

# DPO Advisor Quick Guide

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# Mini Dictionary

## **Dashboard**

The front page where you can see your organisation's Records of Processing Activities.

## **Records**

A full list of your organisation's Records of Processing Activities.

## **Assets**

All IT systems, hardware, physical addresses, etc., which are used to process personal data and the people responsible for each asset.

## **Data Processor**

The suppliers, who process personal information on behalf of the organisation.

## **Risk Assessment**

The assessment of potential threats, their impact on the data subjects and the likelihood of them occurring.

## **Order**

The order determines where in the wheel the Record is placed - just like on a clock. You should choose a system such as 10-20-30 to ensure that your Records are placed in the desired order.

## **Responsible**

It depends on the individual organization who is chosen to be responsible. For example, it may be the person responsible for updating, the person responsible for the activity in practice or the person responsible for the creation of the Record.

# Icon Catalog



Dashboard

---



Records

---



Assets

---



Processor

---



Data Protection

---



Risk Assessment

---



Invite a colleague

---



Tasks

---



Approvals










---



Language

---

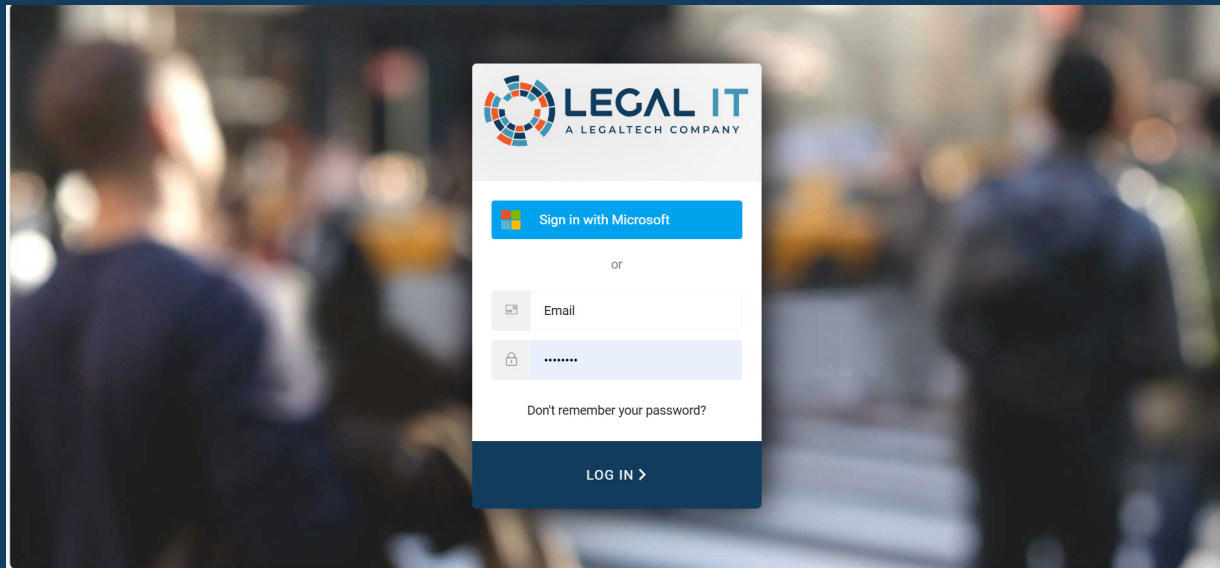
# Icon Catalog

	Settings
	Attachments
	Flows
	See details
	Download
	Edit
	Delete
	Wizard
	Company

# 1

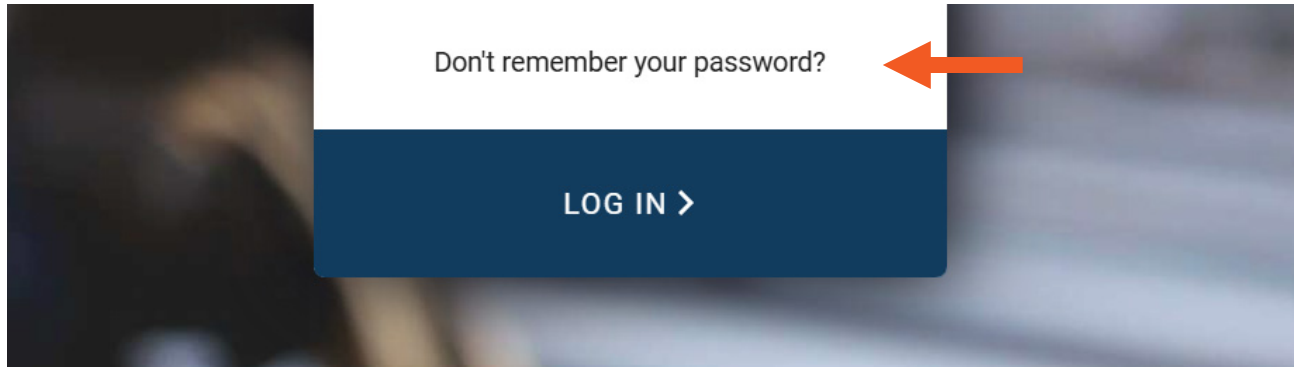
# LOG ON

# 1.1 Log on to DPO Advisor

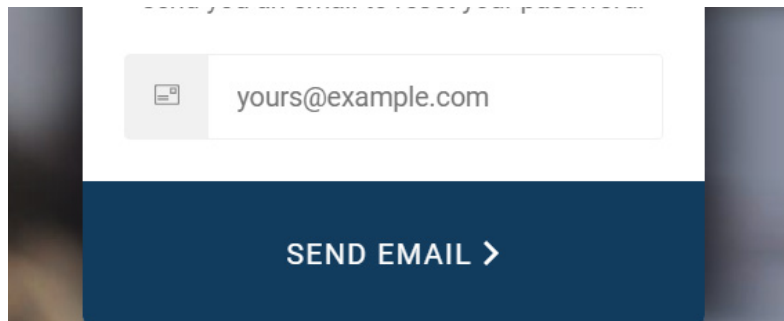


# 1.2 Change Password

Change password by clicking "Don't remember your password?"



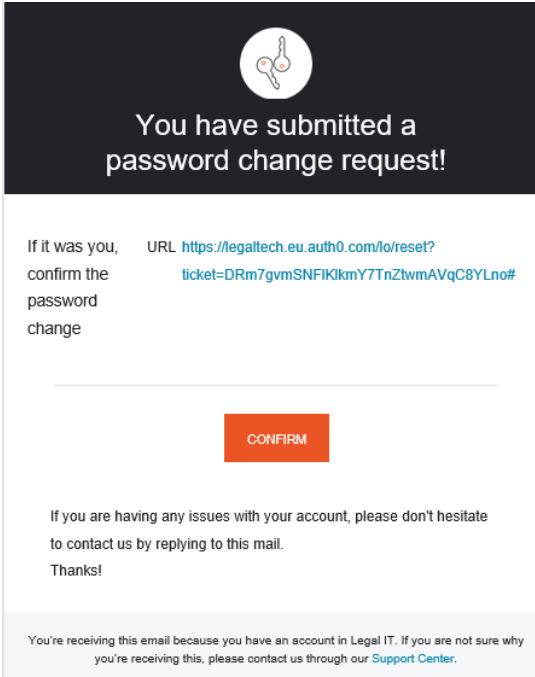
Enter email, click "Send Email" and follow the email sent.





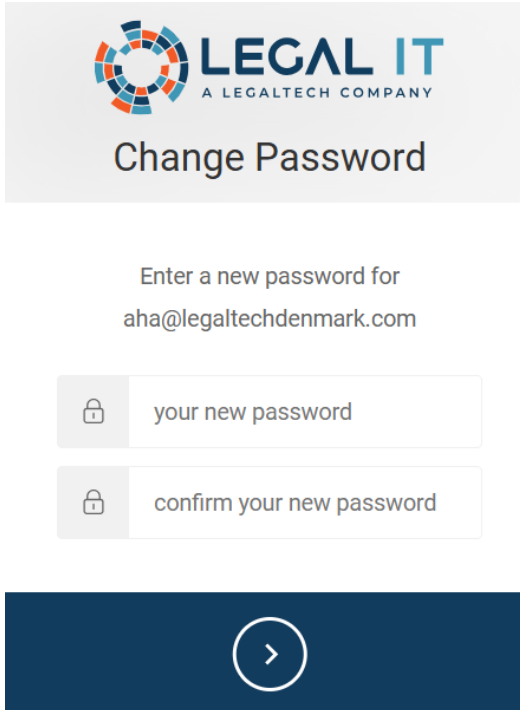
# 1.3 Change Password

Click "Confirm" in the email.



The image shows a screenshot of an email confirmation page. At the top, there is a dark blue header with a white key icon and the text "You have submitted a password change request!". Below this, the email body contains the text: "If it was you, confirm the password change" followed by a URL: "URL <https://legaltech.eu.auth0.com/fo/reset?ticket=DRm7gvmSNFIKIkMYY7TnZlwmAVqC8YLno#>". A prominent orange button labeled "CONFIRM" is centered below the URL. At the bottom, there is a light blue footer with the text: "If you are having any issues with your account, please don't hesitate to contact us by replying to this mail. Thanks! You're receiving this email because you have an account in Legal IT. If you are not sure why you're receiving this, please contact us through our [Support Center](#)."

Insert your new password.



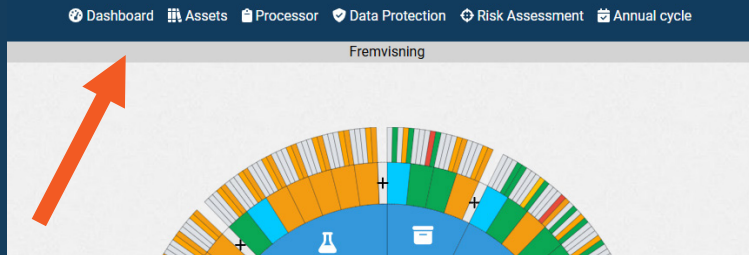
The image shows a password change form interface. At the top, there is a logo for "LEGAL IT A LEGALTECH COMPANY" and the text "Change Password". Below this, the form prompts the user to "Enter a new password for aha@legaltechdenmark.com". There are two input fields, each with a lock icon on the left. The first field is labeled "your new password" and the second field is labeled "confirm your new password". At the bottom, there is a dark blue button with a white right-pointing arrow.

2

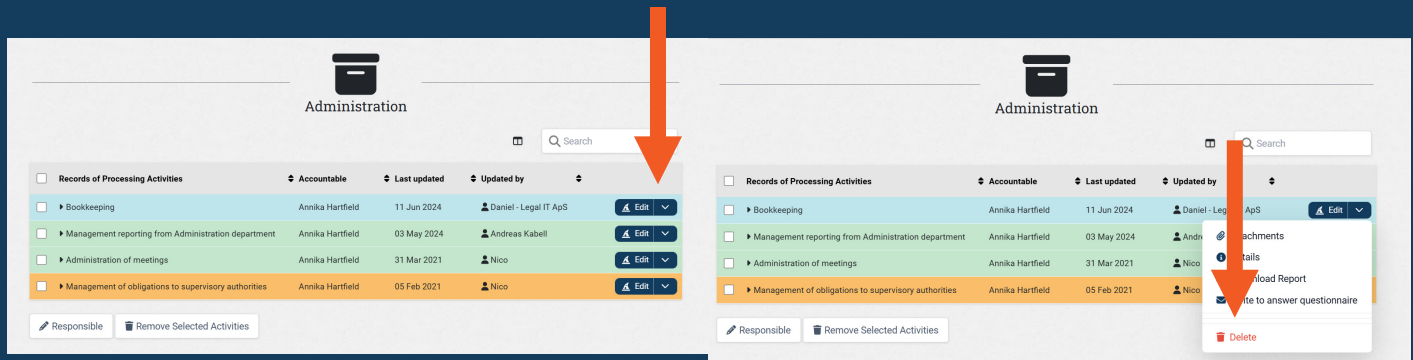
RECORDS

# 2.1 Delete Records

1. Go to 'dashboard' in the menu and scroll down to 'records of processing activities'

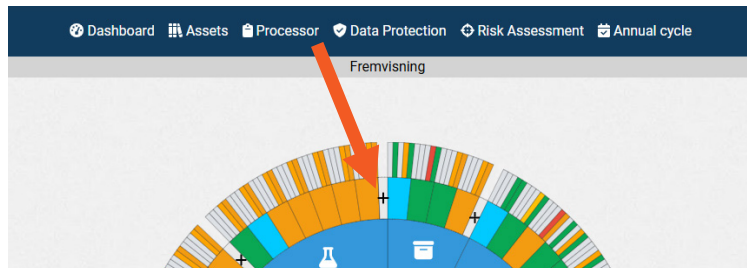


2. Delete those records irrelevant for you. Click on the 'arrow-symbol'. Remember to scroll down so you won't forget any records. They all have their own individual headline like 'administration' and 'marketing'.



# 2.2 Add Records

1. Go to "Dashboard" in the menu and press "+" in the wheel under the relevant section.



2. Add relevant Processes that may be missing - e.g. *optician doing "vision tests"*.

**Process**

Name  Section  Order

Responsible

Description

Assets  Processors  Data Breach

# 2.3 Add Records

1. Name the Record.
2. Choose which order you want the listing placed in.
3. Select who is responsible.
4. Leave the remaining fields and click "Create".

**Process**

Name **1**  Section  Order  **2**

Responsible **3**

Description

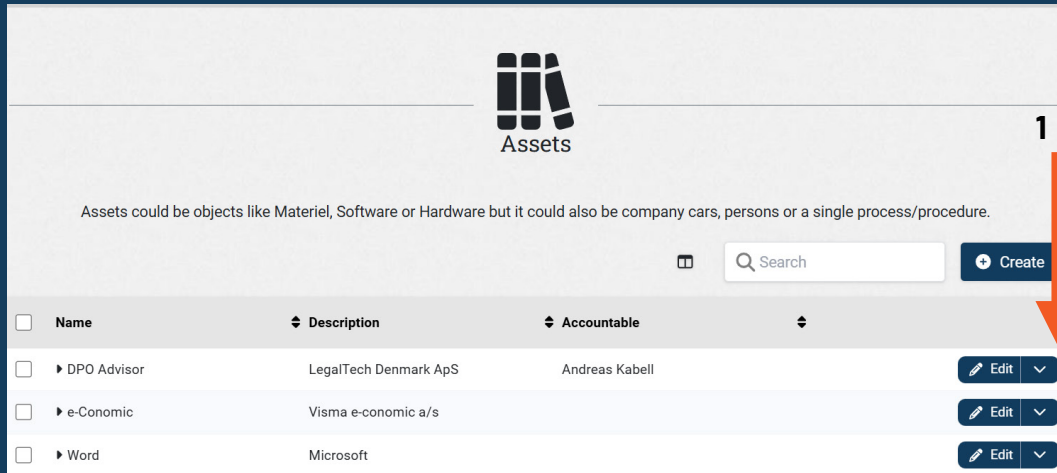
Assets  Processors  Data Breach

**4**

3

ASSETS

# 3.1 Delete Assets



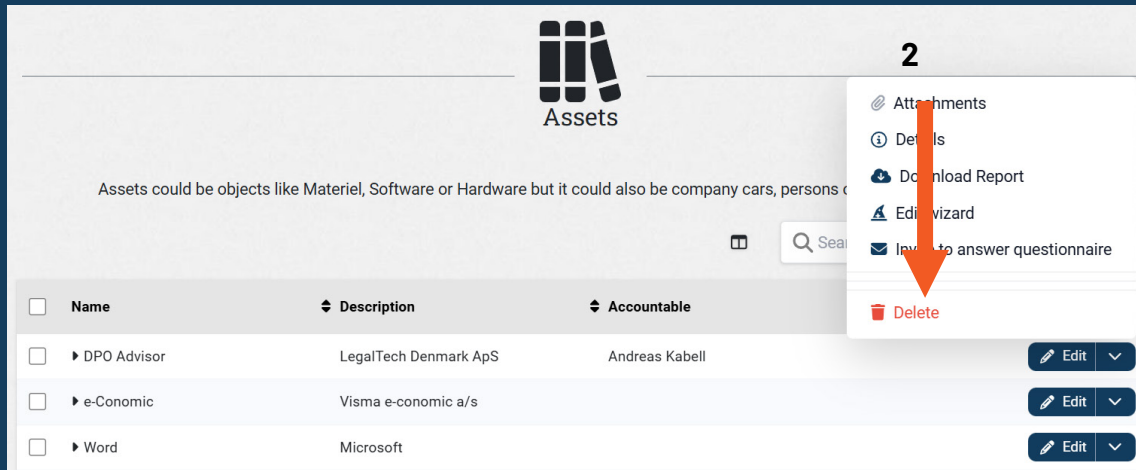
Assets

Assets could be objects like Materiel, Software or Hardware but it could also be company cars, persons or a single process/procedure.

Search [ ] [ + Create ]

<input type="checkbox"/>	Name	Description	Accountable	
<input type="checkbox"/>	▶ DPO Advisor	LegalTech Denmark ApS	Andreas Kabell	[ Edit ] [ v ]
<input type="checkbox"/>	▶ e-Economic	Visma e-economic a/s		[ Edit ] [ v ]
<input type="checkbox"/>	▶ Word	Microsoft		[ Edit ] [ v ]

1



Assets

Assets could be objects like Materiel, Software or Hardware but it could also be company cars, persons or a single process/procedure.

Search [ ] [ + Create ]

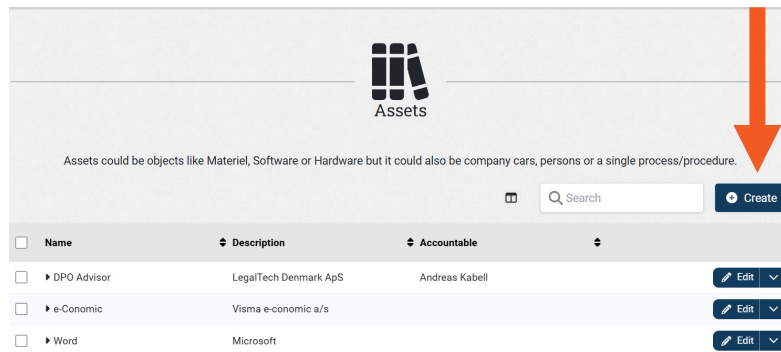
<input type="checkbox"/>	Name	Description	Accountable	
<input type="checkbox"/>	▶ DPO Advisor	LegalTech Denmark ApS	Andreas Kabell	[ Edit ] [ v ]
<input type="checkbox"/>	▶ e-Economic	Visma e-economic a/s		[ Edit ] [ v ]
<input type="checkbox"/>	▶ Word	Microsoft		[ Edit ] [ v ]

- Attachments
- Details
- Download Report
- Edit wizard
- Invite to answer questionnaire
- Delete**

2

# 3.2 Add Assets

1. Click on "Assets" in the menu, and then click "Create".



2. Add relevant Assets that may be missing.

### Create Assets Values

×

Name

Responsible

Parent Entity



# 3.3 Add Assets

1. Name the Asset.
2. Select who is responsible.
3. Leave the remaining fields and click "save".

Create Assets Values ×

Name **1**

Responsible **2** Parent Entity

Select... | v Select... | v

Description

Processors

Select... | v

Records

Select... | v

Manufacturer

Data Processors - Records

Select... | v

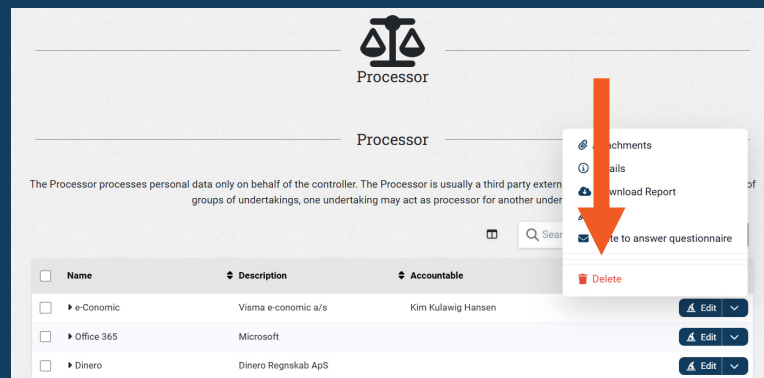
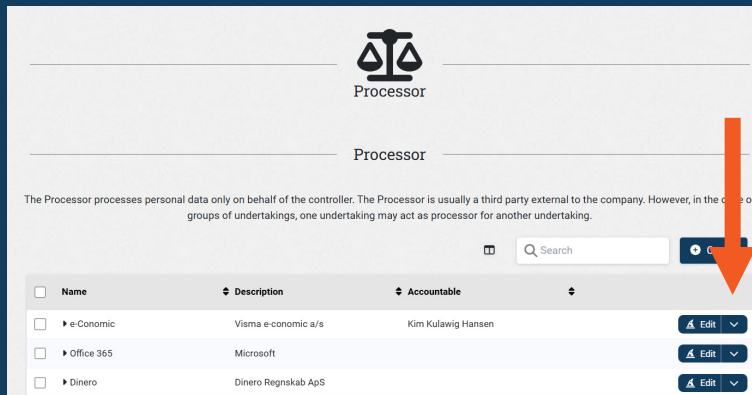
**3**

# 4

# PROCESSOR

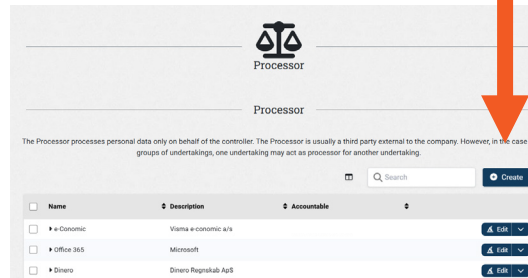
# 4.1 Delete Processors

1. Click on 'processors' in the menu and delete those who are irrelevant for you.



# 4.2 Add Processor

1. Go to "Processor" in the menu and click "Create".



2. Add relevant Processors that may be missing but leave the Data Processing Agreements.

### Create Processor Values ×

Name

Responsible Parent Entity

Select... ▼ | Select... ▼

Description

# 4.3 Add Processor

1. Enter the name of the Processor.
2. Select who is responsible.
3. Leave the remaining fields and click "save".

Create Processor Values ×

Name **1**

Responsible **2** Parent Entity

Select... | v Select... | v

Description

Link to Data Processing Agreement

Assets

Select... | v

Records

Select... | v

Country of processing

Processors - Records

Select... | v

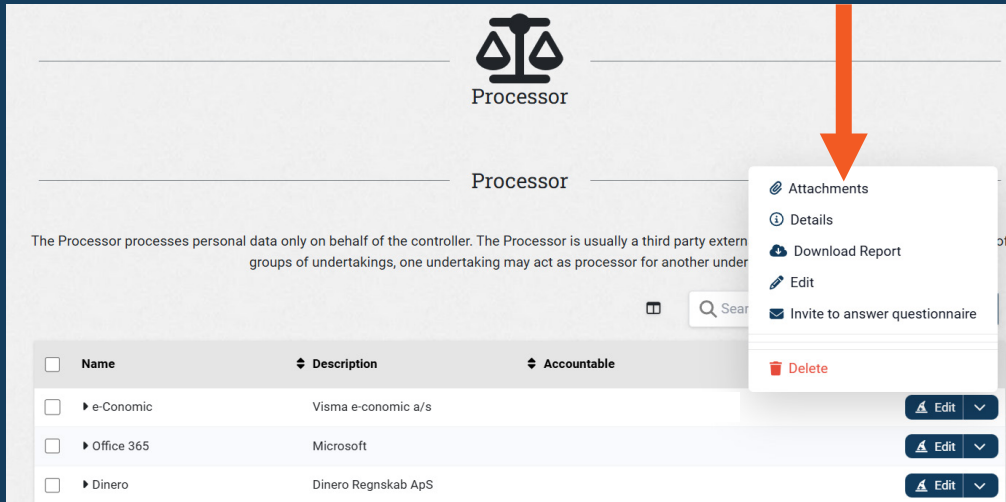
Save **3**

# 5

# UPLOAD DOCUMENT TO A PROCESSOR

# 5.1 Upload document

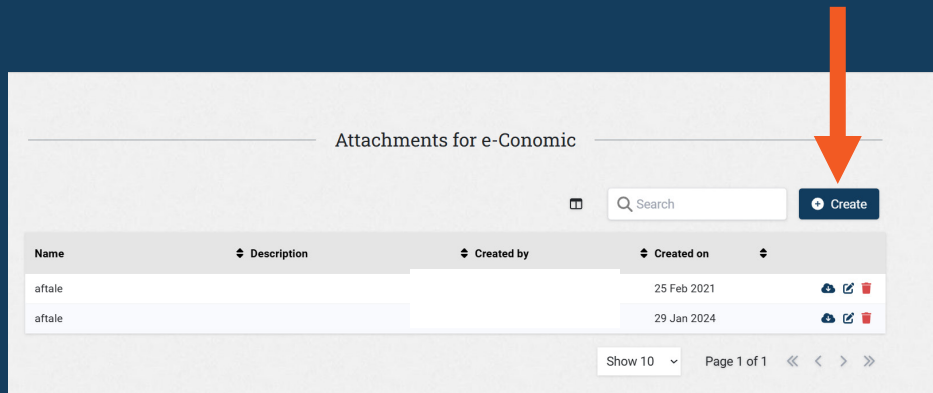
1. Click on 'processors' in the menu and click 'attachments'.



The Processor processes personal data only on behalf of the controller. The Processor is usually a third party external to the controller, or a group of undertakings, one undertaking may act as processor for another undertaking.

<input type="checkbox"/>	Name	Description	Accountable	
<input type="checkbox"/>	e-Economic	Visma e-economic a/s		<a href="#">Edit</a> <span>▼</span>
<input type="checkbox"/>	Office 365	Microsoft		<a href="#">Edit</a> <span>▼</span>
<input type="checkbox"/>	Dinero	Dinero Regnskab ApS		<a href="#">Edit</a> <span>▼</span>

2. Click 'create'.



Attachments for e-Economic

[Create](#)

Name	Description	Created by	Created on	
aftale			25 Feb 2021	<a href="#">Download</a> <a href="#">Edit</a> <a href="#">Delete</a>
aftale			29 Jan 2024	<a href="#">Download</a> <a href="#">Edit</a> <a href="#">Delete</a>

Show 10 Page 1 of 1

# 5.2 Upload document

1. Click "Attach File", and choose your document.
2. Click "Create".

Create attachment ×


---

Name

Description

Attach URL

Attach File **1**



Browse for a file

**Create** **2**

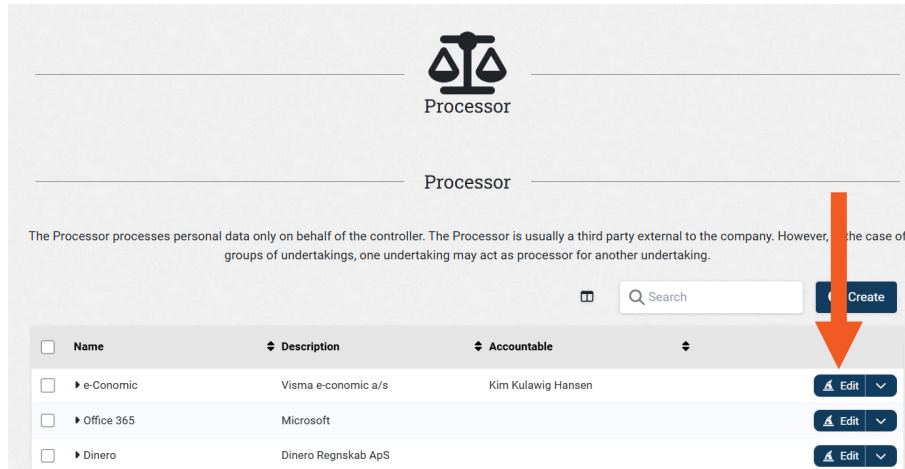


# 6

## HOW TO MAKE A DATA PROCESSING AGREEMENT

# 6.1 Make a data processing

1. Click on "processor" in the menu and then click "edit" (the icon that looks like a wizards hat)



Processor

Processor

The Processor processes personal data only on behalf of the controller. The Processor is usually a third party external to the company. However, in the case of groups of undertakings, one undertaking may act as processor for another undertaking.

Search Create

<input type="checkbox"/>	Name	Description	Accountable	
<input type="checkbox"/>	e-Economic	Visma e-conomic a/s	Kim Kulawig Hansen	Edit
<input type="checkbox"/>	Office 365	Microsoft		Edit
<input type="checkbox"/>	Dinero	Dinero Regnskab ApS		Edit

# 6.2 Example

## 2. Fill out the information

3. Save the data processing agreement by clicking the bottom 'save'. Instead, if you are done, click 'save and finish'.

The screenshot displays a web form for a data processing agreement. At the top, there are three navigation buttons: 'Back', 'Save', and 'Save and Finish'. The form header identifies the entity as 'e-Conomic' (Visma e-conomic a/s). The main section is titled 'Data processing agreement' and contains a 'Controller' section with explanatory text and three input fields: '1. Name' (filled with 'jkhthgf'), '2. Address' (filled with 'kjhhgfgh'), and '3. Postal code' (filled with 'lkhg'). At the bottom, there are again three navigation buttons: 'Back', 'Save', and 'Save and Finish'.

# 7

# DATA PROTECTION

# 7.1 Adjust Data Protection

1. Go to "Data Protection" in the menu and specify how you are working with the Data Protection policies.

**Note! Customized by IT managers**

Data protection



Har I en opgørelse over hvilke enheder, der er autoriseret til anvendelse i firmaet? ⓘ

Har I en opgørelse over hvilken software, der er autoriseret til anvendelse i firmaet? ⓘ

Har I en politik for konfigurering af hardware og software på mobile enheder, bærbare computere, arbejdsstationer og servere? ⓘ

Tested [Policies](#)

Implemented [Policies](#)

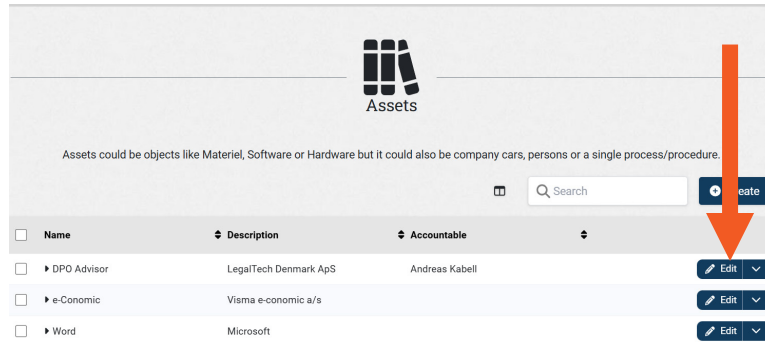
Drafted [Policies](#)

8

**CONNECT ASSETS**

# 8.1 Connect Assets

1. Click on "Assets" in the menu, and click "Edit".



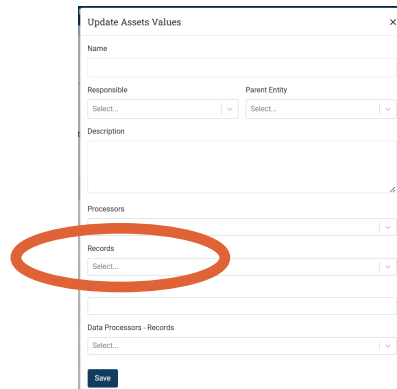
Assets

Assets could be objects like Materiel, Software or Hardware but it could also be company cars, persons or a single process/procedure.

Search Create

<input type="checkbox"/>	Name	Description	Accountable	
<input type="checkbox"/>	▶ DPO Advisor	LegalTech Denmark ApS	Andreas Kabell	Edit
<input type="checkbox"/>	▶ e-Economic	Visma e-economic a/s		Edit
<input type="checkbox"/>	▶ Word	Microsoft		Edit

2. Specify the Records where the Assets are used.



Update Assets Values

Name

Responsible Parent Entity

Select... Select...

Description

Processors

Records

Select...

Data Processors - Records

Select...

Save

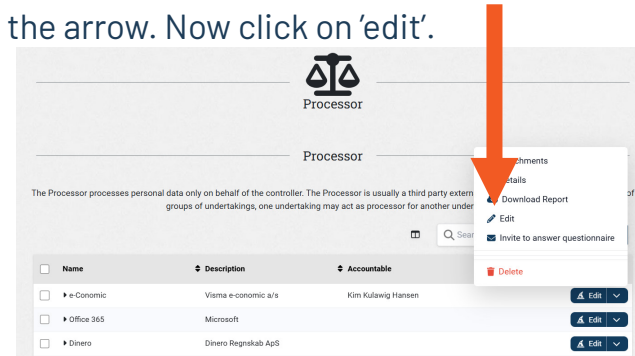
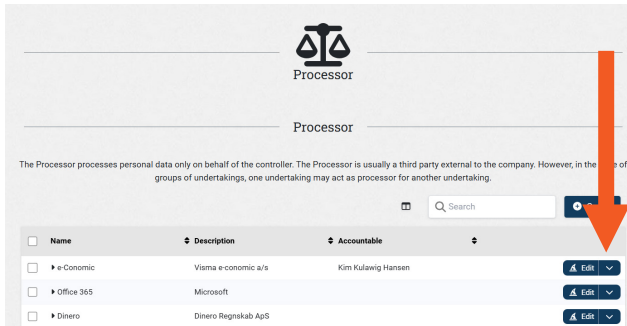
# 9

# CONNECT PROCESSORS



# 9.1 Connect Processors

1. Go to "Processor" in the menu and click on the arrow. Now click on 'edit'.



2. Connect the Processes that are relevant to the Processor.

The screenshot shows the 'Update Processor Values' form. The form has several fields:

- Name: [Text input]
- Responsible: [Select...]
- Parent Entity: [Select...]
- Description: [Text area]
- Link to Data Processing Agreement: [Text input]
- Assets: [Select...]
- Records: [Select...]
- Country of residence: [Text input]
- Linkmark: [Text input]
- Processors - Records: [Select...]

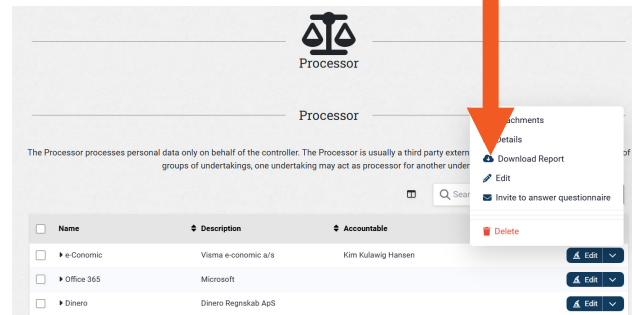
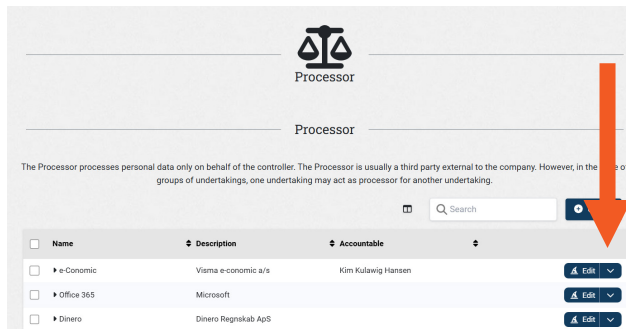
The 'Records' field is circled in orange.

# 10

# CONNECT ASSETS TO PROCESSORS

# 10.1 Connect Assets to Proces-

1. Go to "Processor" in the menu and click on the arrow. Now click on 'edit'.



2. Connect the Assets that are relevant to the Processor.

The screenshot shows the 'Update Processor Values' form. The form has several fields: Name, Responsible, Parent Entity, Description, Link to Data Processing Agreement, Assets, Country of processing, and Processors - Records. The 'Assets' field is circled in red.

Update Processor Values

Name

Responsible

Parent Entity

Description

Link to Data Processing Agreement

Assets

Country of processing

Processors - Records

Save

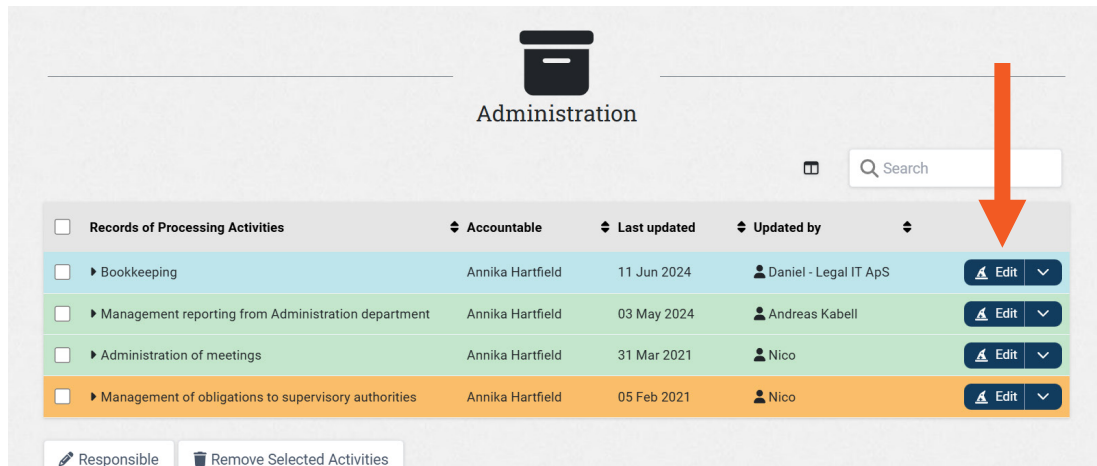
# 11

# ADJUST RECORDS

# 11.1 Adjust Records

1. Go to “dashboard”, scroll down to ‘records’ and click “Edit”.

2. Read through each Process one by one, and make adjustments if necessary.

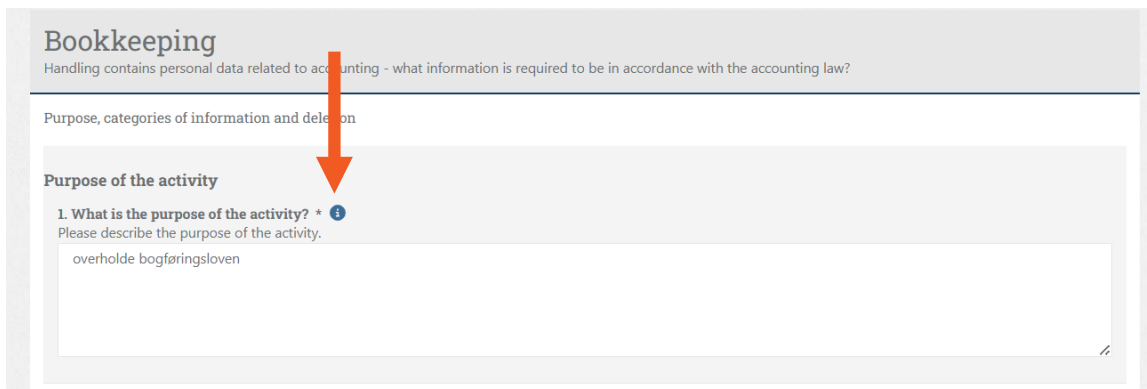


The screenshot displays the 'Administration' dashboard. At the top center is a folder icon and the word 'Administration'. To the right is a search bar with a magnifying glass icon and the text 'Search'. Below this is a table with the following columns: 'Records of Processing Activities', 'Accountable', 'Last updated', and 'Updated by'. The table contains four rows of data. The first row, 'Bookkeeping', is highlighted in light blue and has an orange arrow pointing to its 'Edit' button. The second row, 'Management reporting from Administration department', is highlighted in light green. The third row, 'Administration of meetings', is also highlighted in light green. The fourth row, 'Management of obligations to supervisory authorities', is highlighted in light orange. At the bottom left of the table area are two buttons: 'Responsible' (with a pencil icon) and 'Remove Selected Activities' (with a trash can icon).

<input type="checkbox"/> Records of Processing Activities	Accountable	Last updated	Updated by	
<input type="checkbox"/> ▶ Bookkeeping	Annika Hartfield	11 Jun 2024	Daniel - Legal IT ApS	<a href="#">Edit</a> ▼
<input type="checkbox"/> ▶ Management reporting from Administration department	Annika Hartfield	03 May 2024	Andreas Kabell	<a href="#">Edit</a> ▼
<input type="checkbox"/> ▶ Administration of meetings	Annika Hartfield	31 Mar 2021	Nico	<a href="#">Edit</a> ▼
<input type="checkbox"/> ▶ Management of obligations to supervisory authorities	Annika Hartfield	05 Feb 2021	Nico	<a href="#">Edit</a> ▼

# 11.2 Example

1. Make sure, that the pre-filled texts and answers apply, and adjust them if it is not the case.



**Bookkeeping**  
Handling contains personal data related to accounting - what information is required to be in accordance with the accounting law?

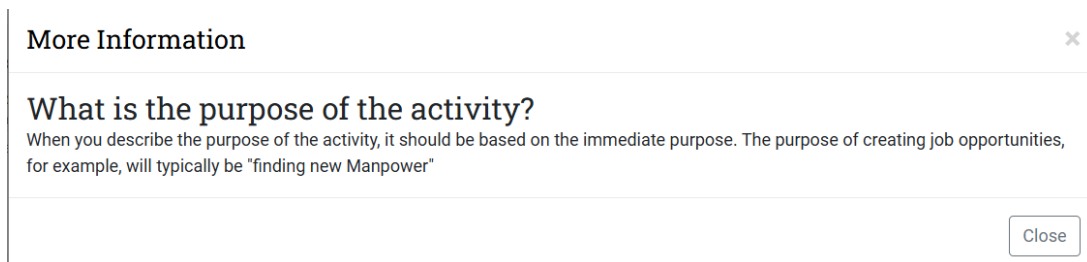
Purpose, categories of information and deletion

**Purpose of the activity**

1. What is the purpose of the activity? ⓘ  
Please describe the purpose of the activity.

overholde bogføringsloven

2. Click "i" if you want more information on the subject.



**More Information** ×

**What is the purpose of the activity?**  
When you describe the purpose of the activity, it should be based on the immediate purpose. The purpose of creating job opportunities, for example, will typically be "finding new Manpower"

Close

# 11.3 Example

1. Go through the pages by clicking “next page”.

2. Now repeat the process until all Records have been proof-read.

## Bookkeeping

Handling contains personal data related to accounting - what information is required to be in accordance with the accounting law?

Purpose, categories of information and deletion

### Purpose of the activity

1. What is the purpose of the activity? \* ⓘ  
Please describe the purpose of the activity.  
overholde bogføringsloven

### What information is required to complete the activity?

Select the objects and areas of data contained in the activity

2. Ordinary information, cf. Article 6 \* ⓘ  
Examples include: name, address and phone number.

Yes No Don't know

Save Next Page →

# 11.4 Save

1. On the last page, you have the opportunity to choose between 'save' and 'save and finish'

2. Only choose 'save and finish' if you are done with the processor.

The screenshot shows a web form titled "Bookkeeping" with the subtitle "Handling contains personal data related to accounting - what information is required to be in accordance with the accounting law?". The form is on "Page 10 of 10". It contains a question: "29. Are the data subjects informed of the processing?" with radio buttons for "Yes", "No", and "Don't know". Below this is a text area for question "30. Here you can elaborate on your answer" with the text "De registrerede oplyses via hjemmesiden." and a text area for the answer. At the bottom of the form, there are four buttons: "Previous Page", "Back", "Save", and "Save and Finish". The "Save" and "Save and Finish" buttons are circled in orange.

Save

Next Page →

## Bookkeeping

Handling contains personal data related to accounting - what information is required to be in accordance with the accounting law?

Notification of the data subjects

29. Are the data subjects informed of the processing? \* ⓘ

Yes No Don't know

30. Here you can elaborate on your answer

De registrerede oplyses via hjemmesiden.

Page 10 of 10

← Previous Page

← Back

Save

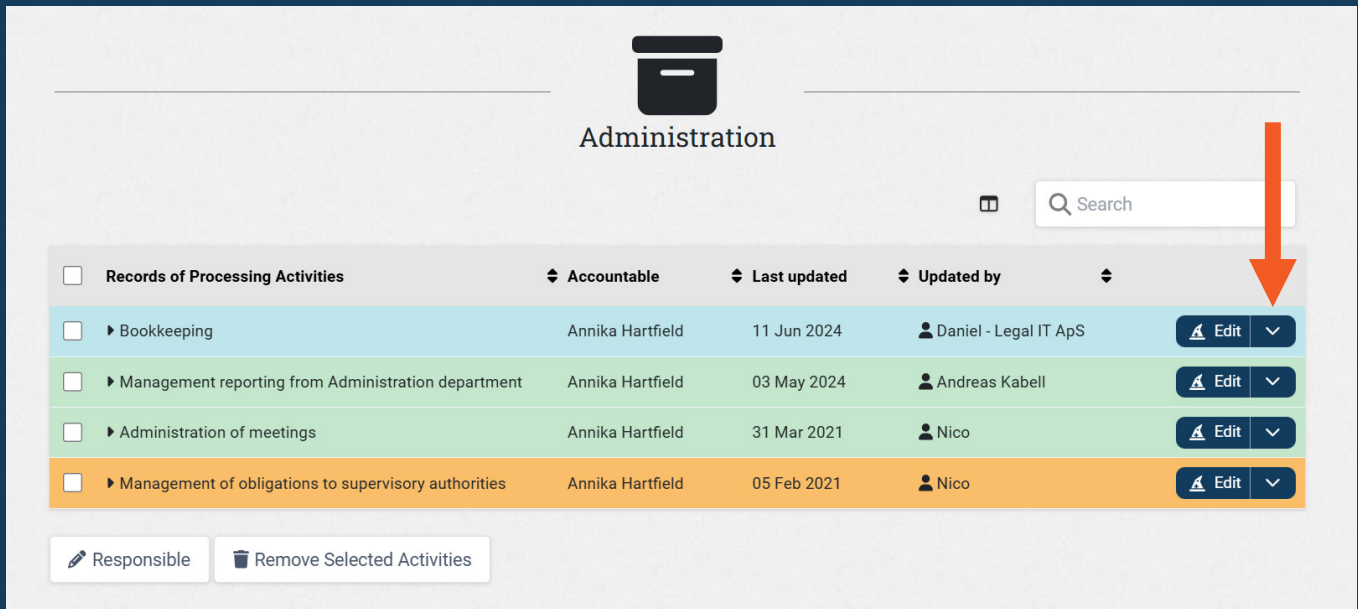
Save and Finish



# 12

# PASS ON THE ASSIGNMENT

12.1 Go to 'dashboard', scroll down to records now click on the arrow.



The screenshot displays the 'Administration' section of the DPO Advisor interface. At the top center is a trash can icon and the title 'Administration'. To the right is a search bar with a magnifying glass icon and the text 'Search'. Below this is a table with the following columns: 'Records of Processing Activities', 'Accountable', 'Last updated', and 'Updated by'. The table contains four rows of data. The first row is highlighted in light blue and has an orange arrow pointing to its 'Edit' button. The second row is highlighted in light green, the third in light green, and the fourth in light orange. Below the table are two buttons: 'Responsible' (with a pencil icon) and 'Remove Selected Activities' (with a trash can icon).

<input type="checkbox"/>	Records of Processing Activities	Accountable	Last updated	Updated by	
<input type="checkbox"/>	▶ Bookkeeping	Annika Hartfield	11 Jun 2024	Daniel - Legal IT ApS	<a href="#">Edit</a> ▼
<input type="checkbox"/>	▶ Management reporting from Administration department	Annika Hartfield	03 May 2024	Andreas Kabell	<a href="#">Edit</a> ▼
<input type="checkbox"/>	▶ Administration of meetings	Annika Hartfield	31 Mar 2021	Nico	<a href="#">Edit</a> ▼
<input type="checkbox"/>	▶ Management of obligations to supervisory authorities	Annika Hartfield	05 Feb 2021	Nico	<a href="#">Edit</a> ▼

[Responsible](#) [Remove Selected Activities](#)

# 12.2 Click on the button 'invite to answer questionnaire'.

Administration

Records of Processing Activities	Accountable	Last updated	Updated by
Bookkeeping	Annika Hartfield	11 Jun 2024	Daniel - Legal IT
Management reporting from Administration department	Annika Hartfield	03 May 2024	Andr
Administration of meetings	Annika Hartfield	31 Mar 2021	Nico
Management of obligations to supervisory authorities	Annika Hartfield	05 Feb 2021	Nico

Buttons: Responsible, Remove Selected Activities

Dropdown menu options: Attachments, Download Report, Invite to answer questionnaire, Delete

Invite to answer questionnaire

Buttons: Invite

Search: Search

Email	Identifier	State	Email
-------	------------	-------	-------

Show 10 Page 1 of 0

# 12.3 Insert information and press invite

## Invite ✕

The text "%token%" will be replaced with the actual token url on the server.

H1 H2 Heading 3 Normal B I U ”

☰ ☷ 🔗 🖼️ <>

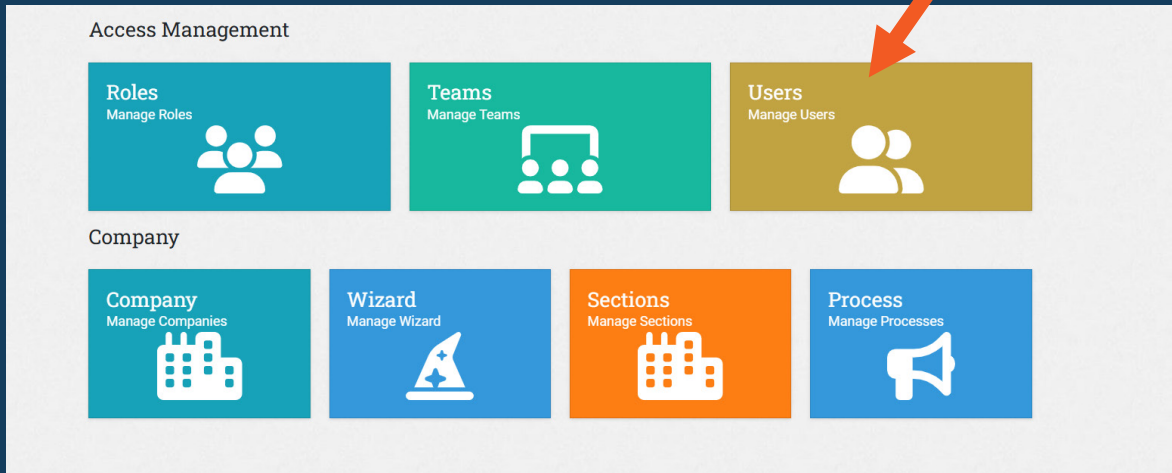
13

**ADD NEW USERS**

# 13.1 Go to company-settings

The screenshot displays the DPO Advisor web application interface. The top navigation bar includes the following items: Dashboard, Assets, Processor, Data Protection, Risk Assessment, and Annual cycle. On the right side of the navigation bar, there are icons for search, a globe, and Incidents. The Incidents dropdown menu is open, showing the following options: Logout, Company Settings, Partner page, and June 12, 2024. A red arrow points to the 'Company Settings' option. The main content area features a large circular chart with a blue center and a multi-colored outer ring. Below the chart is a dropdown menu with the text 'Select...' and a group of three people icon. A 'Guide' button is visible in the bottom right corner of the interface.

# 13.2 Click on 'users'



The screenshot displays the 'Access Management' section of the DPO Advisor interface. It features a grid of seven colored buttons, each with an icon and text. A red arrow points to the 'Users' button. Below the 'Access Management' section is the 'Company' section, also with a grid of four buttons.

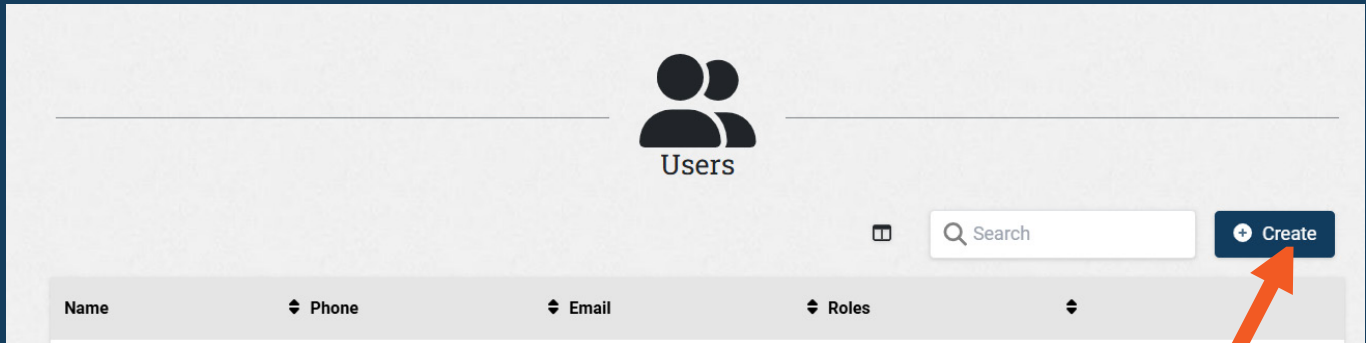
**Access Management**

- Roles** (Manage Roles): Teal button with an icon of three people.
- Teams** (Manage Teams): Green button with an icon of a laptop and three people.
- Users** (Manage Users): Olive button with an icon of two people. A red arrow points to this button.

**Company**

- Company** (Manage Companies): Teal button with an icon of a building.
- Wizard** (Manage Wizard): Blue button with an icon of a wizard hat.
- Sections** (Manage Sections): Orange button with an icon of a building.
- Process** (Manage Processes): Blue button with an icon of a megaphone.

# 13.3 Click 'create'



The screenshot displays the 'Users' management interface. At the top center, there is a user icon and the text 'Users'. To the right of the icon is a search bar with a magnifying glass icon and the text 'Search'. Further right is a dark blue button with a white plus sign and the text 'Create'. An orange arrow points to this 'Create' button. Below the search bar and 'Create' button is a table with the following columns: 'Name', 'Phone', 'Email', 'Roles', and an empty column. Each column has a small up/down arrow icon next to it.

Name	Phone	Email	Roles	
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# 13.4 Insert information and click 'crea-

### Create User ✕

With login Without login

Name

Email Phone

Roles

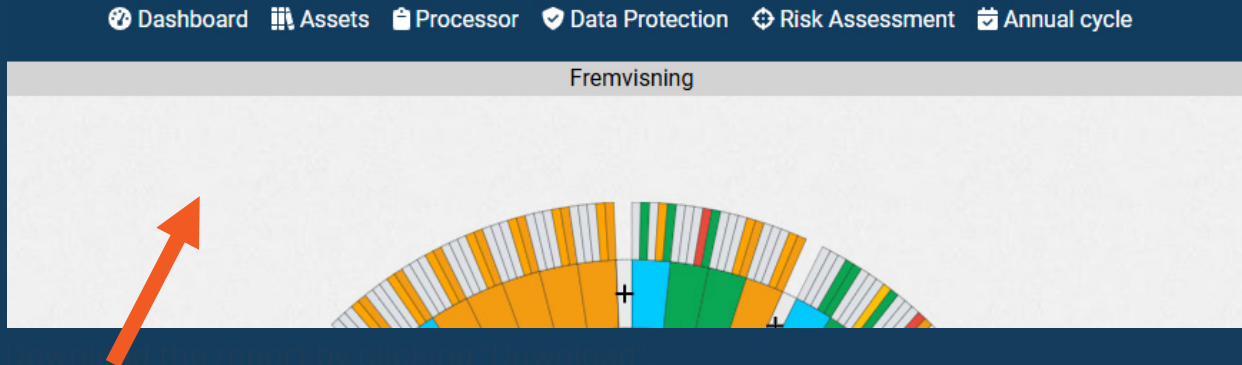
Profile picture Microsoft login

14

**DOWNLOAD REPORT**

# 14.1 Download report

1. Click on "dashboard" in the menu.



2. Scroll down to records and click download.
3. You find the downloaded report on your computer.



