

Epicor Brochure

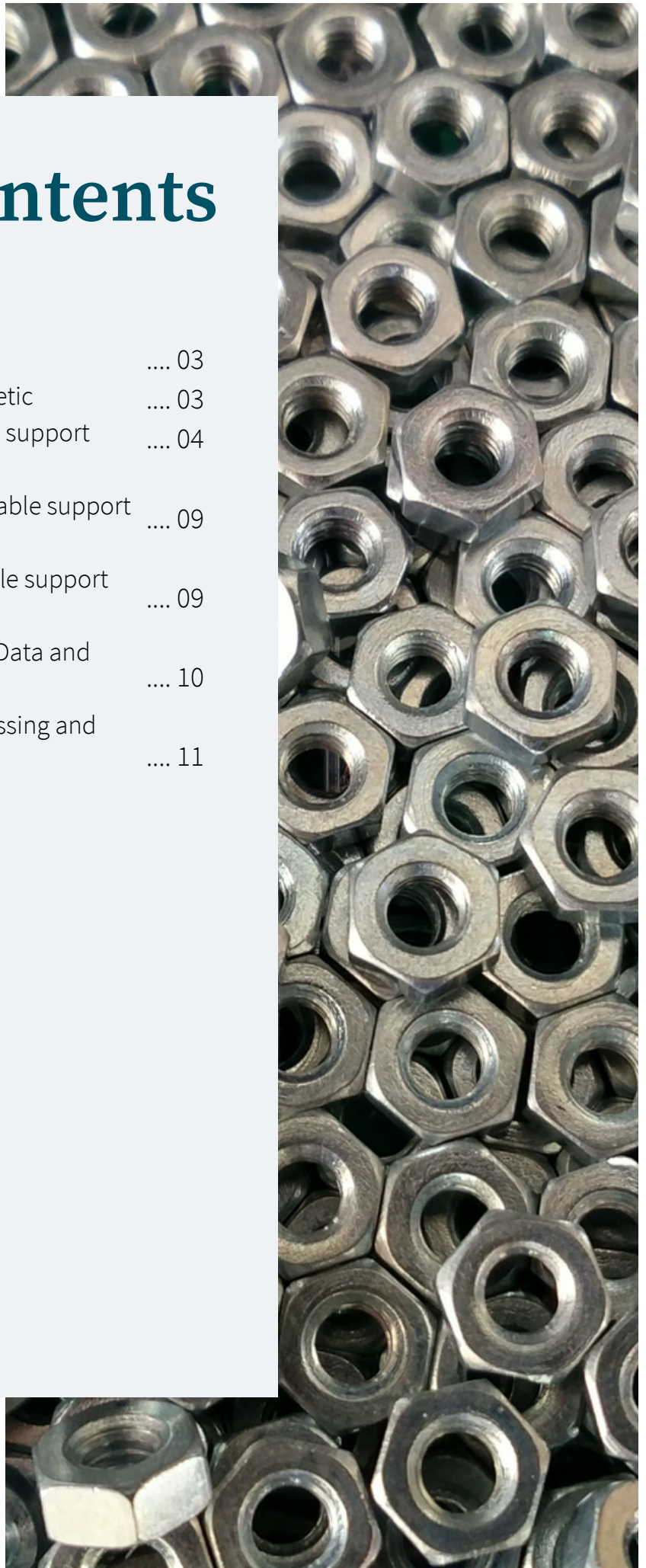
GDPR Response

Responding to Individual
Rights Requests under
GDPR with Epicor Kinetic

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Introduction

This document is intended to provide solution level guidance and instruction to help you as an Epicor Customer fully utilize the Epicor Software in addressing your obligations under the UK and EU versions of UK and EU GDPR. The information contained herein is a concise and simplified guide for organizations, is not exhaustive and is for general guidance only. It should not be relied upon as legal advice or to determine how the UK and EU GDPR might apply to you and your company. We encourage you to work with a legally qualified professional to review the UK and EU GDPR, how it applies, if at all to your organization, and how to help ensure your ongoing compliance. If you would like more detailed and authoritative information about the UK and EU GDPR and its respective requirements, please visit:

For EU GDPR [click here](#).

For UK GDPR [click here](#).

Personal Data held in Epicor Kinetic

Due to the nature of the ERP systems, the data records, including Personal Data (as defined by the UK and EU GDPR), are stored in many entities, tables and fields spread across the entire application.

Epicor ERP stores individual information against the following key entities:

- Epicor Users
- Person / Contact
- Employees
- Payroll Employees
- Customer Contacts
- Supplier Contacts
- Work Force
- Buyers

For each of these entities, the amount and type of Personal Data varies based on functions configuration and implementation of functional areas of the product.

The potential Personal Data stored in Epicor ERP includes but it is not limited to the following:

- Name, Middle Name and Last Names
- Birthday
- Social Security Number / Tax ID
- Personal Address
- Bank Account information
- Phone, Mobile Phone, Home Phone, Pager and Fax
- Individual Photos
- Email, Website, IM, Twitter®, LinkedIn® and Facebook®

Request for Access

Pursuant to the UK and EU GDPR, UK and EU individuals have the right to know if their Personal Data is being processed and stored, and if it is, then the individual has the right to request information on how their Personal Data is processed and stored. The information must be provided to the individual in a way that is clear and understandable. This type of request is also known as “Access Request”.

Options available in Epicor Kinetic to support this type of request.

Personal data information is stored and maintained using the standard entry screens in Epicor Kinetic. Companies can process a “Request for Access” petition by searching the name of the individual on each one of those entry screens or by creating Business Activity Queries to the tables holding the personal information.

Epicor Users

Navigate to: System Setup / Security Maintenance / User Account Security

Search for: User Name

Review: Personal Information

The screenshot displays the 'User Account Maintenance' interface for a user named Clarence Tweed. The interface is organized into several sections:

- User Information:** Includes fields for Name (Clarence Tweed), Address (Main street 221), City (London), State/Prov., Postal Code (WW1 5SE), and Country (United Kingdom).
- Contact Information:** Includes Office Phone (01287 780080), Phone (07844 6790009), and E-mail (ctweed@epicor.com).
- Account Settings:** Includes 'Require Single Sign-On' (checkbox), 'License Timeout Minutes' (15), and 'Client Start Menu ID'.
- Account Actions:** Includes buttons for 'Expire Password' and 'Reset Password', along with fields for 'Date Last Used', 'Password Last Changed', 'Password Expires' (15/05/2020), and 'Password Expires Days' (0).
- Security Settings:** Includes 'Locked Out' (checkbox), 'Locked Out Until', and 'Consecutive Logon Failures' (0).
- ERP Section:** Includes 'Allow Requisitions' (checkbox), 'Advanced Configurator' (checkbox), and 'Shop Tracker Refresh Minutes' (10).
- Mobile Access:** Includes a 'Mobile Password' field and a 'Change Mobile Password' button.

The 'External Identity' field is highlighted with a red box and contains the text 'charles.tweed'. The 'Access Scope' and 'Integration Account' options are also visible at the bottom left.

Person / Contact

Navigate to: Sales Management / Order Management / Setup / Person – Contact

Search for: Person Name

Review: Personal Information

Links grid will show how the Person Contact information is used in other roles. Photo is shown under the Photo tab. More information is shown under the Web Links tab.

The screenshot shows the 'Person Contact Maintenance' interface for 'Andrew Addison'. The page has a blue header with navigation icons and the user's name 'Andrew Addison'. Below the header, there are tabs for 'Detail', 'List', 'Name Details', 'Photo', 'Web Links', 'Comments', and 'Links'. The 'Detail' tab is active, showing a form for 'Contact Information'. The form includes fields for 'Person/Contact' (1), 'Andrew Addison', 'Global' (checkbox), and 'Global Lock' (checkbox). Other fields include 'Function' (VP), 'Role' (Vice President), 'Title' (Vice President), 'Reports To', 'Email' (andrewa@epicors.americas.epicor.net), 'Address' (Addison, INC, 210 Martin Luther King, Jr. Blvd, Madison, WI, 53703, USA), and 'Phone / Fax' (Phone: 608-555-5556, Cell Phone, Fax: 608-555-5566, Pager, Home, Alternate: 608-347-8388). Below the form is a 'Person Contact Link List' table with columns: Contact Link, Primary Contact, Cust. ID, Cust. Name, Ship To, Ship To Name, Cust. Contact Name, Supplier ID, Supplier Name, Purchase Point, Purchase Point Name, and Supplier Contact Name. The table contains one row with a blue background.

Employees

Navigate to: Financial Management / Payroll / Setup / Payroll Employee

Search for: Employee Name

Review: Personal Information and Employee Photo

The screenshot shows the 'Payroll Employee Maintenance' interface for 'John J Labor'. The page has a blue header with navigation icons and the user's name 'John J Labor'. Below the header, there are tabs for 'Employee', 'Detail', 'Roles', 'List', 'Comments', and 'Search Cross-References'. The 'Employee' tab is active, showing a form for 'Employee Photo' and 'Employee Information'. The form includes fields for 'ID' (10), 'SSN' (477-98-6589), 'Person / Contact' (42), 'John J Labor', 'Name' (John J Labor), 'Address' (123 First Avenue), 'City', 'State/Prov' (Chicago, IL), 'Postal Code' (63846), 'Country' (USA), 'Phone', 'Birthday' (01/04/1965), 'Email' (johnlabor@cox.net), 'Payroll Class', 'Hired' (10/06/2007), 'Terminated' (checkbox), 'Date', 'Inactive' (checkbox), 'Emergency Contact' (Contact: Marie Labor, Phone: 312-749-8378), 'Employee Photo' (Image Name: M105), 'Supervisor' (105, David A. Cook), 'User ID' (epicor, Epicor System Admin), and 'Roles' (Sync Name, Sync Address, Sync Phone, Sync Email, all checked).

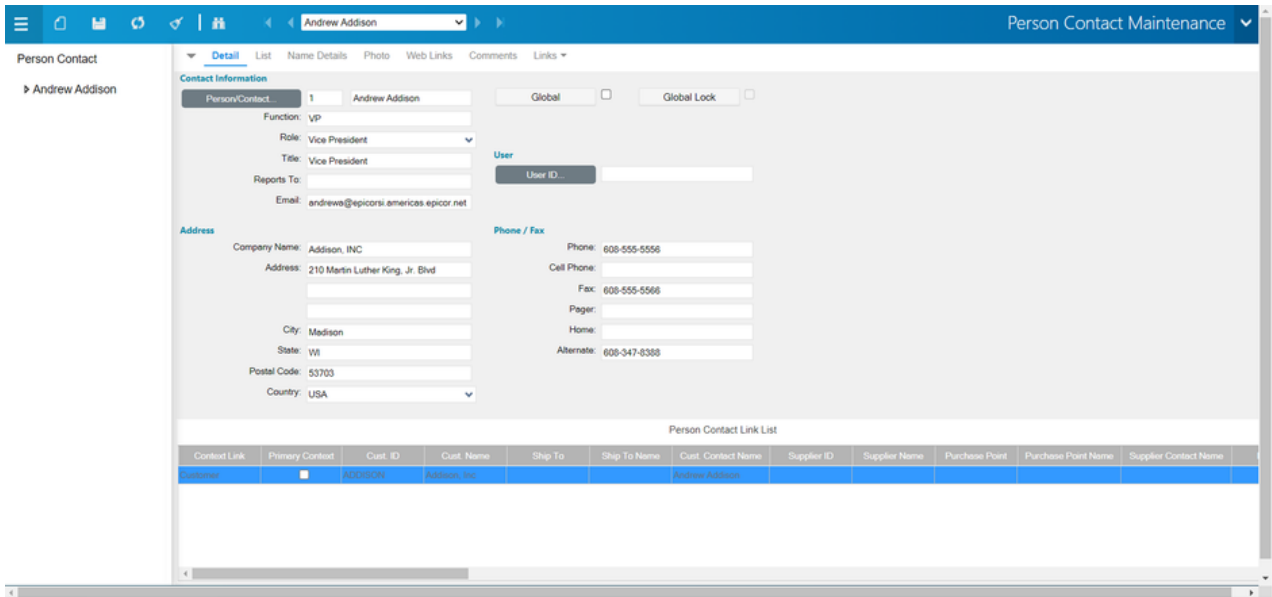
Payroll Employees

Navigate to: Sales Management / Customer Relationship Management / Setup / Person – Contact

Search for: Person Name

Review: Personal Information

Links grid will show how the Person Contact information is used in other roles. Photo is shown under the Photo tab. Look for bank account information under the deductions tab.



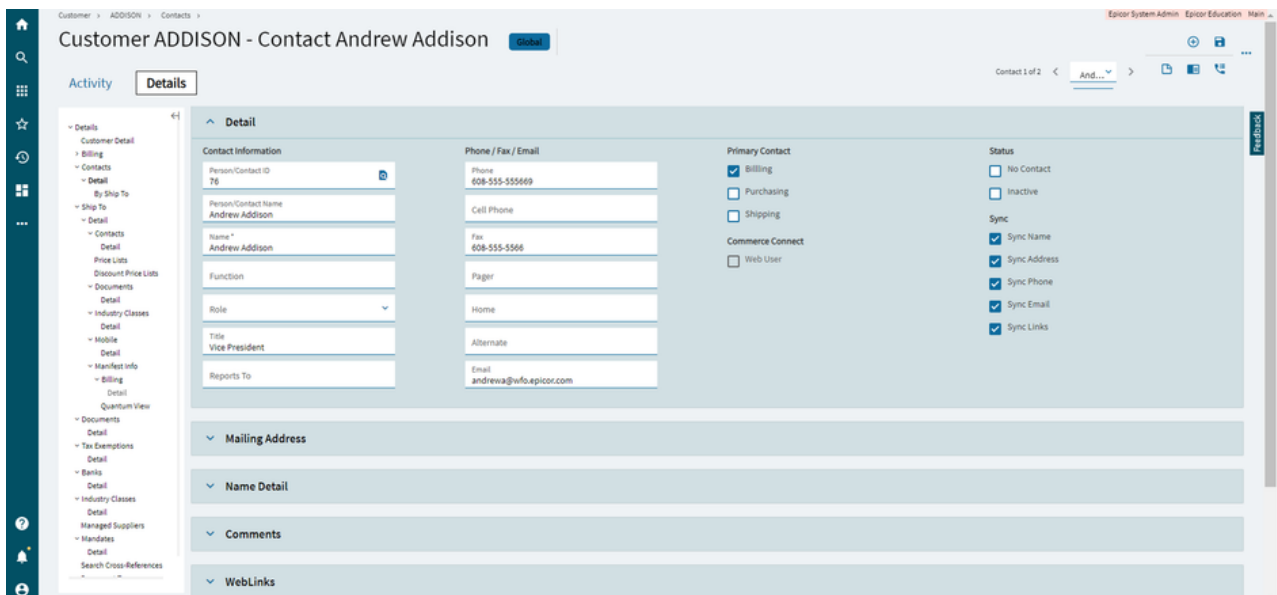
Customer Contacts

Navigate to: Sales Management / Order Management / Setup / Customer

Tabs: Contacts and Ship To / Contacts

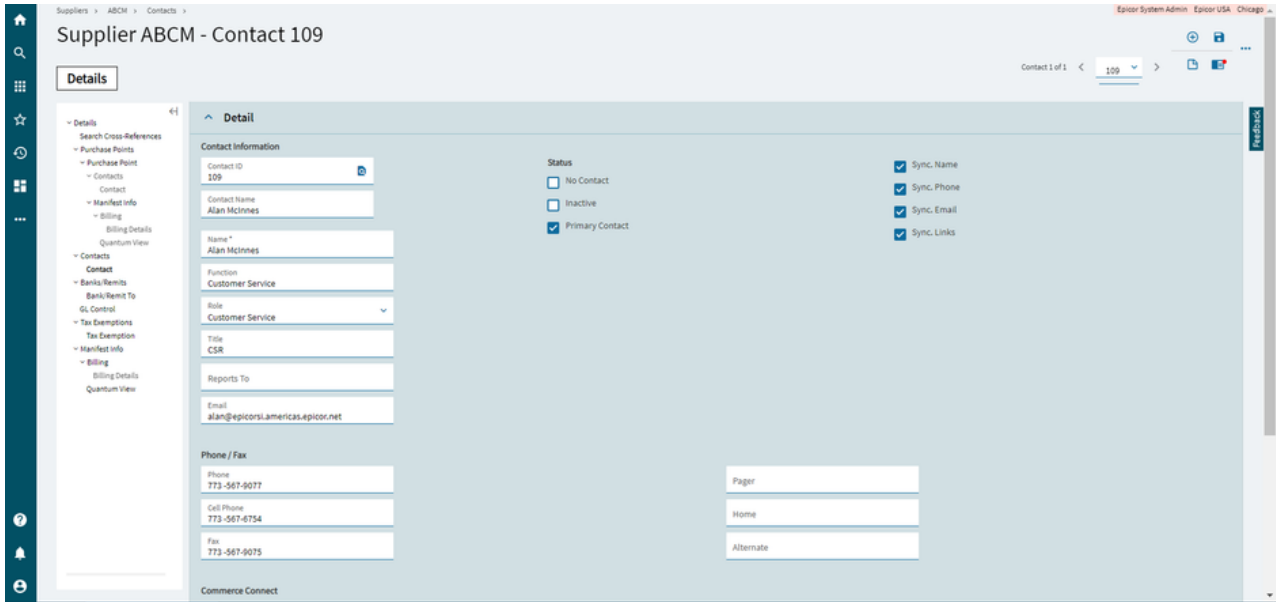
Review: Personal Information

More information is shown under the Web Links tab.



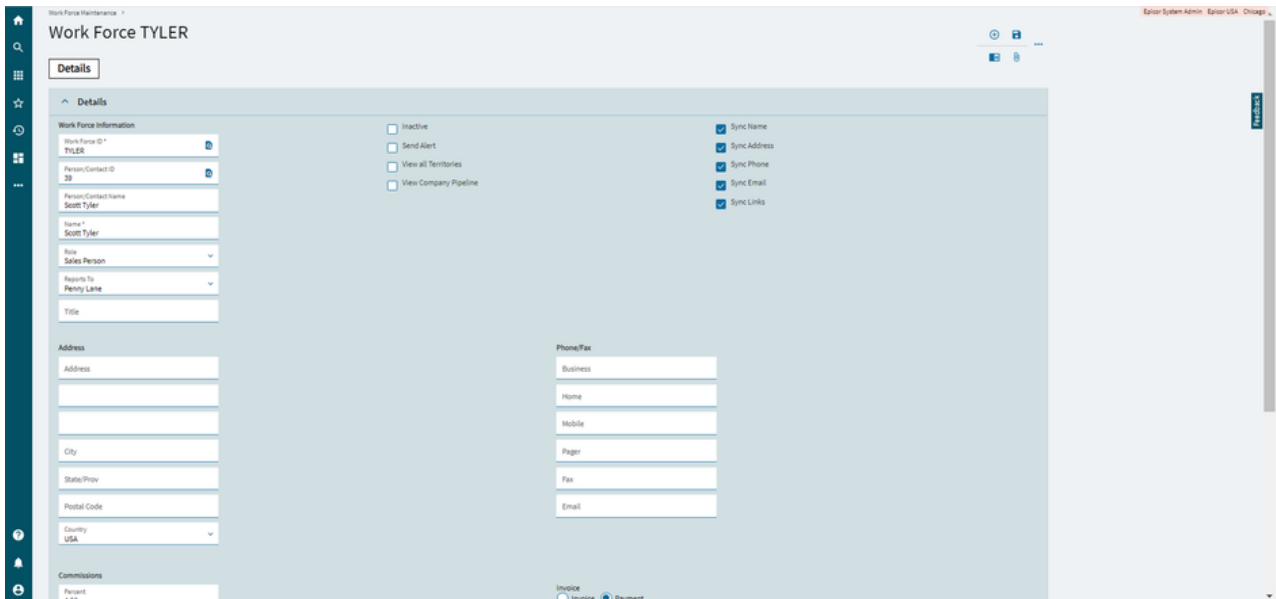
Supplier Contacts

- Navigate to:** Material Management / Purchase Management / Setup / Supplier
Tabs: Contacts and Purchase Points / Contacts
Review: Personal Information
 More information is shown under the Web Links tab.



Workforce

- Navigate to:** Sales Management / Order Management / Setup / Work Force
Search for: Person Name
Review: Personal Information
 More information is shown under the Web Links tab.



Buyers

Navigate to: Material Management / Purchase Management / Setup / Buyer

Search for: Buyer Name

Review: Personal Information

The screenshot displays the 'Buyer Maintenance' application window for 'Buyer HLOW'. The interface features a dark sidebar on the left with navigation icons. The main content area is titled 'Buyer HLOW' and has a 'Details' tab selected. The details form includes the following fields and options:

- Buyer:** HLOW
- PerCon ID:** 23
- Name:** Howard Low
- Name:** Howard Low
- PO Limit:** £ 10,000.00
- Approval Person:** Mehry Crabbree
- Email Address:** (empty field)
- System Default:**
- Inactive:**
- Sync Name:**
- Sync Email:**
- Consolidated Purchasing:**

Below the main form, there is a section for 'Authorized Users' which is currently collapsed.

Companies can also create Business Activity Queries (BAQ's), Dashboards and reports to review and validate personal information. The database tables that should be used as the source of those tools are as follows.

Entity	Table
Epicor Users	Erp.UserFile
Person / Contact	Erp.PerCon
Person / Contact Links	Erp.PerConLnk
Employees	Erp.EmpBasic
Payroll Employees	Erp.PREmpMas
Customer Contacts	Erp.CustCnt
Supplier Contacts	Erp.VendCnt
Work Force	Erp.SalesRep
Buyers	Erp.PurAgent

Request for Correction

Pursuant to the UK and EU GDPR, UK and EU individuals may request the correction of incorrect Personal Data. These types of request are commonly referred to as “Requests for Correction” or “Requests for Rectification”.

Options available in Epicor Kinetic to support this type of request.

Companies can process a “Request for Correction” petition by updating the records using the standard entry screens.

Request for Deletion

Pursuant to the EU and UK GDPR, EU individuals may request that all of their Personal Data be deleted in certain situations. This type of request is commonly referred to as “Request for Deletion”, “Request for Erasure” or “Right to be Forgotten Request”.

Notes: If it is not technically feasible to erase Personal Data, it may be possible to update the data so that it is can no longer be linked to an individual. This may be achieved using techniques such as anonymization, masking (replacing Personal Data with another value such as XXXXXX), or otherwise altering the Personal Data such that it is unidentifiable and cannot be re-identified or linked to an individual in any system.

There may be valid reasons why Personal Data, notwithstanding a request, may not be deleted and it is important that any legal requirements and internal policy or processes are fully understood prior to the deletion of personal information. If the Personal Data may not be deleted, then the individual must be informed of such fact and reasoning.

Options available in Epicor Kinetic to support this type of request.

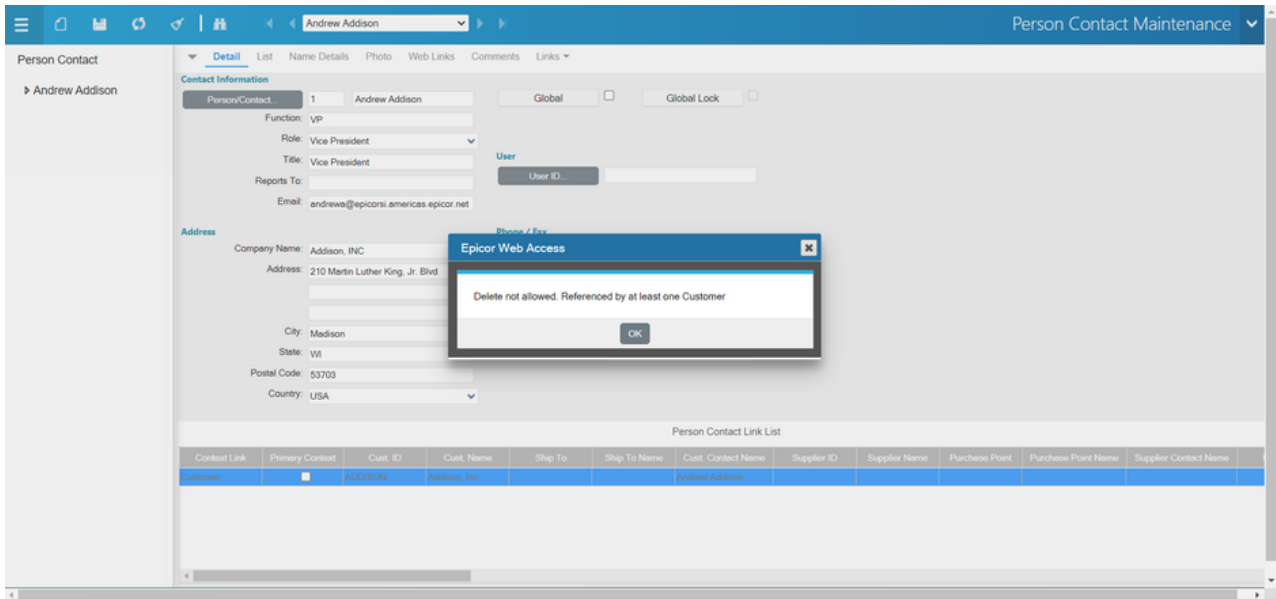
Companies can potentially process a “Request for Deletion” petition by using the Delete action in the entry screens

The screenshot shows the 'Person Contact Maintenance' interface for 'Andrew Addison'. The left-hand navigation pane has the 'Delete' option highlighted. The main content area shows the 'Information' tab with the following details:

- Person/Contact: 1 Andrew Addison
- Function: vp
- Role: Vice President
- Title: Vice President
- Reports To: [User ID field]
- Email: andrewa@epicors.americas.epicor.net
- Company Name: Addison, INC
- Address: 210 Martin Luther King, Jr. Blvd
- City: Madison
- State: WI
- Postal Code: 53703
- Country: USA
- Phone: 608-555-5556
- Cell Phone: [field]
- Fax: 608-555-5566
- Pager: [field]
- Home: [field]
- Alternate: 608-347-8388

Below the form is a 'Person Contact Link List' table with the following columns: Cust Link, Primary Contact, Cust ID, Cust Name, Ship To, Ship To Name, Cust Contact Name, Supplier ID, Supplier Name, Purchase Point, Purchase Point Name, and Supplier Contact Name. The first row shows a link to 'Andrew Addison' under the 'Cust Contact Name' column.

Epicor Kinetic allows deleting records only if the record has not been linked to other Personal entities like Buyers, Customer Contacts, etc. and if they have not been referenced in other entities or transactions like Sales Orders, Purchase Orders, Quotes. If the record has been linked or referenced to another entity or transaction the following message will appear.



If the record cannot be deleted the companies can process a “Request for Deletion” petition by manually anonymizing, masking (replacing Personal Data with another value such as XXXXXX), or otherwise altering the Personal Data such that it is unidentifiable and cannot be re-identified or linked to an individual in any system.

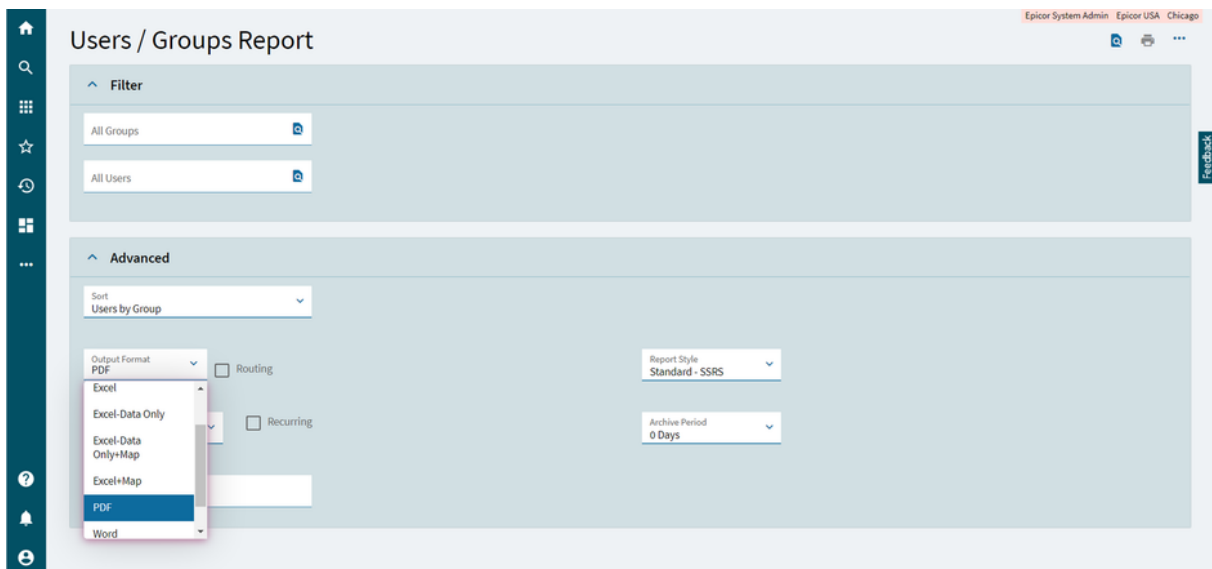
Request for transfer of Personal Data

Pursuant to the UK and EU GDPR, UK and EU individuals may request copies of their Personal Data in a structured format, and request that Personal Data be transferred to a third party of their choosing. This type of request is also referred to as “Request for Data Portability.”

Options available in Epicor Kinetic to support this type of request.

In order to process a “Data Portability” request, companies can create BAQ’s, Dashboards and reports using the Tools available in the Epicor framework (see table in page 9). Once the information is in these tools, it can be exported structured formats like XLS, SLSX XLS, XLSX, HTML, PDF, TXT or CSV.

Exporting Information from a Report



Exporting Information from a BAQ / Grid

The screenshot shows the 'Contact Tracker' interface in Epicor. At the top, there are navigation icons on the left and user information on the right: 'Epicor System Admin', 'Epicor USA', and 'Chicago'. Below the title bar, there are filters for 'Contacts' (set to 'All') and a search box containing 'Contact'. The main area is a table with the following columns: Name, First Name, Last Name, Cust. ID, Customer Name, and CustNum. The table contains 15 rows of contact data. A context menu is open over the table, showing options: Refresh, Save Layout, Export To Excel, and Personalize Columns.

Name	First Name	Last Name	Cust. ID	Customer Name	CustNum
Alfred Vincent	Alfred	Vincent	TWINGITIES	Twin Cities Motor Company	
Andrew Addison	Andrew	Addison	ADDISON	Addison, Inc	
Beverly Joseph	Beverly	Joseph	WEB000355	Guest Customer	
Bob Foreman	Bob	Foreman	VINEPRINT	Vineyard Printing Inc.	
Bob Formann	Bob	Formann	ECD	East Coast Distribution	
Christa Ultieg	Christa	Ultieg	CLARBL	Claronet Clinic - Bloomington	
Dave Greener	Dave	Greener	CHIGLEASE	Chicago Leasing Inc.	
ECC03 Admin	ECC03	Admin	B2CCASH	B2C Default Cash	
Frank DiCapris	Frank	DiCapris	ECD-R	East Coast Distribution - Raleigh	
Frank Fairbanks	Frank	Fairbanks	BOEING	Boeing Company	
George King Bundy	George	Bundy	IMC	International Machine Company	
Gerald Pennard	Gerald	Pennard	KENCO	Kenco Aeronautics	
Jane Butzer	Jane	Butzer	CLARPR	Claronet Prompt Care	
Jennifer Simpson	Jennifer	Simpson	BOEING	Boeing Company	
Jerry Johnson	Jerry	Johnson	NORTHERN	Northern Machine	
Jerry Lanier	Jerry	Lanier	DALTON	Dalton Manufacturing	
Jessica Jackson	Jessica	Jackson	ECD-A	East Coast Distribution - Albany	

Requests to restrict or stop processing

Pursuant to the UK and EU GDPR, UK and EU individuals may request a pause, or temporary stop, of the processing of their Personal Data in certain situations, for example, when the accuracy of the data is in question or when the individual believes the processing is unlawful.

Options available in Epicor Kinetic to support this type of request.

In order to process a “Restrict Processing” request, Epicor® ERP allows some methods to disable some personal information records or flag them as inactive using the standard entry screens.

The screenshot shows the 'Payroll Employee Maintenance' screen for 'John J Labor'. The interface includes a navigation menu on the left with 'Payroll Employees' and 'John J Labor'. The main area is titled 'Employee > Detail' and contains several sections:

- Employee Info:** ID (100), SSN (477-98-6589), Person / Contact (42 John J Labor), Name (John J Labor), Address (123 First Avenue), City, State/Prov (Chicago, IL), Postal Code (63846), Country (USA), Phone, Birthday (01/04/1965), Email (johnlabor@cox.net), Payroll Class.
- Employee Photo:** Image Name (M105), Supervisor (105 David A. Cook), User ID (epicor Epicor System Admin).
- Roles:** Sync Name (checked), Sync Address (checked), Sync Phone (checked), Sync Email (checked).
- Termination:** Terminated (checkbox), Date, Inactive (checkbox).
- Emergency Contact:** Contact (Marie Labor), Phone (312-749-8378).

Entity	Method
Epicor Users	Disable Epicor User by clicking "Disable Account"
Person / Contact	Flag as inactive all the "Links"
Person / Contact Links	Not applicable
Employees	Change the Status to "Inactive"
Payroll Employees	Flag the record as "Inactive"
Customer Contacts	Flag the record as "Inactive" and or flag the record as "No Contact"
Supplier Contacts	Flag the record as "Inactive" and or flag the record as "No Contact"
Work Force	Flag the record as "Inactive"
Buyers	Flag the record as "Inactive"



EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

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