



# GDPR

## Planon Software Suite

Version: L105

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# About this Document

## Intended Audience

This document is intended for *Planon Software Suite* users.

## Contacting us

If you have any comments or questions regarding this document, please send them to: [support@planonsoftware.com](mailto:support@planonsoftware.com).

## Document Conventions

### **Bold**

Names of menus, options, tabs, fields and buttons are displayed in bold type.

### *Italic text*

Application names are displayed in italics.

### CAPITALS

Names of keys are displayed in upper case.

## Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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# General Data Protection Regulation (GDPR)

**General Data Protection Regulation (GDPR)** is a European legislation that aims to protect EU citizens from privacy and data breaches in an increasingly data-driven world. Companies processing or storing personal data need to comply with the GDPR legislation.

The legislation is aimed at the following subjects:

- Breach notification
- Right to access
- Right to be forgotten
- Data portability
- Privacy by design
- Data protection officers



For more information, see [gdpr-info.eu](https://gdpr-info.eu).

To be GDPR-compliant, Planon provides companies/users with the possibility to:

- change personal data.
- limit access to personal data using authorization filters and function profiles.
- show their privacy policy in the user menu.
- Anonymize (automatically) personal data stored in Planon based on criteria specified in their privacy policy. For example, auto-anonymizing personal data of visitors after a month.
- Anonymize the entire database.

## Anonymizing data

Following GDPR legislation, personal data referred to in the application must either be deleted or anonymized.

Planon features two anonymization actions that work differently. The process of anonymization can involve either scrambling data or purging data. This section describes the differences between these two actions:

- [Anonymize](#)
- [Anonymize database action](#)

### Anonymize action

Planon features the anonymization action in the **Persons**, **External requestors**, **Addresses**, **Accounts** and **Visitors** business objects. Anonymizing a business object will scramble its data and the action is irreversible. All the references to this business object will stay intact but pressing the **i**-icon for the referenced anonymized business object will show the scrambled values.

Anonymizing is an irreversible and destructive action, which is important to understand before clicking the **Anonymize** action. A warning will appear and the user must explicitly click **Yes** to confirm the action.

The **Anonymize** action is available for the following business objects:

- Visitors
- Addresses
- Persons
- External requestors
- Accounts
- Contracting parties

#### What does the action do?

When clicking the **Anonymize** action, the record will (seem to) disappear from the user interface. Related personal data on related orders will be scrambled.

In general, the following table shows the anonymized values per type of field after using the **Anonymize** action:

---

Type	Anonymized value
Text	*****
Number	0

---

Type	Anonymized value
Decimal	0,0
Date	1-1-1970
Date-time	1-1-1970 00:00:00

---



- Anonymizing accounts is subject to logging. For more information, see the [Administrator's Guide](#).
- The **Anonymize** action is schedulable by using an action definition and a schedule in Alerts to automate the anonymization process.
- On the above business objects, you can apply the **Anonymize** action via **Action on selection**.

## Anonymize database action

Following GDPR legislation, it is not allowed to have privacy related information available on non-production systems.

### Anonymize database

For this reason, a generic **Anonymize database** action is available in **System Settings > Security** to scramble/purge the information for the above business objects.

The **Anonymize database** action is designed to anonymize data in non-production environments in one go. It is specifically designed to be used in either of the following situations:

- Shipping the database elsewhere to prevent sending potential sensitive and personal information to a third party, for example to Planon Support.
- Moving a production database to a non-production environment, where there is no need in having potential sensitive and personal information available. After anonymizing the database, default test data could be onboarded for use in test cases.



- By clicking the generic **Anonymize database**, all instances of the business objects [mentioned earlier](#), except for Accounts will be anonymized.
- This functionality is available only for non-production environments.
- To start generic anonymization, the general setting **Stop end user access** must be enabled.

## Database procedure

Instead of using the **Anonymize database** on a non-production environment, you can also anonymize the whole database by creating a backup of the production database and executing the following database procedure:

```
PLN_ANONYMIZE_ALL
```

### What does the action do?

When using the **Anonymize database** action, the following actions will be carried out:

- All history is deleted.
- Fields that are part of database constraints ('check' or 'unique' constraints) are skipped and are not anonymized, the value remains as is. Examples of these are:
  - Visitor status: has a check constraint to make sure it contains a valid status.
  - The uniqueness constraint of fields, such as Code, within a property set for certain business objects.
- Date/Time fields get the value 1970-01-01 00:00:00.
- Number and Decimal fields are cleared when they are part of a foreign key and not mandatory.
- Number and Decimal fields are skipped when they are part of a foreign key and mandatory.
- Number and Decimal fields get the value 0 when they are not part of a foreign key.
- Text fields are cleared when they are not mandatory.
- Text fields get the value \* when they are mandatory.

## Accounts in database procedure

The database procedure allows the following accounts to remain usable so the database remains accesible:

- SUPERVISOR
- CLOUDADMIN
- AWMDATAENGINEADMIN
- EVENTCONNECTORADMIN



- EXCHANGEADMIN
- SCHEDULERENGINEADMIN

In addition, the accounts linked to the user group specified in the System settings > General > Planon administrator group field will also retain access.

## Anonymize history

Following GDPR legislation, any personal data stored, even in history records, must be anonymized. In Planon, when a business object with personal information is updated, a history record is created containing this personal information. To comply with GDPR, a generic **Anonymize history** action is available in history-aware business objects that enable you to anonymize this history.

The **Anonymize history** action is available in the **Action on selection** menu on all the root business objects that have history, for example, **Orders** and **Contracts**. The action can be performed manually, but is also schedulable.

When the **Anonymize history** action is triggered, all person, address, external requestors, visitors (also external) and account fields in a business object for which history is enabled are hashed with a '\*\*\*\*\*' string.

Examples of business objects for which anonymization of history records is possible are shown below:

- Orders
- Contracts
- Assets
- Planned maintenance
- Questionnaire
- Spaces and moves scenario planning

## Privacy statement

Planon features a **Help** menu in the top-right corner to provide access to customers to link their Privacy Policy statement. The menu lists the **Privacy statement** option which allows you to view the privacy statement of your company to comply with GDPR regulation.

GDPR mandates that the Privacy Policy statement must be easy to find. The law insists that the information provided to customers about how their personal data is processed must be concise, transparent, intelligible and easily accessible.

You can specify the privacy statement in System settings > General > Privacy Statement . If there is no privacy statement specified, the option will not be visible in the menu.

The Privacy Policy statement must document and describe the following items:

- For what purpose do you need to process personal data?

- Is the personal data shared with any other parties?
- How long will the information be retained?

As per the rule, you can only process personal data as long as it is required for a specific purpose in which the personal data will be collected. For some specific type of information, such as employee illness/absence information, you must adhere to specific limits.

- How can users alter personal data that they have submitted?
- How can people revoke their consent and remove their personal data from your system?

### No Web client

Typically, the Privacy statement can be published as a [web content web definition](#) or an external URL which can be linked in the **Privacy statement** field.

However, to make this functionality available to those who do not have access to the Web client, the configured Privacy statement will now also be available under the homepage in the user menu.

## My account

The **My account** button in the [Planon ribbon](#) allows you to edit your personal data and account settings. In **My user account**, you can view your **User name**, **Password expiry date** and change your password with the **Change password** option.



Planon application managers can add or remove fields in this window in the Web Configuration TSI. For more information, see [Making My account settings for end users](#).

In **My account settings**, click the **Edit** button to change the following settings:

- **Use 24-hour notation**  
With this setting, you can toggle between the 24-hour clock notation and the 12-hour clock notation (with AM and PM). The 24-hour clock notation represents time continuously from 00:00 (midnight) to 23:59 (11:59 PM) without the use of AM or PM indicators, employing a 24-hour format to express the time of day. The 12-hour clock notation, along with AM (Ante Meridiem) and PM (Post Meridiem), divides the day into two 12-hour segments to denote time. The selected time notation is used throughout the application.
- **Contact's email address**  
Select or add an email address that must be used as the user's Exchange email address. This field is used by the Connect for Outlook feature in order to link the Outlook user to a user account in Planon.
- **Language**  
Select the language in which you want to display the application.
- **Displayed unit of length**

Select the unit of length you want to use in the application: meters or feet.  
The selected unit of length is used throughout the application.

- **Autoselect first item in list?**

Select **Yes** to automatically highlight and select the first item in the elements list.

- **Theme**

Select the theme you want to use: Planon light, Planon dark or High contrast.



To view the changes, click the **Save and log off** button.

The name displayed in the **My Account** list is either derived from the account or the person linked to the account. This table shows the name that is displayed.

Account		Person		Displayed
User name	Description	First name	Last name	
WEASLY	Adam Weasley	Adam	Bilt	Adam Bilt
WEASLY	Adam Weasley	Adam		Adam
WEASLY	Adam Weasley		Bilt	Bilt
WEASLY	Adam Weasley			Adam Weasley
WEASLY		Adam	Bilt	Adam Bilt
WEASLY		Adam		Adam
WEASLY			Bilt	Bilt
WEASLY				WEASLY


The photo displayed on the **My Account** menu is determined based on this table.

Account - Photo	Person - Photo	Photo displayed in 'My Account'
Y	Y	Person-Photo
Y	N	Default image
N	Y	Person-Photo

Account - Photo	Person - Photo	Photo displayed in 'My Account'
N	N	Default image

If no photo is selected in the **Photo** field, a default image appears. This placeholder displays one or two characters. This example shows which characters might appear in the default image.

Account - User name	Person - First name	Person - Surname	Displayed
WEASLY	Adam	Bilt	AB
WEASLY	Adam		A
WEASLY		Bilt	B
WEASLY			W

 If **First Name** and **Surname** do not contain any value, then it means the fields are empty (none of them are system mandatory) or no person is linked to the account.

## Help menu

Planon features a **Help** button in the top-right corner that opens a menu providing access to information about the software and privacy statement of your company (GDPR legislation).

The options listed in the **Help** menu are:

- **TSI Help:** Enables you to view help information related to the TSI that is active on the screen. The option is visible only if a document/web page related URL is specified in [TSI Help URL](#). If there is no URL specified, the option will not be visible in the menu.
- **WebHelp:** Enables a user to start and view the Planon WebHelp. The WebHelp is displayed in the language of the version of the WebHelp specified in the [Help URL](#) field (System settings).
- **Privacy statement:** Enables you to view the privacy statement of your company to be compliant with GDPR regulation. The privacy statement can be specified in **General settings TSI > Privacy Statement**. If there is no privacy statement specified, the option will not be visible in the menu. For more information about the Privacy Policy statement, see [Privacy statement](#).
- **About:** Enables you to get information about the version of Planon you are using.



For information about the history of installed versions of Planon in your environment, see [Creating a product version overview](#).

- This information is important in the communication with Planon or to assess whether an update should be considered (based on the release date)



Build:	81.0.0.0-105
Database:	-
Database host:	-
Java version:	11.0.13
Release date:	2022-05-01
License name:	Planon Accelerator (demo)
Application server:	-
User:	SUPERVISOR
Property set:	Accelerator

Day code

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- **Keyboard shortcuts:** Enables you to view the available keyboard shortcuts in Planon. For more keyboard shortcuts, refer to .

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