
**Gold Client for Data Protection
Solution 2.0
User Guide**

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Introduction

This document serves as a guide for configuring and using the Gold Client for Data Protection Solution.

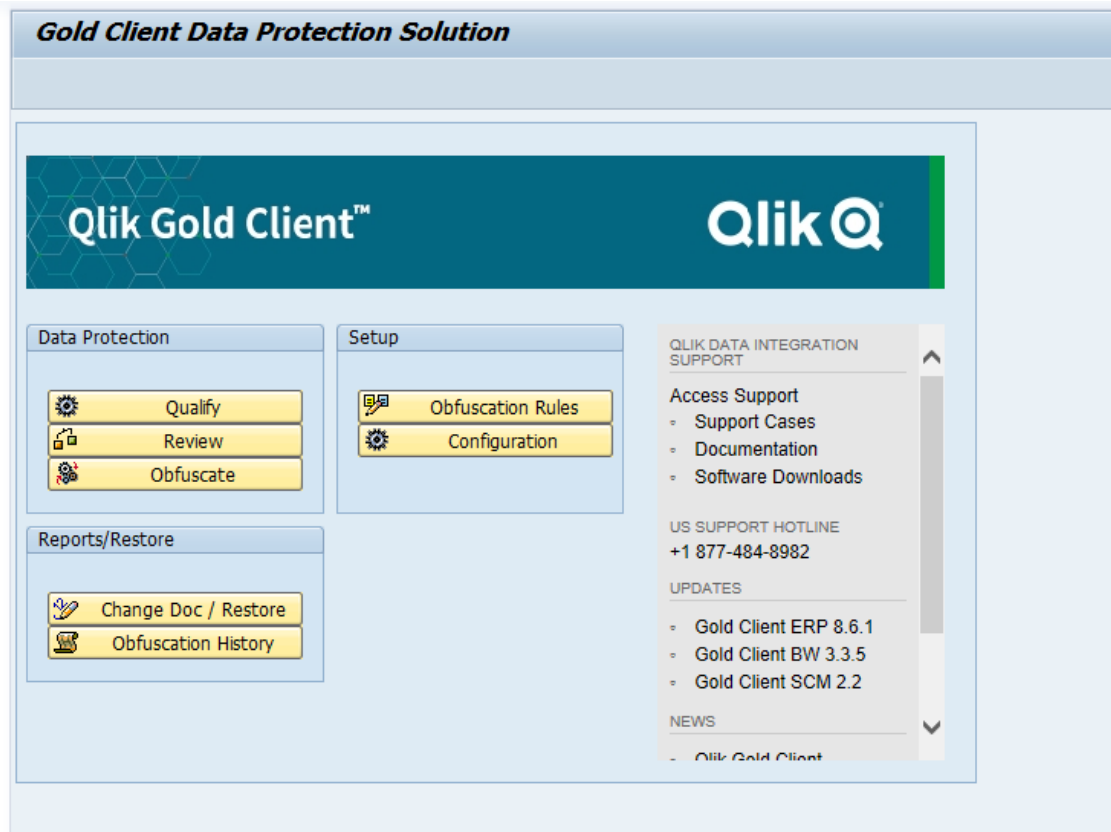
If a user needs to know how to Obfuscate a set data, this is the user guide that they should reference. The Obfuscation process consists of three basic steps: (1) Qualify, (2) Review, and (3) Obfuscate.

Illustrated within this document are the step-by-step instructions for executing the various steps within the obfuscation process, as well as how to use the other various (optional) features that are available. Additionally, this document covers the steps needed for restoring data that was previously obfuscated with Gold Client for Data Protection Solution.

Gold Client for Data Protection Solution

Overview

Transaction Code /GDPR/GCDPS will display the main screen.



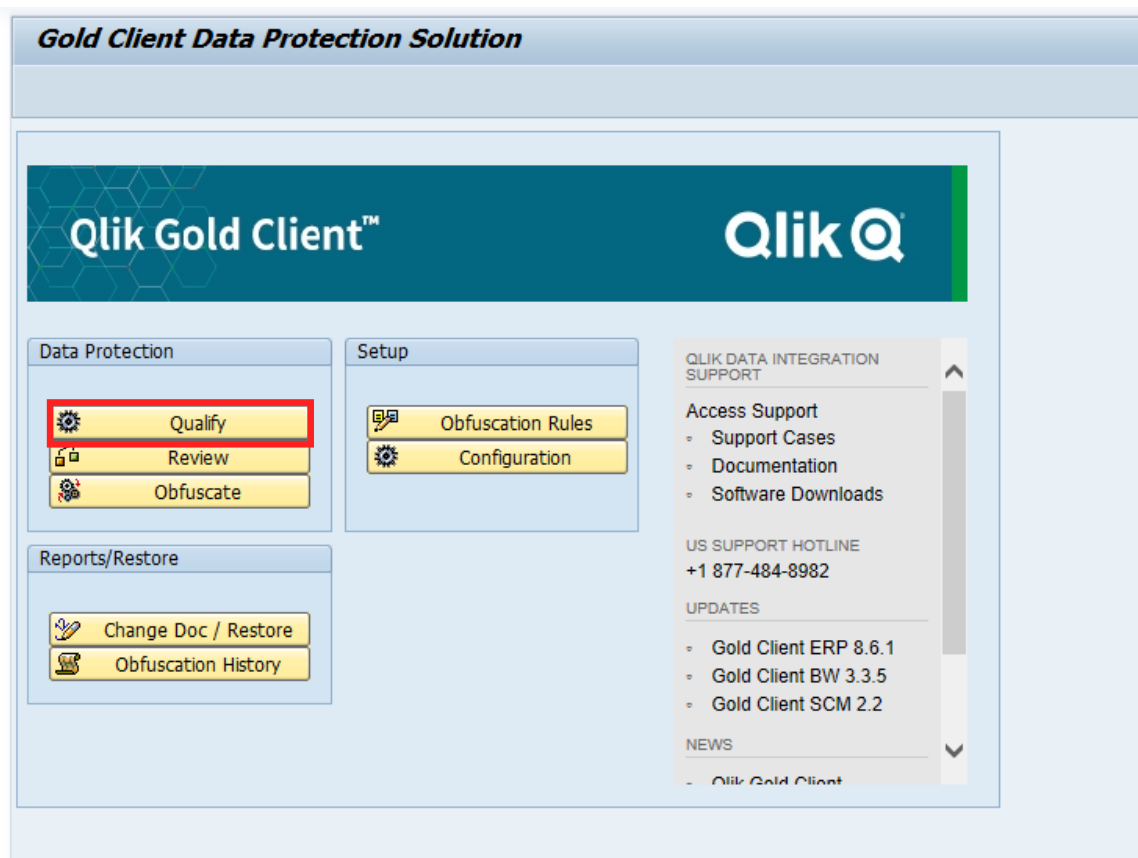
Data Categories

Qlik currently supports the following main data categories:

- Customer Master
- Vendor Master
- Business Partner
- Employee Master
- CRM – Transactions
- CRM – Business partners

Qualify

The Qualify utility will allow you to select data based on policies. This is the first step of the data obfuscation process.



When you click on the Qualify button, it brings the following screen. Click Data Protection Area list box to select the area for which you want to run data qualification/Obfuscation.

Once you select the data protection area, the program generates a dynamic selection based on the policies defined for the area. A Selection Screen is created and one or several policies can be selected.

Previous saved scenarios can be used were by clicking on Select Scenario or you can create your own.

It can be executed the data qualifier in Foreground or Schedule a background job. You can also save the policy selection as Scenario by clicking on Save Scenario button from the menu.

Once you click on Execute or Schedule Job, a pop screen comes up with default Obfuscation rule for the data protection area. You can choose a different obfuscation rule.

ASD(1)/100 SAP

Parameters

Data Protection Area: CUSTOMER

Obfuscation Rule: CUST

Accept Cancel

Click on Accept to continue. If you want to cancel the run, click on Cancel button. When running in Online mode, you will get a popup screen with a summary of how many total records qualified for the policy selection that include new and old which are still waiting for review for further processing.

ASD(1)/100 SAP

Qualifier Results

Qualified based on policy	26
Previously qualified and ready for review	26
Newly identified	0

Show all Show newly qualified Don't show report

Click on Show All to view all the qualified data (old and new), Click on Show newly qualified to only see new data or click on Don't show report if you do not want to review the data right away. You can always to Review screen from main screen to view and act on the qualified data.

When you click on Show all or Show newly qualified, it takes you to review details screen where you can see the details and take required action.

Gold Client Qualifier Data Review

Data Protection Area	CUSTOMER
Transformation Rule ID	CUST
Runtime ID	20181203125831BOKWFG

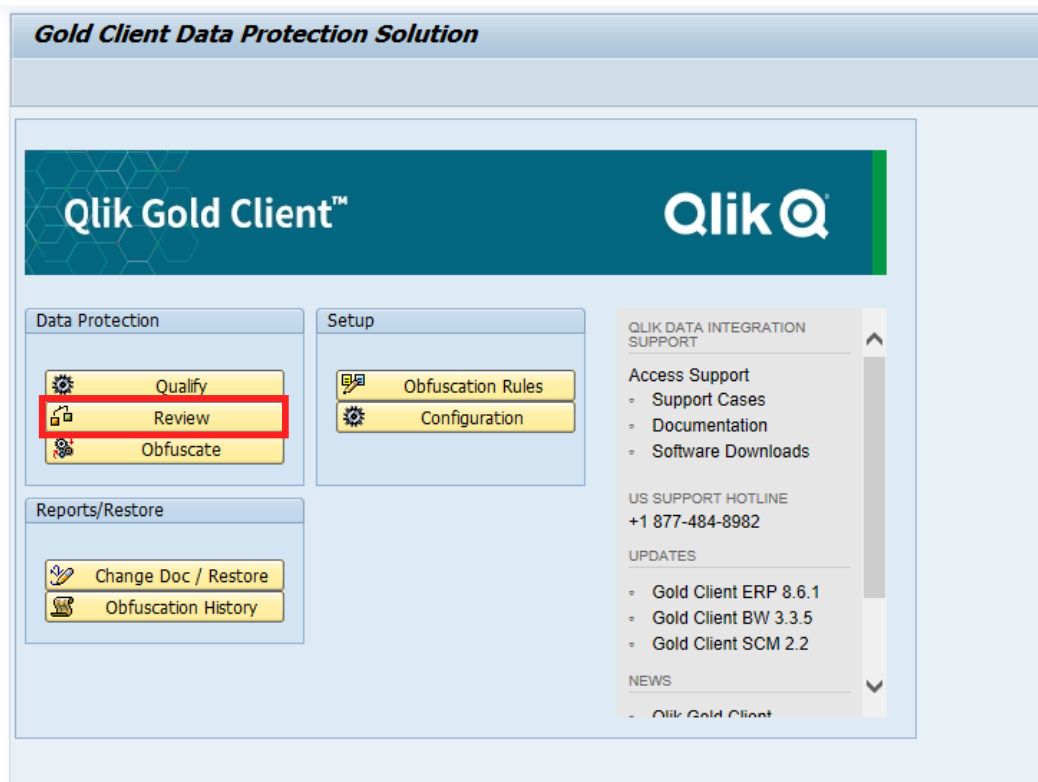
Approve
Reject
Exclude
Obfuscation Queue

General Data in Customer Master

Custom...	C...	Name 1	Name 2	City	Post.Code	Rg	Search term	Street	Telephone 1	Fax Number
3090	US	Star Supermarkets		CHICAGO	60660	IL	MSA	1 1 100 Drury Street	333-23222-123	333-23222-124
3215	US	Inrstore Superma...		OCEANP...	07757	NJ	SERVICES	180 180 West Des...	732-870-3200	732-870-3208
3720	US	Woodfield Super...		Chicago	60173	IL	MSA	4321 Buffalo Rd	312-440-3570	312-440-3590
20008	US	Supermarket chai...		WASHIN...	20005	D	TPM	103 Beach St		
100140	US	First Hyper's Sup...		New York	10015		HYPER'S SU	3999 West Chester...		
100206	US	First Hyper's Sup...		New York	10015		HYPER'S SU	3999 West Chester...		
300831	US	Intermarket HQ		NORTH C...	14514	N	TPM	75 Roseship St		
300832	US	Intermarket North		SILVER L...	14549	N	TPM	86 Strawberry St		
300833	US	Intermarket 1086		SOUTH P...	10090	N	TPM	5 Raspberry St		

Review

This utility to review and approve the recent qualified data. This is the second step of the data obfuscation process.



Select the data protection area to display the list of all qualifier run header level details (Runtime ID, Area, Date and Time, User, Record Count and Obfuscation rule) where you have several options:

Gold Client Qualifier Data Review

GDPR Home

Data Protection Area: CUSTOMER

Show Details
 Approve All
 Exclusion Report
 Delete

Runtime ID	Data Protection Area	Date	Time	User Name	Record Count	Tfor...
202010261255448OELGX	CUSTOMER	26.10.2020	12:55:54	MANTUNES	22	CUST

Show Details:

Select any row(s) and click on Show Details button to the qualified data.

Gold Client Qualifier Data Review

Data Protection Area: CUSTOMER

Show Details
 Exclusion Report
 Delete

Runtime ID	Data Protection Area	Date	Time	User Name	Record Count	Tform...
20181203165121BBQKX	CUSTOMER	03.12.2018	16:51:21	GOLDSKH	5	CUST

Data Protection Area: CUSTOMER
 Transformation Rule ID: CUST
 Runtime ID: 20181203170040BBKZRC

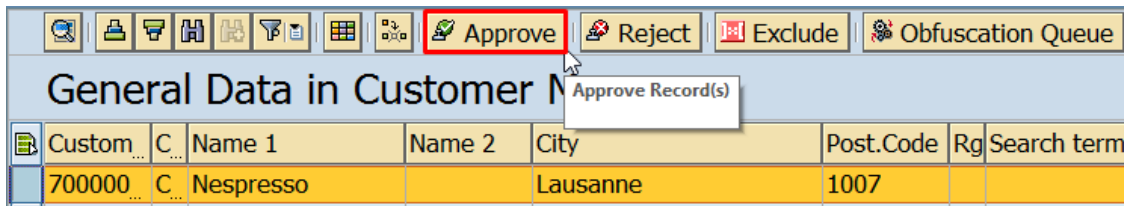
Approve
 Reject
 Exclude
 Obfuscation Queue

General Data in Customer Master

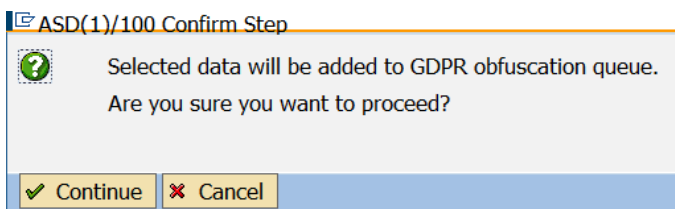
Custom...	C...	Name 1	Name 2	City	Post.Code	Rg	Search term	Street	Telephone 1
700000	C...	Nespresso		Lausanne	1007			Avenue De ...	
700000	C...	Nestle SA		Vevey	1800			Avenue Nest...	
700000	C...	HPA Schweiz		Brig-Glis	3900			Industriestra...	
CE32	C...	GDPR PROTECTE...	TEST	Lausanne	11111		GDPR		

Approve Data:

Select the row(s) click on Approve button to add the record to the obfuscation queue.



A popup will be prompted to confirm the action. Once the record(s) is approved it will disappear from the queue.

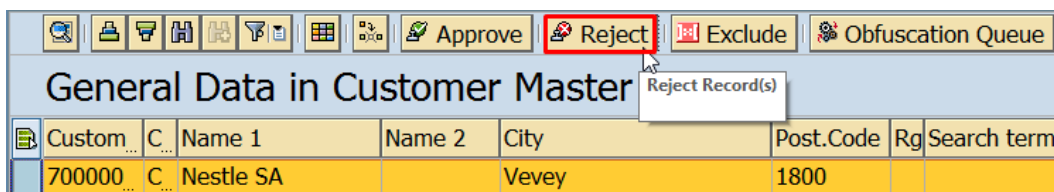


Click on Continue to add the record to the queue or click cancel if do not want to proceed further.

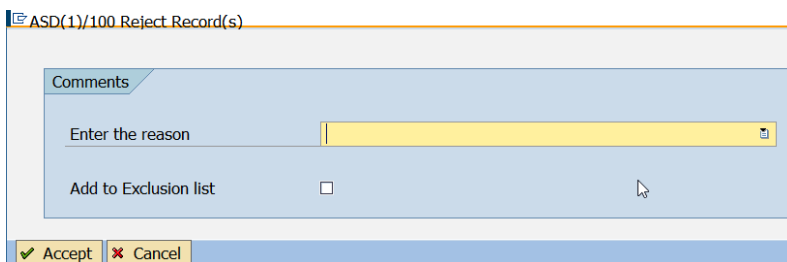
Reject Data:

Select the row(s) click on Reject button to reject the data. The record(s) will be deleted from review Qualification area.

By doing this the record(s) can be Qualified again.



A popup will be prompted to select a reason and confirm step.



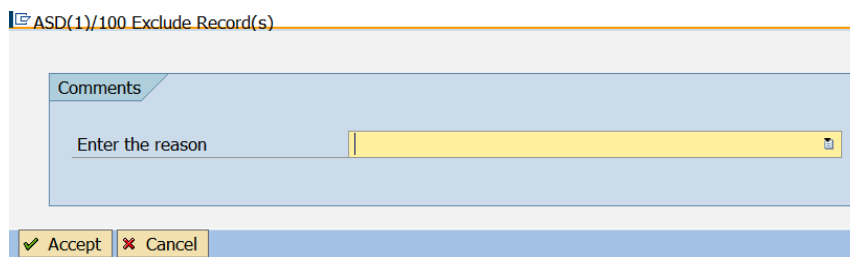
Click on the pre-populated reason list and select a reason. You can also click on the checkbox to add the record to exclusion list. Click on Accept to continue or click cancel to cancel the action.

Exclude Data:

Select the row(s) click on Exclude button to add the record(s) to the exclusion list. These records are always excluded from re-qualification and/or data processing. The exclusion List can be managed from Review -> Exclusion Report



A popup will be prompted to select a reason and confirm step.

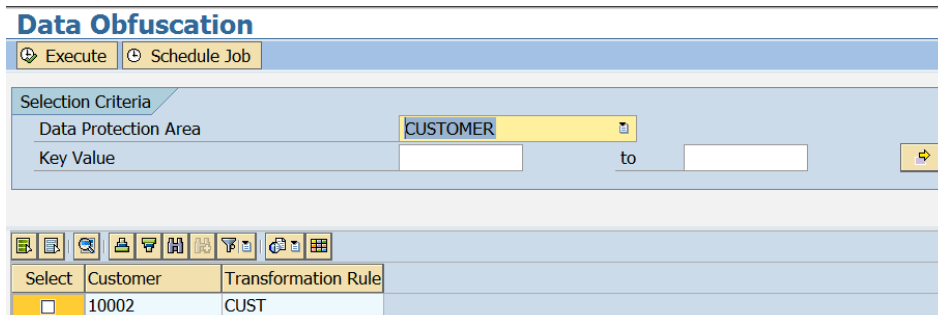
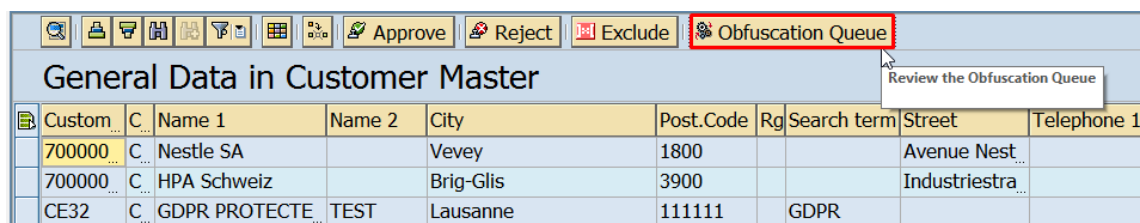


Click on the pre-populated reason list and select a reason. Click on Accept to continue or click cancel to cancel the action. To view all the previously excluded records, go back to main screen and click on Exclusion report from ALV menu.

Obfuscation Queue:

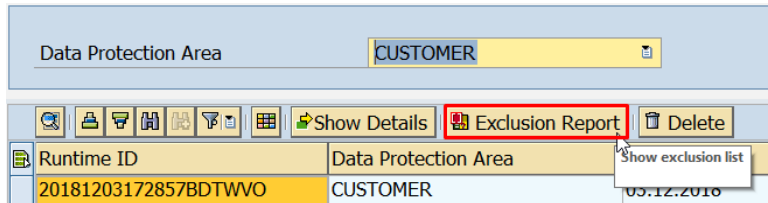
Click on the Obfuscation Queue button to go straight to Obfuscation and view the data that have been already approved for obfuscation.

*Is not required to select any row(s) for this function.



Exclusion Report:

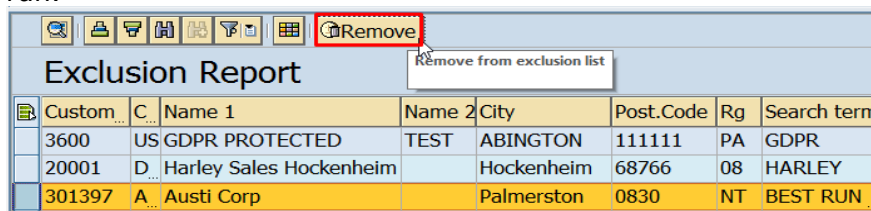
Click on the Exclusion report button to review/manage all the records that have been marked as Excluded.



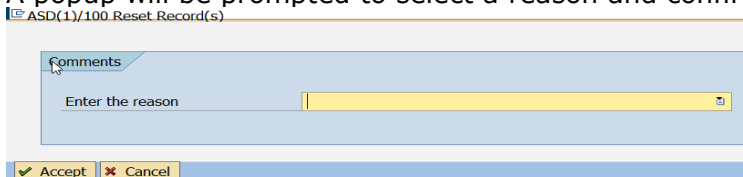
Exclusion Report								
Custom...	C...	Name 1	Name 2	City	Post.Code	Rg	Search term	Street
3600	US	GDPR PROTECTED	TEST	ABINGTON	111111	PA	GDPR	1 1 1835 Market Street
20001	D	Harley Sales Hockenheim		Hockenheim	68766	08	HARLEY	Ringstrasse 100
301397	A	Austi Corp		Palmerston	0830	NT	BEST RUN	300 Emma Ct
301398	A	Smorgo Industries		Logan Central	4114	QLD	BEST RUN	400 Kingston Road

Exclusion Report - Remove:

Select any row(s) from the list and click on Remove button to remove the record from the exclusion list. Once you do this, the record will re-qualify on the next policy run.



A popup will be prompted to select a reason and confirm step.



Click on the pre-populated reason list and select a reason. Click on Accept to continue or click cancel to cancel the action.

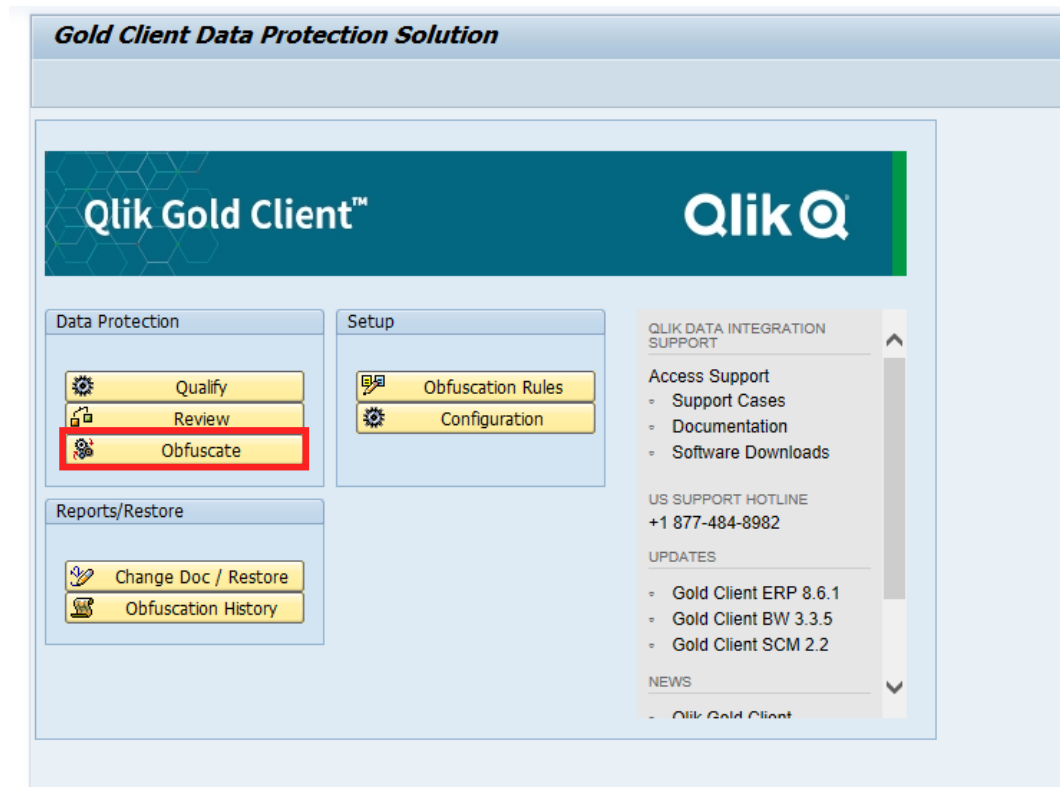
Delete:

Select any row(s) and click on Delete button to delete the qualified data from review staging area. This permanently deletes the records from /GDPR/ tables and a new Qualification will be required.

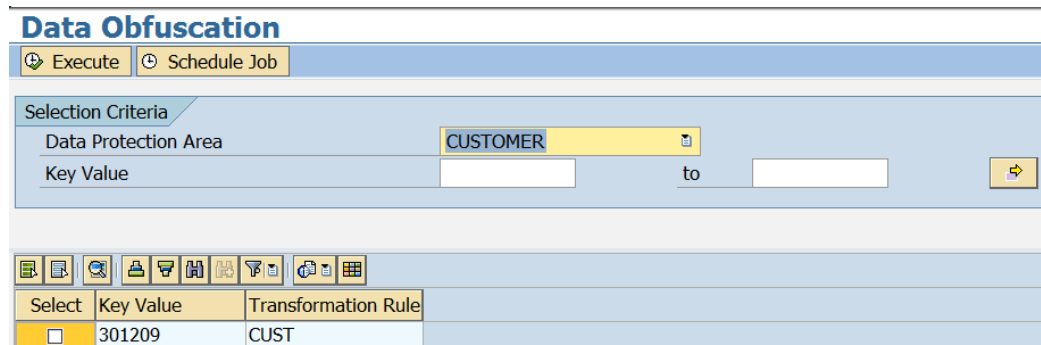
Runtime ID						Data Protection Area		Date	Name
20181203173350BDELTE						CUSTOMER		03.12.2018	GOLDSKH
20181203172857BDTWVO						CUSTOMER		03.12.2018	GOLDSKH

Obfuscate

This utility applies the data obfuscation rules to the data and update the database tables. This is the third and final step of the data obfuscation process.



By selecting Obfuscate button and Data Protection Area, it will display all the qualified and reviewed records.



From this screen you can select the record(s) to be Obfuscated. After the data selection, click on Execute to run in online mode or schedule a background job.

Summary report is displayed for all the records that are processed.

Data Obfuscation

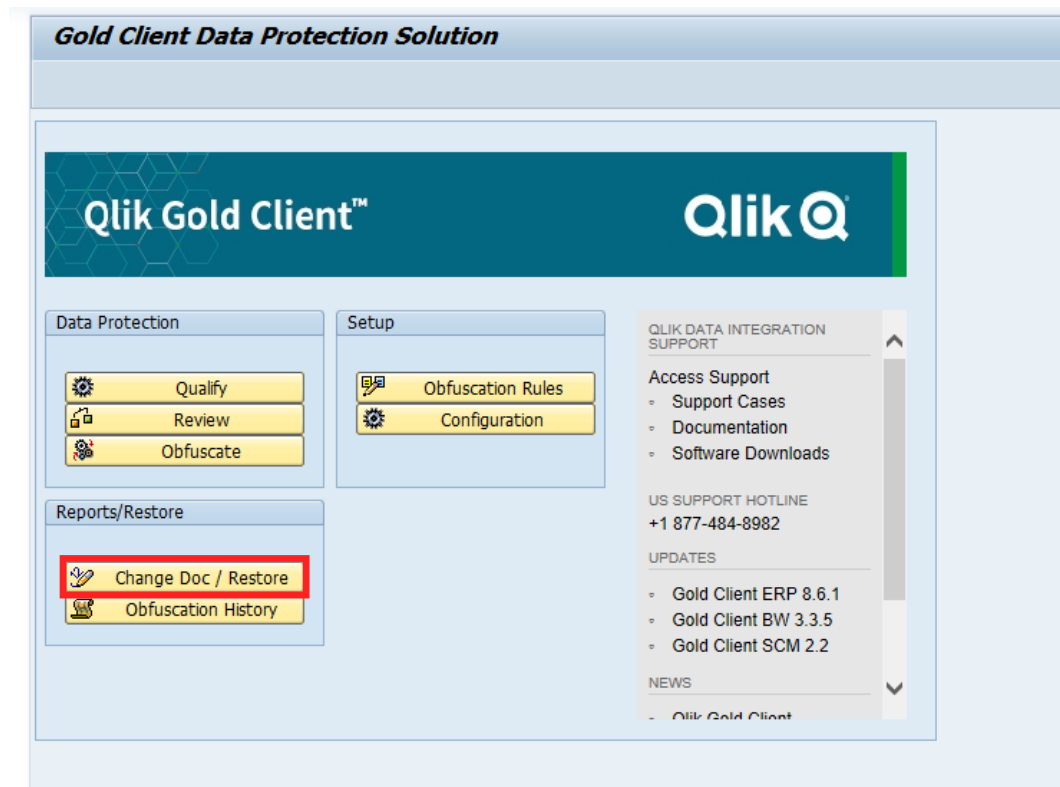
Summary Report

Data Protection Area	Key Value	Tfor	ID	Chg. no.
CUSTOMER	301209	CUST	00	1359115

Once the data is processed, change history is updated. You can view the changed values by going to Change Doc/Restore utility.

Change Doc/Restore

Execute this utility to view the change doc history for the records that have been obfuscated. It also allows you to restore the original values if required.



When you execute the report, it displays header level information. You can filter records based multiple selection criteria.

Click refresh button from the menu to refresh the data selection.

Change Doc Report

Refresh Restore Schedule Job

Selection Criteria

Data Protection Area

Runtime ID

Change Date to

User Name to

Object Value to

Object Type to

Field Name to

Old Value to

Select Data Protection Area Object Value Object Type Chg. no. User Name Date Time Tcode Runtime ID Tform Rule Status

☒	PARTNER	422308		500001...	ATEJEDA	12/0...	21:3...	GCDPS	20201202...	BUPA	S
☐	PARTNER	3277		100303...	ATEJEDA	12/0...	13:4...	/GDPR/PSA	20201201...	BUPA	S

To view the field level details for a change doc, double click anywhere on the row.

Change Document Details

Object Class: DEBI

Object ID: 0000301209

Change Number: 1359115

Runtime ID: 20181204120436BMXBIP

Table	Field	Table Key	Rule Type	New Value	Old Value
KNA1	MCOD1	1000000301209	B		GDPR TEST
KNA1	MCOD2	1000000301209	F	OBFS	GDPR TEST2
KNA1	NAME1	1000000301209	F	Obfuscated	gdpr test
KNA1	NAME2	1000000301209	F	Obfuscated	gdpr test2

Change Doc/Restore - Restore

To restore the fields to its original values, select the record from main screen and click on Restore button from the menu. The utility reads the change history table records and updates to the last original values that are available. Once the data is restored, the records may re-qualify on the next qualifier process run.

Change Doc Report

Refresh **Restore** Schedule Job

Selection Criteria

Data Protection Area

Runtime ID

Change Date to

User Name to

Object Value to

Object Type to

Field Name to

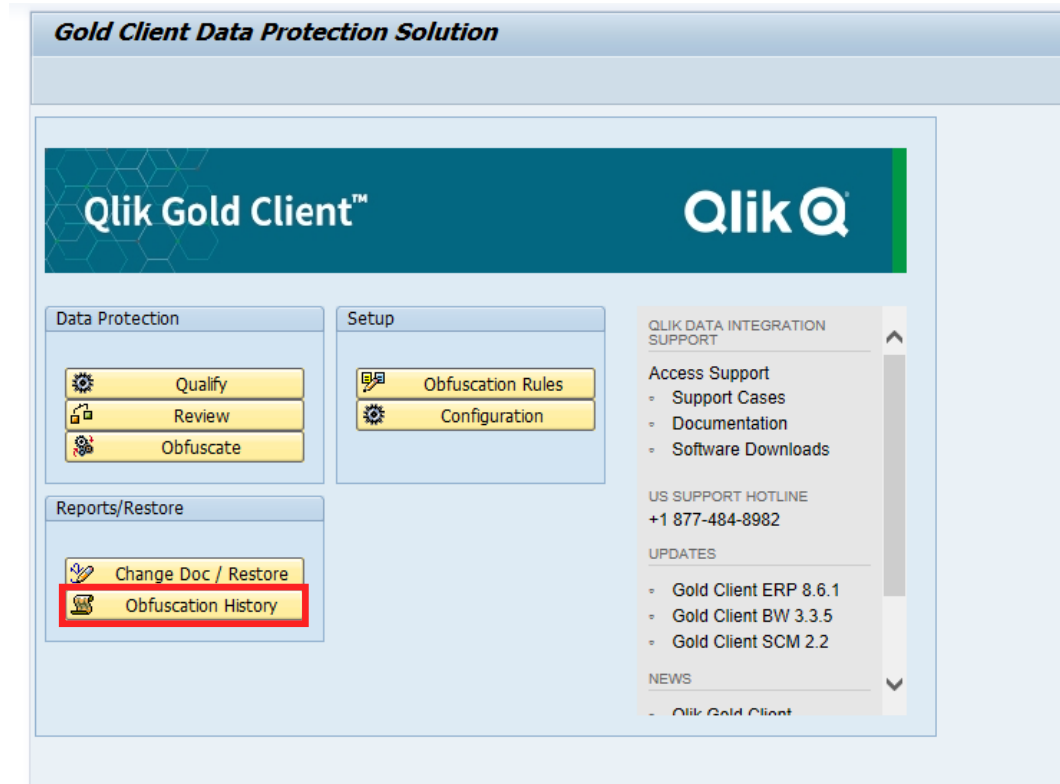
Old Value to

Select Data Protection Area Object Value Object Type Chg. no. User Name Date Time Tcode Runtime ID Tform Rule Status

☒	PARTNER	422308		500001...	ATEJEDA	12/0...	21:3...	GCDPS	20201202...	BUPA	S
☐	PARTNER	3277		100303...	ATEJEDA	12/0...	13:4...	/GDPR/PSA	20201201...	BUPA	S

Obfuscation History

This provides complete trace of when the data was qualified, and subsequent actions taken. You have many options to query the data to find out specific details.



Obfuscation History

Refresh

Selection Criteria

Data Protection Area: PARTNER

Runtime ID:

Data Event: DELE to

Event Date: 12/09/2020 to 12/16/2020

User Name: to

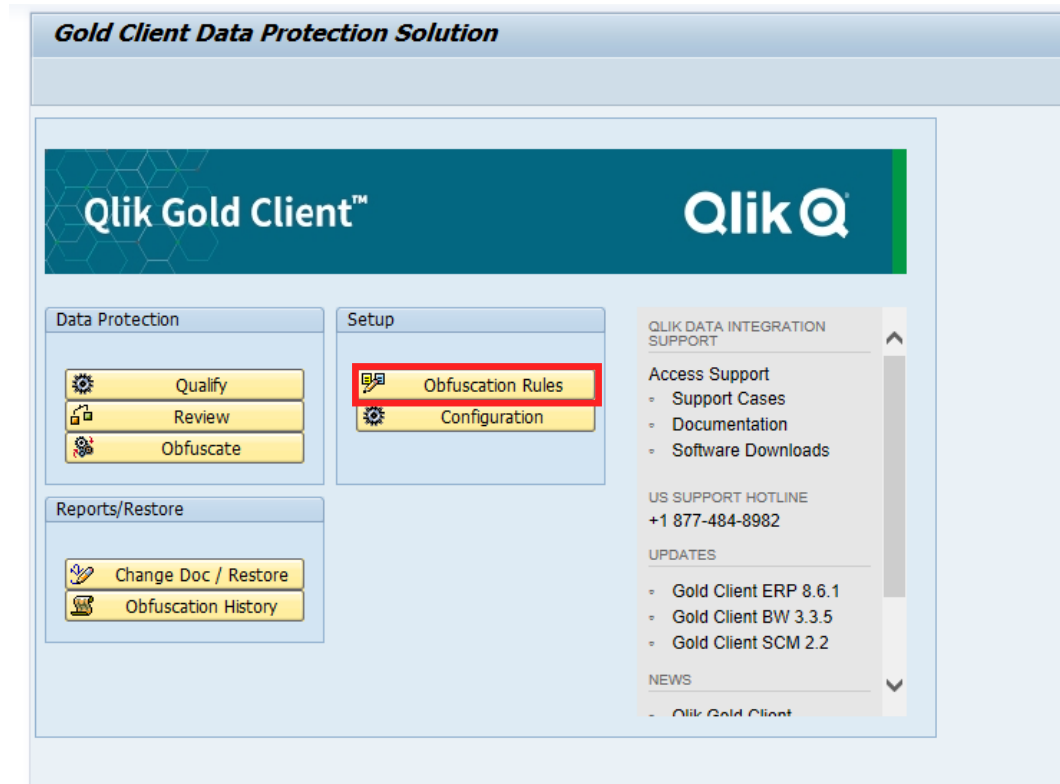
Key Value: to

Data Protection Area	Key Value	Object Type	Data Event	Date	Time	User Name	Tfor...	Runtime ID	Reason (Comment)
PARTNER	12345		Approved	12/16/2020	05:27:35	MANTUNES			
PARTNER			Qualified		05:27:27	MANTUNES	BUPA	20201216052727MDKOAC	Region WY is not defined for country DE

By default, all deleted records are removed from original selection screen.

Obfuscation Rules

Setup obfuscation rules for protecting your data.

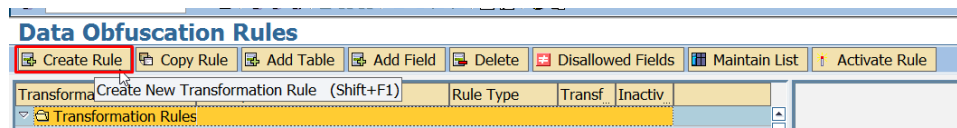


Qlik delivers pre-configured rules that can be changed based on your need.

Data Obfuscation Rules				
Create Rule Copy Rule Add Table Add Field Delete Disallowed Fields Maintain List Act				
Transformation Rules	Description	Rule Type	Tra...	Ina...
Transformation Rules				
BUPA	Business Partner			
CUST	Customer Master			
KNA1	General Data in Customer Master			
ANRED	Title	Blank		
MCO1	Search term for matchcode search	Blank		
MCO2	Search Term for Matchcode Search	Blank		
NAME1	Name 1	List		
NAME2	Name 2	Blank	☒	
ORT01	City	Fixed Value		
ORT02	District	Blank		
PFACH	PO Box	Fixed Value		
PSTL2	P.O. Box Postal Code	Fixed Value		
PSTLZ	Postal Code	Fixed Value		
REGIO	Region (State, Province, County)	Fixed Value		
SORTL	Sort field	Fixed Value		
STRAS	House number and street	Fixed Value		
TELF1	First telephone number	Fixed Value		
TELF2	Second telephone number	Fixed Value		
TELFX	Fax Number	Fixed Value		
TXJCD	Tax Jurisdiction	Blank		
KNB1	Customer Master (Company Code)			
INTAD	Internet address of partner comp...	Fixed Value	☒	
KNBK	Customer Master (Bank Details)			
KNVK	Customer Master Contact Partner			

Create Rule:

To create a new obfuscation rule, click on the Create rule button from the menu.



It opens a popup window with proposed rule id.

ASQ(1)/800 Data Obfuscation Rules

New Rule ID	0001
Description	

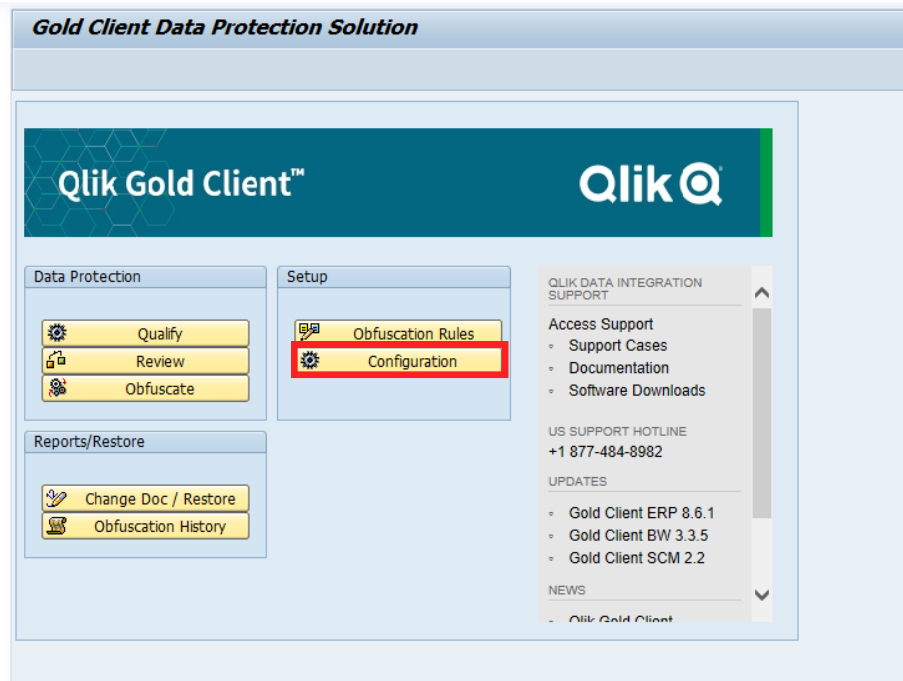
You can enter any alpha numeric value or keep it. Enter the description and click on Create button.

ASQ(1)/800 Data Obfuscation Rules

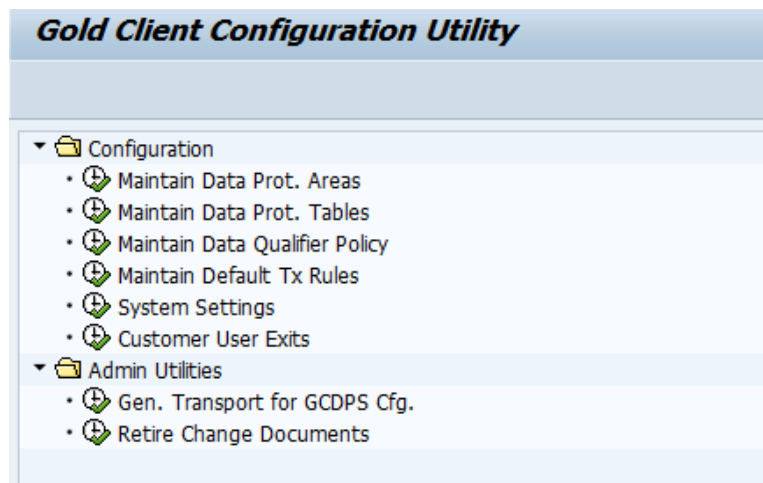
New Rule ID	DEMO
Description	Demo Rule

Or you can select a rule, make a copy and make the changes you want. After creating the rule, click on Add Table to add that to the rule. The table name needs to be added in the configuration utility "Maintain Data Prot. Tables". After that you need to click on Add Field to add specific fields that you want to obfuscate. When we add field, by default they are assigned rule type "Blank". Double click on the field name to open the rule and select the rule type from the available options and set the values.

Configuration



Click on the configuration button to access various configuration utilities. You need to have change authorization to make any changes.



Maintain Data Protection Areas:

This is pre-populated, and no changes should be made to this.

Configuration		
Maintain Data Prot. Areas		
Data Protection Area Maintenance View		
	Data Protection Area	Description
	BUS . PARTNER	Business Partner
	CUSTOMER	Customer Master
	EMPLOYEE	Employee Master
	VENDOR	Vendor Master

Maintain Tables for Data Protection Areas:

The tables listed here are only allowed for obfuscation rules. Currently this is very limited and should not be changed.

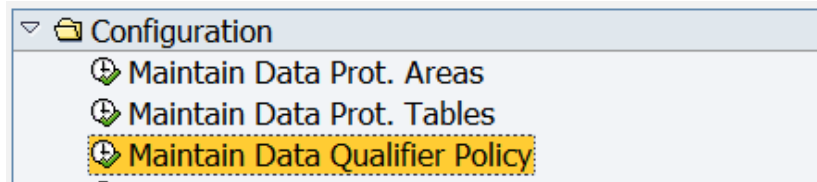
Configuration
Maintain Data Prot. Areas
Maintain Data Prot. Tables

Display View "Maintenance View for Data Protection Area Tables": Overview				
Maintenance View for Data Protection Area Tables				
Data Protection Area	Table Name	Header Table	Inactive	
CRM TRANSACTIONS	/GDPR/CUSTOMER_H	☐	☐	
CRM TRANSACTIONS	/GDPR/OPPORT_H	☐	☐	
CRM TRANSACTIONS	/GDPR/ORDERADM_H	☐	☐	
CRM TRANSACTIONS	CRMD_CUSTOMER_H	☐	☐	
CRM TRANSACTIONS	CRMD_ORDERADM_H	☒	☐	
PARTNER	/GDPR/BUSINESSPAR...	☐	☐	
PARTNER	BUT000	☒	☐	
PARTNER	ZCARLOS	☐	☐	

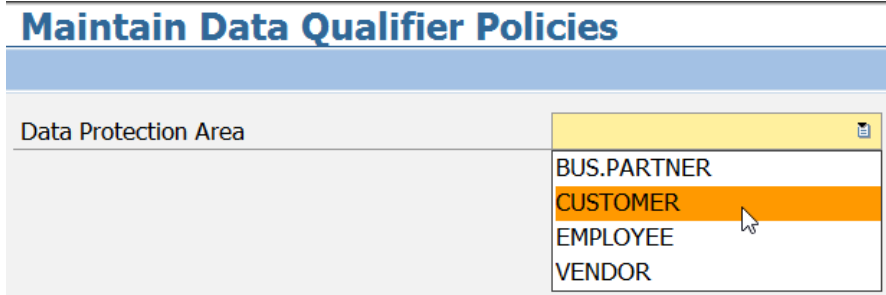
It's possible to map standard tables (ex: BUT000) or Custom Tables (ex: ZCARLOS), but you have always available our own structures (ex: /GDPR/BUSINESSPARTNER) that reflects the standard tables, standard fields and any append custom fields/structures.

Maintain Data Qualifier Policies:

This is a crucial utility to maintain the policies that are required for data qualification. The directly controls the Qualify selection screen parameters.



Select the data protection area from the list.

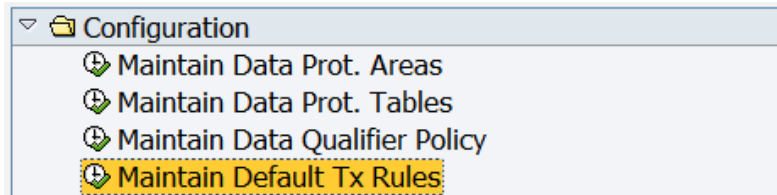


It will display all the policies that have been defined for the data protection area. You can add new policy and/or change, delete policies based on your requirements. For each new policy you need to either create a new function or raise a request to Gold Client support team. Once a policy is used for a saved scenario, you cannot change or delete it.

Maintain Policy Functions for CUSTOMER

DPR	Policy	Function	FM Description	SelScr Element Type	Active
CUSTOMER	1	/GDPR/DPQ2_CUSTOMERS_NAMED	Customers named...	Select Option	☒
CUSTOMER	2	/GDPR/DPQ2_CUST_DELETION_MARK	Customers marked for deletion	No Input Required	☒
CUSTOMER	3	/GDPR/DPQ2_CUSTOMERS_KUNNR	Customer Number(s)	Select Option	☒
CUSTOMER	4	/GDPR/DPQ2_CUST_COUNTRY	Customer from these Countries	Select Option	☒
CUSTOMER	5	/GDPR/DPQ2_CUST_SLS_OVER_XDAY	Customers with sales over x number of days	Parameter (Numeric)	☒
CUSTOMER	6	/GDPR/DPQ2_CUST_INV_OVER_XDAY	Customers with invoices over x number of days	Parameter (Numeric)	☒

You can add/create your own by just maintain the DPR and incremental policy number.

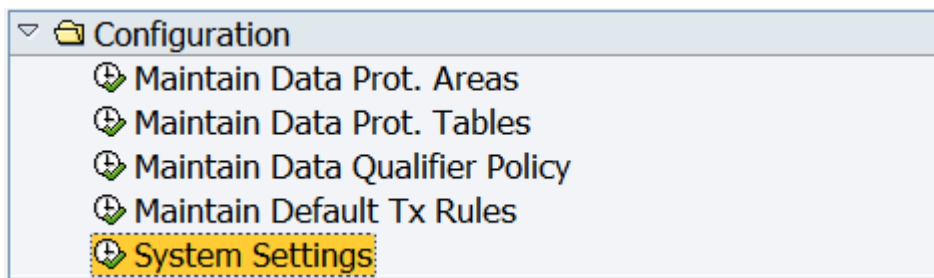
Assign Default Obfuscation Rules for Data Protection Area:

Maintenance View for Default Transformation Rules		
	Data Protection Area	Tform Rule
	BUS . PARTNER	BUPA
	CUSTOMER	CUST
	EMPLOYEE	EMPL
	VENDOR	VEND

To be able to run Obfuscation you must connect the Data Protection Area to the Transformation rule.

System Settings:

These are global setting that can impact different process and only ADMIN's should add and/or change.

**CDRETENTIONPERIOD**

- Retention period in days (ex: 30 to 180)

FRAMEWORKLOG

- Must be 'X' to have audit on workflow (change traceability)

INITSAPCHANGEDOC

- Must be 'X'

X_ALLOW_CONFIG_CHANGES

- Must be 'X' To allow configuration changes

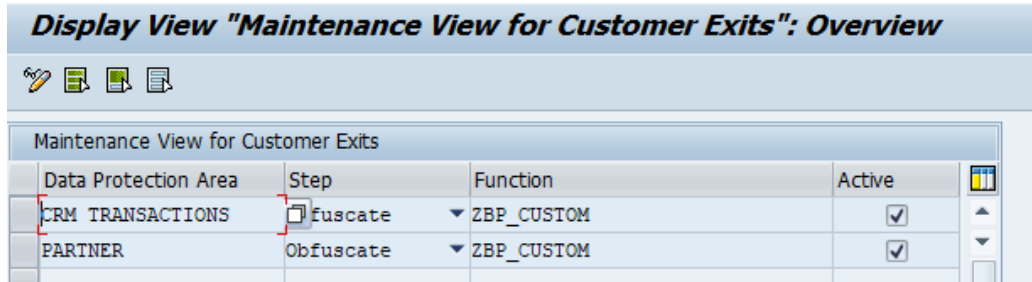
X_DISABLE_SECURITY

- Must be 'X' To disable security (authorizations) to run the GC4DPS

Customer User Exits:

This utility allows the users to run external ABAP code, leveraging the GC4DPS transformation rules and process control tables to track the changes. With this its possible to manage other areas that GC4DPS cannot address.

Display View "Maintenance View for Customer Exits": Overview



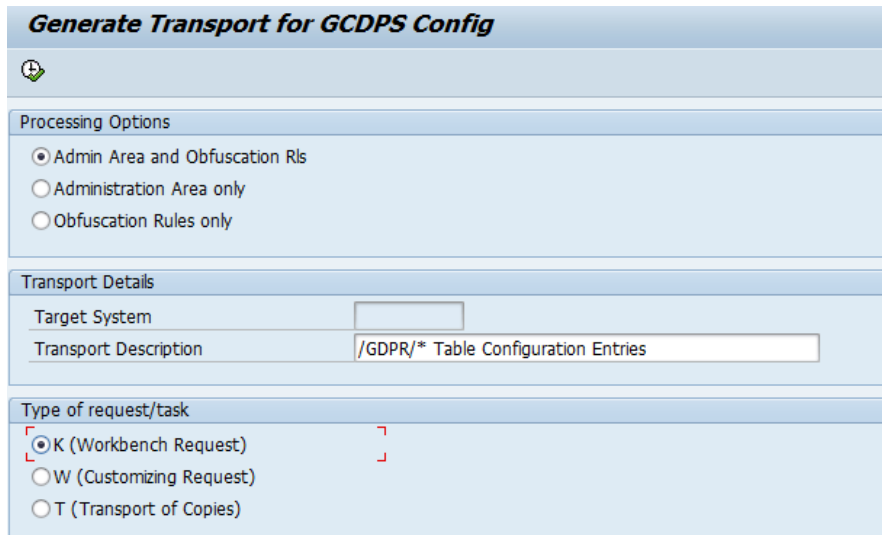
The screenshot shows a table titled "Maintenance View for Customer Exits" with the following data:

Data Protection Area	Step	Function	Active
CRM TRANSACTIONS	fuscate	ZBP_CUSTOM	☒
PARTNER	Obfuscate	ZBP_CUSTOM	☒

Gen. Transport for GCDPS Configuration.

This utility allows the user to create transport(s) for the GC4DPS configuration to be moved to production.

Generate Transport for GCDPS Config



The screenshot shows a form titled "Generate Transport for GCDPS Config" with the following sections:

- Processing Options:**
 - ☒ Admin Area and Obfuscation Rls
 - ☐ Administration Area only
 - ☐ Obfuscation Rules only
- Transport Details:**
 - Target System:
 - Transport Description:
- Type of request/task:**
 - ☒ K (Workbench Request)
 - ☐ W (Customizing Request)
 - ☐ T (Transport of Copies)

Retire Change Documents

This utility put the Obfuscated data to be Expired, no change/restore will be possible after this step.

It updates /GDPR/ tables that hold the original field values with a fixed text "Expired". Once the values are marked as expired, they cannot be used for restoring the fields to its original values.

Gold Client Configuration Utility

- ▼ Configuration
 - Maintain Data Prot. Areas
 - Maintain Data Prot. Tables
 - Maintain Data Qualifier Policy
 - Maintain Default Tx Rules
 - System Settings
 - Customer User Exits
- ▼ Admin Utilities
 - Gen. Transport for GCDPS Cfg.
 - **Retire Change Documents**

Set Change Doc Records as Expired

Refresh
 Set Expired
 Schedule Job

Change Date	11/15/2020	to	12/16/2020	
Data Protection Area	PARTNER	to		
Key Value		to		
Runtime ID		to		
User Name	MANTUNES	to		
Field Name		to		
Old Value		to		

Select	DPR	Obj. Value	Type	Chg. no.	User Name	Date	Time	Tcode	Runtime ID	Tform Rule
☒	PARTNER	300178		100303049	MANTUNES	11/16/2020	14:19:37	/GDPR/PSA	20201116091922CMSNP	BUPA
☐	PARTNER	300177		100303046	MANTUNES		14:19:27	/GDPR/PSA		BUPA

Support Information

Qlik Analytics (ISR) Ltd. can be contacted either by telephone or via email. Any support related issue regarding problems with or use of the Gold Client software and process can be reported for resolution.

If our offices are closed, or staff is unable to directly respond to a support request, we will respond within 24 hours of the initial call. Problems related to the export or import processing may require code enhancements. If a code enhancement or fix is required, resolution time may vary.

As per the maintenance agreement, any repairs or enhancements to the Gold Client software will immediately be deployed to all customers up-to-date with their maintenance contract. It is the choice of the customer as to if and when such enhancements are implemented. In addition, customers may request a planning session with Qlik to review changes in the software and how the changes might impact their environment.

We can also be contacted to discuss application or feasibility of using the Gold Client process to resolve a current challenge the project team faces. When this is required, a planning session can be scheduled in advance to ensure proper participation by both Qlik and the client.

Corporate Offices:

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