



User Guide

Data Compliance Navigator, version 1.2.0

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1. Welcome

Welcome to the user guide for the Privitar Data Compliance Navigator (DCN). Designed to make data compliance simple and quicker, DCN:

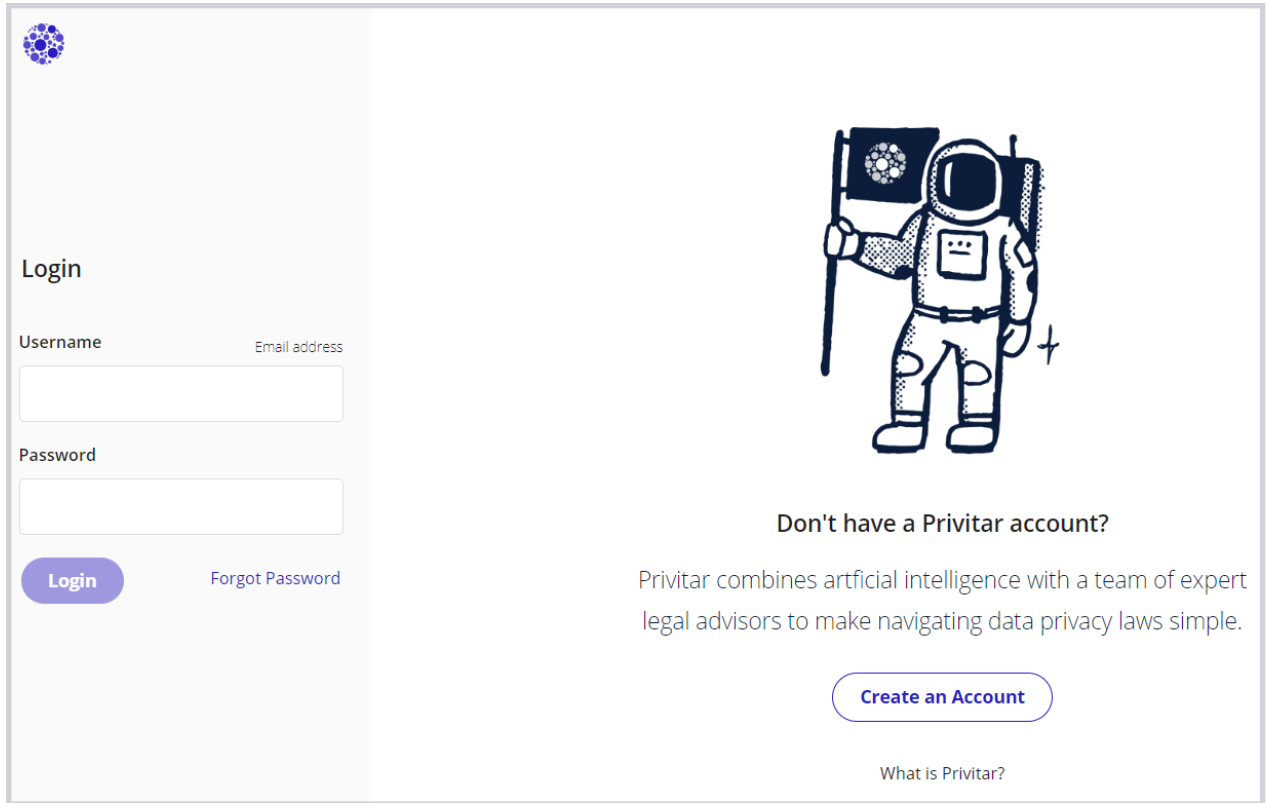
- Provides data owners with the right rules and data compliance steps across varying contexts to ensure consistency.
- Enables data guardians to automate data compliance, thereby reducing human intervention, and saving time and money.
- Enables data consumers to:
 - analyze their intended data project against relevant changing data compliance rules
 - see how their intended usage and purpose, and target data storage (and access) locations may affect risk
 - understand which compliance regulations your data must meet

This document covers:

- [Creating a company account](#)
- [Logging in and initial options](#)
- [Adding team members to a company account](#)
- [Creating a case](#)

2. Create a Company Account and Personal Account

1. Navigate to the Data Compliance Navigator URL in your browser.



2. Click **Create an Account**.
3. Click **Get Started**.

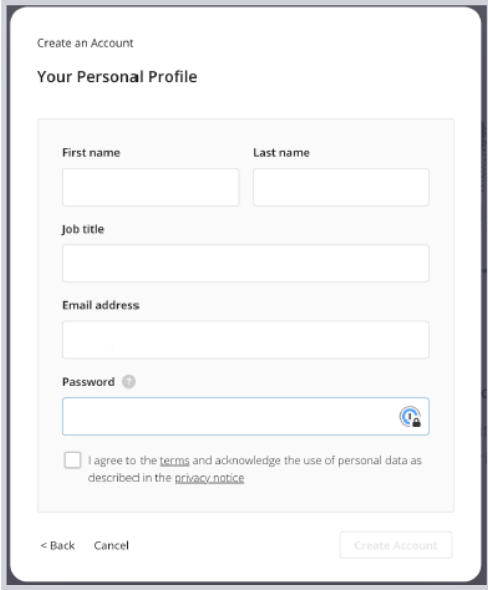
A screenshot of the 'Create an Account' form, specifically the 'Your Company Profile' section. The form contains the following fields: 'Company name' (text input), 'Company website' (text input with 'www.companyhouse.com' as a placeholder), 'Company location(s)' (dropdown menu with 'Select as many as applicable...' as the selected option), 'Sector' (dropdown menu with 'Please select one' as the selected option), and 'Number of employees' (dropdown menu with 'Please select one' as the selected option). At the bottom of the form, there are '< Back', 'Cancel', and 'Next' buttons.

4. Enter your company information:

- a. Enter the company name.
- b. Enter the company website address.
- c. Select a company location.
You can select multiple locations.
- d. Select the company business sector.
- e. Select a category for the number of company employees.

5. Click **Next**.

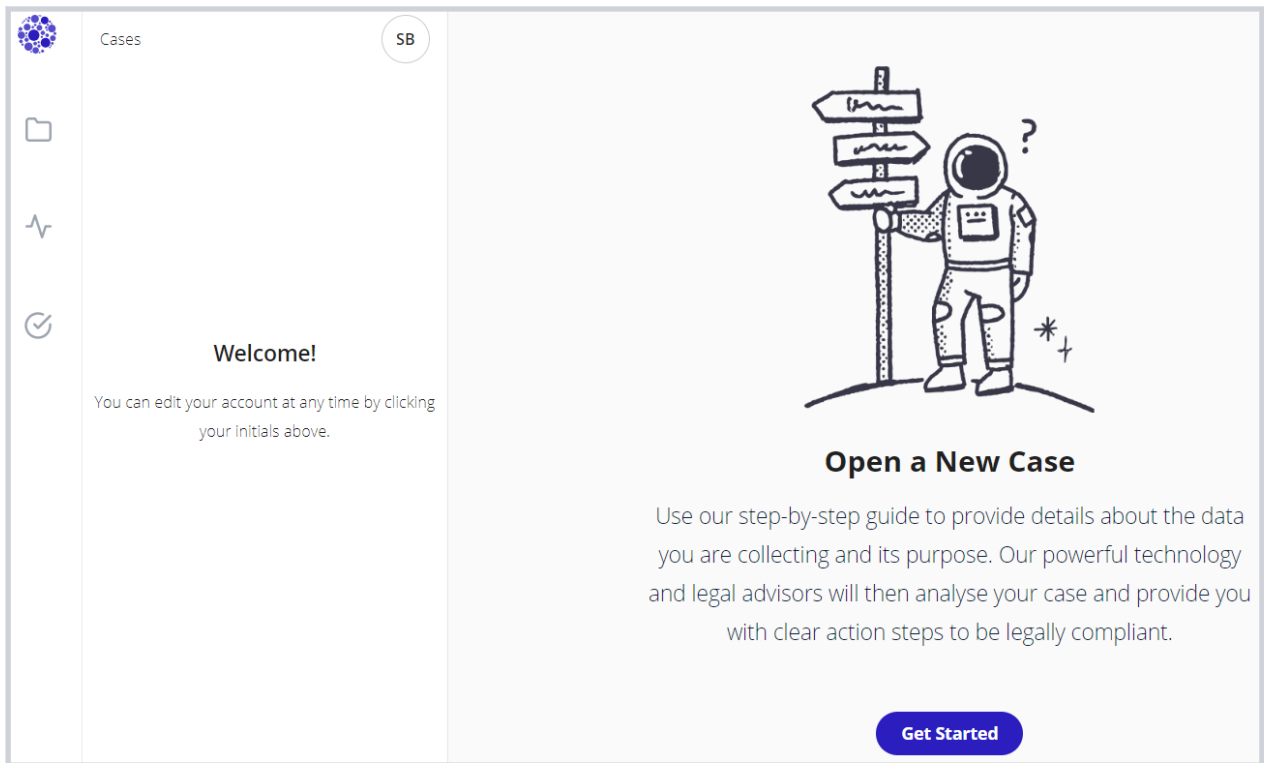
The **Your Personal Profile** page appears. As the default user, enter your personal details and create a password.



The screenshot shows a mobile application interface for creating an account. At the top, it says "Create an Account" and "Your Personal Profile". The form contains several input fields: "First name" and "Last name" (two separate boxes), "Job title" (one box), "Email address" (one box), and "Password" (one box with a strength indicator icon). Below the password field is a checkbox with the text "I agree to the [terms](#) and acknowledge the use of personal data as described in the [privacy notice](#)". At the bottom left, there are "< Back" and "Cancel" buttons. At the bottom right, there is a "Create Account" button.

6. Enter your personal details and create a password. You will be the default user, with full administrative rights.
7. Read the terms and privacy notice, and check the box to acknowledge that you have read them and accept them.
8. Click **Create Account** to complete the default user account setup.

3. Log In and Options



When you log in to the Data Compliance Navigator, you have three options:

- Select a left navigation option. Select **Cases** to view and edit existing case files.
- Click your initials to edit:
 - Your account
 - Team settings
 - Company account settings
 - Your payments and account plan
- [Open a new case](#). This starts a step-by-step process of case creation.

4. Add Team Members to a Company Account

To add team members to your company's account:

1. Highlight your initials in the left navigation menu, and then click **Team**.
The **Manage user accounts for your company** page appears.
At this point, there is only one account; the Owner account.
2. Click **Add New User**.
The **Invite a Team Member** dialog appears.
3. **First name**—Enter the team member's first name.
4. **Last name**—Enter the team member's last name.
5. **Job title**—Enter the team member's job title.

6. **Access level of user**—Select the level of access that the new user will have on the system.
7. **Email address**—Enter the user's email address.
DCN uses this to send an invitation to log in to the system.



Note

Administrators can add and delete team members. Team members cannot add or remove other team members.

8. Click **Send Invite** to create the new user account.
The process completes when the new user clicks the link in their email invitation and logs in to the system. Until that happens, the account stays in the **Invite sent** status.

5. Create a Case

1. On the welcome screen, click **Get Started**.



Note

If cases already exist, click the cases symbol in the left navigation and click **Open a New Case**.

The **Data Request** dialog opens. The four fields define the data that you wish to request. In each field, select from the available responses.

2. **Data subject**—Select the people to whom the source data relates. You can add one type of data subject per case. To add another, you will need to create an additional case.

3. **Type of data collected**—Select one or more data types (the source data) to be accessed and used.
4. **Origin of data**—Select one or more places where the data subjects are located.
This is a long list of geographical locations. Start typing the location name to narrow down the selection options.
5. **Number of people the data is retrieved from**—Select the number of people from whom data will be sourced.
6. Click **Next**.

The **Data Location** dialog appears. Define where the data is stored and the type of organization managing the data.

7. **Data storage managed by**—Select one or more data management options.
8. **Where will the data be stored**—Select one or more geographical locations that are used for data storage.

This is a long list of geographical locations. Start typing the location name to narrow down the selection options.

9. Click **Next**.

The **Data Purpose** dialog appears. Define who will access the data and why.

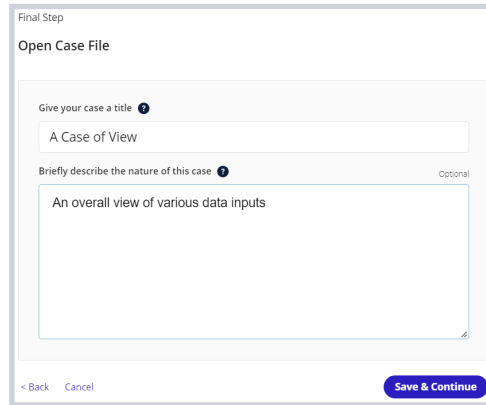
10. **Who will access the data**—Select one or more groups of people who will access the data.
11. **What will the data be used for**—Select one or more categories of data usage.
12. **Where will the data be accessed**—Select one or more locations from where the data is accessed.

This is a long list of geographical locations. Start typing the location name to narrow down the selection options.

13. Click **Next**.

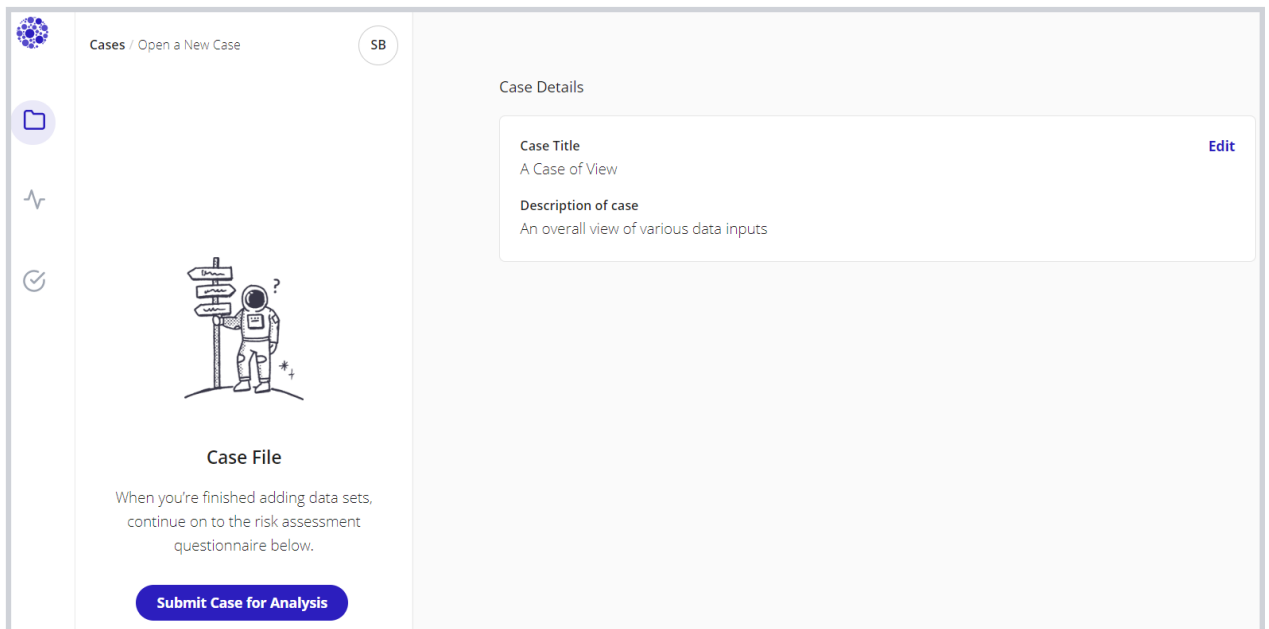
The **Final Step** dialog appears.

14. **Give your case a title**—Enter a title for your case that gives a clear idea what this case is about.



The screenshot shows a 'Final Step' window titled 'Open Case File'. It contains two input fields: 'Give your case a title' with the text 'A Case of View' and 'Briefly describe the nature of this case' with the text 'An overall view of various data inputs'. The description field is marked as 'Optional'. At the bottom, there are '< Back' and 'Save & Continue' buttons.

15. **Briefly describe the nature of this case**—Enter information about the case that you think is important or helpful for others to know.
16. Click **Save and Continue** to open the case file.



The screenshot shows the 'Cases / Open a New Case' interface. On the left, there is a sidebar with icons for home, a pulse line, and a checkmark. The main content area is split into two panels. The left panel, titled 'Case File', features an illustration of an astronaut at a signpost and a 'Submit Case for Analysis' button. The right panel, titled 'Case Details', shows the case title 'A Case of View' with an 'Edit' link and the description 'An overall view of various data inputs'.

17. At this point, you can still click **Edit** if you wish to make changes to the case. Otherwise, click **Submit Case for Analysis**.
A case report appears.

5.1. Case Report

The case report shows all items that your organization needs to address in order to be compliant in each of the countries in which the case will operate.

Cases / Case File / Report SB

Case Title
A Case of View

Report Actions

Risk Level
An overview of your risk assessment analysis

Report
The results of your risk assessment

Advisor Review
Submit report to your legal & compliance team

Case File

Edit Case File
Editing the case file may impact your risk level

Report

Based on the information in your case file, below is a breakdown of action items we've identified as needing to be addressed in order to be compliant in the countries you operate in — ordered by their level of risk.

Permitted

- Germany - Berlin**
Permissible [Upgrade to View](#)
- United States of America (USA) - New York**
Permissible [Upgrade to View](#)
- United Kingdom (UK) - England**
Permissible [Upgrade to View](#)

Pending

- 1 France**
Pending [Upgrade to View](#)

The highest risk items are at the top of the report.

Click **Risk Level** to view the overall risk level for your case. This shows:

- the overall risk to the company by proceeding with the case
- where the required actions are not completed

Cases / Case File / Risk Level SB

Case Title
A Case of View

Report Actions

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Editing the case file may impact your risk level

Risk Level

L **A Case of View**
Last updated October 13, 2022 [View Report](#)

What does low risk mean?
This is calculated as the risk of non-compliance with law, risk of harm to individuals and/or where there are actions to complete, risk for failure to carry out and implement those actions.
This case is considered low risk. *The risk may be further managed by following any actions set out in your report.*

What can you do to lower your risk?
[View Your Report](#)

What if you change the way you handle data?
Any change(s) to the way you handle data may affect your risk profile. If you do make any changes, you should edit your case file or open a new case.

If you wish to reduce the case risk, you need to edit the case. For example, you may decide to mitigate risk by not making it available for consumption in a particular country.

To re-edit the case, click **Edit Case File**. You can edit each of the sequential screens described in [Create a Case](#).