



GDPR Compliance
Feature Guide
Summer 18



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Introduction

In Kimble's Summer 18 Release, Kimble has introduced three enhancements to support compliance with GDPR.

- [Resource Mentions](#)
Under GDPR, individuals have the right to access their personal data and supplementary information. The right of access allows individuals to be aware of and verify the lawfulness of the processing. In practice, a likely use case will be an ex-employee asking for a copy of all their personal data. To comply with the Right of Access and support Subject Access Requests, Kimble has introduced the ability to export a list of all Resource Mentions for a Resource whose tenure has ended.
- [Redact Resource](#)
The GDPR introduces a right for individuals to have personal data erased. The right to erasure is also known as 'the right to be forgotten'. To comply with the Right to be Forgotten, Kimble has introduced the ability to redact all mentions of a Resource whose tenure has ended, redacting their name and email address in all Kimble fields.
- [Opted Out Billing Field](#)
Consent is one lawful basis for processing data under the GDPR. The GDPR sets a high standard for consent, the biggest change from earlier Data Protection regimes is what this means in practice. The GDPR is clear that an indication of consent must be unambiguous and involve a clear affirmative action (an opt-in). To comply with the Consent lawful basis for processing, Kimble has introduced the ability to exclude Contacts who do not consent when dispatching Invoices, Supplier Invoices and Credit Notes.

Essential Concepts

The General Data Protection Regulation (GDPR) is the new data privacy regulation aiming to strengthen and unify data protection laws for individuals within the European Union. Any company failing to comply with GDPR's rules may face fines up to €20m or 4% of revenue whichever is the larger.

- Who does it apply to?
 - GDPR applies to any company whose data processing concerns the personal data of European Union data subjects, irrespective of the company's location. It also impacts any other companies involved with the downstream processing of personal data.
- Where can I find more information on GDPR?
 - See the [GDPR page on the Kimble Website](#) for further information on Kimble's compliance with GDPR and links to further useful content.



Kimble's GDPR Compliance functionality is not enabled by default. It is enabled from the Config Catalog. For more on the Config Catalog please see the [Configuration and Administration Management Feature Guide](#).

Once GDPR Compliance is enabled in Kimble, the *Opted Out Billing* field will be available on all Salesforce Contacts. The options to view all Resource Mentions and to Redact Resource will only be available on the Resource record of a Resource whose Tenure has ended.



To learn more about ending the tenure of a Resource, please refer to the [Managing Leavers and Returners Feature Guide](#).

Resource Mentions

Where a Resource whose tenure has ended submits a Subject Access Request, Kimble allows you to view and/or export a spreadsheet detailing mentions of the Resource in Kimble data (not including Custom Fields, Chatter Posts, or any mentions in Notes).

To access Resource Mentions:


1. Navigate to Resources.
2. Click the name of the relevant Resource.

	RESOURCE TYPE ↑	RESOURCE NAME	P...	B...	U...	G...
1	Contractor	Luke Walker		N...		Pr...
2	Contractor	Ian Jacob	B...	UK	Ia...	Pr...
3	Employee	Jennifer Kerry	Pr...	N...	Je...	S...
4	Employee	Claire Smith	T...	UK	Cl...	Pr...
5	Employee	Paul Jones	B...	UK	P...	S...
6	Employee	Colin Lowe		N...		J...
7	Employee	Emma Powell	In...	N...	E...	J...

3. Click *Resource Mentions*.

Resource Home		Emma Powell > Resource Home	
Maintain Resource		Emma Powell	
Profile			
Experience			
Calendar			
Groups			
Timesheet			
Contact			
Roles and Permissions			
New Tenure			
Redact Resource			
Resource Mentions			

Resource Type	Employee	Last Name	Powell
First Name	Emma	Business Unit	Business Strategy
User	Emma Powell	Location	Boston
Business Unit	North America	Time Pattern	12 hours/day
Grade	Junior Consultant	Expense Reimbursement	USD
Primary Role	Industry Expert	Currency	
Calendar	US Calendar	End Date	03/04/2018
Allowance Scheme		Actual Cost Unit Type	Day
Start Date	01/08/2016	Standard Cost	USD 644.74
Actual Cost	USD 600.00	Standard Cost Unit Type	Day
Assigned Until	04/04/2018		

4. Click  next to each Type to expand the list of Resource Mentions.



Resource Mentions Types are:

- Activity Assignments
- Forecast Timesheets
- Timesheets
- Expense Claims
- Travel Requisitions
- Invoices
- Credit Notes
- Supplier Invoices

5. Click  to download a .csv file.

Redact Resource

Kimble, complying with Right to be Forgotten regulations, allows you to redact first name, last name and email address details in Kimble for a Resource whose tenure has ended.



The scope of Redact Resource is limited to Kimble data. If you have added custom fields or notes that identify the Resource, or if you hold any data on the Resource in Salesforce Sales Cloud, this will need to be amended manually.

Resources are redacted from:

- Activity Assignments
- Forecast Timesheets
- Timesheets
- Expense Claims
- Travel Requisitions
- Invoices*
- Credit Notes*
- Supplier Invoices*



*PDF documents are not redacted, for Invoices, Credit Notes or Supplier Invoices.

To redact Resource details:

1. Navigate to Resources.
2. Click the name of the relevant Resource.

Resources
All ▾

24 items • Sorted by Resource Type • Updated a few seconds ago

	<input type="checkbox"/> RESOURCE TYPE ↑	RESOURCE NAME	P...	B...	U...	G...
1	<input type="checkbox"/> Contractor	Luke Walker		N...		Pr...
2	<input type="checkbox"/> Contractor	Ian Jacob	B...	UK	Ia...	Pr...
3	<input type="checkbox"/> Employee	Jennifer Kerry	Pr...	N...	Je...	S...
4	<input type="checkbox"/> Employee	Claire Smith	T...	UK	Cl...	Pr...
5	<input type="checkbox"/> Employee	Paul Jones	B...	UK	P...	S...
6	<input type="checkbox"/> Employee	Colin Lowe		N...		J...
7	<input type="checkbox"/> Employee	Emma Powell	In...	N...	E...	J...

3. Click *Redact Resource*.

Resource Home

Emma Powell > Resource Home

Emma Powell

Resource Type: [Employee](#)

First Name: [Emma](#) Last Name: [Powell](#)

User: [Emma Powell](#)

Business Unit: [North America](#) Business Unit (Secondary): [Business Strategy](#)

Grade: [Junior Consultant](#) Location: [Boston](#)

Primary Role: [Industry Expert](#)

Calendar: [US Calendar](#) Time Pattern Variant: [12 hours/day](#)

Allowance Scheme: [Expense Reimbursement](#) Currency: [USD](#)

Start Date: [01/08/2016](#) End Date: [03/04/2018](#)

Actual Cost: [USD 600.00](#) Actual Cost Unit Type: [Day](#)

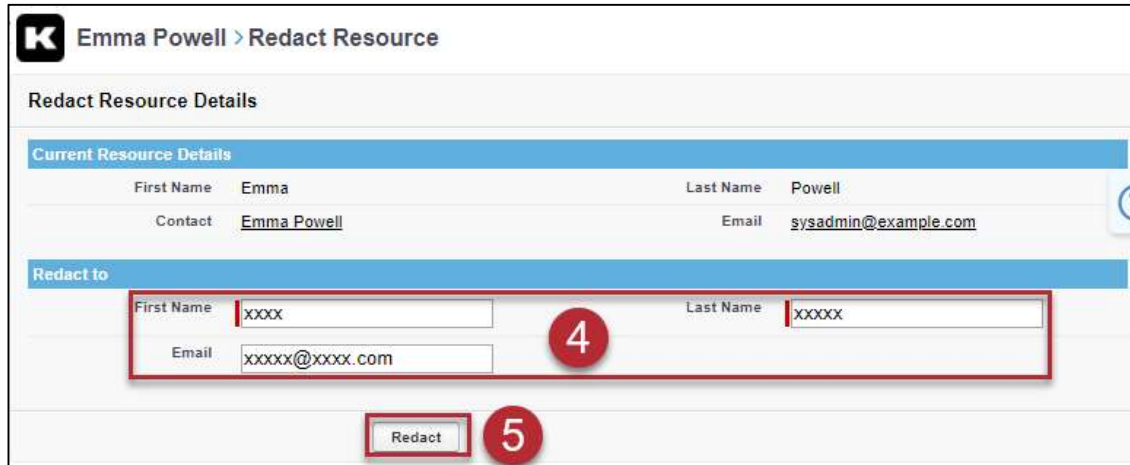
Assigned: [04/04/2018](#)

Redact Resource

4. Enter revised information for:
 - First Name

- Last Name
- Email (optional)

Kimble will replace all instances of the Resource's First Name, Last Name, and Email with the revised information entered here.



K Emma Powell > Redact Resource

Redact Resource Details

Current Resource Details

First Name	Emma	Last Name	Powell
Contact	Emma Powell	Email	sysadmin@example.com

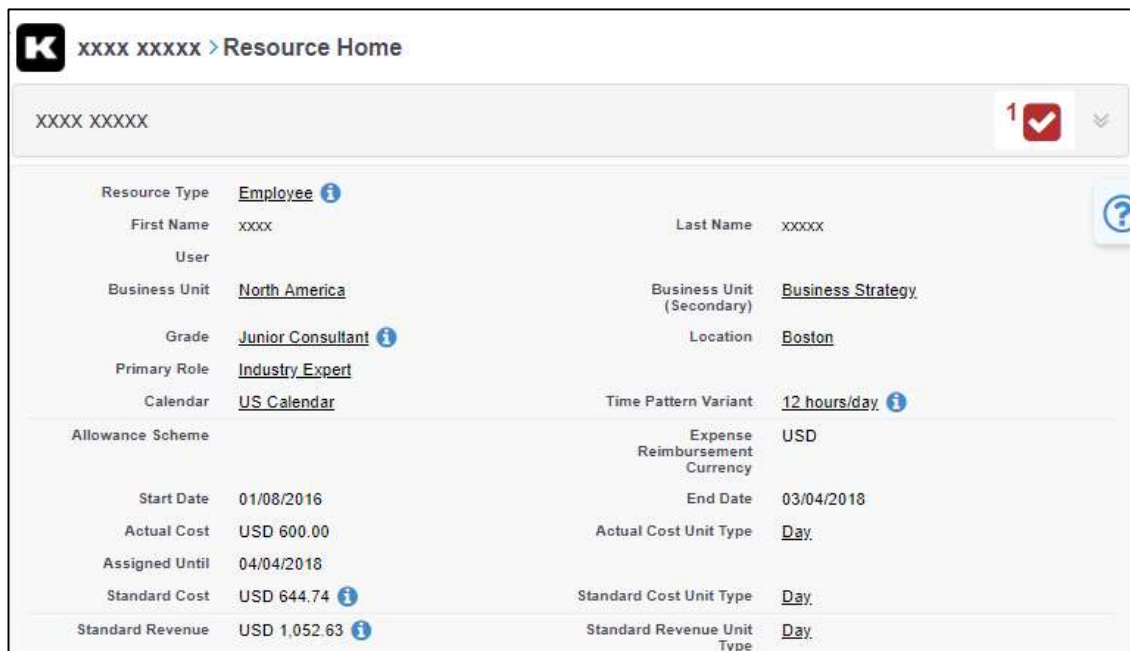
Redact to

First Name	xxxx	Last Name	xxxxx
Email	xxxxx@xxxx.com		

Redact

5. Click *Redact*.

The Resource's details are redacted on the Resource page and anywhere else they appear in Kimble. The link to the Resource's Salesforce Contact is removed from the menu on the Resource page, and the First Name, Last Name and Email on the Contact are redacted too.



K xxxx xxxxx > Resource Home

xxxx xxxxx

Resource Type [Employee](#)

First Name xxxx **Last Name** xxxxx

User

Business Unit [North America](#) **Business Unit (Secondary)** [Business Strategy](#)

Grade [Junior Consultant](#) **Location** [Boston](#)

Primary Role [Industry Expert](#) **Time Pattern Variant** [12 hours/day](#)

Calendar [US Calendar](#) **Expense Reimbursement Currency** USD

Allowance Scheme

Start Date 01/08/2016 **End Date** 03/04/2018

Actual Cost USD 600.00 **Actual Cost Unit Type** [Day](#)

Assigned Until 04/04/2018 **Standard Cost Unit Type** [Day](#)

Standard Cost USD 644.74 **Standard Revenue Unit Type** [Day](#)

Standard Revenue USD 1,052.63

Opted Out Billing? Field

Consent for Contact impacts on Kimble functionality only when dispatching Invoices, Credit Notes or Supplier Invoices.

A new field on Salesforce Contacts – *Opted Out Billing?* – supports compliance with Consent for Contact regulations. If the *Opted Out Billing?* checkbox is checked, this Contact will not be available in the list of Contacts when dispatching Invoices, Credit Notes, or Supplier Invoices.



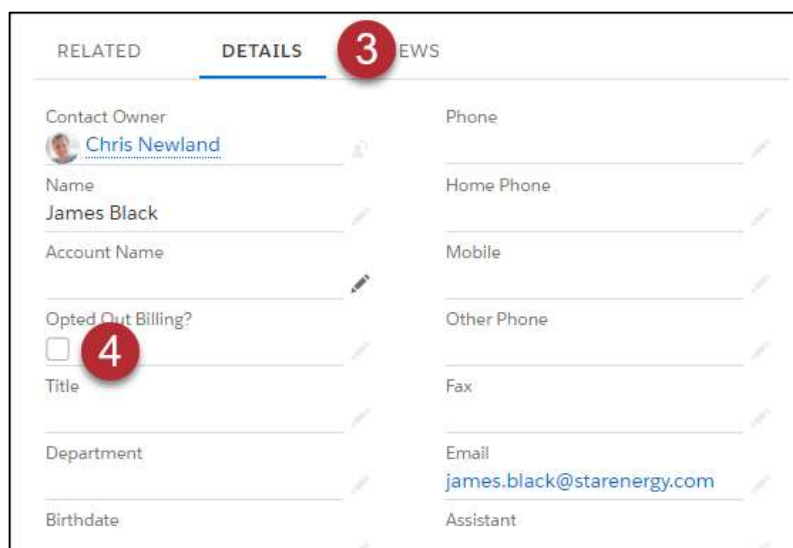
This new field only controls communications from Kimble. You may need to take other actions for non-Kimble communications, including those managed from Sales Cloud. If the *Opted Out Billing?* field is not visible, please have your Kimble System Administrator add it onto the Page Layout, or contact Kimble for further assistance.

To indicate that a Contact has not opted-in to receive dispatched Invoices, Credit Notes or Supplier Invoices:

1. Navigate to Contacts.
2. Click the Contact's name.



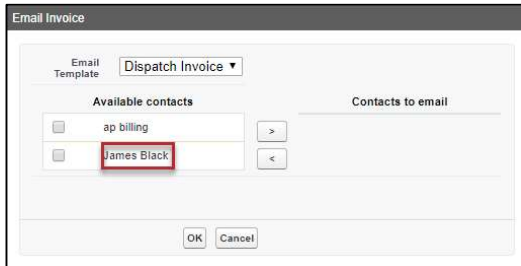
3. If using Lightning, click *Details*.
4. Check the *Opted Out Billing?* checkbox.



5. Click .

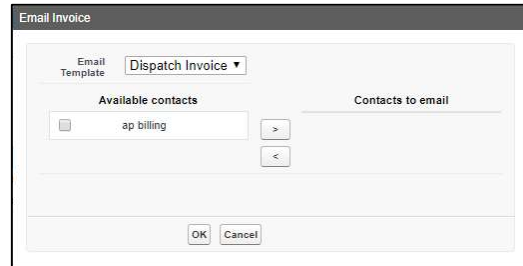
The Contact will no longer be an available when dispatching Invoices, Credit Notes or Supplier Invoices.

Opted Out Billing? is unchecked



The screenshot shows the 'Email Invoice' dialog box. At the top, there is a dropdown menu for 'Email Template' set to 'Dispatch Invoice'. Below this, there are two columns: 'Available contacts' and 'Contacts to email'. In the 'Available contacts' column, there are two entries: 'ap billing' and 'James Black'. The 'James Black' entry is highlighted with a red rectangle. To the right of these entries are two buttons: a right arrow (>) and a left arrow (<). At the bottom of the dialog, there are 'OK' and 'Cancel' buttons.

Opted Out Billing is checked



The screenshot shows the 'Email Invoice' dialog box. At the top, there is a dropdown menu for 'Email Template' set to 'Dispatch Invoice'. Below this, there are two columns: 'Available contacts' and 'Contacts to email'. In the 'Available contacts' column, there is one entry: 'ap billing'. To the right of this entry are two buttons: a right arrow (>) and a left arrow (<). At the bottom of the dialog, there are 'OK' and 'Cancel' buttons.