

GDPR Data Protection Principles and TAS Books

Under the General Data Protection Regulation (GDPR) individuals have increased rights over the personal data you hold on them. This includes the right to know why you're holding their data and what you're using it for as well the right to request data is rectified or destroyed.

Sage TAS Books is mainly designed to hold the data you need to carry out your duties. However, if you are using it to process personal data, you need to make sure you're aware of an individual's rights.

You can find out more detail about each right from the www.dataprotection.ie and <http://gdprandyou.ie>.

Collected for specified legitimate purposes

Your organisation should have procedures in place for identifying the reason for processing a personal data. You need to have a clear and compelling case for why you need to use a person's data and it is good practice to document the reasoning behind your decision. This also applies to data used for marketing purposes.

Adequate, relevant and limited to what's necessary

You shouldn't collect more data than is necessary for the original purpose. The best practice is to calculate the information you need to achieve your goals and document this.

Accurate and, where necessary, kept up to date

You should take reasonable steps to ensure the personal data you hold is accurate and up to date and have a process in place to address how you'll maintain the data you're processing and storing, for example, carrying out regular audits.

Kept in a form that permits identification for no longer than is necessary

The GDPR doesn't set out any specific minimum or maximum periods for keeping personal data, instead, it says you must keep data no longer than is necessary for the purpose you obtained it for. This protects the individual by making sure irrelevant or out of date information is deleted. You should review the length of time you keep personal data for and if you don't already have one, create a retention policy. You can find out more from www.dataprotection.ie and <http://gdprandyou.ie>.

Once you've identified your retention dates, you need to remove any data that's no longer necessary. To do this, you can overwrite the information in the relevant records to anonymise it, for example, change the contact name to XXX. For information on removing data from your TAS accounts please see <https://pimbrook.ie/knowledge-base/4522/>.

Processed in a manner that ensures appropriate technical and organisational security

You should keep the data you hold safe and secure and ensure you have appropriate protection and information security policies, procedures and standards in place. These apply to IT systems, paper records and physical security.

In terms of your software, you must ensure that your computer or network on which it's installed is secure. If necessary, check with your IT support.

Consent

If you have another lawful basis for collecting personal data, you may not always need consent, but you need to have policies in place for this. You can find out more from www.dataprotection.ie and <http://gdprandyou.ie>.

GDPR Individual Rights and TAS Books

Right to be informed

You must tell people what you're doing with their personal data this includes any personal data you hold in software applications. In TAS Books you will hold a certain amount of data about your customers and suppliers. Your company would normally need a privacy statement or notice to cover this. You can find out more about what type of information you need to inform individuals about from the www.dataprotection.ie and <http://gdprandyou.ie>.

Right of access

Individuals have a right to access their personal data, so they are aware of what data you hold and what you're holding it for. They have a right to:

- Confirmation that you're processing their data.
- Access their personal data.
- Access other supplementary information.

If an individual sends you a subject access request, you must send them the relevant information.

Right to rectification

You must make sure that the personal data you hold for individuals is accurate and kept up to date. If an individual asks you to correct their data, you must update this in your software. You must respond to the individual within one month, or two months if the request is complex.

In TAS Books you can amend the customer or supplier records that may hold information about individuals, such as their name and email address.

Right to erasure (right to be forgotten)

Unless there's another legal reason for keeping personal data, you must delete or remove the data at the request of the individual. In Sage TAS Books you can amend the customer or supplier records to overwrite information to anonymise it, for example, change the client name to XXX.

You can find out more about when this right applies and other conditions from www.dataprotection.ie and <http://gdprandyou.ie>. For more information on removing data from your TAS accounts please see <https://pimbrook.ie/knowledge-base/4522/>.

Right to restrict processing

Individuals have a right to block or suppress processing of their personal data. If they request this, you can still store their personal data, but you can't process it further. You can keep just enough information about them to make sure the restriction is respected in future.

If necessary, you can amend the customer or supplier records to anonymise or remove any non-relevant information.

Right to data portability

If an individual has provided their personal data to you on the basis of consent or contract, they have a right to request that the data is returned to them in a structured, commonly-used and machine-readable format. Machine-readable means the information is structured so that other software can extract the data for example, in an Excel or CSV file, rather than a Word or PDF document.

In TAS Books, when running reports, to export to csv use the option to print to disk, this can then be imported into other software if required.

Right to object

Individuals have a right to object to you processing their personal data. This is mainly aimed at using their data for direct marketing, including profiling, however there are other legitimate reasons for objecting.

Right not to be subject to automated decision making, including profiling

Individuals have a right to object to being subject to a decision based solely on automated processing, including profiling. If you use an automated decision-making system, it should allow for a human intervention.

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