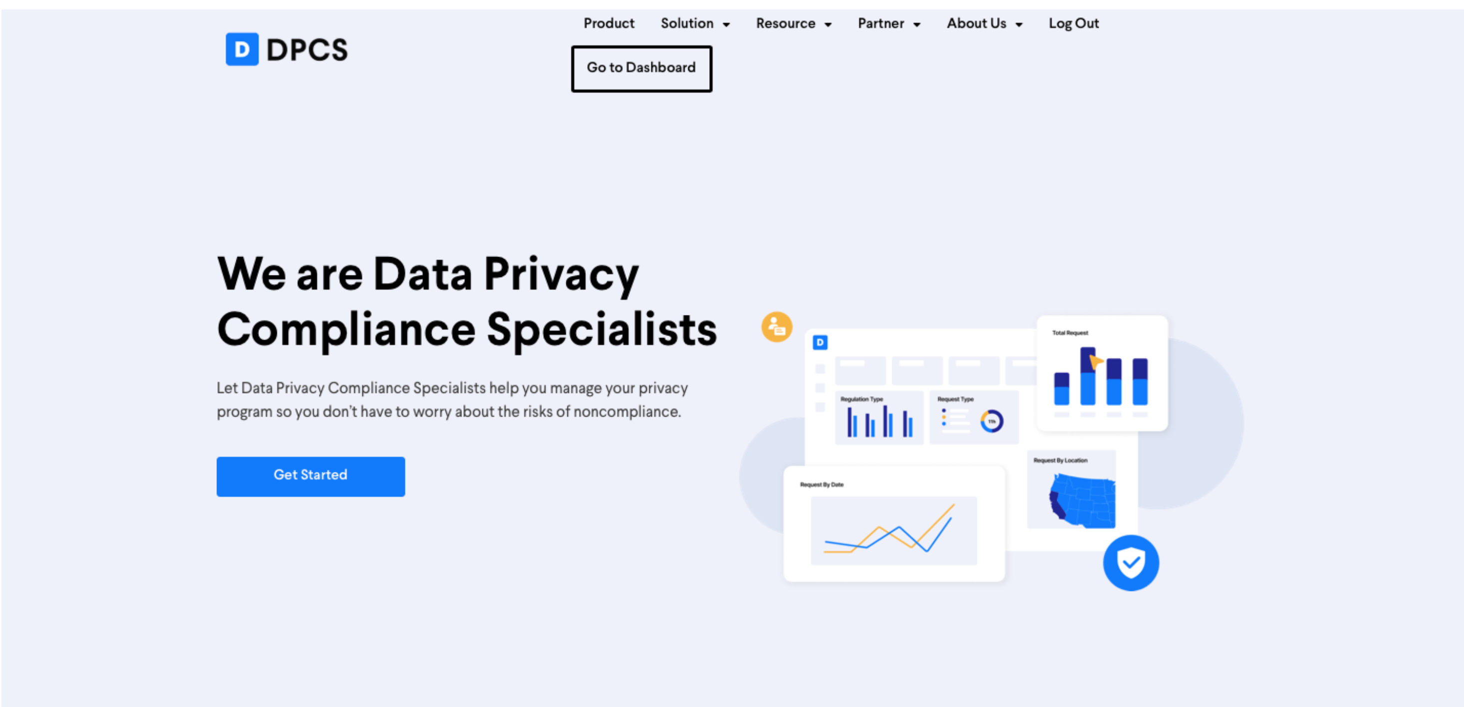
Privacy Center

We currently only support "Download Total Database" which downloads all the data in your database into CSV format file



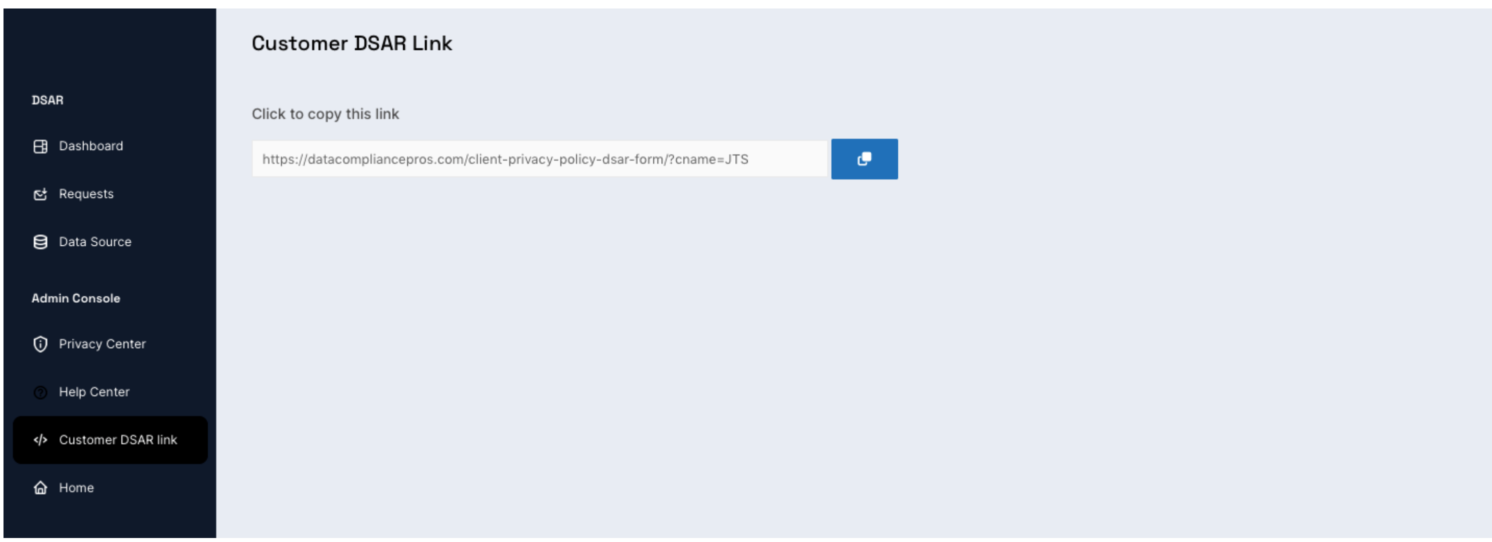
Home

This takes you back to home page. If the admin is already logged in then you can just click "Go to Dashboard" to go to your DSAR platform main screen. Or if you are not logged in then you can click on "Log In" to login to DSAR platform main screen.



Customer DSAR link

This page contains the actual link that you can place on their website so your customers can click on it to access their DSAR platform to fill out the data privacy request and submit it.



Help Center

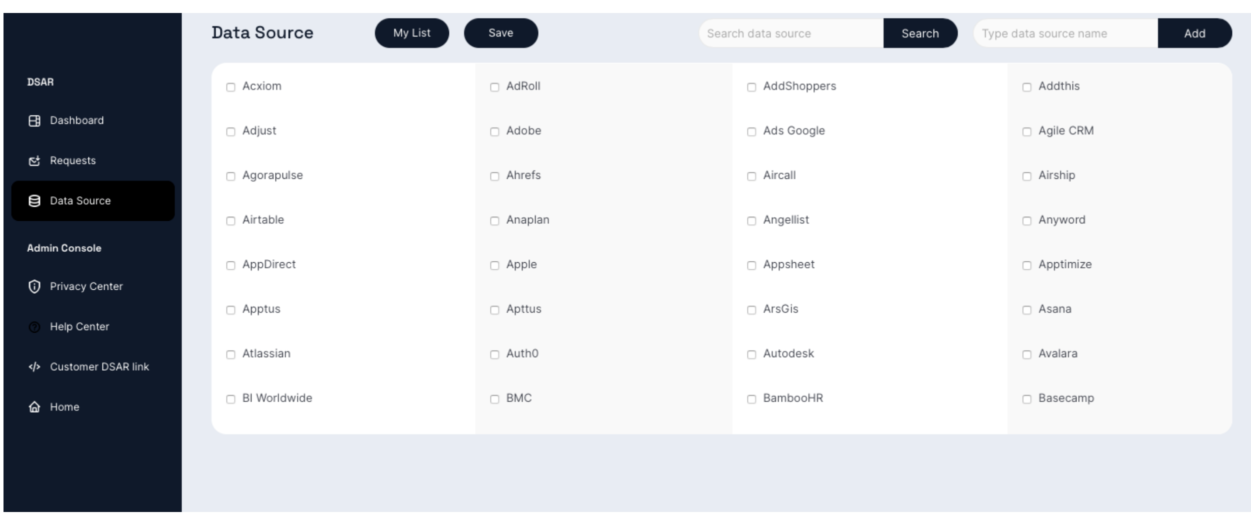
We will be uploading User Guide here when it is ready.

Getting started with data subject access request handling

Automatically fulfill requests across multiple data sources using integrations, email integrations, and manual data sources checklists.

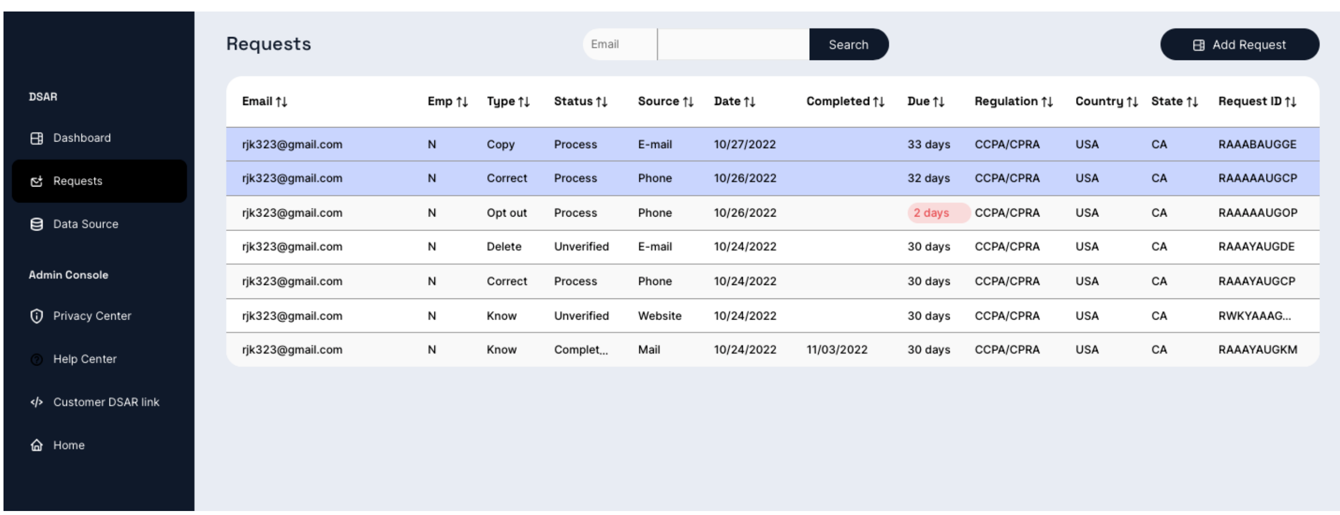
To get started with data subject access request handling, you first need to build your data inventory. You can create your data inventory by clicking on "Data Sources" on left side on the menu bar.

Upon clicking "Add data source" on your Data Inventory page, you can search & add systems from the list of existing data sources or create a custom system.



The data privacy requests workflow includes the following four statuses:

- **Review -** Continue or reject each request using the request's identifying details, including email evidence.
- **Process** - Process users request and document the manual process.
- **Reply & Close** - Reply to users by using email (predefined templates will be provided later) and Close the request and keep a record of all request activities for audit purposes.



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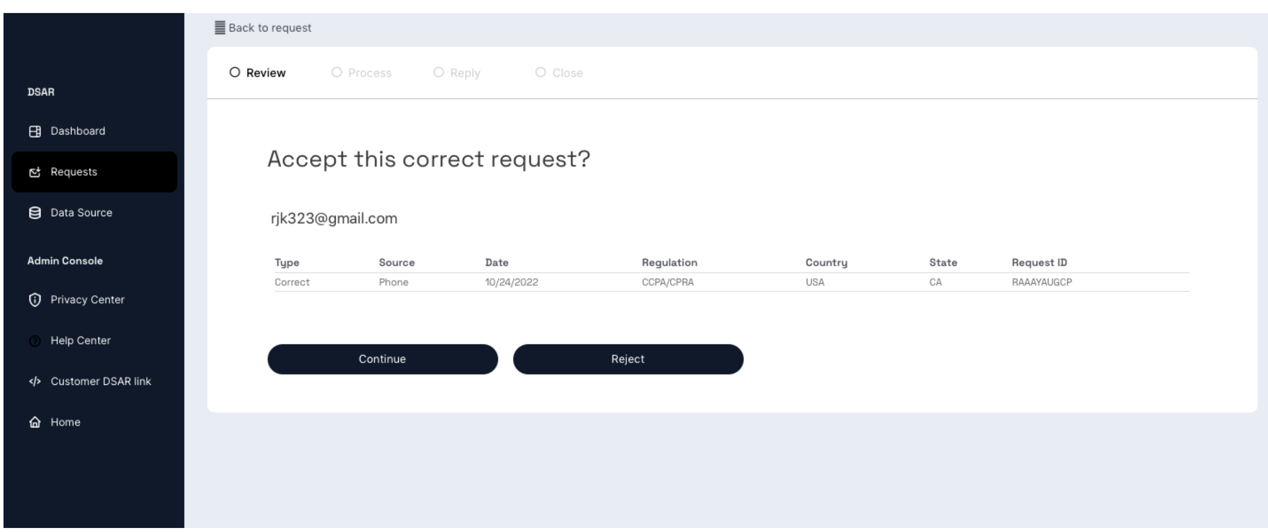
Stage 1 - Review:

There are currently six types of supported privacy requests:

- Delete (delete info in client's data sources)
- Copy (receive copy of user info stored in client's data sources)
- Know (right to know what info is stored)
- Opt Out (Do Not Sell)
- Limit (Do Not Mail)
- Correct (right to edit/correct)

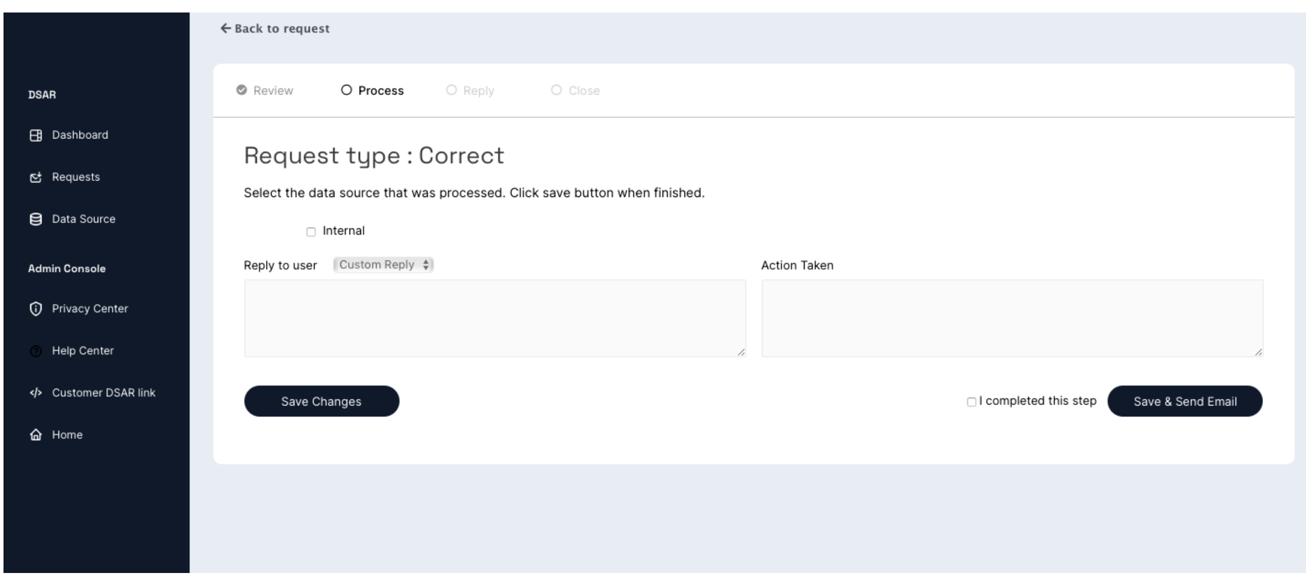


Stage 2 - Process:

The processing stage depends on the request type. You will be using the data source list that you had built to process these requests.

Upon accepting a new request, select the relevant data sources required for the request type.

At the Process stage of each request handling, you will be able to handle users' data from data sources as well as mark data sources requiring different requests as they are being processed (you can save the data sources that have been processed by clicking on "Save Changes" and come back later if you need to complete the process for all data sources.



Stage 3 - Reply & Close:

You can send reply to the customer/employee by entering your message (pre-filled response will be provided later).

Click "I completed this step", then click "Save & Send Email" to save all your changes and email the user that their request has been completed.

Congratulations! You have successfully fulfilled a data privacy rights request.

For Questions Please Contact:

info@dataprivacyinstitute.org