

# DSAR (Data Subject Access Request)

## Introduction to DSAR Management

### What is DSAR?

A Data Subject Access Request (DSAR) is a request raised by a consumer to an organization that gives the right to access personal data processed by the organization. Additionally, it allows consumers to exercise that right within a reasonable timeline.

Consumers have the right to receive a copy of the data and other information to ensure all their privacy rights are respected. Publishers need to educate their client organizations about the data privacy regulations like GDPR and CCPA and how they affect their privacy policies. Consumers and users are not the only people who have the right to submit a DSAR also, employees, contractors, sales prospects, and job candidates can also submit one. Organizations must respond to DSAR requests within 45 business days.

### How to manage DSAR System?

Adzapier helps build and maintain a DSAR system with Adzapier that includes the following necessary components.

- [Web Form](#) - Your website or app should have a web form for the users to create their requests.
- [Workflows](#) - Your organization needs a set of internal workflows for various request categories requests to process the request among your team.
- [Dashboard](#) - An information panel for monitoring the request receiving and the status of each request.
- [Data discovery system](#) - When you receive an enormous number of requests you might need an automated data discovery system to track the consumer data through the database or hosting systems.
- [Responding system](#) - You need a responding system to validate and respond to each request including the features of assigning subtasks, messaging, and emailing with documents.

# Manage Workflows

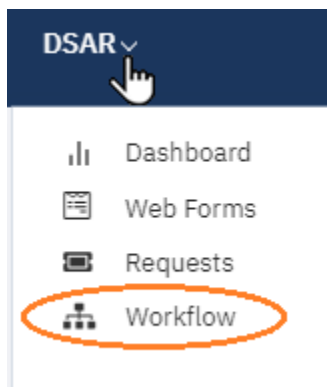
Workflow is a step-by-step process flow performed by the approver while processing a DSAR request. The request senders can track their request and find what stage of the workflow the request stands at.

In the Adzapier Portal, four predefined workflows are available namely Access Workflow, CCPA Workflow, Default Workflow, and Delete Workflow. Moreover, you can create your customized workflow. While creating the DSAR web form for your organization, you should choose any one of the workflows from the list.

## Predefined Workflows

As mentioned above there are four predefined workflows available in our portal.

- To view the predefined workflows, in the DSAR menu, click Workflow.



A list of workflows appears.

Search		<a href="#">+ Create</a>				
Workflow Name	↕	Status	Created by	Last Updated by	Created at ↕	Updated at ↕
Access Workflow		active			10 months ago	10 months ago
CCPA Workflow		active			10 months ago	10 months ago
Default Workflow		active			10 months ago	10 months ago
Delete Workflow		active			10 months ago	10 months ago
5		<< < 1 > >>			Showing 1 to 5 of 5 entries	

- Click each workflow to view the details.

## Access Workflow

"Access Workflow" has seven stages of processing the DSAR.

Unverified > New > Verify Request > Request Fulfill > Legal/Privacy Review > Consumer Notification > Complete.

Access Workflow **ACTIVE**

UNVERIFIED NEW + VERIFY REQUEST + RE >

\* Workflow

Access Workflow

\* Stage ⓘ

UNVERIFIED

\* Guidance Text ⓘ

Only requests that have some type of verification enabled on the web form will be reached at this stage. Webform requests submitted without any verification enabled will go to the new stage directly.

To understand the purpose of each stage, read the Guidance Text of each stage thoroughly. Click the next block to read its Guidance Text.

To view the further blocks, click > on the page.

## CCPA Workflow

If you are concerned CCPA based cookie consent management, the "CCPA Workflow" might opt for the DSAR process.

Stages of CCPA workflow: Unverified > New > Verify Request > Verify Consumer Request > In Progress > Complete.

To compare the workflow with other workflows, click each stage and read the Guidance Text of each stage thoroughly.

## **Default Workflow**

"Default workflow" is the simplest one that has only four stages. This will opt if you use a generic type of cookie consent management. Also, for creating a customized workflow you can prefer this workflow.

Stages of Default workflow: Unverified > New > Notify > Complete.

## **Delete Workflow**

This is similar to Access Workflow and the only difference is the Request Fulfill stage is done after the Legal/Privacy Review. This also has seven stages like Access Workflow.

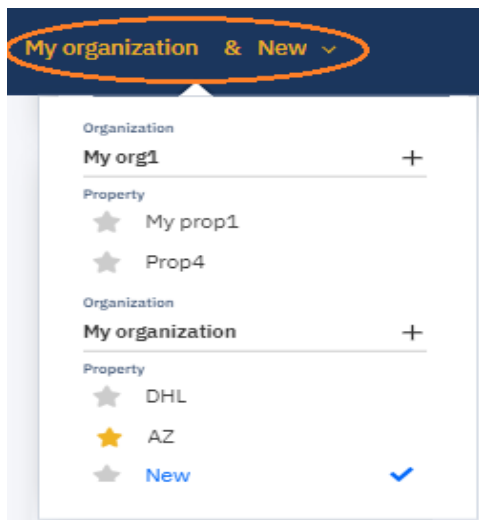
Stages of Delete workflow: Unverified > New > Verify Request > Legal/Privacy Review > Request Fulfill > Consumer Notification > Complete.

**Note:** You can't edit the predefined workflows.

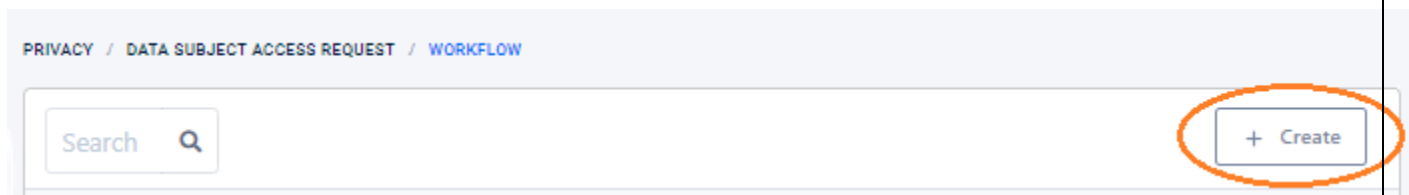
## **Create a New Workflow**

You can create a customized workflow for your organization. The limitation of the number of workflows to be created depends on the Data Subject Request plan that you have subscribed to. For more details about the limitations, see [Subscribe to a DSAR Plan](#). However, there is no limitation to creating the workflow drafts.

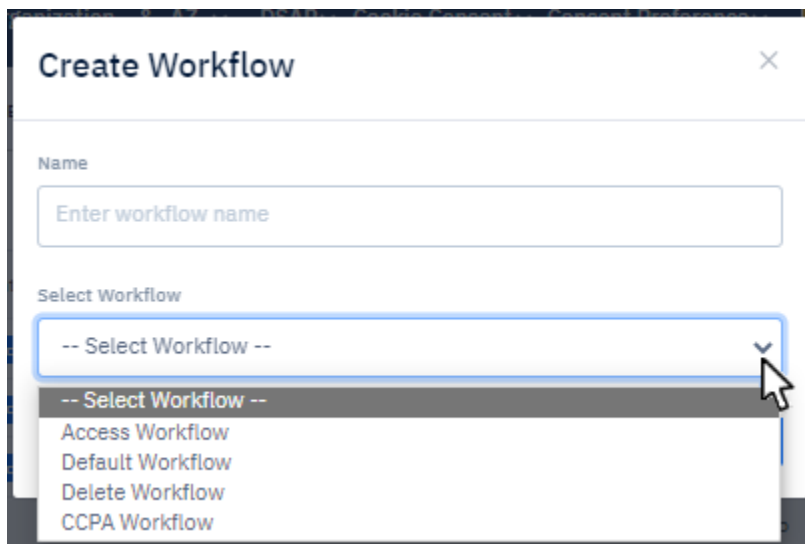
1. On the home page, click the property selection menu and select the organization that you want to create the workflow.



2. Go to Workflows and click Create.



Create Workflow pop-up appears.



3. In Name, type the *name* of the workflow.
4. In Select Workflow, select any predefined workflow.  
The purpose of selecting a predefined workflow is to initiate your workflow design based on any of the above workflows, that is you can start editing the stages that have already


available with the workflow you are choosing. In other words, select any workflow to create a workflow based on that.

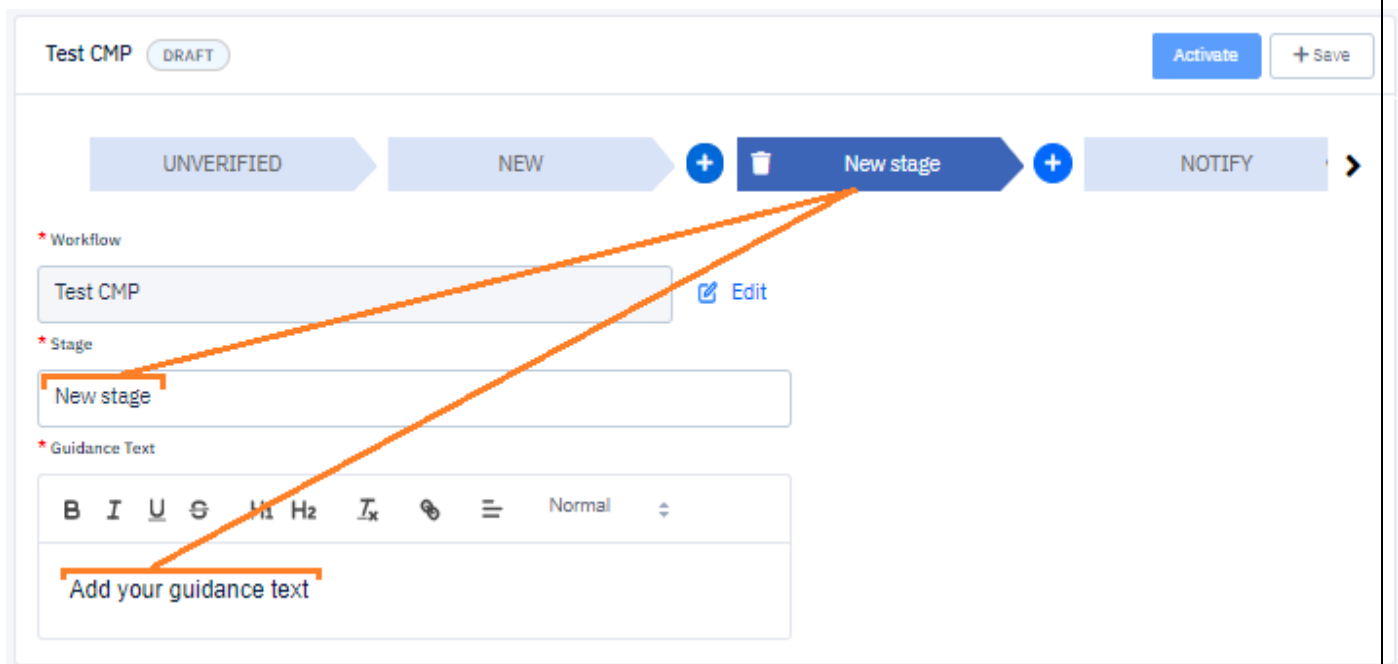
5. Click Save.


The workflow designing page appears. The blocks of workflow stages available on this page are according to the predefined workflow that you have selected in the previous step.

## Add New Stage

You can add new stages in between the existing stages.

1. If you want to add a new stage in between any two stages, click 
2. A new stage is added.



3. To define the title of the new stage, in the Stage text box, type the *title*.
4. To write the description of the stage, in the Guidance Text box, type the *description*.
5. If you want to delete any stage added by you, click  on the block.

**Note:** You can't edit the predefined stages and you can edit only custom stages.

6. After editing the stages, click Save.  
The workflow is saved as a draft and added to the list of workflows.

## Activate New Workflow

Once you activate the workflow, it will be accounted for, so before activating the workflow finalize the draft.

1. Go to the Workflows page and click the workflow draft that you want to activate.

Search

Q

+ Create

Workflow Name	↑↓	Status	Created by	Last Updated by	Created at	↑↓	Updated at	↑↓
Access Workflow		active			11 months ago		11 months ago	
CCPA Workflow		active			11 months ago		11 months ago	
Default Workflow		active			11 months ago		11 months ago	
Delete Workflow		active			11 months ago		11 months ago	
Test CMP		draft	User 1	User 1	20 minutes ago		20 minutes ago	

10

▼

<<

<

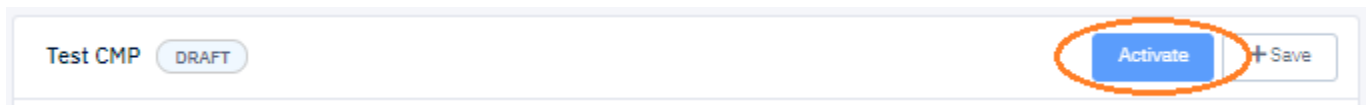
1

>

>>

Showing 1 to 7 of 7 entries

The workflow draft opens.



2. Click Activate.

## Edit Custom Workflows

To edit the active custom workflows,

1. Go to Workflows, in the list of workflows, click the custom workflow that you want to edit.

The screenshot shows the top of a workflow editor. At the top left, it says 'ABC Workflow' followed by a 'DRAFT' button. At the top right, there is a blue 'Edit' button with a pencil icon, which is circled in orange, and a '+ Save' button.

2. Click Edit.

The screenshot shows the 'Test CMP' workflow editor. At the top left, it says 'Test CMP' followed by a 'DRAFT' button. Below this, there is a horizontal flow of stages: 'UNVERIFIED' (light blue arrow), 'NEW' (light blue arrow), and 'New stage' (dark blue arrow). The 'New stage' arrow is circled in orange. To the right of 'New stage' is a blue circle with a plus sign. Below the stages, there are three sections: '\* Workflow' with a text input field containing 'Test CMP' and an 'Edit' button (circled in orange); '\* Stage' with a text input field containing 'New stage'; and '\* Guidance Text' with a rich text editor containing the text 'Add your guidance text'.

3. To change the name of the workflow, click Edit.
4. To edit any custom stages, click the stage, and you can edit the stage name and guidance text. But you can't edit the predefined stages.
5. You can also add a new stage in between the stages.
6. After making the changes, click Save.

## Manage DSAR Web Forms

With your Adzapier account, after successfully subscribing to a Data Subject Request Plan and assigning the desired organization to the subscription, you can create a web form for a Data Subject Access Request for your organization to intake the request from the user. Initially, you can create a web form draft, and then you can publish it once finalized.



Note: Before configuring your web form, you must learn about the DSAR workflows. For more details, see [Manage Workflows](#).

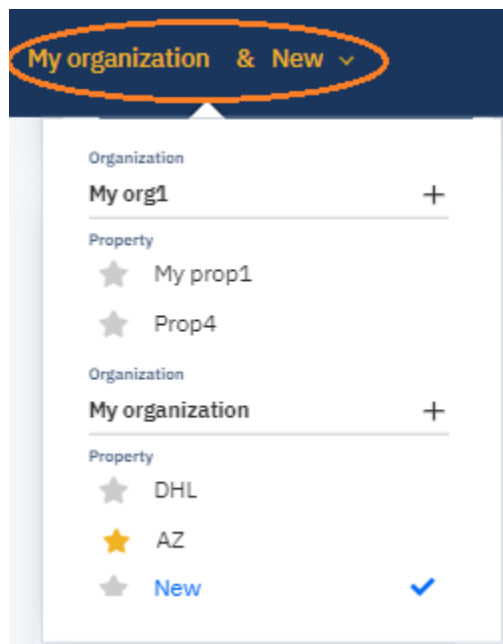
The limitation of the number of web forms to be published depends on the plan you have subscribed to. However, there is no limitation to creating the drafts. For more details about the limitations, see [Subscribe to a DSAR Plan](#).

Before creating a web form, you must assign the desired organization to a DSAR subscription. For more details, see [Assign Organization to DSAR Subscription](#).

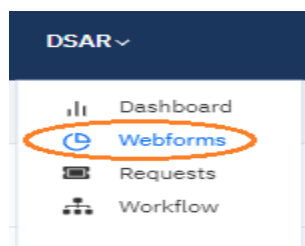
## Create Web Forms

Initially, create a DSAR web form draft for your organization.

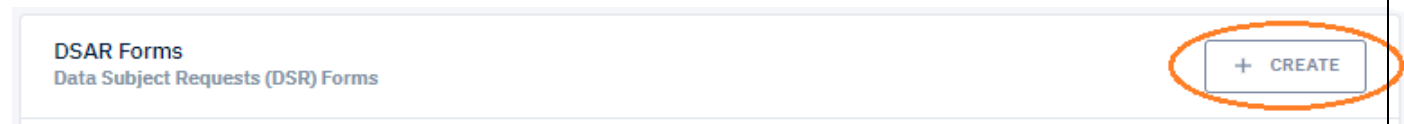
1. On the home page, click the property selection menu and select the organization you want to create a web form.



2. On the DSAR menu, click Webforms.



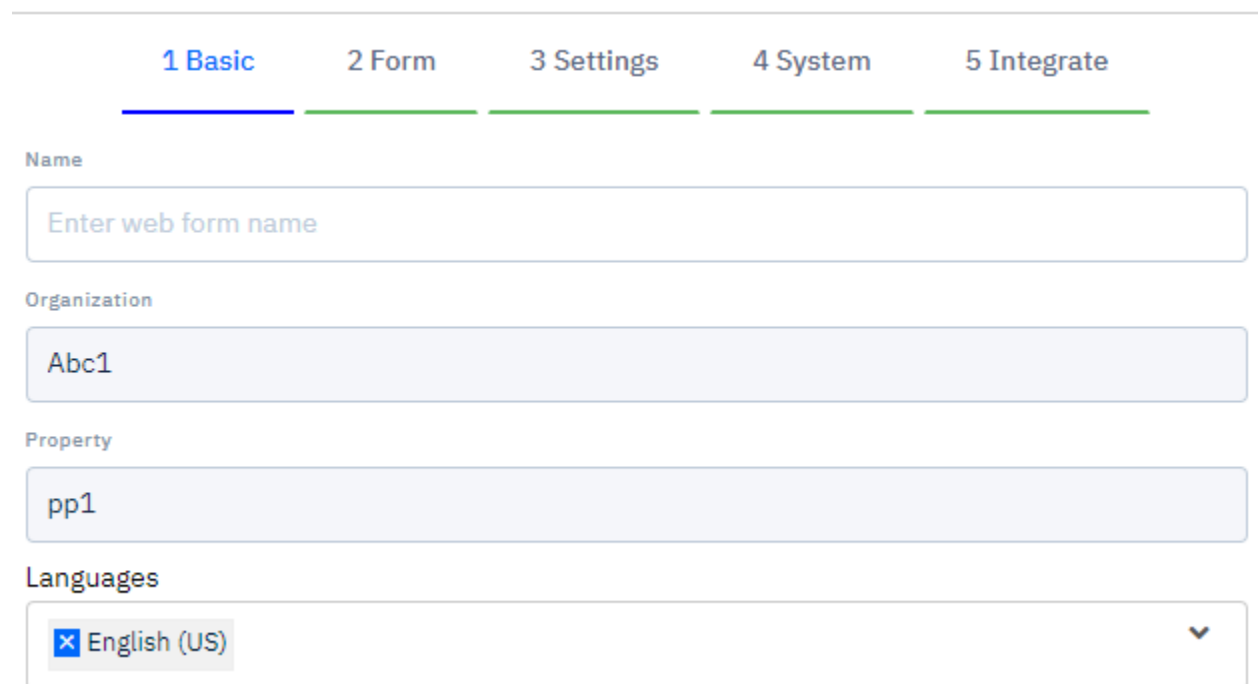
The DSAR Web Forms page appears.



DSAR Forms  
Data Subject Requests (DSR) Forms

+ CREATE

3. On the DSAR Web Forms page, click Create.  
The web form designing page appears.  
A default web form template is available with various fields, and you can customize it under the following five tabs one by one.



1 Basic   2 Form   3 Settings   4 System   5 Integrate

Name  
Enter web form name

Organization  
Abc1

Property  
pp1

Languages  
x English (US) ▼

## 1. Basic Tab

1. Under the Basic tab, in the Name box, type the name of the web form.  
The desired organization and the property are shown in the respective fields which you can't change.
2. You have the option to publish the web form in 10 different languages. English is used as the default language. You can select as many languages as you want from the Language drop-down and set any language as your default language.

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1 Basic

2 Form

3 Settings

4 System

5 Integrate

---

Name

My Test Form

Organization

Abc1

Property

pp1

Languages

✕ English (US)

✕ German (Germany)

✕ Hindi (India)

✕ Italian (Italy)

✕ Portuguese (Brazil)

☒ English (US)

☒ German (Germany)

☒ Hindi (India)

☒ Italian (Italy)

☒ Portuguese (Brazil)

☐ Chinese (China)

3. Click the next tab and click Yes to save the details.

## 2 Form (Fields) Tab

The default web form template is available.

- On the form's top, you can select a language from the drop-down menu. The languages that you choose in the Basic tab will now be shown in this drop-down.
- The initial display of the form will be in the default language you've selected.

DRAFT

Save

1 Basic

2 Form

3 Settings

4 System

5 Integrate

Form Fields

Form Styling

Form Text

English (US)

My Test Form

Welcome! Please complete this form to submit a request and we will respond as soon as possible. Thank you.

**\*I am a (an)**

☐ Customer
 ☐ Contractor
 ☐ Employee
 ☐ Student

**\*Select request type(s)**

☐ Data Processing
 ☐ Data Portability
 ☐ Update Data

☐ Info Request
 ☐ Data Deletion
 ☐ Opt out

- To customize the template, on the left pane, click Form Fields.

DRAFT

Save

1 Basic

2 Form

3 Settings

4 System

5 Integrate

Form Fields

Form Styling

Form Text

English (US)

My Test Form

Welcome! Please complete this form to submit a request and we will respond as soon as possible. Thank you.

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 ☐ Student

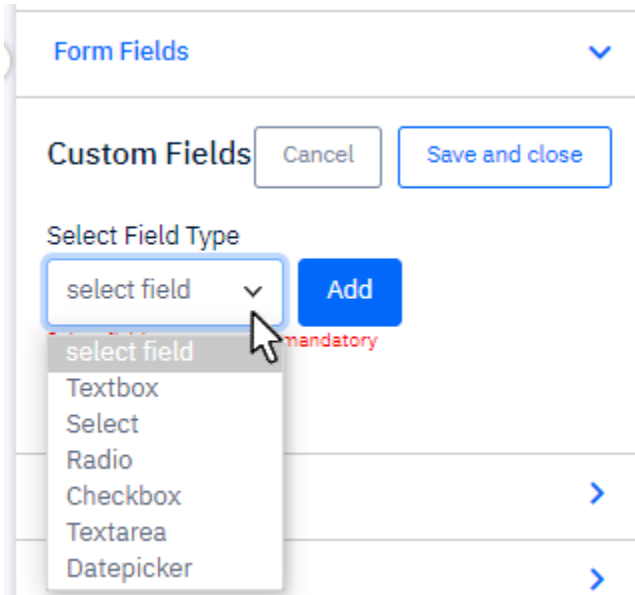
**\*Select request type(s)**

☐ Data Processing
 ☐ Data Portability
 ☐ Update Data

☐ Info Request
 ☐ Data Deletion
 ☐ Opt out

## Add a New Field



1. If you want to add a new field, click Add New.  
A custom field configuration appears.

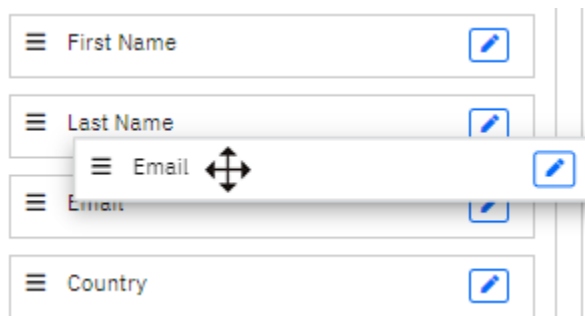


2. In Select Field Type, select a field type and click Add, and then add a label and control as per the selected field type.
3. To save the changes, click Save and close.

## Edit and Reposition a Field


You can edit the existing fields as well as the custom fields.

1. To edit any field, click  right on the field and then you can make any changes.
2. To move any field up and down, on the left pane, click  and drag the field to the desired position.



## Delete a Custom Field

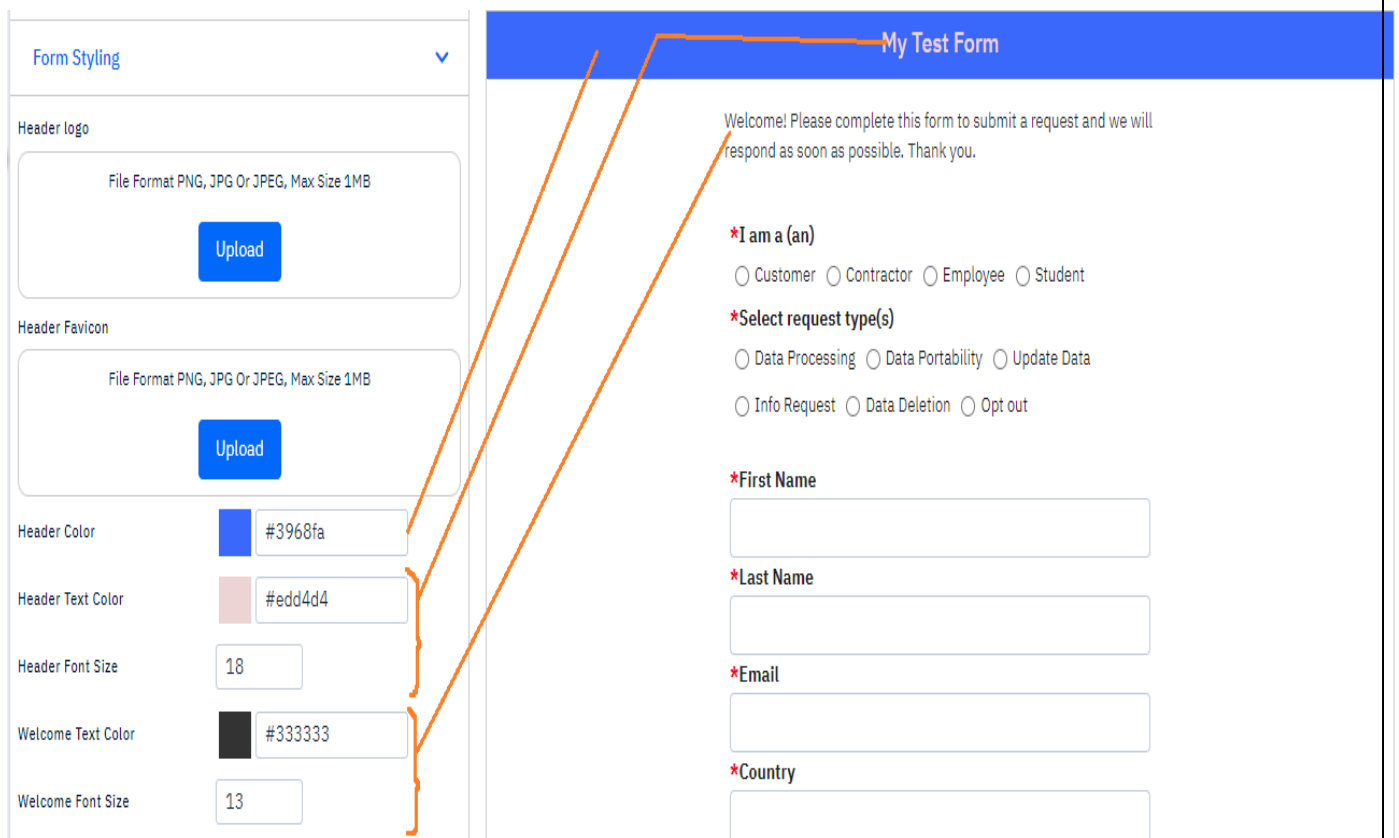
Although you can't delete the existing default fields, you can delete the custom fields that you added.

- To delete a custom field, click  right on the field.

## Form Styling

With this setting, you can customize the header and footer of the web form.

- On the left pane, click Form Styling.



The screenshot displays the 'Form Styling' configuration interface. On the left, a sidebar titled 'Form Styling' contains several settings:


- Header logo:** A section for uploading a logo, with a file format specification of 'File Format PNG, JPG Or JPEG, Max Size 1MB' and an 'Upload' button.
- Header Favicon:** A section for uploading a favicon, with a file format specification of 'File Format PNG, JPG Or JPEG, Max Size 1MB' and an 'Upload' button.
- Header Color:** A color selection tile (blue) and a text input field containing the hex code '#3968fa'.
- Header Text Color:** A color selection tile (light pink) and a text input field containing the hex code '#edd4d4'.
- Header Font Size:** A text input field containing the value '18'.
- Welcome Text Color:** A color selection tile (black) and a text input field containing the hex code '#333333'.
- Welcome Font Size:** A text input field containing the value '13'.

Orange lines connect the 'Header Color', 'Header Text Color', 'Header Font Size', 'Welcome Text Color', and 'Welcome Font Size' settings to the corresponding elements in the main form area on the right. The main form area features a blue header bar with the text 'My Test Form'. Below the header, the form contains the following fields:

- A welcome message: 'Welcome! Please complete this form to submit a request and we will respond as soon as possible. Thank you.'
- A required field: '\*I am a (an)' with radio button options: 'Customer', 'Contractor', 'Employee', and 'Student'.
- A required field: '\*Select request type(s)' with radio button options: 'Data Processing', 'Data Portability', 'Update Data', 'Info Request', 'Data Deletion', and 'Opt out'.
- A required text input field: '\*First Name'.
- A required text input field: '\*Last Name'.
- A required text input field: '\*Email'.
- A required text input field: '\*Country'.

- You can upload a logo to the header, change the header background color, header text color, font size, and welcome text color and font size. The logo image size must be under 1 MB.
- To change the color, click the color tile and then select any color.



Or to select a color using a color-picker, click 

- A lens appears, hover over the lens anywhere on the window and click to pick a color.
- You can add a favicon that is displayed on the browser tab of your web form. The resolution of the image must be under 32X32.
- You can customize the footer text and color.



## From Text




The default header and footer text are available, and you can customize them.

1. On the left pane, click Form Text.

Form Text

Welcome Text

Footer Text

Welcome! Please complete this form to submit a request and we will respond as soon as possible. Thank you.

**\*I am a (an)**

Customer

Contractor

Student

**\*Select request type(s)**

Data Processing

Data Portability

Update Data

**\*First Name**

**\*Last Name**

Adzapier

123 Main Street Capital City, ST, USA 10001 +1-800-000-0000 emailprivacy@generitech.com

2. To edit the welcome text and footer text, click 

Welcome Text

×

B

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H<sub>1</sub>

H<sub>2</sub>

🔗

☰

Normal

⌵

Welcome! Please complete this form to submit a request and we will respond as soon as possible. Thank you.

Close

Save

- Edit the text and click Save.
- After editing the form fields, click the Settings tab and click Yes to save the changes.



### 3 Settings Tab

Under the Settings tab, you can configure the following.

The screenshot shows the '3 Settings' tab selected in a navigation bar with five tabs: '1 Basic', '2 Form', '3 Settings', '4 System', and '5 Integrate'. Below the tabs, the 'DEFAULT APPROVER' section features a dropdown menu with 'Admin 1' and 'Admin 2' as options. The 'DEFAULT DAYS TO RESPOND' section has a text input field containing '45'. At the bottom, there are three toggle switches: 'ALLOW ATTACHMENTS' (labeled 'Allow user to attach file through portal'), 'EMAIL VERIFICATION' (labeled 'Required user to verify email their email address'), and 'CAPTCHA VERIFICATION' (labeled 'Require CAPTCHA Validation'). All three toggles are currently turned off.

1. In Default Approver, select an approver.  
The names of the organization administrators are shown in the approver's list. The Default Approver will receive a notification each time a new DSAR request is submitted.
2. In Select Workflow, select a workflow.  
To learn more about workflows, see [Managing Workflows](#).
3. In Default Days to Respond, enter a value. It shows 45 days by default which is the maximum, and you can change the days which means the approver could process the request within the period mentioned.
4. a) If you want to allow the request sender to attach any files while sending the request, toggle on Allow Attachments. If you want to mandate the attachment required, toggle on Required Attachments.  
b) If you want to enable email verification, toggle on Email Verification. To learn about the purpose, see [Email Verification Status](#).  
c) To add captcha verification, toggle on Captcha Verification.
5. After completing the above settings, click the System tab and click Yes to save the changes.

## 4 System Tab - System Integration

Under the System tab, the list of systems connections appears which are already activated through the systems connection settings. You can select any one of the system connections to integrate the desired system with your DSAR workflow for targeted data discovery.

1 Basic 2 Form 3 Settings 4 System 5 Integrate

Choose Connection [+ Create Connection](#)

ID	Connection Name	Description	Connector Type	System Name	Created	Configured	Test Connection
335881bf-bb5...	Mailchimp AZ	Test connection	Test connector	mailchimp	Nov 9, 2021		<a href="#">▶ Test</a>
95232f54-4c5...	MySQL AZ test	test connection	sample	mysql	Nov 9, 2021		<a href="#">▶ Test</a>
ad0f6905-ac7...	My DB AZ	test	test	mysql	Nov 11, 2021		<a href="#">▶ Test</a>

### Test Connection

- To check the stability of the system connection that you want to integrate with the DSAR workflow, click Test right to the system.  
If the "Connection Stable" message appears, then you can configure the integration.

### Create New Connection

- If you want to add a new connection, click Create Connection.  
It redirects to the system connection wizard.  
To learn about connecting a system, see [Systems Connection](#).

### Mapping System fields with DSAR fields

- Click the ID of the system that you want to integrate.

ID	Connection Name	Description	Connector Type	System Name	Created	Configured	Test Connection
335881bf-bb5...	Mailchimp AZ	Test connection	Test connector	mailchimp	Nov 9, 2021		<a href="#">▶ Test</a>
95232f54-4c5...	MySQL AZ test	test connection	sample	mysql	Nov 9, 2021		<a href="#">▶ Test</a>
ad0f6905-ac7...	My DB AZ	test	test	mysql	Nov 11, 2021		<a href="#">▶ Test</a>

The field mapping setup appears.

2. Select any table populated from the system to map with the entered DSAR field.  
This will be the chosen data point in the results summary where the data will populate.

1 Basic

2 Form

3 Settings

4 System

5 Integrate

Select Table

Select

▼

[◀ GoBack](#)

For the database management systems, select any table.

Email Address

form.Email

▼

Choose Columns

contact id

email address

email client

email type

full name

ip opt

ip signup

language

last changed

list id

For email service systems, select an email column.

3. Select the columns that have the attributes you want to map with the DSAR fields.

- Click Rule and set up the comparison. If you want to set up a nested comparison, click Ruleset.  
See the illustrated sample comparison below.

**SQL WHERE Clause**

1) Add a Rule (to add a nested rule click Ruleset) + Rule + Ruleset

2) Select AND or OR logic AND OR

3) Select system attribute e\_email = Form.Email ×

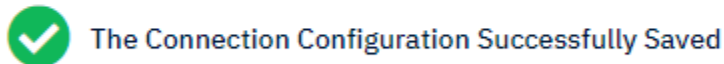
4) Select comparison operator e\_firstname = Form.First Name ×

5) Select DSAR attribute

6) Click Save Cancel Save

- After setting up the mapping, click Save to complete the configuration.  
If done successfully, it shows the message below.

1 Basic 2 Form 3 Settings 4 System 5 Integrate



[Back to connection list](#)

Tip: In the same way, you can configure with multiple system connections.

## Save the Web Form Design

Once you have completed all the settings, you must save the configuration.

- On the web form designing page, click on Save.

PRIVACY / DATA SUBJECT ACCESS REQUEST / WEB FORMS / MY TEST FORM

DRAFT Save Publish

- The web form will be saved as a draft, and it will be added to the list of web forms.

## Preview and Edit Web Forms

There is no limitation to creating the web form draft. But once you have published it, it will be accounted for. So before publishing the web form seeing the preview is recommended.

1. In the DSAR menu, click Web Forms.  
The list of web forms appears on the page that shows all the drafts and published web forms.

### DSAR Forms Data Subject Requests (DSR) Forms

<b>Name</b> Test form	<b>Organization</b> My organization	<b>Name</b> Newtest	<b>Organization</b> My organization
<b>Property</b> AZ	<b>Create</b> Jun 8, 2022, 3:08:48 PM	<b>Property</b> AZ	<b>Create</b> Dec 16, 2021, 3:06:47 PM
<b>Status</b> Draft	<b>Update</b> Jun 8, 2022, 3:08:59 PM	<b>Status</b> Publish	<b>Update</b> Dec 16, 2021, 3:06:47 PM
<div> <div>View</div> <div>Delete</div> </div>		<div> <div>View</div> <div>Publish History</div> </div>	

2. Click View right to the web form draft.

DRAFT

Save

Publish

3. Click the preview icon 

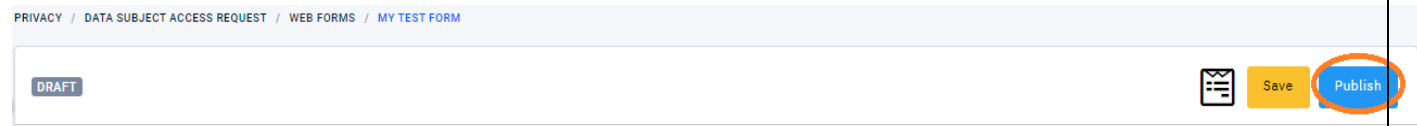
The preview opens in a new tab on your browser.

4. To make any changes go back to the Adzapier Portal tab, then you can make changes, and click Save.

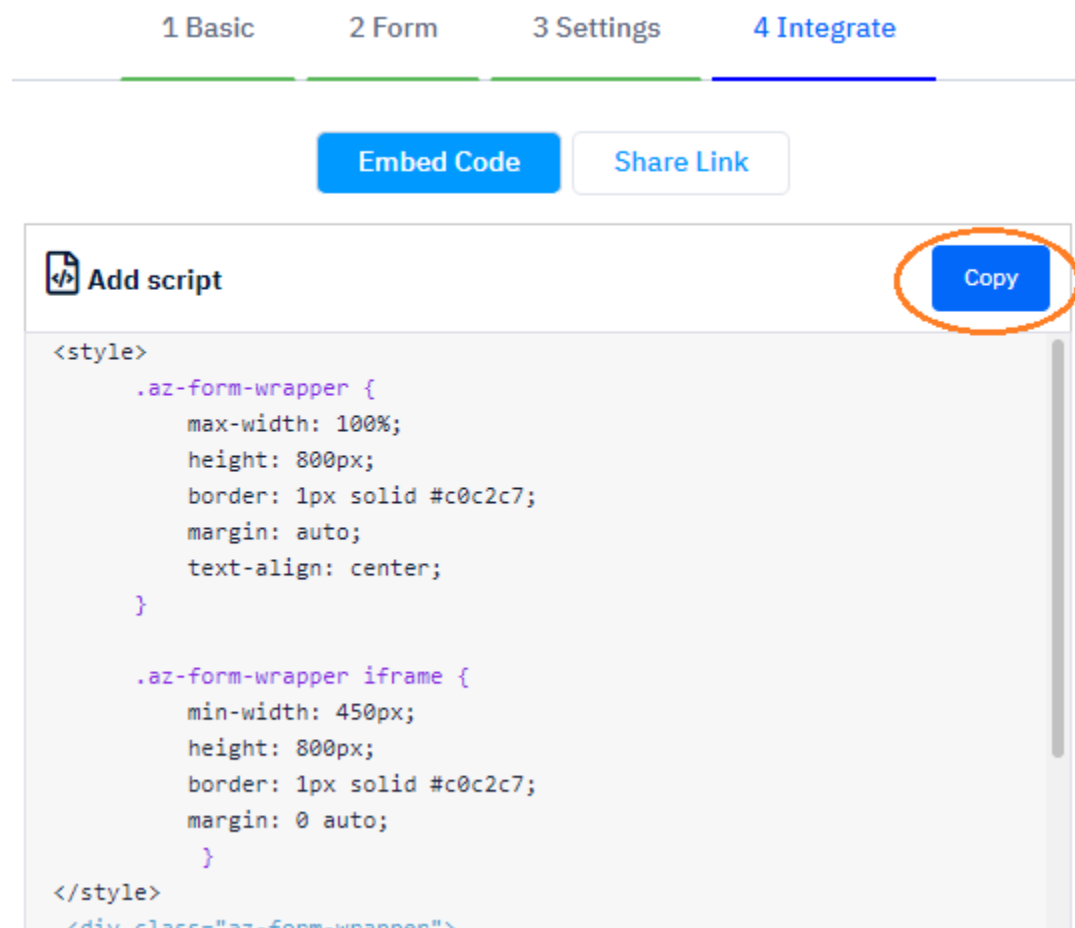
## Publish Web Form

If your web form preview looks perfect, you can publish it.

1. On the Web Forms page, click View right to the web form that you want to publish.

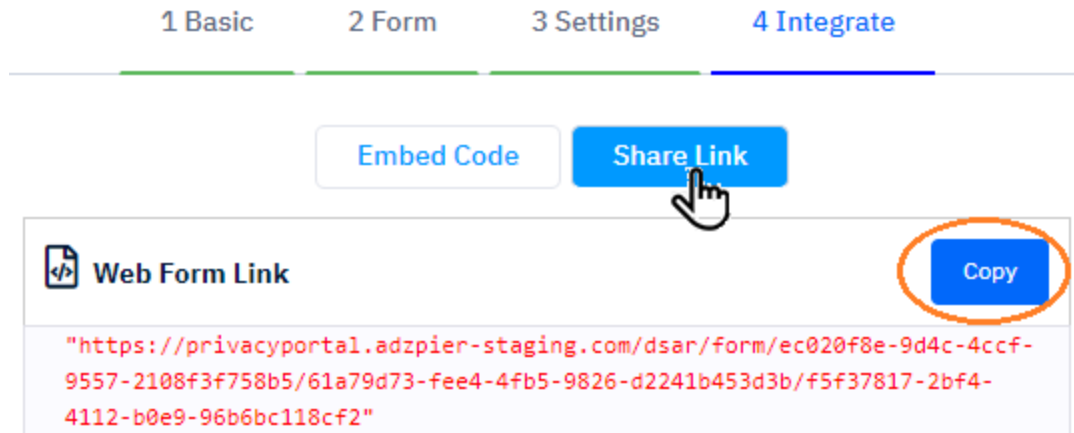


2. Click Publish.  
It generates the embed code, as well as the web form link under the, Integrate tab.
3. To copy the embed code script of the web form, under Embed Code, click Copy.



It copies the script to your clipboard. Now you can insert the script into your domain to implement the web form.

4. To copy the link of the web form, click Share Link and click Copy.



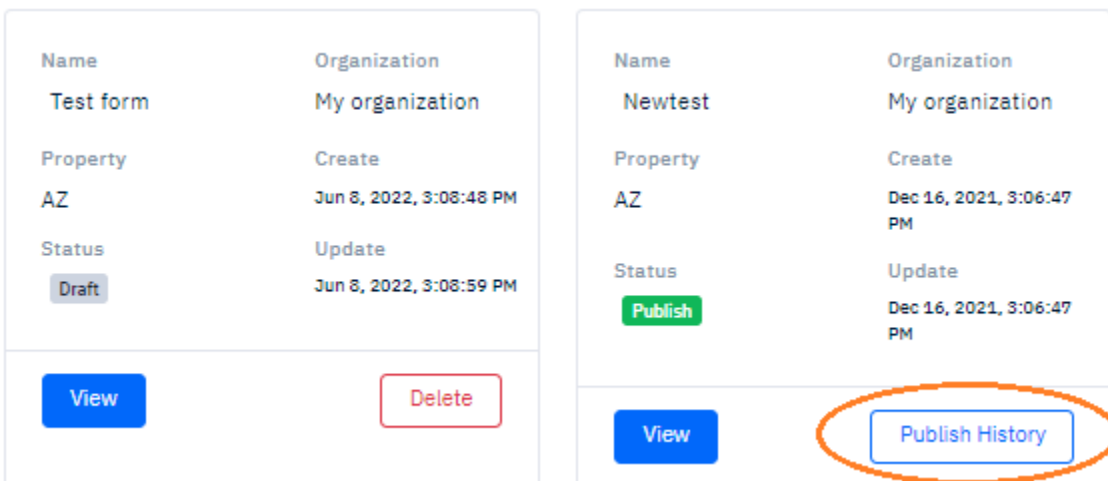
It copies the web form URL to your clipboard.

Note: After publishing the web form, if you make any changes, publish it again to reflect the changes.

## Publish History

You can see the Web Form's version history and, manage them.

- In the Web Form gallery, click Publish History.



- The publishing history appears.
- If you have a sequence of versions, you can roll back into an older version.

Publish history				
Version	Form Name	Publish Date	Status	Action
V-	Vijay form	Nov 2, 2021, 7:37:50 PM	ACTIVE	
V-	Vijay form	Nov 2, 2021, 7:37:50 PM	INACTIVE	⋮
				Rollback
				Delete

Click  and click Rollback.

## Delete Web Form Draft

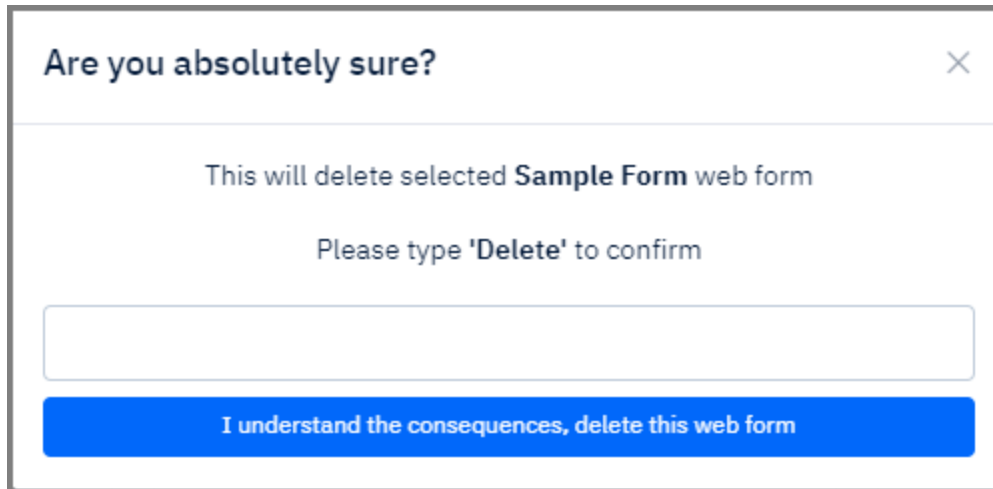
As mentioned earlier, once you have published a web form it will be accounted for, so you can't delete a published web form. However, you can delete a web form that is in the draft status.

1. On the DSAR Web Forms page, click Delete right to the web form that you want to delete.

<b>Name</b> Test form  <b>Organization</b> My organization  <b>Property</b> Create AZ Jun 8, 2022, 3:06:48 PM  <b>Status</b> Update Draft Jun 8, 2022, 3:06:59 PM	<b>Name</b> Newtest  <b>Organization</b> My organization  <b>Property</b> Create AZ Dec 16, 2021, 3:06:47 PM  <b>Status</b> Update Publish Dec 16, 2021, 3:06:47 PM
<div>View</div> <div>Delete</div>	<div>View</div> <div>Publish History</div>

2. Type "Delete" in the box, and then click I understand the consequences, delete this web form.





A confirmation dialog box with a title bar that says "Are you absolutely sure?" and a close button (X) in the top right corner. The main content area contains the text "This will delete selected **Sample Form** web form" and "Please type 'Delete' to confirm". Below this is a text input field. At the bottom is a blue button with the text "I understand the consequences, delete this web form".

## Create a DSAR Request

### How can your Visitor Submit a Request through Organization's Web Form?

You can either publish the web form to your website or share the web form link with your visitors that you created for your organization to intake the DSAR requests from your visitors.

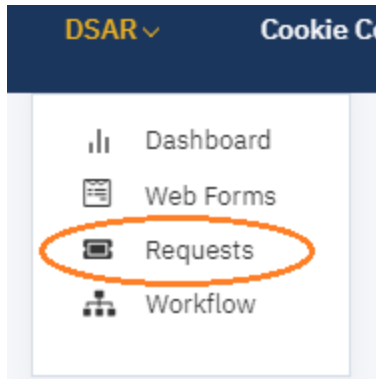
To learn about web forms, see [Manage DSAR Web Forms](#).

Your visitor can submit the request through the web form. Once it is submitted, the request is received on the DSAR request page.

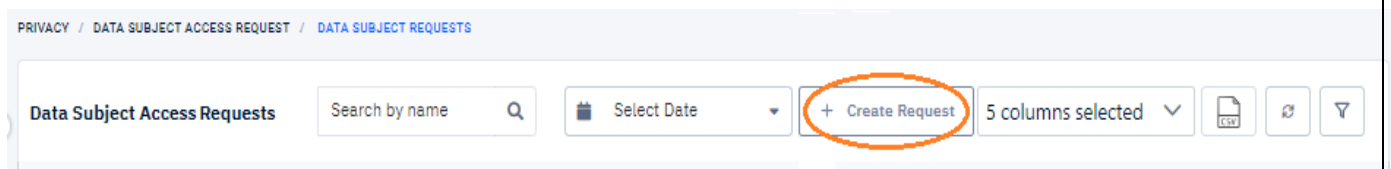
### Submit a Request Manually through Adzapier Portal

You can create a DSAR request manually through the portal itself.

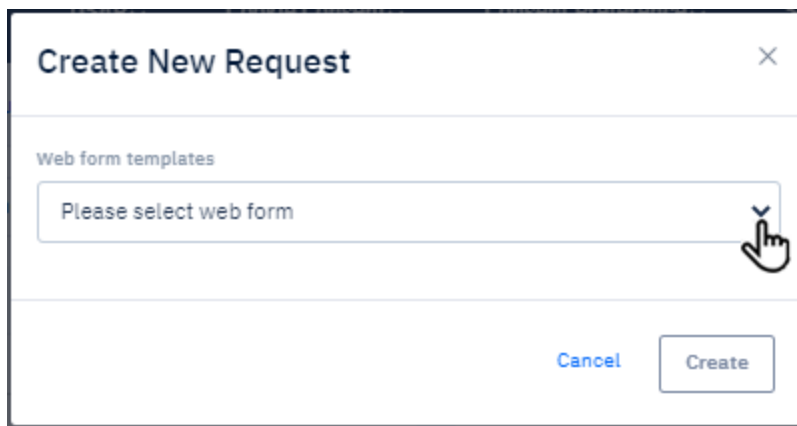
1. On your account home page, click the property selection menu and select an organization.
2. In the DSAR menu, click Requests.



The Data Subject Requests page appears.



3. To create a new request, click Create Request.



4. In Select Web Form, select any web form and click Create.  
The preferred DSAR web form opens in a new tab.
5. Fill in all the details duly in the web form and click Submit.  
The request is created, and it will be queued in the requests list.  
Once you submit the request, a notification will be sent through the request sender's email.

## View the Request through Client-facing Portal.

The request sender can log in to the client-facing portal using the email which you have filled in the web form. When you submit a request, the notification will be sent through the same email and the request can be viewed via the notification.

1. After submitting the request, go to the email and open the email sent by AZSupport.

### Hey User !

You have logged a request successfully (Request ID: aeb0f5ca-75ce-45f3-b2be-a635154ab9b6). To view your request via the portal, click the button below.

[View Request](#)

Thank you,  
Team Adzapier

2. In the email, click View Request.

The access code request page appears.

This is a temporary access code it will expire in 30 minutes. If code is expired, you will need request a new access code.

Email address



Captcha code

Enter above captcha code

[Send](#)

OR

[Already have an access code?](#)

3. To get the access code, enter your email id, then enter the Captcha code, and then click Send.  
The Privacy access portal password will be sent through email.
4. Go to your email again and open the email sent by AZSupport.  
It contains the access password.

## Hey User !

To view your submission on the Portal, use this one-time access code.  
This code will expire in 30 minutes for safety reasons. Do not forward this code to anyone.

Reference ID: 5e776191-b19d-44a3-b617-1024ea4190d4  
Email: [vnivash@adzapier.com](mailto:vnivash@adzapier.com)  
Password: 4MKJVjM0

Login

Thank you,  
Team Adzapier

5. Click Login.  
It redirects to the login page of the client-facing portal.

In order to access the Privacy Portal, you need to request an access code by entering your email address below.

Email address

Password

[Request New Access code](#)

Login

OR

Don't have an access code? [Request New Access code](#)

6. Enter your email id, then the password that you received through the email, and then click Login.

A list of the request details appears.

AdZapier					Logout
Privacy portal request list					
Request ID TL	Request Type TL	Organization TL	Submitted Date TL	Last updated date TL	
<a href="#">21d9a1f5-084a-400c-8e38-d1967526dad0</a>	Info Request	Org_1	2 days ago	2 days ago	
<a href="#">ba565809-6e41-4002-aa8d-e36eaf38528b</a>	Data Processing	Org_1	2 days ago	2 days ago	
10 ▾ << < 1 > >>					Showing 1 to 4 of 4 entries

7. Click Request ID to view any request.

## Manage DSAR Requests

The organization is receiving DSAR requests applied through the DSAR web form. The request is then processed by the approver of the organization over the stipulated period of days. If you are the approver of your organization, follow the procedure to complete a request.

### View Individual Request Details

1. In the property selection menu, select your organization.
2. In the DSAR menu, click Requests.  
A list of DSAR requests appears.

Data Subject Access Requests												
Search by name				Select Date		+ Create Request		5 columns selected		CSV	Refresh	Filter
ID	Request Type	Subject Type	Status	Name	Web Form	Country	Organization	Property	State	Approver	Due In	Created at TL
<a href="#">fc878...</a>	Data Portability	Contractor	New	ramani sahu	<a href="#">My New Form</a>	India	My Organisa...	Property1	Odisha	Snigdharani	36 Days	1 week ago
<a href="#">a9d8...</a>	Data Portability	Customer	New	Salu Sahu	<a href="#">My New Form</a>	India	My Organisa...	Property1	Odisha	Snigdharani	36 Days	1 week ago
<a href="#">65ba...</a>	Data Processing	Customer	InProgress	Rahul Nath	<a href="#">My Web Form</a>	India	My Organisa...	Property1	Odisha	Snigdharani	24 Days	3 weeks ago
<a href="#">8410...</a>	Data Portability	Contractor	InProgress	rahul saha	<a href="#">My Web Form</a>	India	My Organisa...	Property1	Odisha	Snigdharani	11 Days	1 month ago

3. To view a request, click the ID of the request.  
The details of the individual request page appear. All the details of the request are available including the details filled in by the request sender on the DSAR web form.

## Email Verification Status

If you have enabled the email verification option in your web form, a verification email will be sent to the request sender through the email when the request sender submits the request.

### Hey User !

Before we begin to work on your request, just one more step is needed.  
Kindly confirm your email by clicking the button below.


Your Request ID is aeb0f5ca-75ce-45f3-b2be-a635154ab9b6, please keep this for your records.

**Request Id:** aeb0f5ca-75ce-45f3-b2be-a635154ab9b6  
**Date Submitted:** : 2021-11-16 13:11:13.722692669 +0000 UTC


[Confirm Email](#)

Thank you,  
Team Adzapier

To process the request, the request sender must confirm his/her email. Once the request sender confirms the email, the status shows Verified on the request details page.

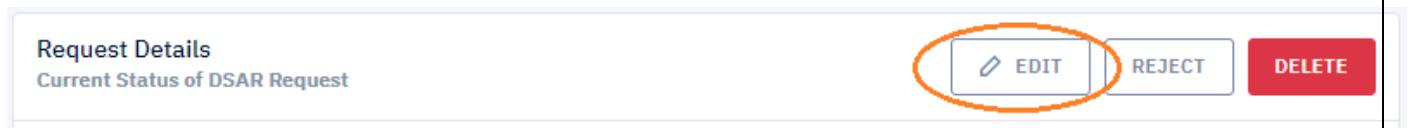
COUNTRY	EMAIL  Verified	ATTACHMENTS
Albania	<i>user_email-id</i>	No attachment found
REQUEST DETAILS	STATE	

Until the request sender confirms his/her email, the request can't be processed by the approver. You can resend the verification email if the request sender doesn't respond for a while. To resend the verification email, click Resend Verification.

COUNTRY	EMAIL  Resend Verification	ATTACHMENTS
Albania	<i>user_email-id</i>	No attachment found
REQUEST DETAILS	STATE	

## Edit Request Details

Some details of the request like Approver, and Risk Factor are editable.



The screenshot shows the top section of a web interface. On the left, there is a header with the text "Request Details" and "Current Status of DSAR Request" below it. On the right, there are three buttons: "EDIT" (with a pencil icon), "REJECT", and "DELETE". The "EDIT" button is circled in orange.

To edit such details,

1. Open the request that you want to edit and click Edit.  
Update Request Details appear.



The screenshot shows a modal window titled "Update Request Details" with a close button (X) in the top right corner. The form contains several fields: "REQUEST ACCEPTING AGENT" (a text input field), "SELECT RISK FACTOR" (a dropdown menu with "Likely Low Risk" selected), "SELECT APPROVER" (a dropdown menu with "Approver\_1" selected), "COUNTRY" (a text input field with placeholder text "type and search country"), "SELECT STATE" (a text input field with placeholder text "type and search state"), and "CITY" (a text input field). At the bottom right of the modal, there are two buttons: "Cancel" and "Save".

You can add Request Accepting Agent and you can change the Risk Factor, Approver, Country, and so on.

2. Make the changes and click Save.

## Targeted Data Discovery

You can discover the data of the user who has sent the DSAR request when you have integrated the respective system with the DSAR web form.

1. On the DSAR Requests page, click the request that you want to process.  
The Request Details page appears.

**ADVANCE STATUS**

1 → 2 → 3 → 4

UNVERIFIED NEW NOTIFY COMPLETE

NEW

A CCPA application was submitted. The next step is to verify that the request to determine whether or not you are required to comply with it is within the scope of the CCPA. Please continue by clicking on the Verify Consumer Request buttons in the status bar above.

**Activity area**

Activity Email Tasks **Systems**

**Integrated Connections** [Refresh](#)

System Name	Connection Name	Status	Total Record	Error Message	View Details
mailchimp	MailChimp_AZ	STABLE	1		

2. Under the activity area, click Systems.  
If the required data matches the attribute of the DSAR request, it shows the data records.
3. To view the details of the data record, click .

## Request Fulfilment Process

You can process the request stage by stage to complete it. The stages are as per the workflow available with the web form that the request sender used for the request. The web form used by the sender may have any of the predefined workflows or a custom workflow.

To learn more about the workflows, see [Manage Workflows](#).

Let's assume the request sender has sent a request using a web form that has the CCPA-based workflow.

1. On the DSAR Requests page, click the request that you want to process.  
The Request Details page appears.  
Under Advance Status, the stages of the request process are available.



2. Every request stands at <sup>1</sup> the Unverified stage initially then click the next stage <sup>2</sup> New and read the stage description.

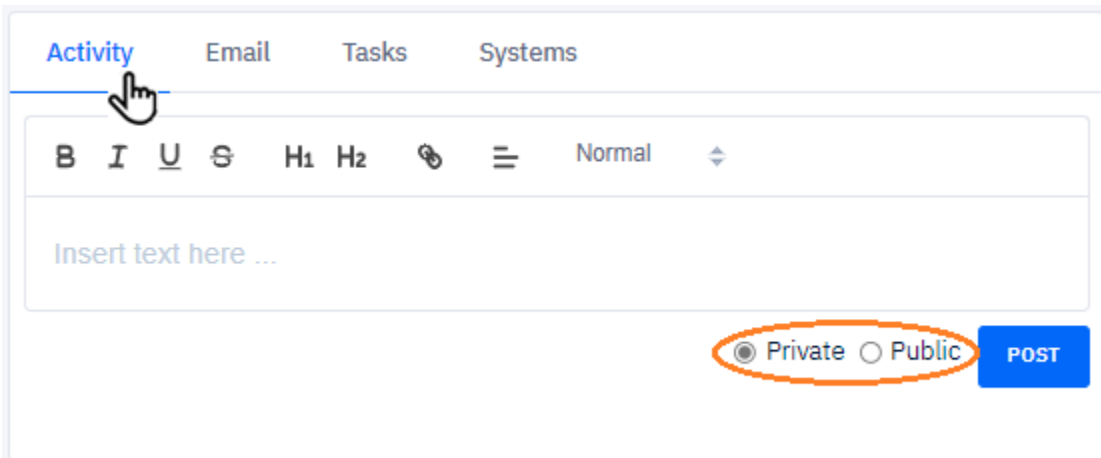
Note: If the web form has the email verification option, and the email is get verified, then it will be automatically moved from Unverified to New.

3. Whenever you move from one stage to the next stage, the notification appears in the notification area.

At any stage, you can perform the following activities.

a. Send an Activity Message

If you want to notify about an activity, click Activity, type any message, select Private or Public and click Post.

The screenshot shows a web form titled 'Activity' with tabs for 'Activity', 'Email', 'Tasks', and 'Systems'. The 'Activity' tab is selected, indicated by a hand cursor icon. Below the tabs is a rich text editor with formatting options: Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Heading 1 (H1), Heading 2 (H2), Link (chain icon), and a list icon. The text area contains the placeholder 'Insert text here ...'. At the bottom right, there are two radio buttons labeled 'Private' and 'Public', with 'Private' being selected. An orange oval highlights these radio buttons. To the right of the radio buttons is a blue 'POST' button.

Private - Activity message notifies within the admin portal. The notification appears in the notification area (bottom of the page).

Public - Activity notification will appear in the admin portal as well as the client-facing portal.

## b. Send an Email

If you want to send an email to the request sender, click Email.

- Type the email text or click Select Template and select any template relevant to your subject.
- The template fetches in the text box and you can edit with the custom details.
- If you want to attach any file, click Browse and attach any file from your computer.

Note: The email matter appears also in the notification area.

- If you want to send an email to internal members or other users, click the button Send Mail To

Other Users. You can also add CC, BCC, and other steps that are the same as above. To field is mandatory.

Activity **Email** Tasks Systems

To\*  Cc  Bcc

Select template select email template ▼

B I U H1 H2 Normal ▼

Insert text here ...

Attach file Choose file BROWSE SEND

### c. Create a Subtask

You can create a subtask at any stage for official use.

- On the request details page, click Tasks.

Activity Email **Tasks** Systems **SUBTASK**

Task	Stage	Status	Assignee	Deadline	Reminder	Action
No records						

- Click Subtask.

## Add Subtask

ASSIGNEE

SUB TASK NAME

SUB TASK DESCRIPTION

☐ IS REQUIRED


DEADLINE

REMINDER

Cancel

Save

- Enter the details of the subtask and click Save. The task is assigned and appears on the list of tasks.
- If you want to mandate the subtask, select the Is Required check box.



Activity	Email	Tasks	Systems	SUBTASK		
Task	Stage	Status	Assignee	Deadline	Reminder	Action
Subtask 1	NEW	Assigned	Viruvj KMV	11-30-2021		 Edit

If you want to edit the subtask, click Edit, make any changes, and click Save.

#### d. Respond on Subtask

On the request details page, click Tasks.

A list of subtasks assigned to the request appears. - Click the task that you want to complete.

Activity	Email	Tasks	Systems	SUBTASK		
Task	Stage	Status	Assignee	Deadline	Reminder	Action
* Subtask 2	NEW	Assigned	Viruvj KMV	12-05-2021		 Edit
Subtask 1	NEW	Assigned	Viruvj KMV	11-30-2021		 Edit

Note: The mandatory subtask is labeled by the \* symbol.

Task Response

TASK NAME

sample task

TASK DESCRIPTION

test sample task

TASK DEADLINE

05/19/2021

TASK RESPONSE

☐

MARK AS COMPLETE

ATTACHMENTS

Choose file

Browse

Cancel

Save

- To complete the task, in Task Response, type any response message, then select the Mark as Complete check box, and then click Save.

- You can attach any relevant.

At each stage, you can send an activity message or email or create a subtask as mentioned in the previous step.

4. In the same way, process the further stages. After processing all stages and sending the required data files to the request senders, click final stage Complete. It completes the request process.

#### Note:

- Since you must process it stage by stage, you can't skip any stage while moving forward.
- But you can revert the request process to any previous stage, and process it again.



- If any mandatory subtask is created at a stage, you must complete the task then only you can move next stage.

## Extend Due Date

You can extend the due date of a request which is in In-Progress status.

1. On the DSAR Requests page, click the request that you want to extend the due date.

PRIVACY / DATA SUBJECT ACCESS REQUEST / DSAR REQUEST / 21D9A1F5-084A-400C-8E38-D1967526DAD0

#### Request Details

Current Status of DSAR Request

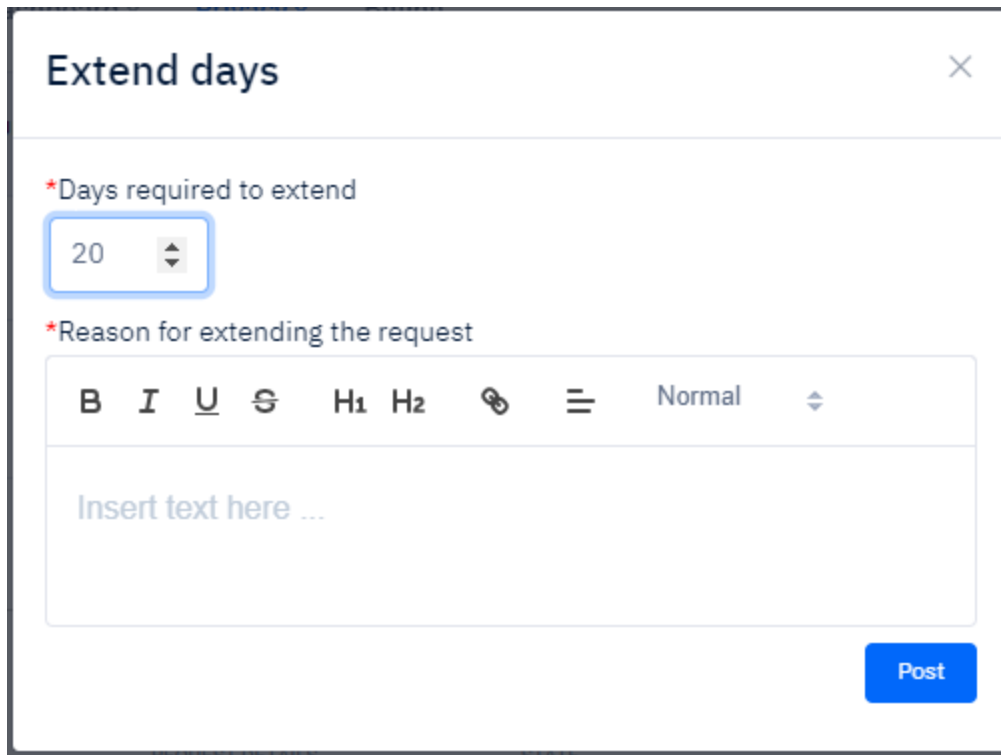
EDIT

EXTEND DAYS

REJECT

DELETE

2. Click Extend Days.





**Extend days**

\*Days required to extend

20

\*Reason for extending the request

**B I U** ~~ABC~~ H1 H2   Normal

Insert text here ...

Post

3. In Days required to extend, enter a value.
4. In Reason for extending the days, type the reason and click Post.

### View Duplicate Request

If the request sender sends a duplicate request, the "View Duplicate" option will appear on that corresponding request details page.

If the following three pieces of information are repeated while the user is requesting using the web form, the request will be listed as a duplicate request.

- i) Customer Type
- ii) Request Type
- iii) Email

**\* I am a (an)**

Customer Contractor Student Employee

**\* Select request type(s)**

Data Processing Data Portability Opt out

Update Data Info Request Data Deletion

**\* First Name**

**\* Last Name**

**\* Email**

Note: Although the user enters different information in other fields of the web form, if the above three pieces of information match any other request, the request will be listed as a duplicate.

To view the duplicate request and reject the same,

1. Open the request that you want to view whether it's a duplicate.

**Request Details**  
Current Status of DSAR Request

VIEW DUPLICATE REFRESH EDIT EXTEND DAYS REJECT DELETE

If the request has any duplicate requests, then the View Duplicate option will be available on the Request Details page.

2. Click View Duplicate.  
It shows the details of the duplicate request.



Duplicate Requests

×

19F3C141-BC5F-4940-802B-3...

New

Request ID : 19F3C141-BC5F-4940-802B-3FF4DF2C653A

Status: **New**

City: Ramanathapuram Dist.

Country: India

Days left: 45

Email: vijaynivash@gmail.com

Email verified: true

First name: Vijay Nivash

Last name: M

Request type: Data Processing

Short country: IN

Short state:

State: Tamil Nadu

Subject type: Customer

Upload: undefined

Workflow: Access Workflow

3. To reject the duplicate request, below the request details, in Select Reason, select a reason, type a message in the text box, and then click Post.

Duplicate Requests

×

19F3C141-BC5F-4940-802B-3...

New

Subject type: Customer

Upload: undefined



Workflow: Access Workflow

SELECT REASON

select reason

▼

\*Reason for rejecting the request

**B** **I** **U**  **H1** **H2** 

Normal

Insert text here ...

Post

## Reject and Reopen Request

To reject a request,

1. Open the request that you want to reject and click Reject.



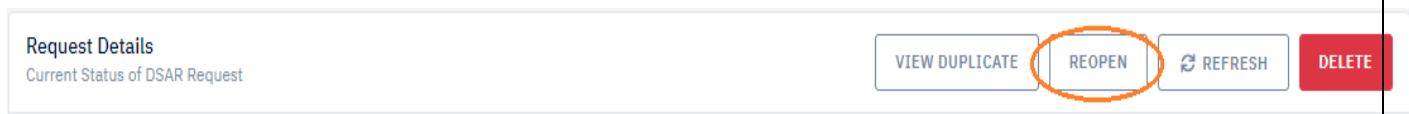
Reject Request appears.

A screenshot of a 'Reject request' modal window. It has a title bar with a close button. Inside, there's a section 'SELECT REASON' with a dropdown menu showing 'select reason'. Below the dropdown is a list of reasons: 'Excessive request', 'Frivolous / unfounded request', 'Incomplete / partial request', 'No response verification', 'Not a privacy related request', 'Non-EU request', and 'Repetitive request'. To the right of the list is a 'Normal' status selector. At the bottom right is a blue 'Post' button.

2. In Select Reason, select any reason.
3. In Comments, type any comment and click Post.

To reopen a request,

1. Open a rejected request that you want to reopen and click Reopen.

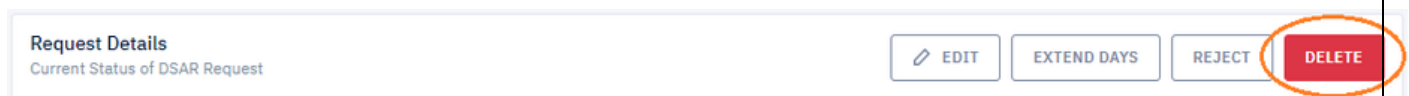


It reopens the request as a new one.

## Delete a Request

To delete a request,

1. Open the request that you want to delete and click Delete.



Are you absolutely sure?

×

This will delete selected **dbc0e6b1-33c7-4c2f-9e95-5956340561e6**  
DSAR Request detail

Please type 'Delete' to confirm


I understand the consequences, delete this DSAR Request detail

2. Type “Delete” in the box and click I understand the consequences, delete this DSAR Request detail.

Note: Once you delete a request, you can’t reopen it.

## Export Request Details

You can export the list of request details as a CSV file.

1. To export the DSAR request details, select any date range, and click  to apply more filters.  
The filter pop-up appears.

Filter the results

×

Request Type

Request Type

Subject Type

Subject Type

Status

Status

Due In

Cancel

Apply

- You can filter the requests by Request Type, Subject Type, Status, and Due in.
- After entering the filters, click Apply.

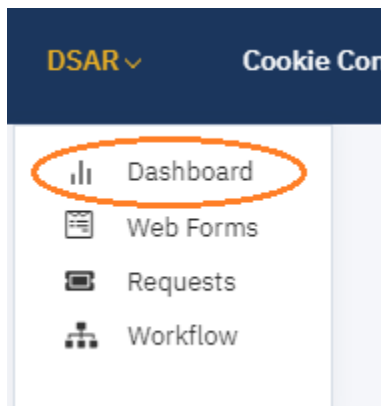
2. Click 

A CSV file will be downloaded that contains all the details same as you view in the list of the request details.

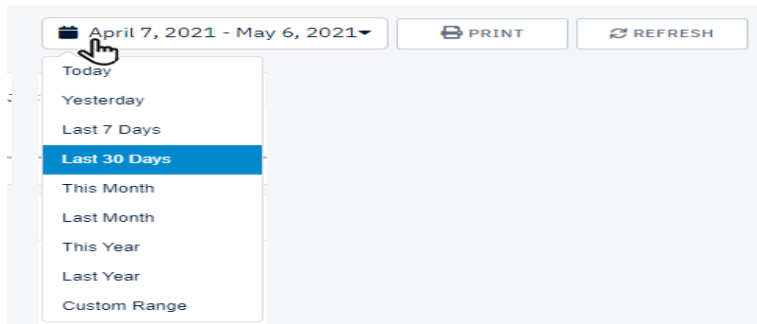
## DSAR Dashboard

The DSAR Dashboard is an information panel for the Data Subject Access Requests activities. It shows the DSAR analytics of your organization with the Adzapier Portal.

- In the DSAR menu and click Dashboard.



- The DSAR Dashboard page appears.
- To change the organization, click the property selection menu and select any organization.  
The dashboard shows the personalized DSAR analytics of each organization available on your account.
- You can change the date range.

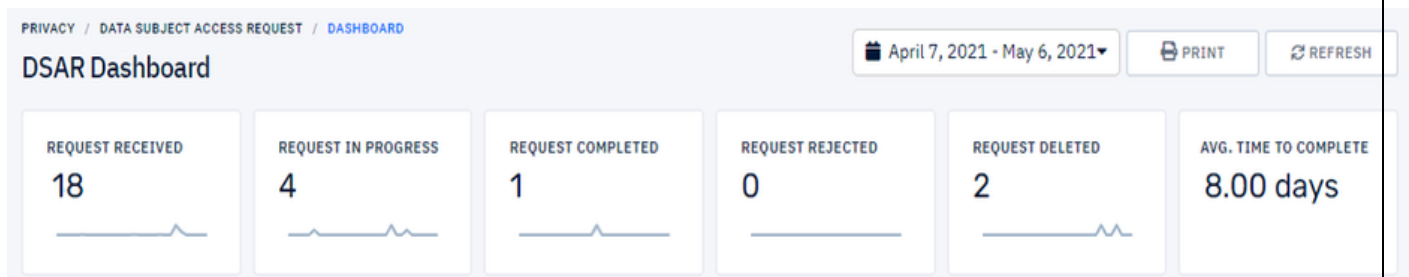


- You can print the Dashboard page. To print the dashboard, click Print.

The DSAR Dashboard shows the following analytics.

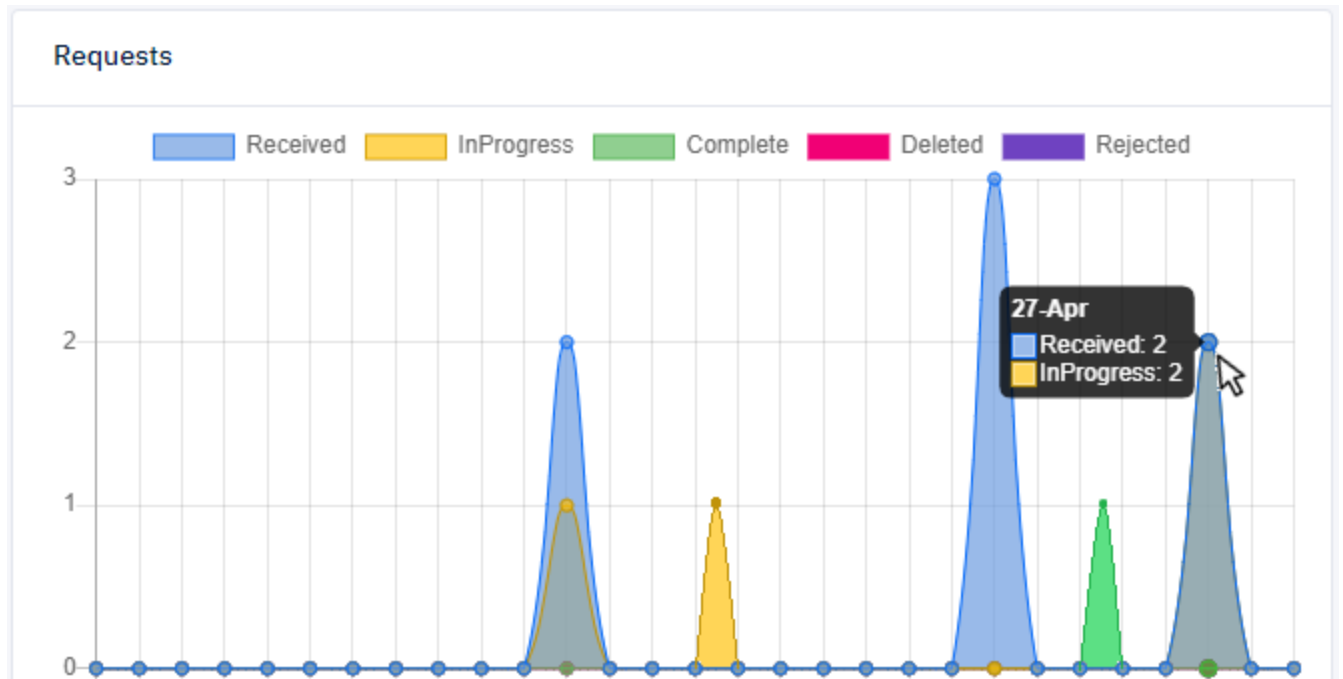
## Request Received - Count

It shows the total number of DSAR requests received by your organization as well the count of the requests in various statuses like In-Progress and Completed. It also shows the average time taken to complete a request, based on your performance of the request completion process.



## DSAR Timeline Chart

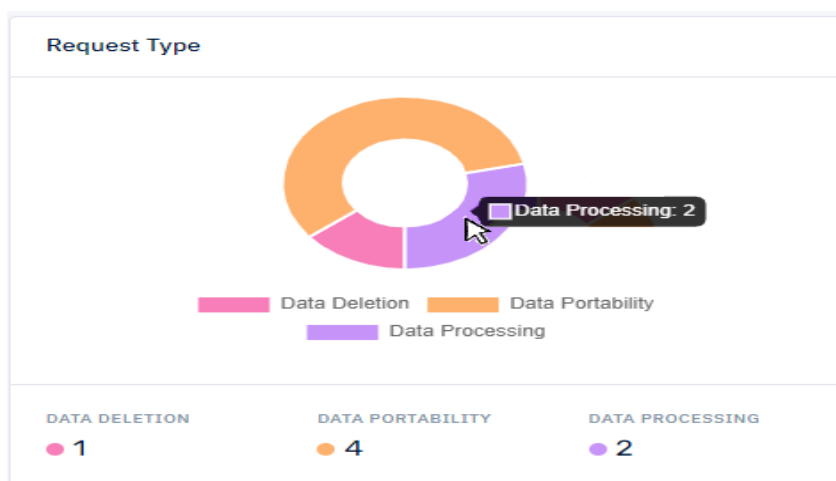
It shows the timeline chart of DSAR activities that happened over a period.



When you hover over each plot on the chart, it shows the count of each DSAR activity that happened on a date like the number of requests received, number of requests completed, and so on.

## Pie Chart - Request Type Analytics

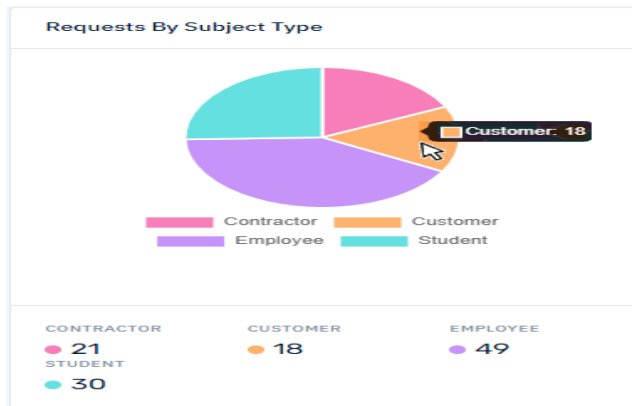
This pie chart shows the analytics of the request types, that is the count of each request type received by the organization.



When you hover over each slice of the pie chart, it shows the count of the respective request type.

## Pie Chart - Subject Type Analytics

It shows the analytics of the subject type of the request senders, that is the count of the

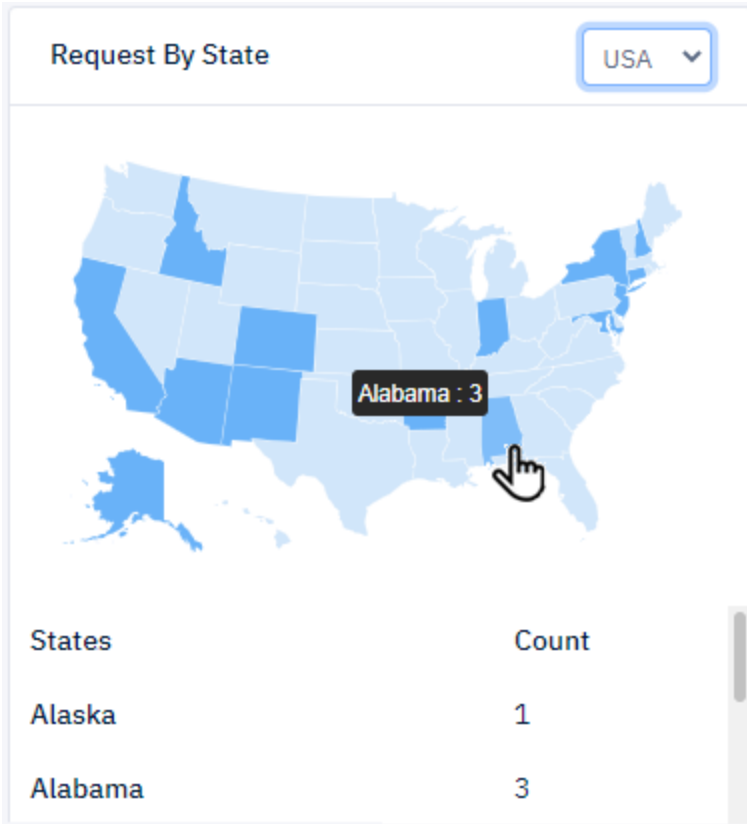


subject type of each request.

## State/Country-wise Requests Count

The United States map shows the count of requests received from each state as well as the count from other countries all over the world.

- Hover over the map to view the count of requests received from each state.









- You can change the USA map into the World map to view the count from each country.





## Recent Request Activities

A list of recent request activities with the approver's name is shown in the dashboard.

Requests		
	Approver_1 1 hour ago	Status New
	Approver_1 1 hour ago	Status InProgress
	Approver_2 8 hours ago	Status Completed
	Approver_1 4 days ago	Status New
	Approver_2 4 days ago	Status Completed
	Approver_1 1 week ago	Status Completed
<a href="#">View All Transactions</a>		

To view the full list of DSAR Requests, click View All Transactions. It redirects to the Data Subject Access Requests page.

