DEP | **Data Steward Job Aid**

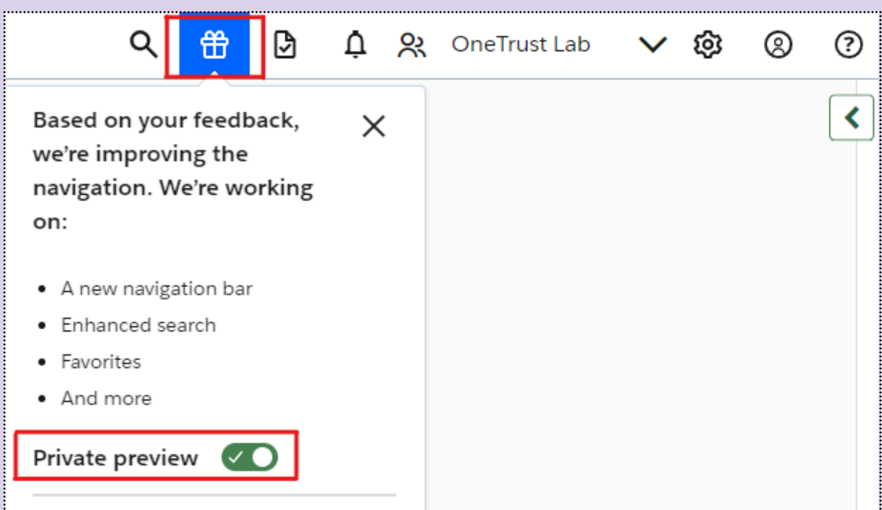
Table of Contents

Note!

The instructions and screenshots in this document are using the **latest OneTrust User Interface**, the "**Private preview**".

To enable the latest User Interface, log into go/onetrust and in the landing page

- Navigate to the top right of the screen and click on the gift icon
- Enable "**Private preview**"



Accessing OneTrust

The Data Enablement Plan (DEP) is an assessment hosted in OneTrust. To execute Data Steward responsibilities within the DEP, completion of the Data Stewardship training is mandatory to obtain the necessary access. The programs team tracks training completion, and will email you once your access has been granted. To find out more about becoming a data steward, visit go/datastewards.

- To access the tool, go to go/onetrust.
- If you have a telus.com email, you do not need to create a password. Enter your TELUS email address and click "**Next**". SSO will automatically log you in.
    - **For non telus.com users** (i.e. @telusagcg.com, @lifeworks.com), go to this link, select "**Forgot Password**" and follow the steps.
    - You will receive an email from OneTrust. Follow the instructions in the email.

How to launch a DEP

Once successfully logged into OneTrust, the Data Steward will launch a DEP assessment.

- Click on the "**Workspaces**" icon on the left of the landing page. *Figure 1*
- Select the "**Privacy Management**" workspace. *Figure 1*
- Click on "**PIA & DPIA**" under "Assessments". *Figure 1*
- One the top right of your screen, click on "**Launch Assessment**". *Figure 2*
- In the "Select a Template" screen, find and select "**Data Enablement Plan**". *Figure 3*

Figure 1

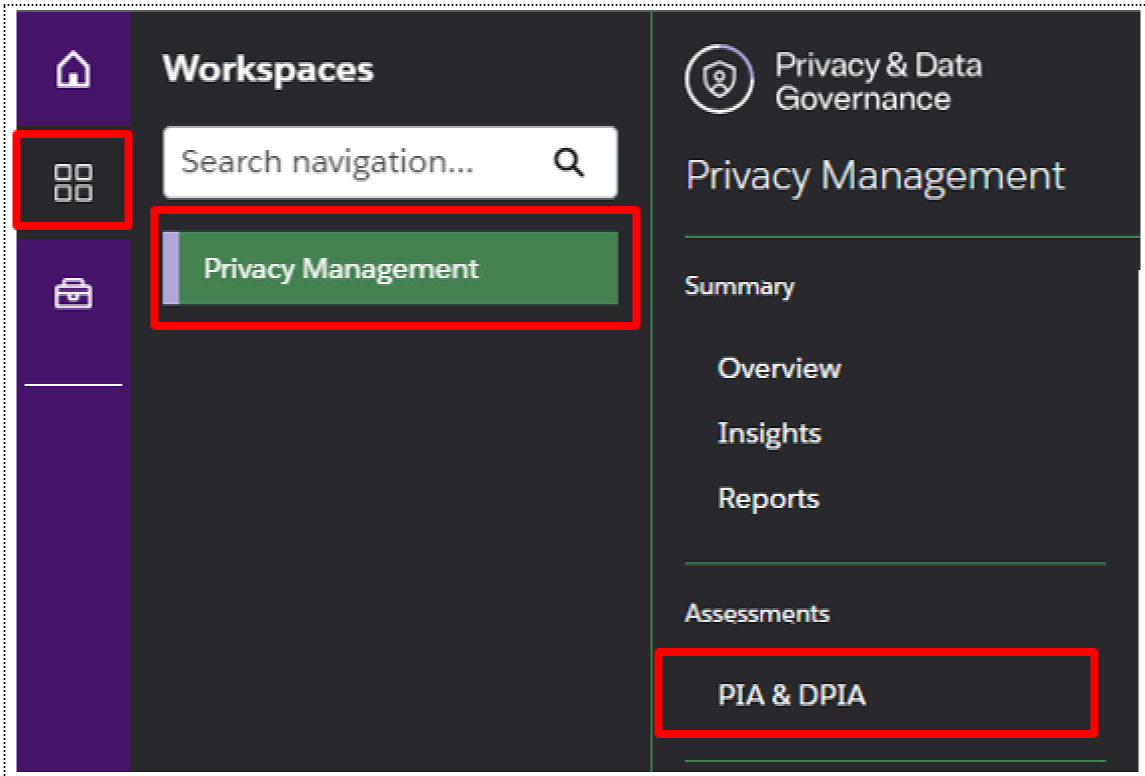


Figure 2

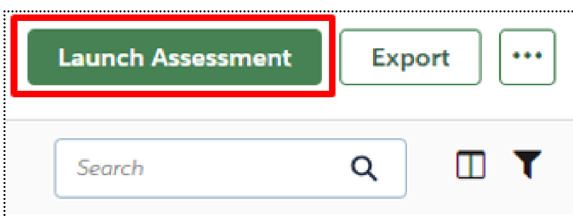
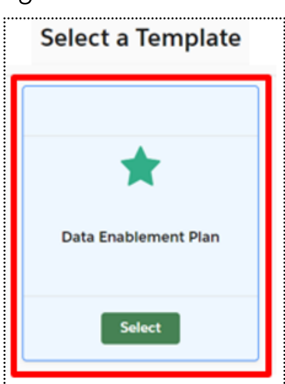
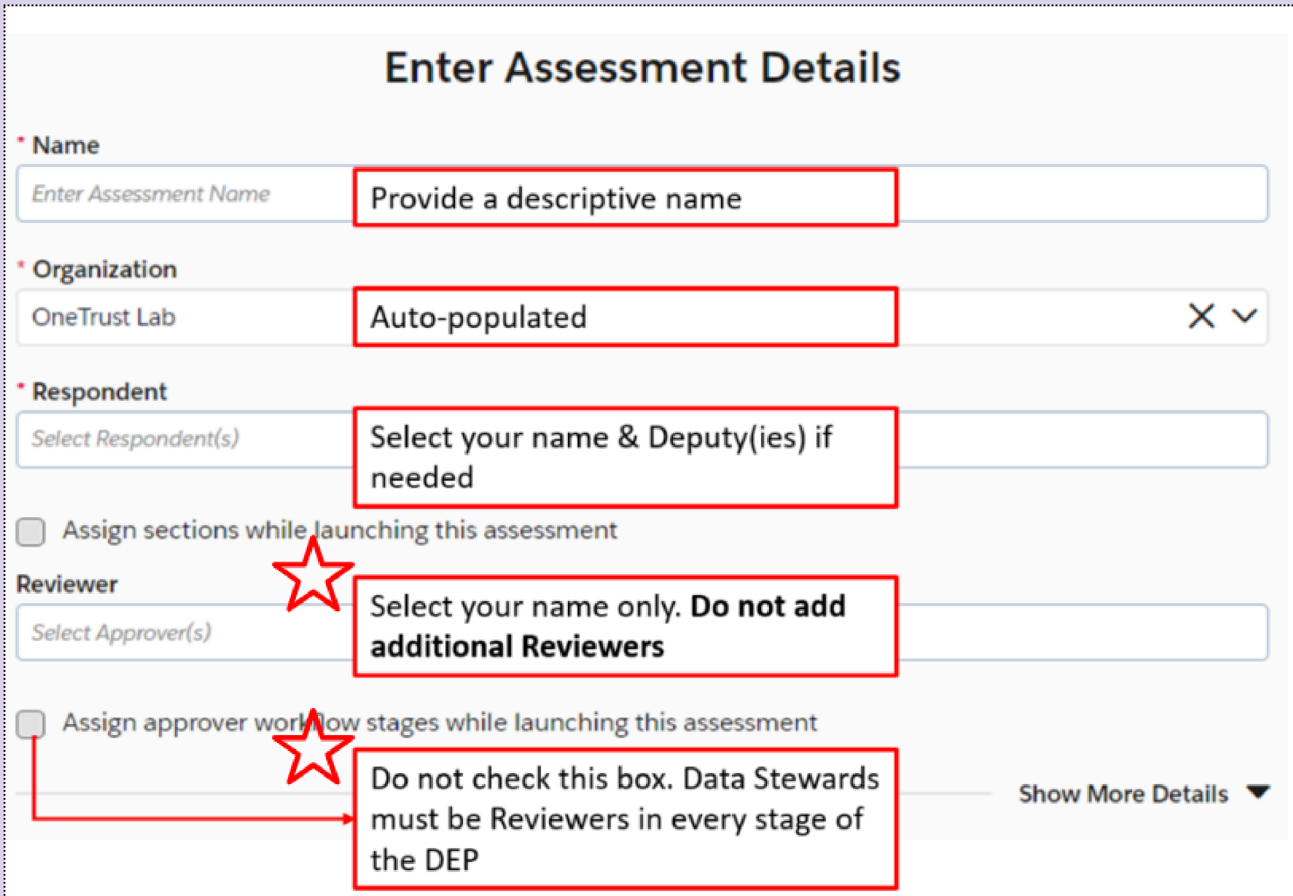


Figure 3



Once the Data Enablement Plan assessment template has been selected, the Data Steward will be prompted to "Enter Assessment Details" as shown below. Once all details have been entered, the Data Steward can "Launch" the DEP.



Reminder!

Do not add additional Reviewers in the Assessment Details. Approvers are **automatically** added to the DEP.

The DS will need to add the Sponsoring Director at a **later stage of the process**.

Data Stewards must be Reviewers in every stage of the DEP. **Please do not remove yourself as a Reviewer and do not check the box "Assign approver workflow stages while launching this assessment" when launching a DEP.**

If the Data Steward is leveraging Deputies, they can be added as "**Respondents**" in the Assessment Details. However, deputies can also be added as Respondents after the DEP is launched.

Note!

If the Deputy is not available in OneTrust, direct them to the [training and form](#) available from [go/dep](#).

- Once the training and form are completed, the Deputy can log into OneTrust via go/onetrust or https://telus.my.onetrust.com/
- Upon logging into OneTrust, the Deputy will automatically receive the required user role.

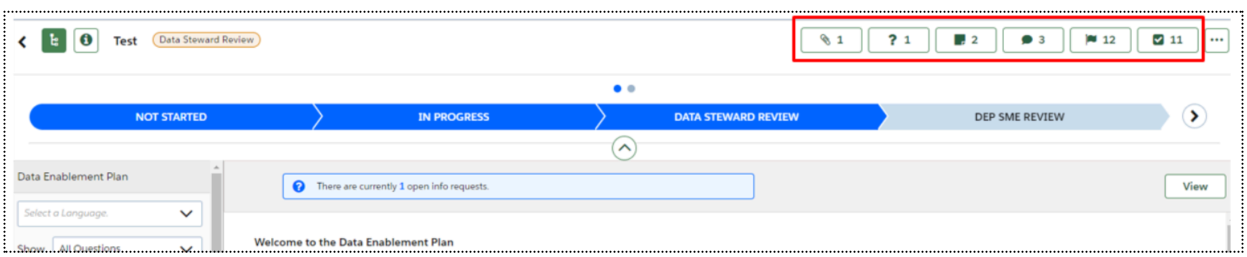
If the deputy does not have a TELUS email domain, please submit an access request at go/depfeedback.

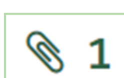
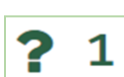
If the deputy has completed the steps above and they are not available, please submit an access request at go/depfeedback.

The Data Steward will then be presented with the DEP assessment. The Data Steward, with the help of Deputies as needed, will respond to all required questions. The Data Steward will “Submit” the DEP once all responses have been provided.

Navigating the DEP

DEP responses are used to identify tasks and potential data risks associated with the DEP initiative. This section provides an overview of how to navigate the essential aspects of a DEP.



	**Attachments:** centralizes attachments added to questions.
	**Info Requests:** centralizes information requests added to questions.
	**Notes:** allows users to create notes.
	**Comments:** centralizes comments added to questions.

	**Risks:** centralizes risks to be reviewed by DEP SMEs.
	**Tasks:** activities that must be implemented by Data Stewards and their BU teams to mitigate risk. All tasks must be completed for the DEP to be Completed.

Adding Deputies as Respondents

Data Stewards can leverage "Deputies" to provide responses. Deputies are subject matter experts within the business that can provide accurate responses to specific DEP questions.

Note!

If the Deputy is not available in OneTrust, direct them to the training and form available from go/dep.

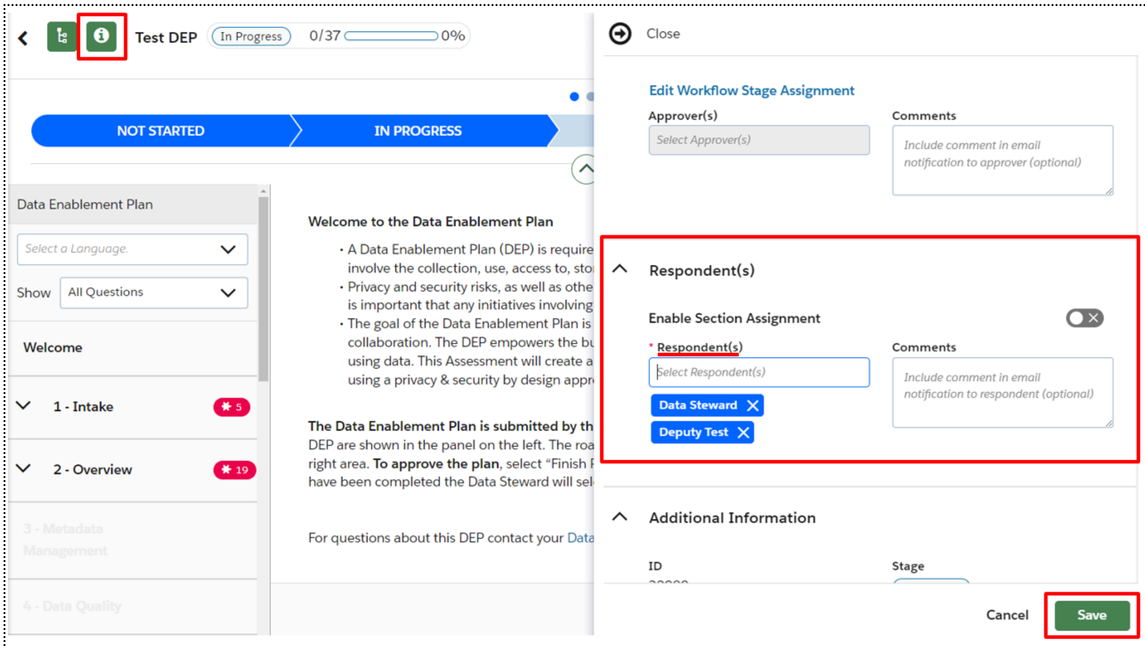
- Once the training and form are completed, the Deputy can log into OneTrust via go/onetrust or https://telus.my.onetrust.com/
- Upon logging into OneTrust, the Deputy will automatically receive the required user role.

If the deputy does not have a TELUS email domain, please submit an access request at go/depfeedback.

If the deputy has completed the steps above and they are not available, please submit an access request at go/depfeedback.

Adding the Deputy as a Respondent

- In the DEP, select the "i" icon (Metadata details) in the top left.
- The Metadata details tab will open on the right side of the screen.
- Locate the "**Respondent(s)**" section and hove over it. Click the edit icon.
- Find your Deputy and click Save.



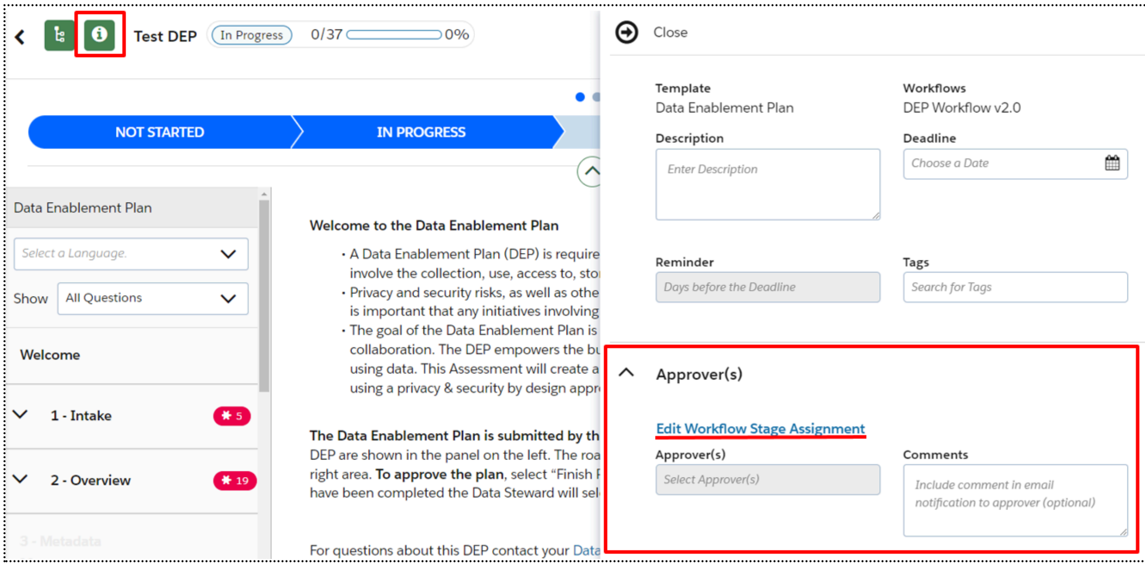
Adding Director as Reviewer/Approver

Once the DEP enters the "DEP Approval" stage, the Data Steward must add the director as an Approver/Reviewer to this stage.

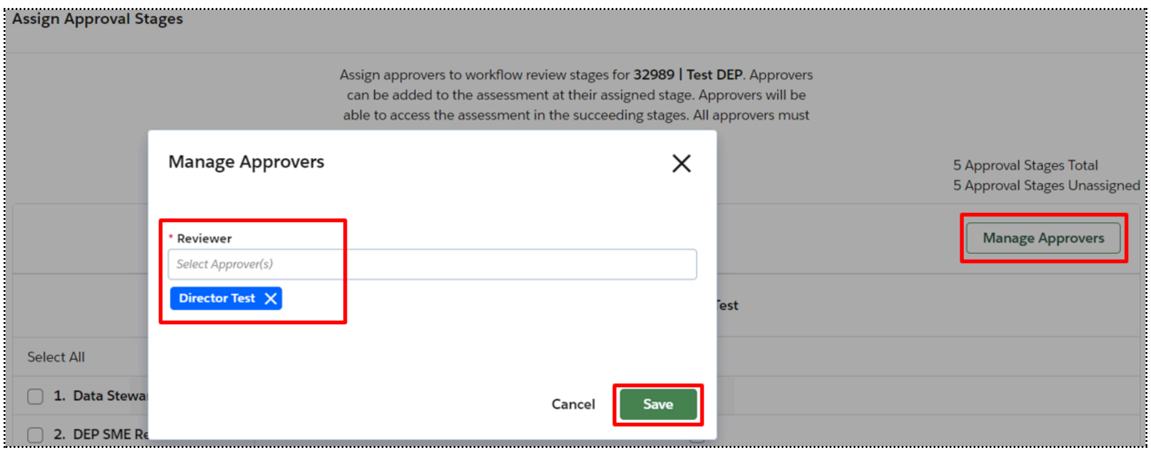
Note!
If your Director is not available in OneTrust, please submit an access request via go/depfeedback.

Adding the Director as a Reviewer/Approver

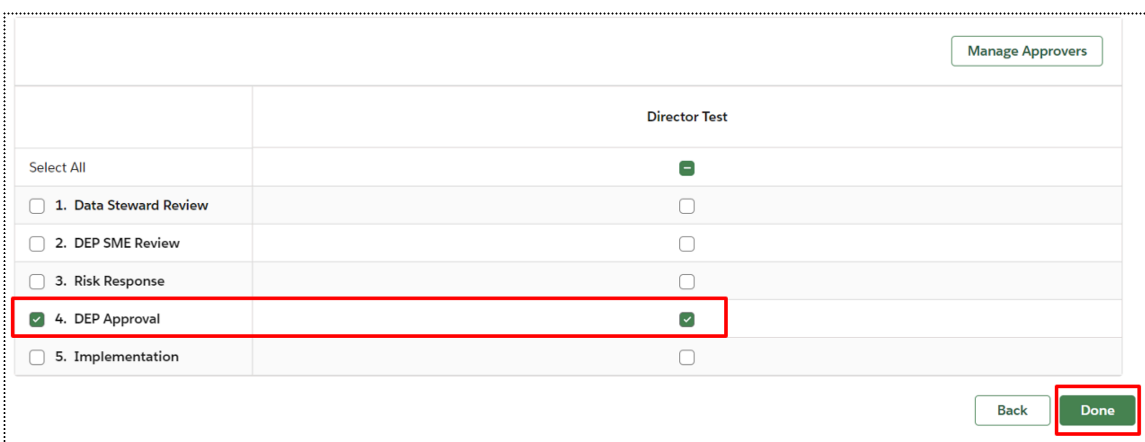
- In the DEP, select the "i" icon (Metadata details) in the top left.
- The Metadata details tab will open on the right side of the screen.
- Locate the "**Approver(s)**" section and select "**Edit Workflow Stage Assignment**".



- In the “**Assign Approval Stages**” screen, click on “**Manage Approvers**”.
- Search for the Director and click **Save**.



- Assign the Director to the “**DEP Approval**” stage and click **Done**, and then **Save**.



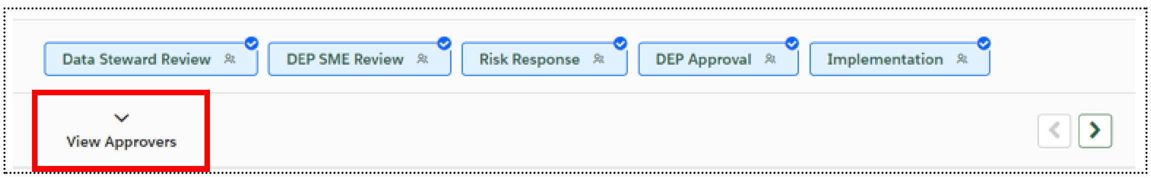
How to identify a DEP SME

Identifying your DEP SME will give you a first point of contact for any Privacy or Security questions you or your business primes may have as you move through the DEP. SMEs are automatically added by the system when a DEP advances to the DEP SME Review stage.

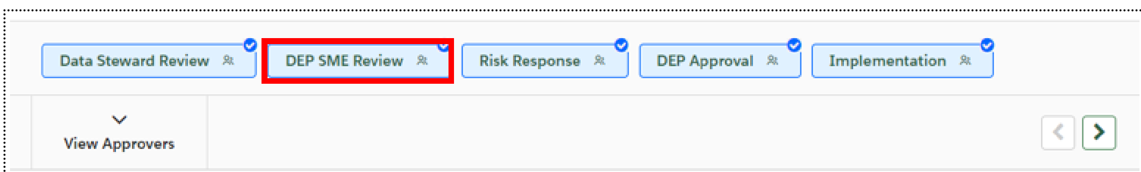
How to identify a DEP SME from your DEP

- Navigate to your DEP
    - Note: Your DEP must have reached the **DEP SME Review** stage before approvers will be visible.

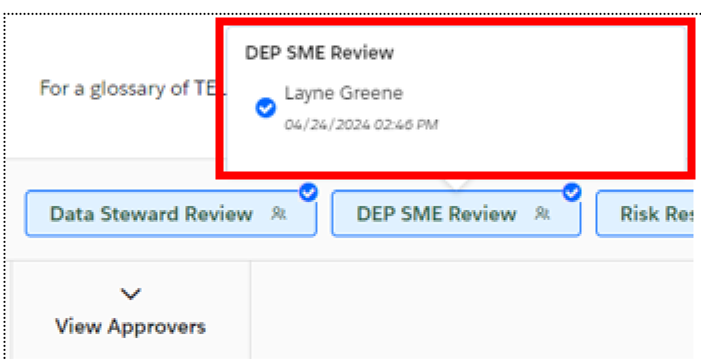
- Click on the "**View Approvers**" button near the bottom of the page



- Click on the "**DEP SME Review**" stage.



- Your DEP SME will appear above the selected stage.



How to identify your Data & Trust partner

If you have not yet started your DEP, or are generally unsure who your Data & Trust partner is, you can view a list of Data & Trust partners by business area at the link below:

https://sites.google.com/telus.com/data-innovation-team/meet-the-team

How to find Additional Assessments

Upon the DEP being submitted, additional assessments may be triggered.

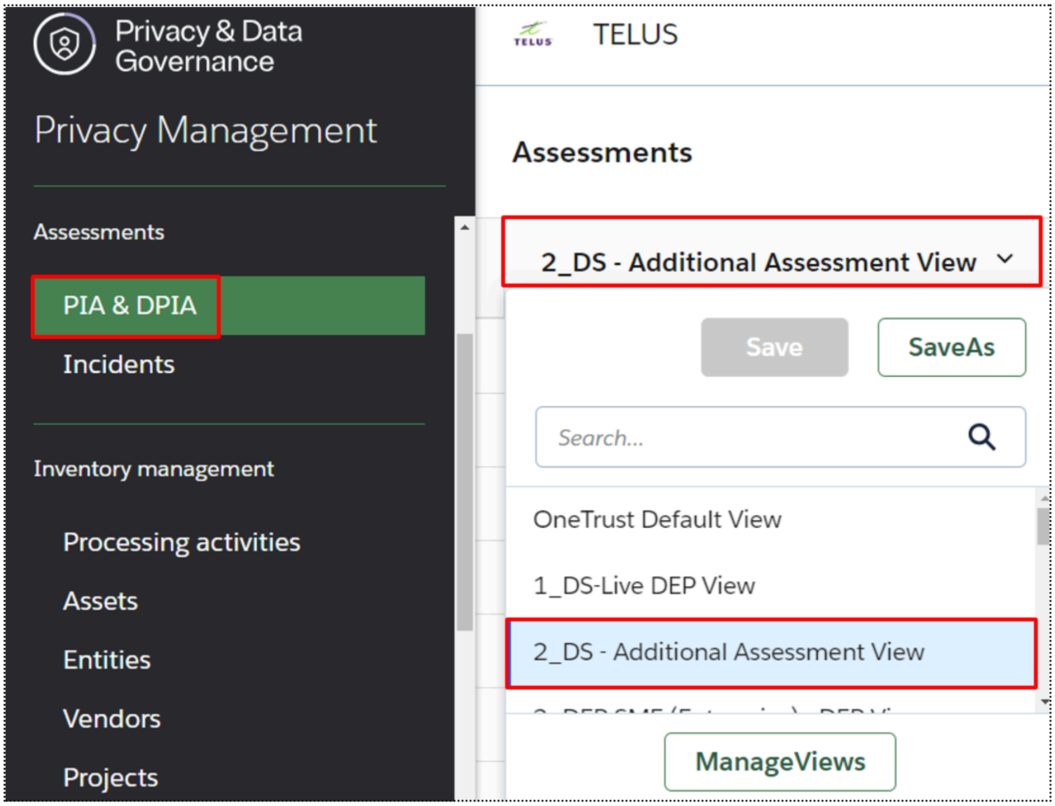
If additional assessments are triggered, these are to be completed during the "**Data Steward Review**" stage.
A DEP can trigger any of the following four assessments: TELUS Vendor - Responsible AI Assessment, TELUS Vendor - Additional Partner, TELUS Vendor - Privacy Vendor Assessment, TELUS Vendor - Third Party Security Questionnaire.

To determine if you are required to complete an additional assessment(s):

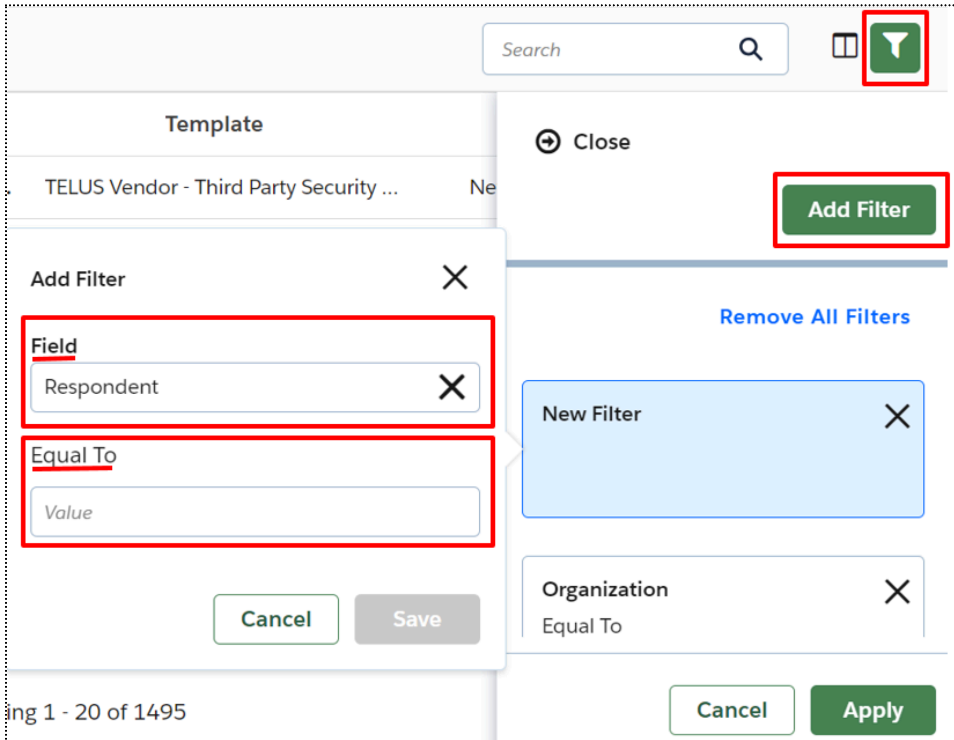
- In the DEP, locate the "**Tasks**" on the top right of the screen
- If additional assessment(s) need to be completed, they will be called out as a Task
    - In the list of Tasks, additional assessments will be called out in the following manner:
        - DEP Task - Privacy vendor assessment
        - DEP Task - Third party security assessment
        - DEP Task - Complete TELUS Vendor - Responsible AI Assessment
        - DEP Task - Additional Vendor Assessment

To find the additional assessment(s)

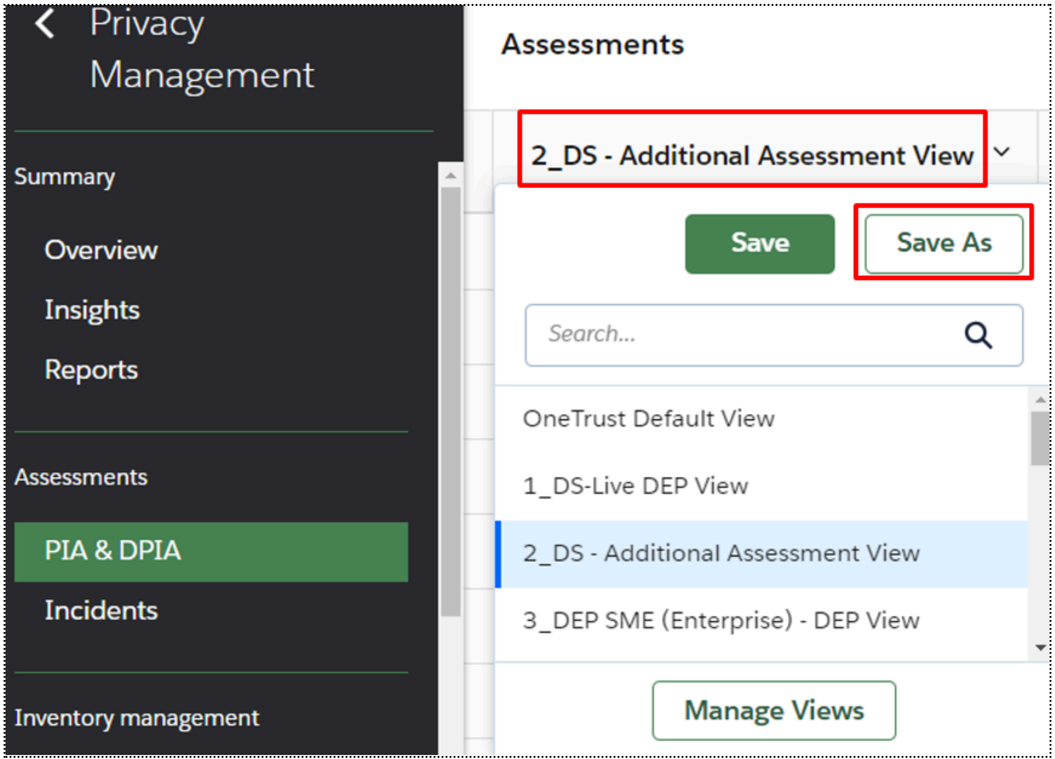
- In OneTrust, navigate to the "PIA & DPIA" landing page
- In the "**Assessments**" screen, expand the "**Views**" and select "**2_DS - Additional Assessment View**"
    - This View will display **all** additional assessments within your organization
    - The "**Template**" column will denote the specific assessment



- To filter your search
  - Use the search bar on the top right and search your DEP's name. All additional assessment will inherit the DEP name as a prefix
  - Alternatively, to filter for all additional assessments that you are responsible for, go to the filter icon located at the top right and;
    - "**Add Filter**"
    - "**Field**" = "Respondent"
    - "**Respondent**" = Data Steward's name
    - **Save** and **Apply**



- If you would like to save this “View”, after you have applied the desired filters
  - Click on the “**Views**” drop down
  - Select “**Save As**” and follow the prompts
  - In the future, this customized view will be available at the bottom of the Views pick list



Adding external users as Respondents to an assessment (i.e. third-party vendor emails)

Note!
External users are added as Respondents to **additional assessments only**. **Do not add external users (i.e. non-TELUS) as Respondents to DEPs. DEPs contain sensitive and confidential information that is typically only accessible to the initiating project team.**

To add an external user as a Respondent:

- In the additional assessment, locate the "i" icon on the top left. *Figure 1*
- Locate and click on the "**Respondent(s)**" section. *Figure 1*
- Type in the external email address and select "**+ Assign to:**" and click **Save**. *Figure 1*
  - If a prompt screen appears, select "**Send the link (no sign-in required)**" and **Confirm**. *Figure 2*

Figure 1

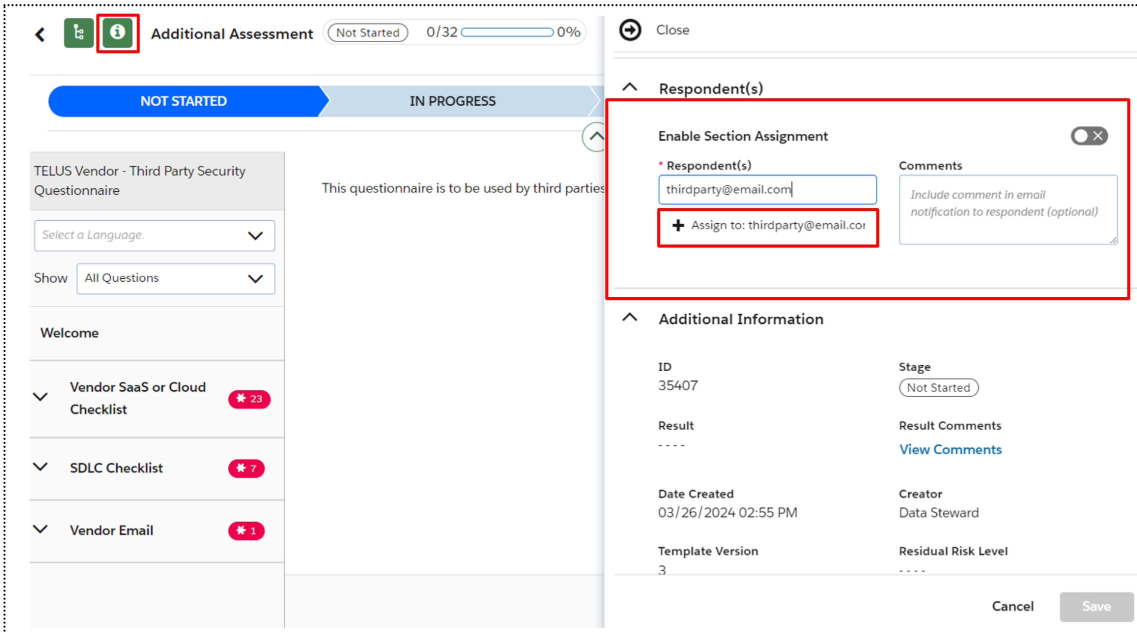
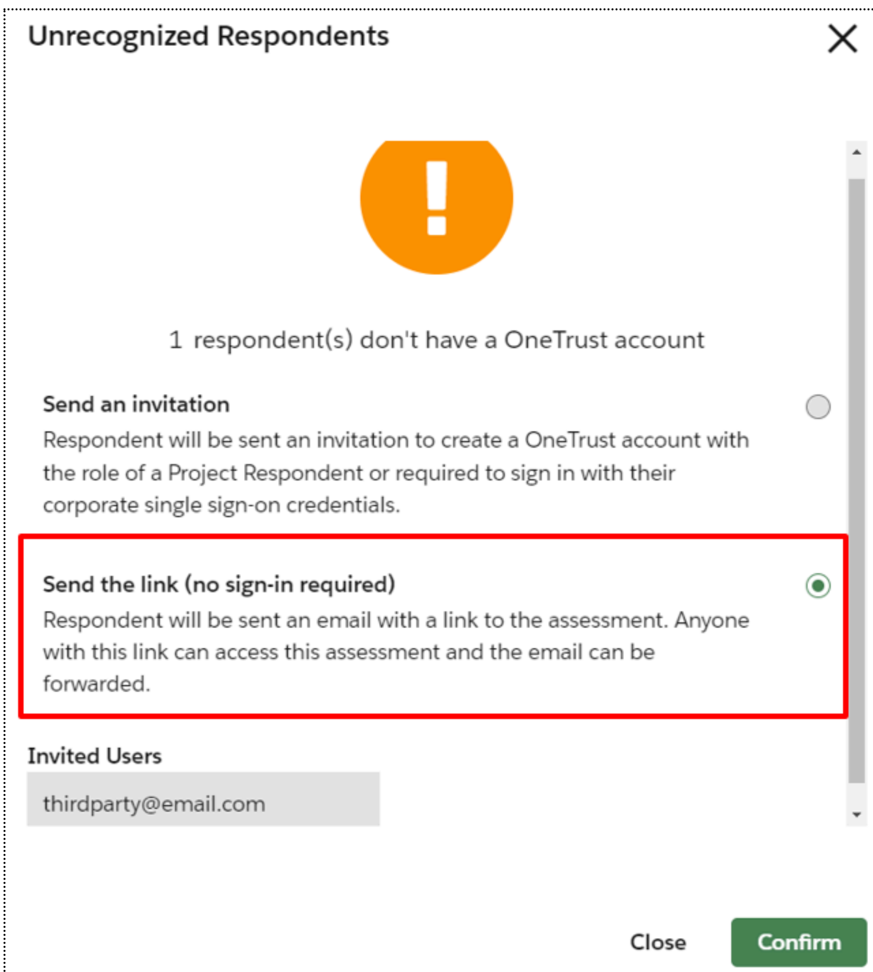

Additional Assessment
Not Started
0/32
0%
NOT STARTED
IN PROGRESS
TELUS Vendor - Third Party Security Questionnaire
Select a Language
Show
All Questions
Welcome
Vendor SaaS or Cloud Checklist
23
SDLC Checklist
7
Vendor Email
1
This questionnaire is to be used by third parties
Close
Respondent(s)
Enable Section Assignment
* Respondent(s)
thirdparty@email.com
Assign to: thirdparty@email.cor
Comments
Include comment in email notification to respondent (optional)
Additional Information
ID
35407
Stage
Not Started
Result
- - - -
Result Comments
View Comments
Date Created
03/26/2024 02:55 PM
Creator
Data Steward
Template Version
3
Residual Risk Level
- - - -
Cancel
Save

Figure 2


Unrecognized Respondents
1 respondent(s) don't have a OneTrust account
Send an invitation
Respondent will be sent an invitation to create a OneTrust account with the role of a Project Respondent or required to sign in with their corporate single sign-on credentials.
Send the link (no sign-in required)
Respondent will be sent an email with a link to the assessment. Anyone with this link can access this assessment and the email can be forwarded.
Invited Users
thirdparty@email.com
Close
Confirm

Info Request

DEP SMEs (ie. Privacy & Security partners) can leverage “Info Requests” to seek additional clarification on specific questions.
DEP SMEs initiate Info Requests, and data stewards follow up on the requests to provide the required information. The DEP SME closes the Info Request once they have the necessary information.

How to identify Info Requests

There are two ways to identify when an Info Request has been initiated:

- The data steward will receive an email notification
- The Info Request will appear under “Info Requests” in the DEP

HIVE

Data Stewards may be required to attend HIVE. After reviewing the DEP, DEP SMEs , including the Data & Trust partner (Privacy) and the Secure by Design partner (Security), may ask the data steward to schedule a HIVE. Any business SMEs that have essential knowledge about the initiative should be invited by the Data Steward. Please do not invite vendors to HIVE without first discussing with your DEP SMEs.

What is HIVE?

HIVE serves as an agile forum where Data and Trust Office and Chief Security Office Subject Matter Experts (SMEs) collaborate with the data steward to raise questions and risks related to a specific DEP.

How do I know if I need to schedule a HIVE?

If a HIVE session is necessary, a DEP SME will generate an "Info Request" on the DEP with detailed instructions on how to schedule the session.

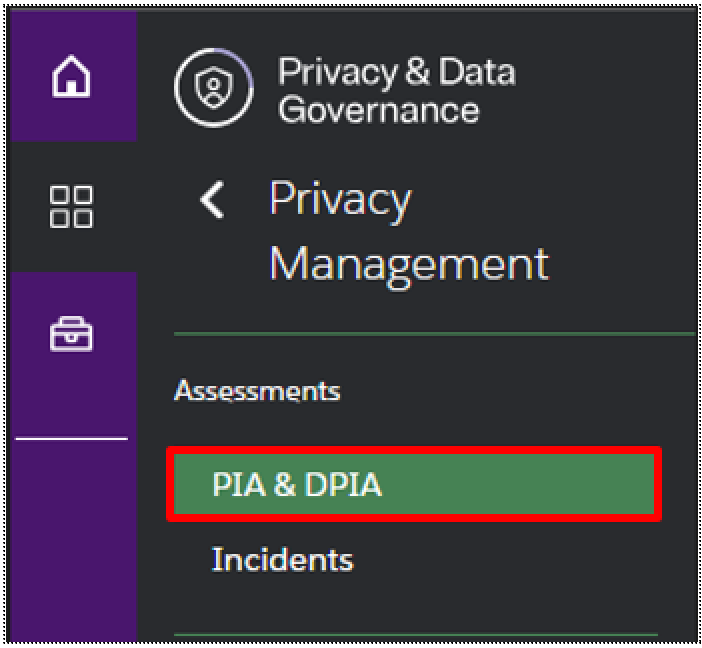
How to search for PIAs and HPIAs in OneTrust / How to switch roles

This section demonstrates how a Data Steward can switch between roles in OnTrust. A Data Steward will need to modify their role if they are searching for PIAs or HPIAs.

Data Stewards have access to either PIAs or HPIAs, and this depends on the business area; if you are a Data Steward in TELUS Health, you will be granted access to search for HPIAs, if you are a Data Steward in TTech, you will be granted access to search for PIAs.

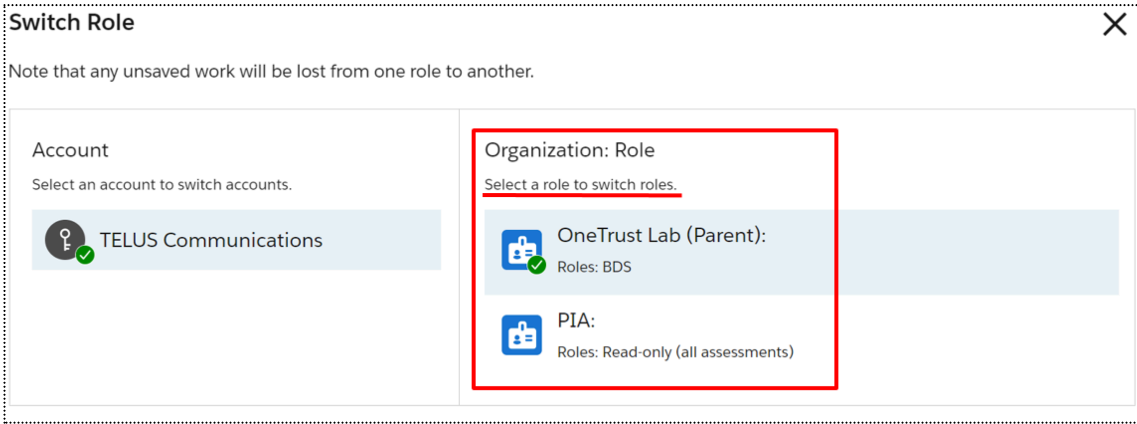
How to search for PIAs and HPIAs / How to switch between roles

- Log into OneTrust and navigate to the **PIA & DPIA Automation** module

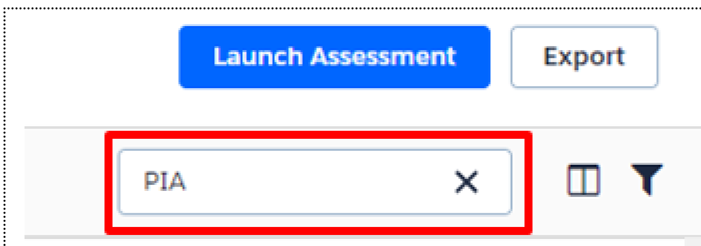


- In the bottom left corner of your screen, locate your initials to open your profile menu, then select **Switch**

- Select **PIA** or **HPIA** to change your role.



- You will now be able to search via keyword or PIA/HPIA number. It is recommended to add PIA or HPIA to the search bar to specify results

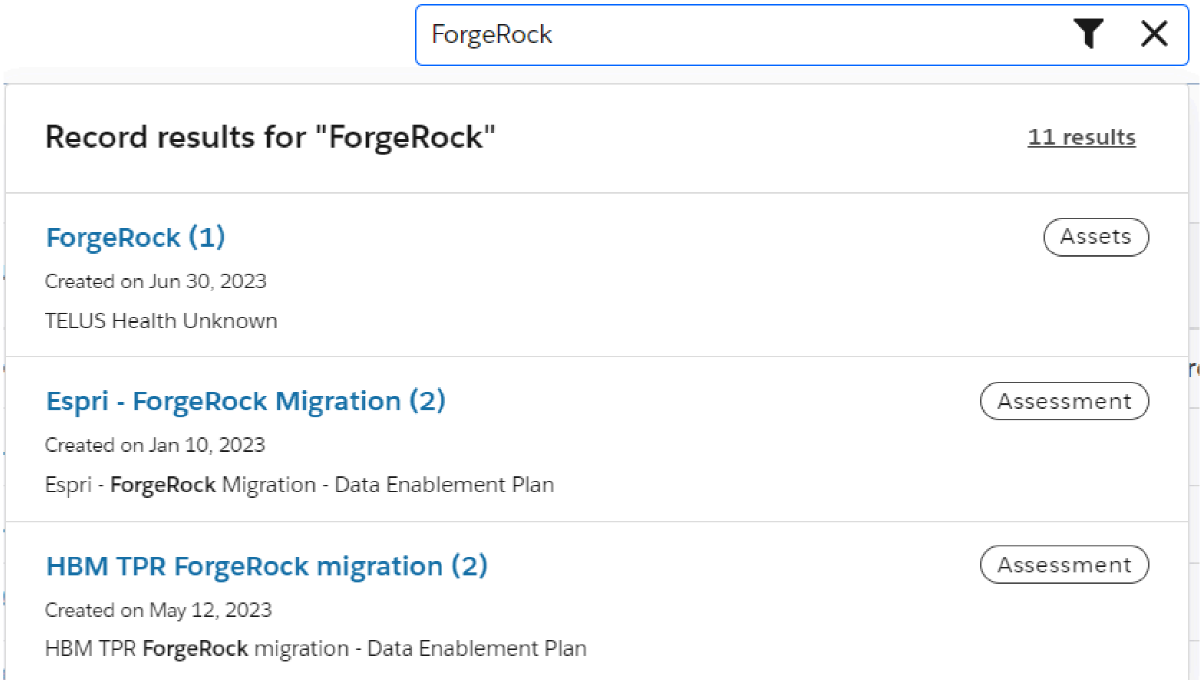


- **Once you are done, be sure to switch back to your OneTrust organization**

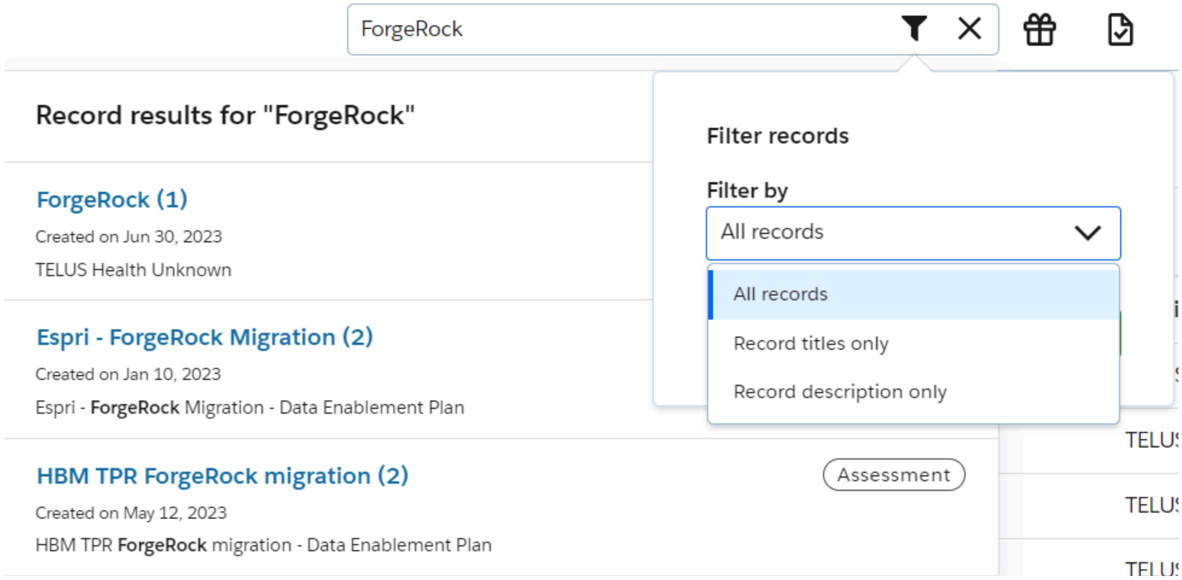
How to perform a global search of all records in OneTrust

Use the search field in the Global Header to look up assessments, assets, and more. To use the global search function:

- Click on the magnifying glass 🔍 in the Global Header. The search field appears.
- Enter your keyword in the search field. For example, entering "ForgeRock" will instantly populate the Search popover with results containing that keyword.



- The first three search results appear. The total number of search results appear at the top right of the popover. Click on the link for all of the search results to view them on a new screen. With this example, there are results for Assessments (re: Data Enablement Plans or DEPs), as well as Assets, which are registered and maintained in OneTrust.
- If you click on an assessment title, you have the option to view this record on the PIA & DPIA Automation screen or the Data Mapping Automation screen. For DEPs, either option will open the DEP.
- To filter the search results, click the Filter icon . A popover appears giving you the option to filter the search results by All Records, Record titles only, or Record description only

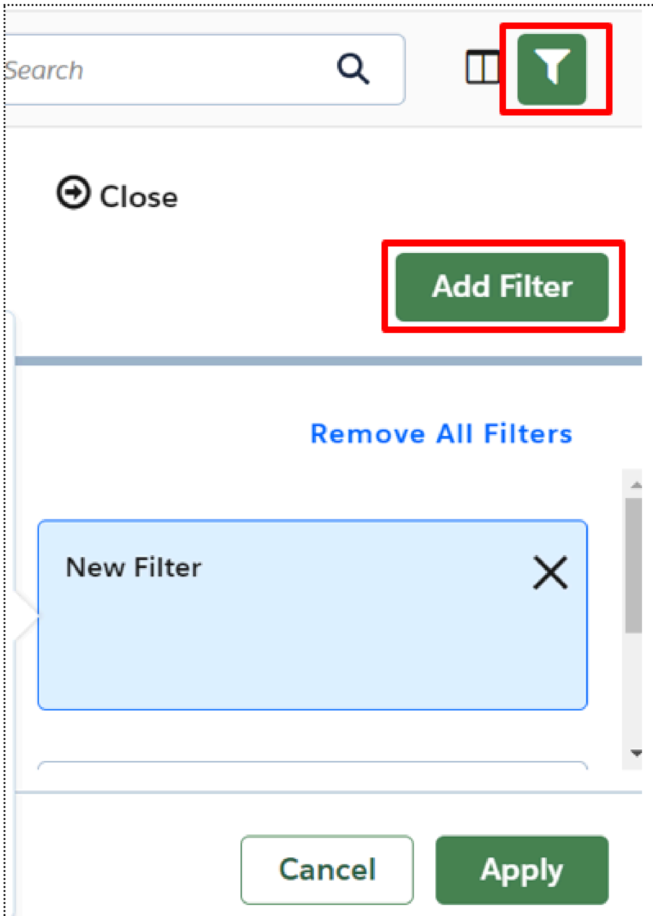


How to create a Custom View

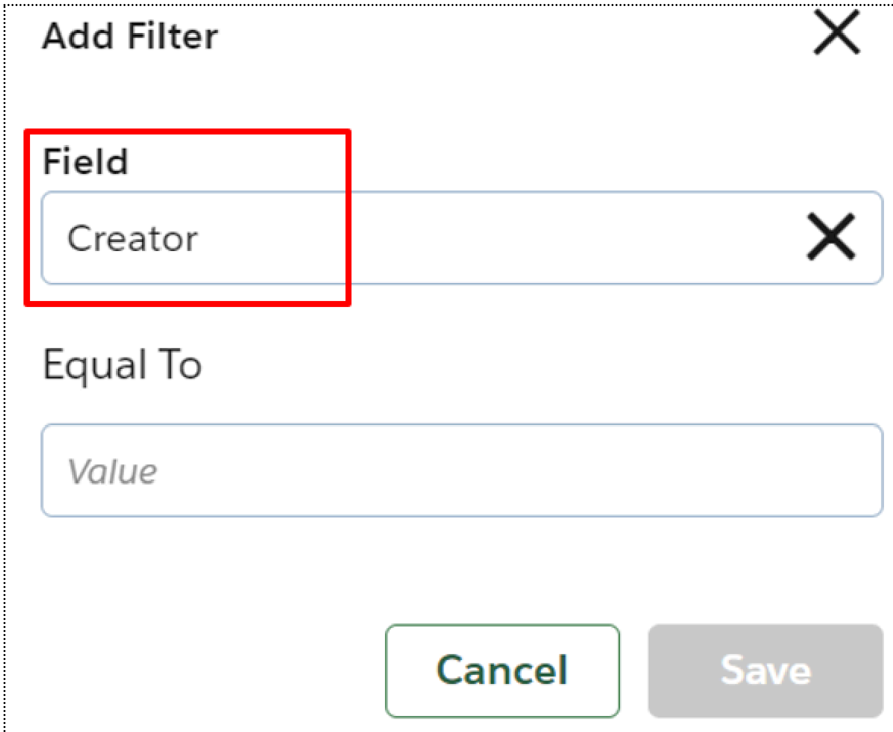
A View is the landing page of the PIA & DPIA module. Data stewards can use "Views" to filter DEPs based on specific criteria.
For instance, if a data steward is only interested in viewing the DEP assessments they are responsible for, they can create a custom view that displays only those assessments.

Creating a custom view

- In OneTrust, navigate to the [“PIA & DPIA” landing page]()
- In the “Assessments” screen, expand the “**Views**” and select “**1_DS - Live DEP View**”
  - This shows **all** DEP assessments created within your OneTrust organization
- On the top right, click on the **filter** icon
  - You can use this feature to “**Add Filters**” and refine the results

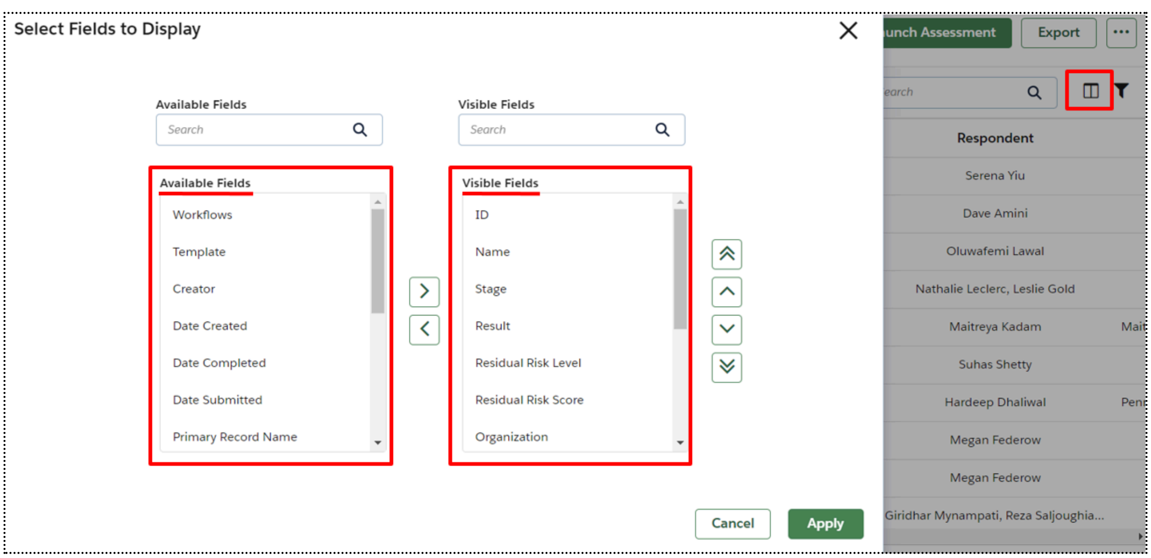


- To filter for DEPs you are responsible for, simply add the "**Creator**" field, select your name in the “**Equal To**” field, **Save**, and **Apply**



How to modify Display Fields

- On the top right, click on the book icon (beside the filter icon)
- A window will appear where you can define the “Visible Fields” from the list of “Available Fields”



How to Save a View

Once the desired filters and displayed fields are specified, the custom view can be saved.

- On the top left, click on the Views drop down
- Select "**SaveAs**". *Figure 1*
- When prompted, provide a "**View Name**" and "**Create View**". *Figure 2*
- The View will be available in the views dropdown going forward
- If you make modifications to the view in the future, you must Save the view. The Save button can be found beside the "SaveAs" button under the Views dropdown

Figure 1

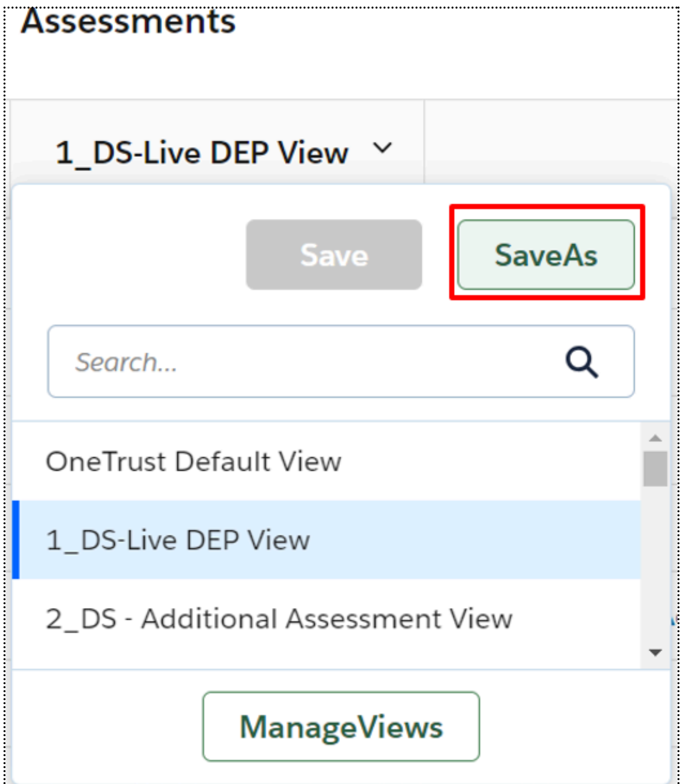
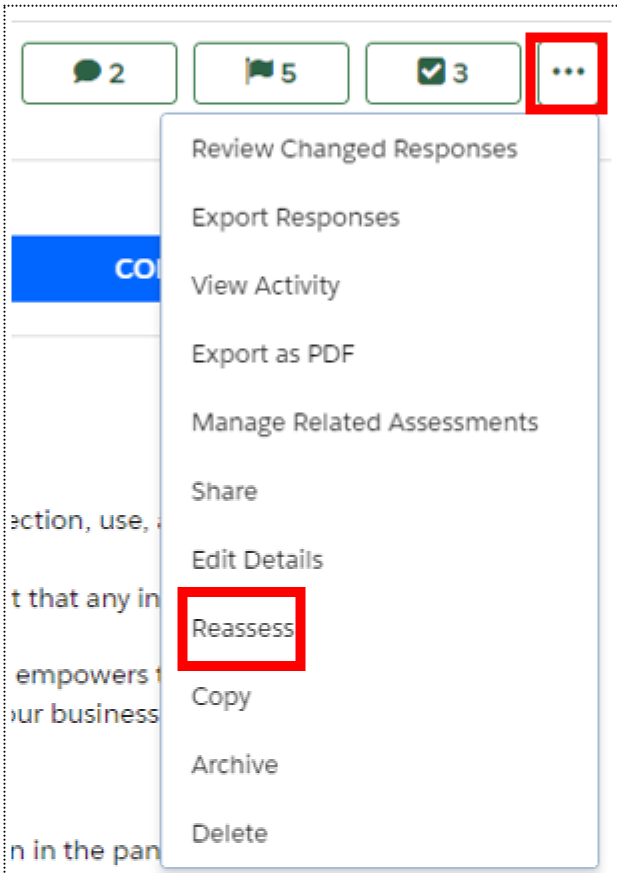


Figure 2

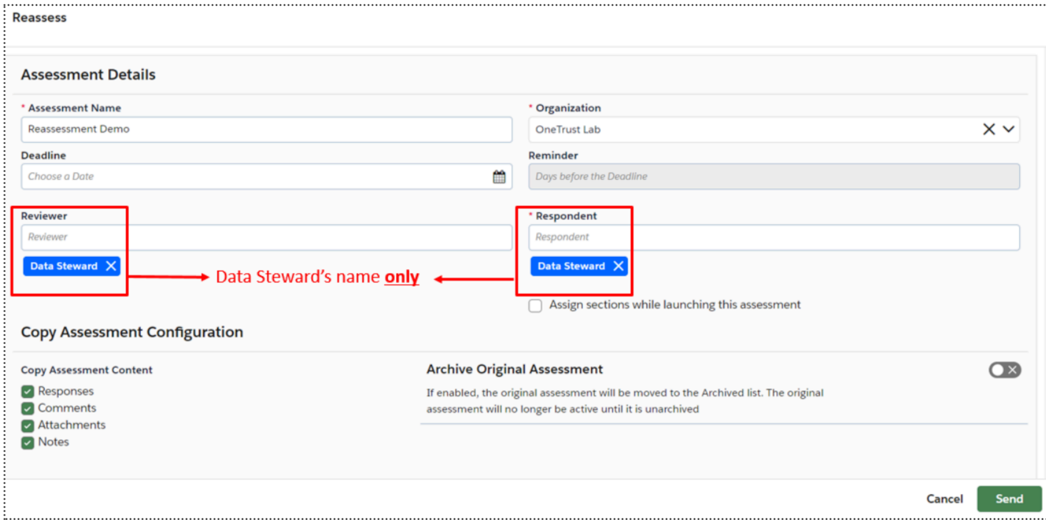
Copying/Reassessing DEPs

Data Stewards can create copies of existing DEPs by leveraging the ‘Reassess’ functionality.
To create a copy of a DEP:

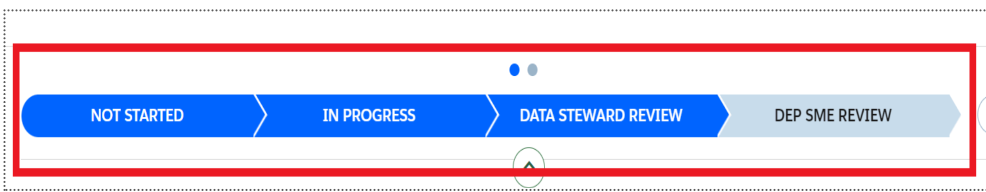
- Locate the DEP to be copied.
- Top right, menu button (three dots), select “**Reassess**”.



- In the “Reassess” screen:
  - Modify the “**Assessment Name**”.
  - ***Reviewer field:** remove all reviewers under the “Review” field except for yourself (Data Steward).
  - **Respondent:** ensure you (the Data Steward) is the Respondent.



- Verify if the 'Workflow' needs to be updated.
  - After successfully creating a copy using the 'Reassess' function, you can identify if the Workflow needs updating in two ways. If the Workflow needs to be updated, contact your DEP SME for assistance.
  - **Option 1:** The Stages banner located at the top of the DEP. If the Stages banner does not contain the stages listed below, plus Risk Response, DEP Approval, and Implementation, the Workflow will need to be updated. Contact your DEP SME for assistance.



  - **Option 2:** Assessments Metadata Details. If the Workflow is not 'DEP Workflow v2.0', contact your DEP SME for assistance.