

# What's New

Strato Version 2.3.2



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# 1 Introduction

The purpose of this document is to give you an overview of the new and modified features in Strato 2.3.2.

The available languages are English UK, Danish, Swedish, Norwegian, Spanish, Polish, Mandarin (Traditional), Finnish, and German. Strato v.2.3.2 is certified to NOAH 4 and works with Noah v.4.9.

## 2 Noah compliance

Strato v2.3.2 is certified for Noah v4.6.

Therefore, Strato will automatically update Noah to v4.9 when installing or updating Strato.

### 3 GDPR

#### 3.1 GDPR Overview

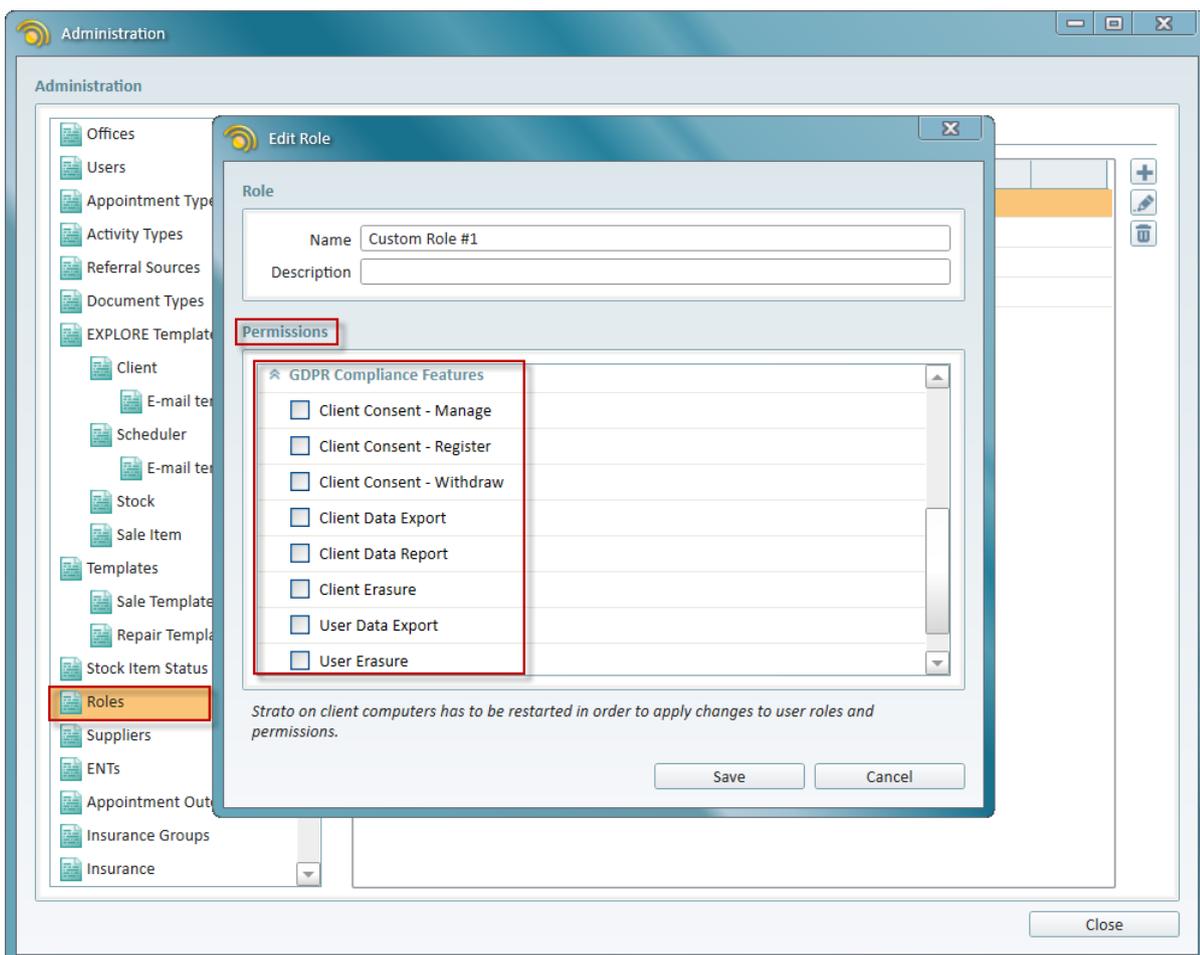
Strato is now fully compliant with the GDPR regulation on data protection and privacy for everyone within the EU. GDPR was designed to protect all EU citizens from privacy and data breaches in an increasingly data-driven world. Strato functionality complies with all the key GDPR concepts:

- **Right to Access** - clients are entitled to obtain information on the use of their personal data and the purpose of its use
- **Right to be Forgotten** - clients can request for their personal data to be erased
- **Data Portability** - clients can request for their personal data to be transferred to them in a structured, commonly used and machine-readable format
- **Privacy by Design** - Strato is designed and built so data is inherently protected

You can read more on GDPR by visiting <https://www.eugdpr.org>.

#### 3.2 GDPR Permissions

You can find all the GDPR related permissions in one place by going to **Tools > Administration > Roles**. Start editing the role and then locate **GDPR Compliance Features** under **Permissions**.



Here you can set the following permissions:

- **Client Consent - Manage** - select to create and edit consent forms in the Administration
- **Client Consent - Register** - allows the user to register client consent
- **Client Consent - Withdraw** - allows the user to withdraw client consent
- **Client Data Export** - allows to export client data from Strato
- **Client Data Report** - allows the user to display the client data on customer's request
- **Client Erasure** - with this permission, users can erase clients from Strato
- **User Data Export** - allows to export user data from Strato
- **User Erasure** - select to allow erasing users from Strato

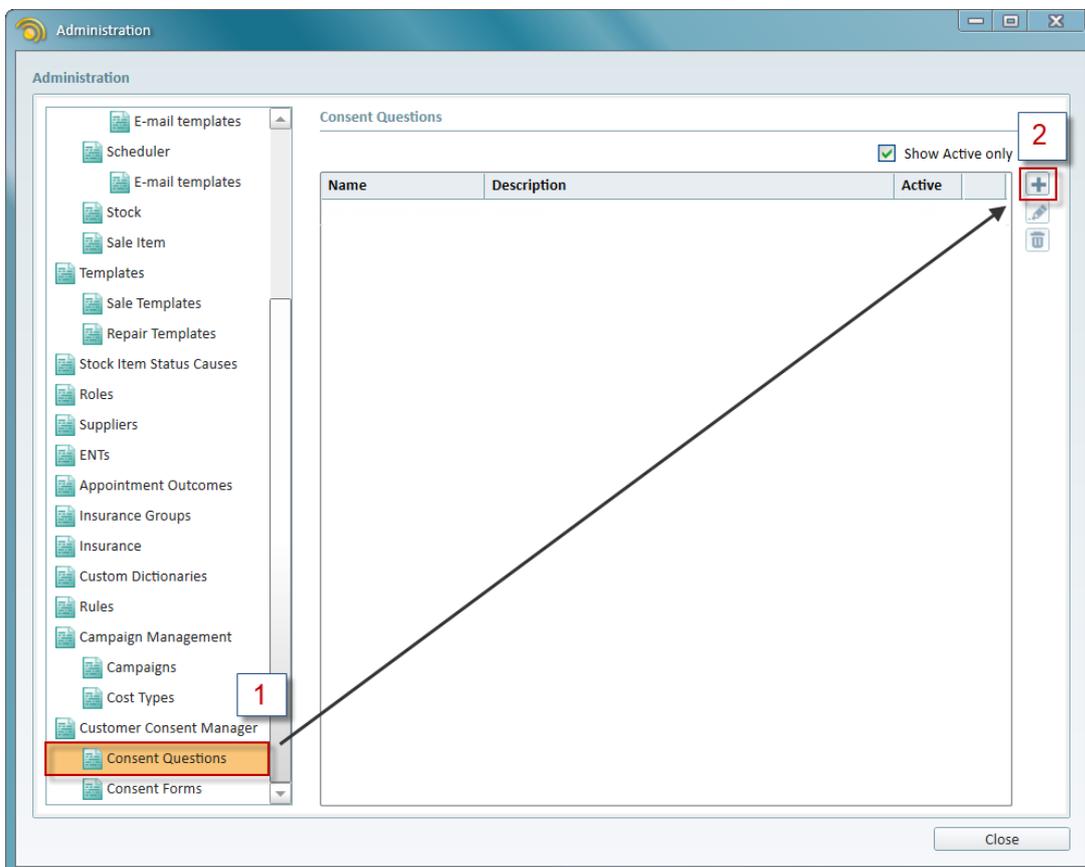
### 3.3 Managing Client Consent

Strato provides you with an easy way to collect client’s consent which you may require to process or transfer their data. You can create consent questions and then add them to your consent forms. Consent forms with questions are available on the client screen.

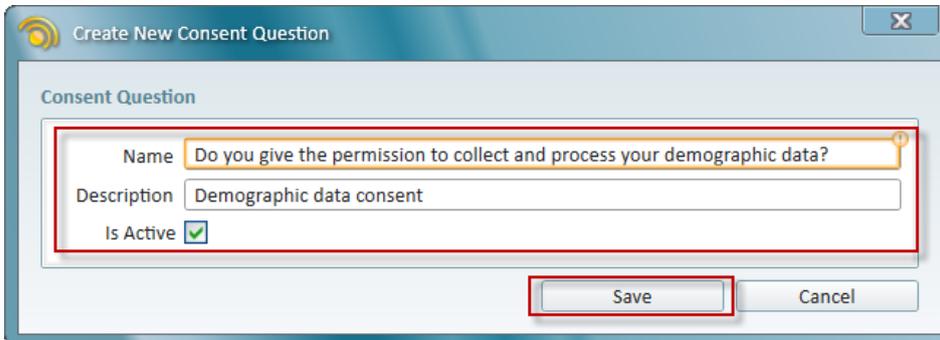
#### 3.3.1 Adding Consent Questions

To add a consent question:

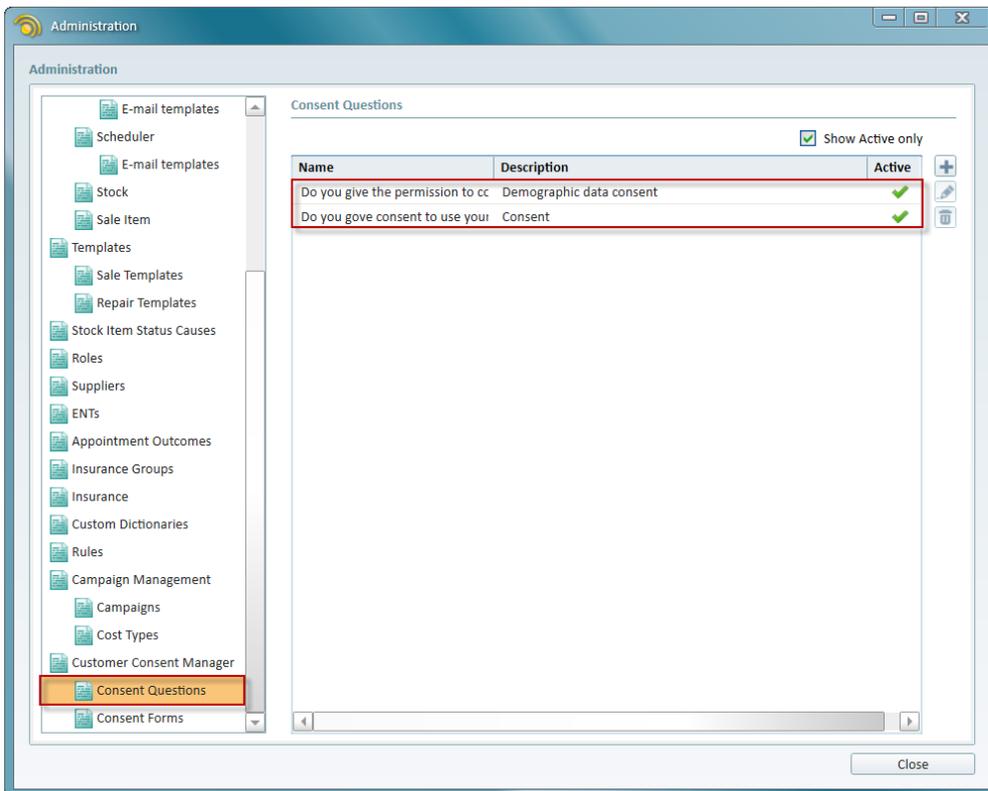
1. Go to **Tools > Administration > Customer Consent Manager > Consent Questions** and click **Add New**.



2. In the *Create New Consent Question* window, type in your question in the **Name** field and provide the description if necessary. Make sure the **Is Active** option is selected and click **Save**.



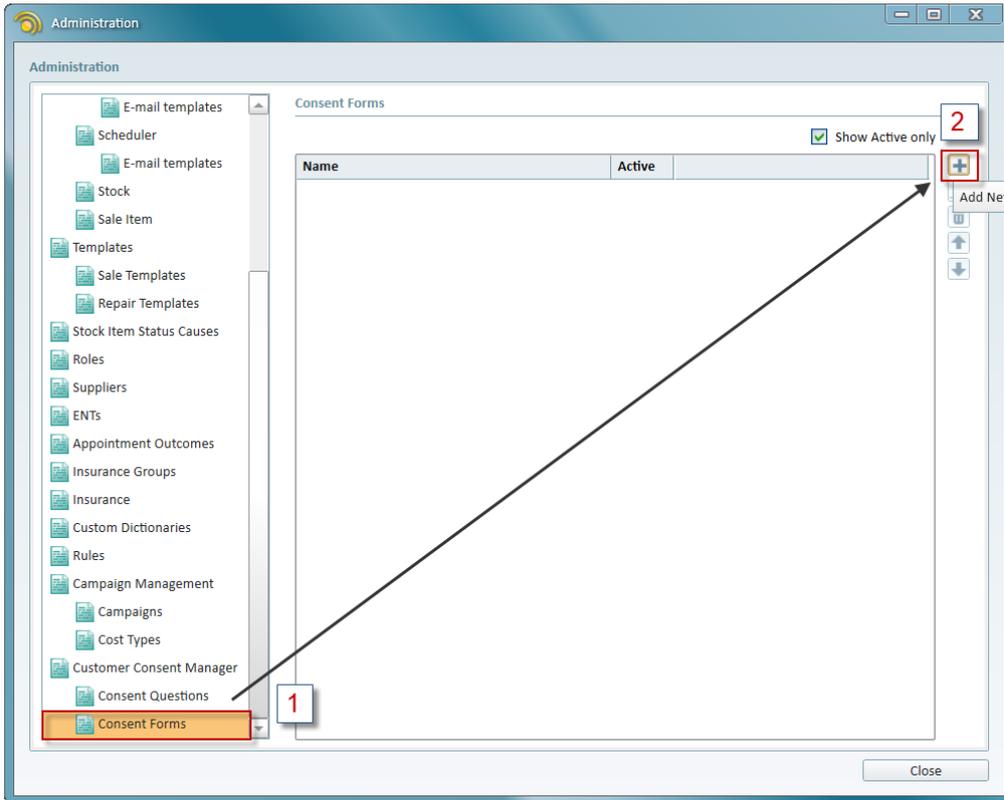
3. All your questions are listed under **Consent Questions**. Here, you can add new questions, edit or remove them using the action buttons to the right.



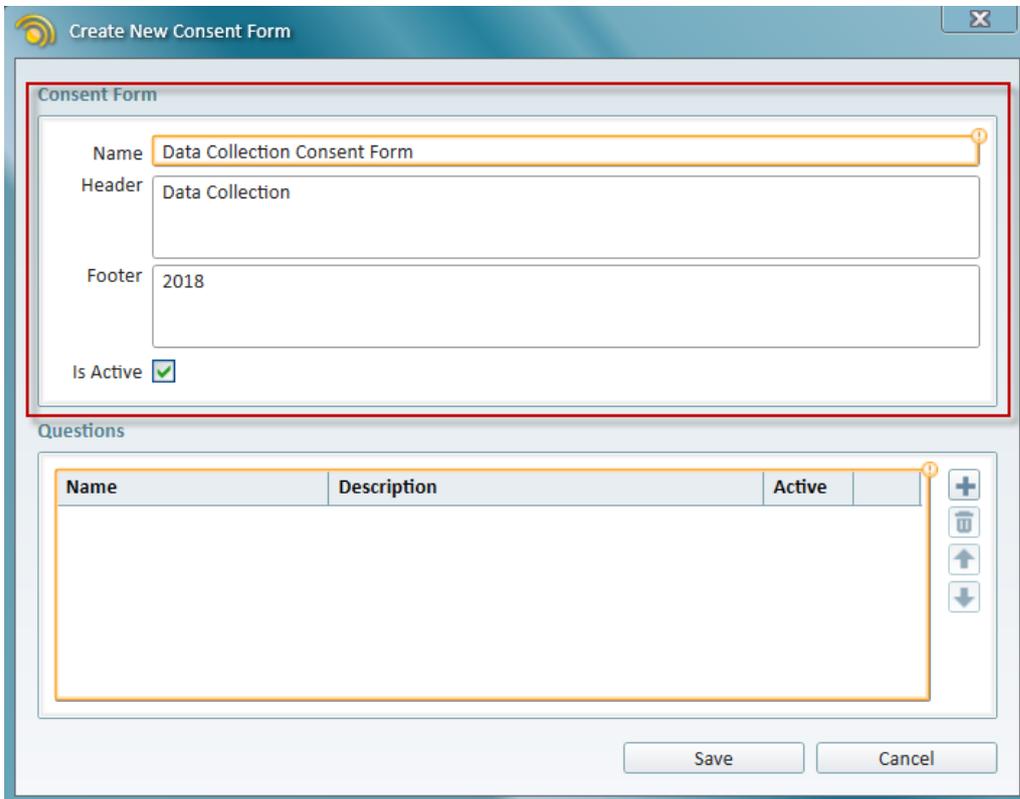
### 3.3.2 Adding Consent Forms

Switch to the **Consent Forms** tab to create your consent form:

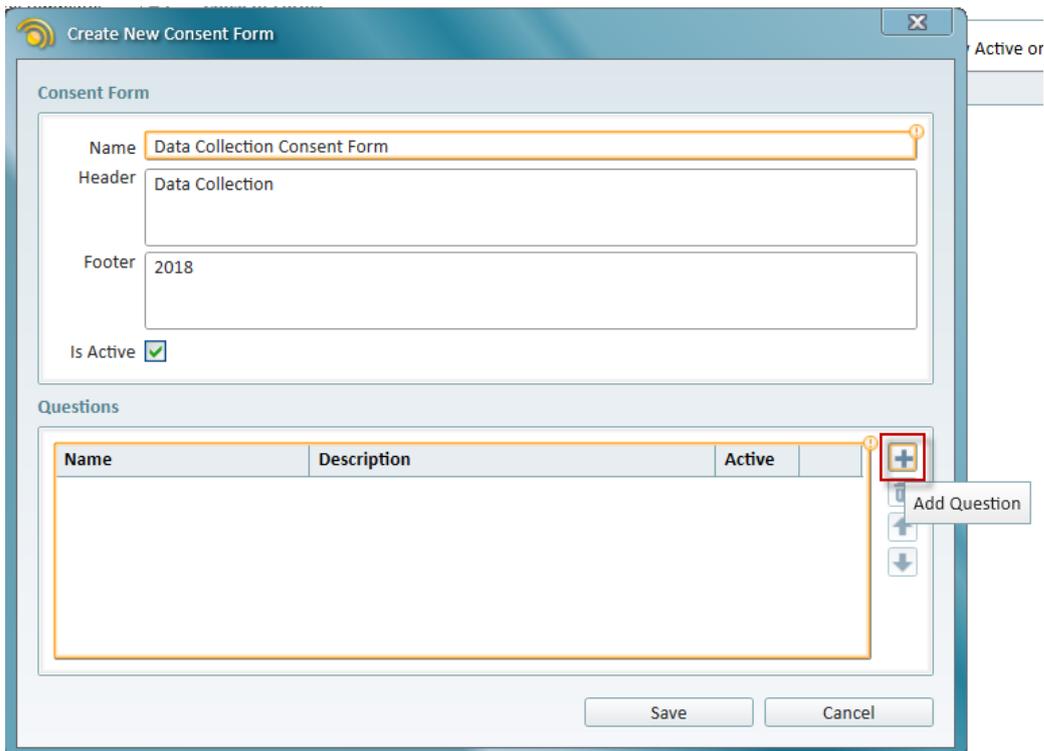
1. Click the **Add New** button.



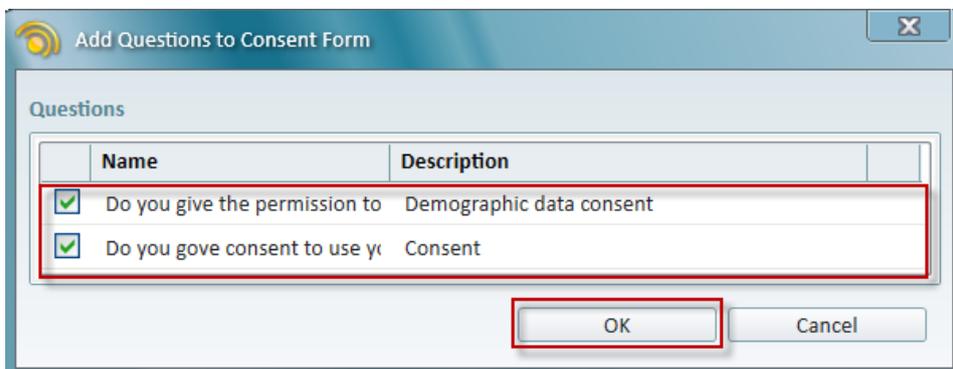
- 2. In the *Create New Consent Form* window, type in the name of the form. You can also enter text to be displayed in the form's footer and header sections.



- 3. Add the questions to your form using the **Add Question** button. Select **Is Active** if you want to display the form on the client screen.



- 4. Select the questions that you want to add and click **OK**.



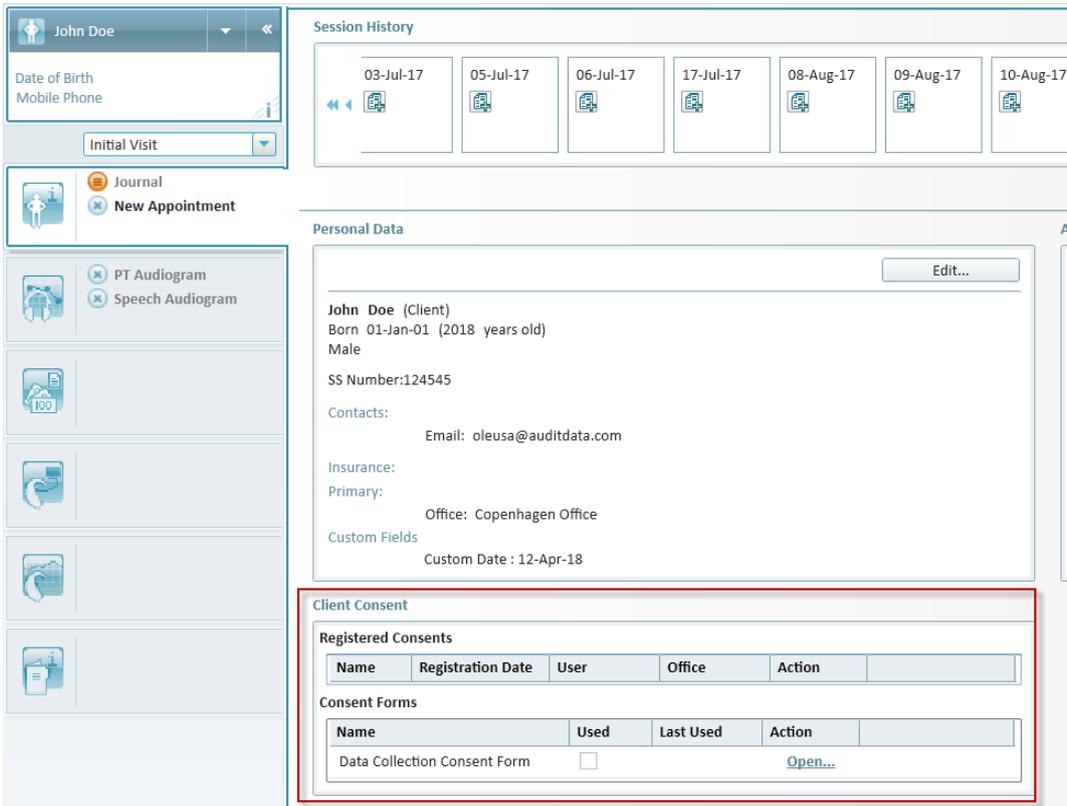
Your consent form must have at least one question. You can also create as many consent questions or forms as you need.

**Note:** Only users with the role that has **Client Consent - Manage** permission can work with consent questions and forms in the Administration.

### 3.3.3 Registering Client Consent

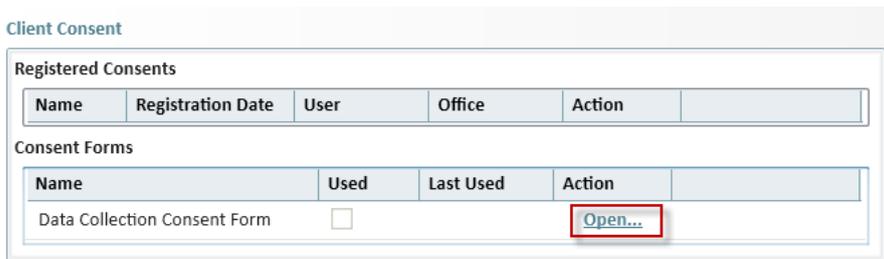
Active consent forms are available for each client in Strato.

Open the client screen and switch to the **Client Info** tab. Consent forms are listed under **Client Consent** and can be registered by the Strato users with the **Client Consent - Register** permission.

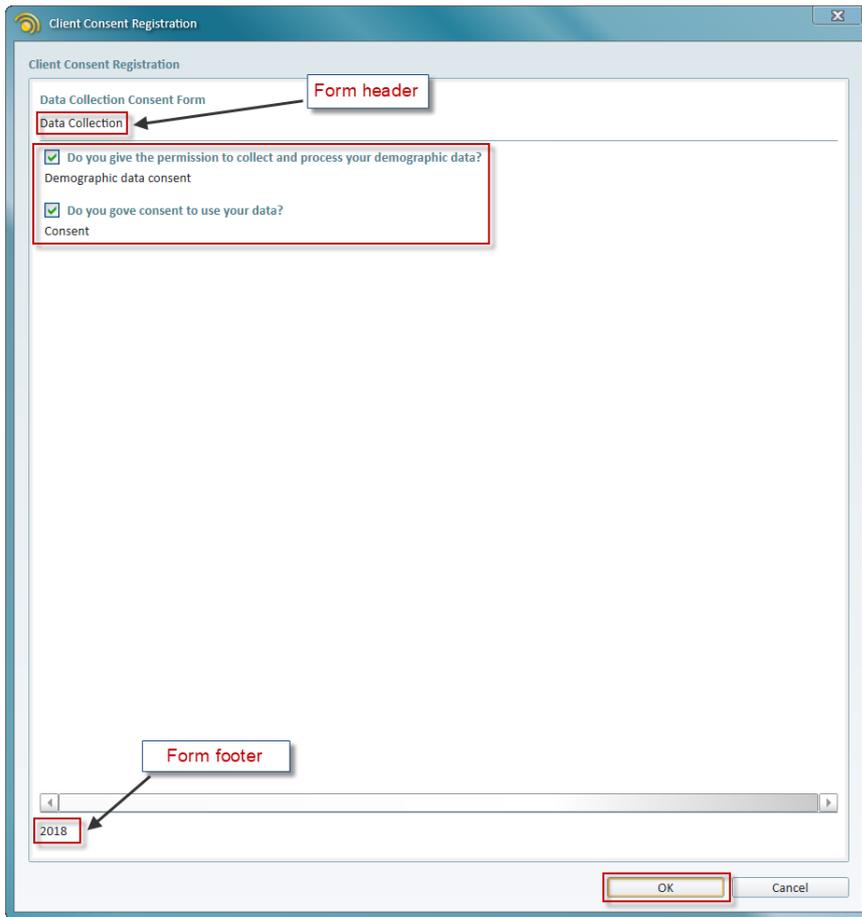


To register client's consent:

1. Click **Open** on the form you want to register.



2. In the *Client Consent Registration* window, select the questions to which the client consents. Click **OK** to complete the procedure.



The questions to which client consented are now listed under **Registered Consents**.

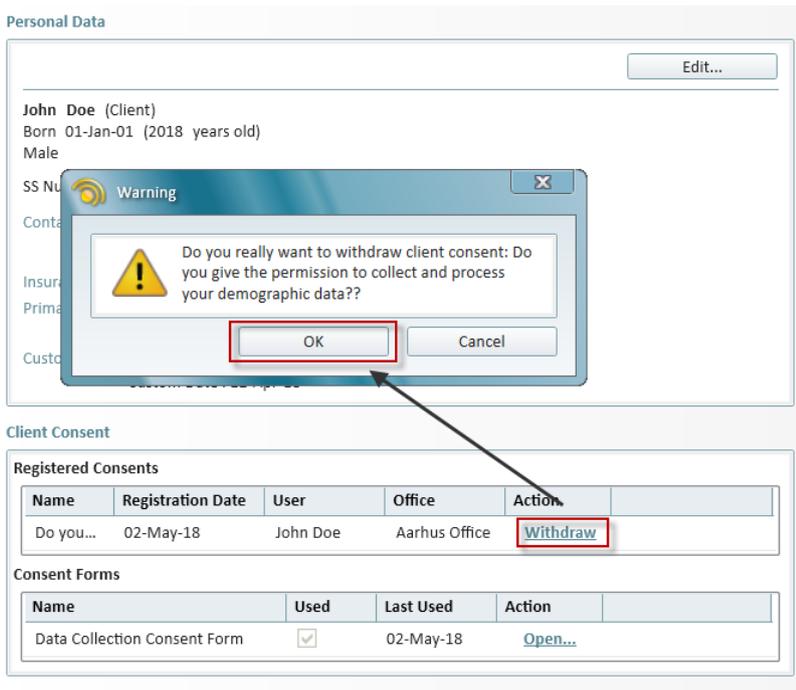
Client Consent

Registered Consents				
Name	Registration Date	User	Office	Action
Do you...	02-May-18	John Doe	Aarhus Office	<a href="#">Withdraw</a>

Consent Forms				
Name	Used	Last Used	Action	
Data Collection Consent Form	<input checked="" type="checkbox"/>	02-May-18	<a href="#">Open...</a>	

If the clients change their mind and decide to withdraw their consent, you need to click **Withdraw** and then click **OK**.



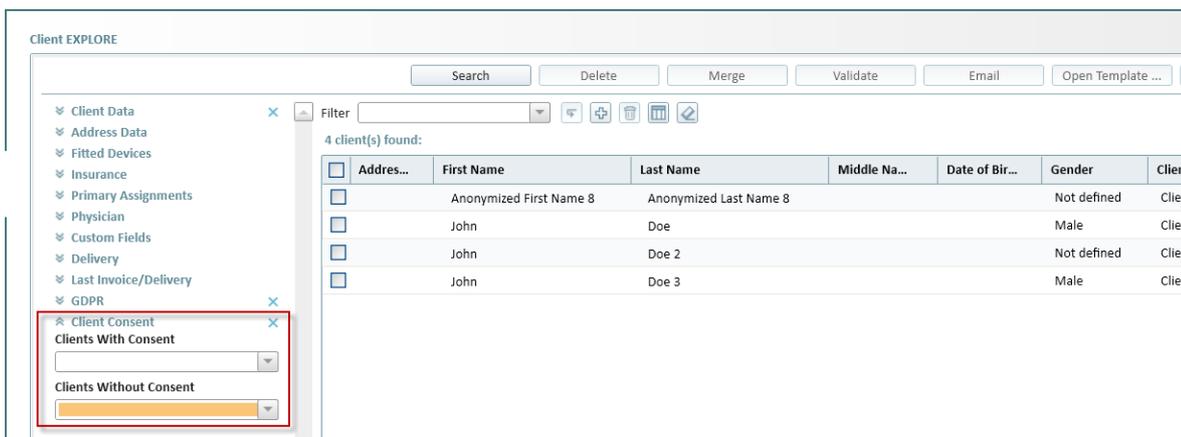
**Note:** Only users with the role that has **Client Consent - Withdraw** permission can perform consent withdrawal.

The question(s) will be removed from the **Registered Consents** list. You can still register this consent form again if needed.

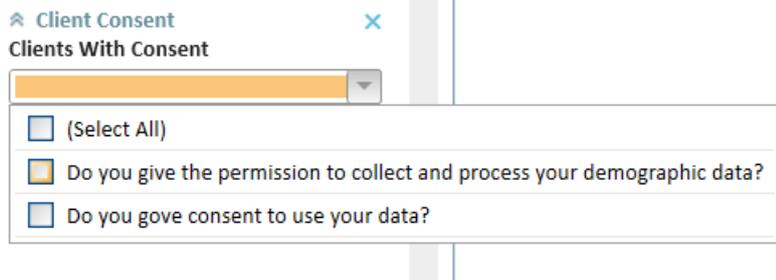
It is impossible to delete a consent question in the Administration if at least one client consented to it. A consent form with such question cannot be removed as well. You need to withdraw all received client consent to be able to remove these forms and questions.

### 3.3.4 Filtering Clients by Consent

Apply the **Client Consent** filters in the Client EXPLORE view to display clients by their consent.



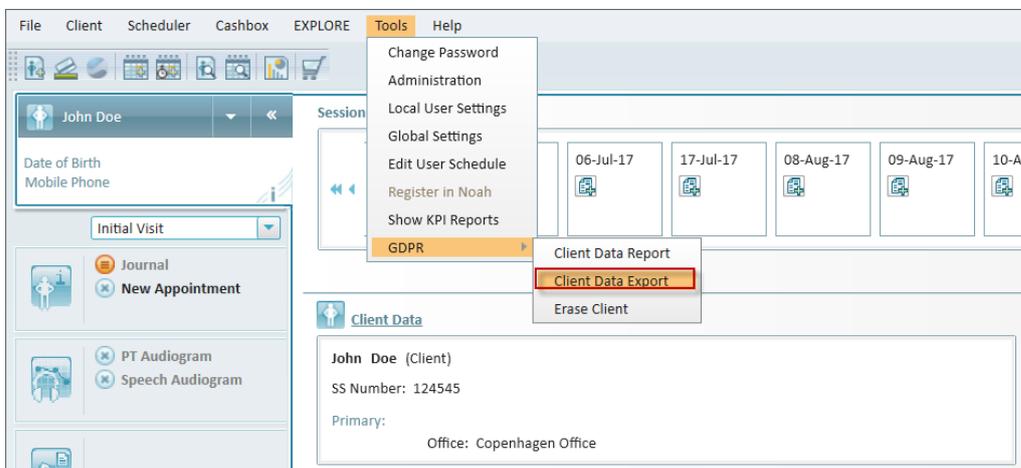
You can display clients with or without consent to one or several questions.



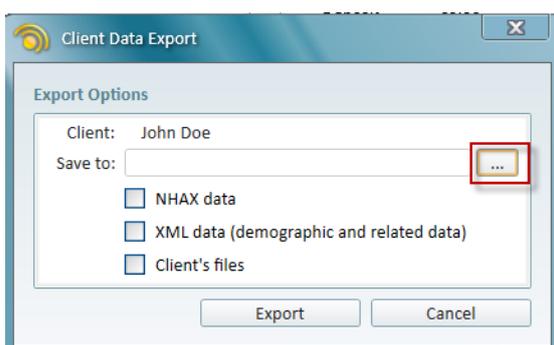
### 3.4 Exporting Client Data

You can now provide the clients with their data by exporting all the client information in a structured, commonly used and machine-readable format. To do this:

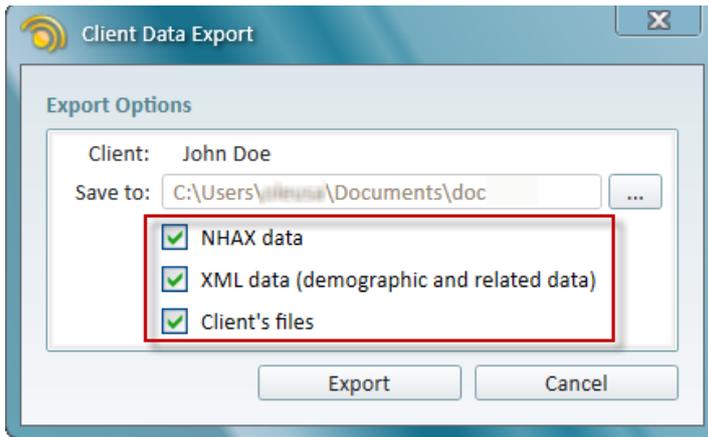
1. Open the client screen and select the **Client Data Export** option under **Tools > GDPR**.



2. Specify the local folder where you want to save the files with client data.



3. Then select what data you want to export. Available options are:
  - NHAX data - client's diagnostic data (records from the client's Session History)
  - XML data - client's demographic data and other related data (personal information, appointments, sales, treatment information)
  - Client's files - all the files from the client's **Documents** tab

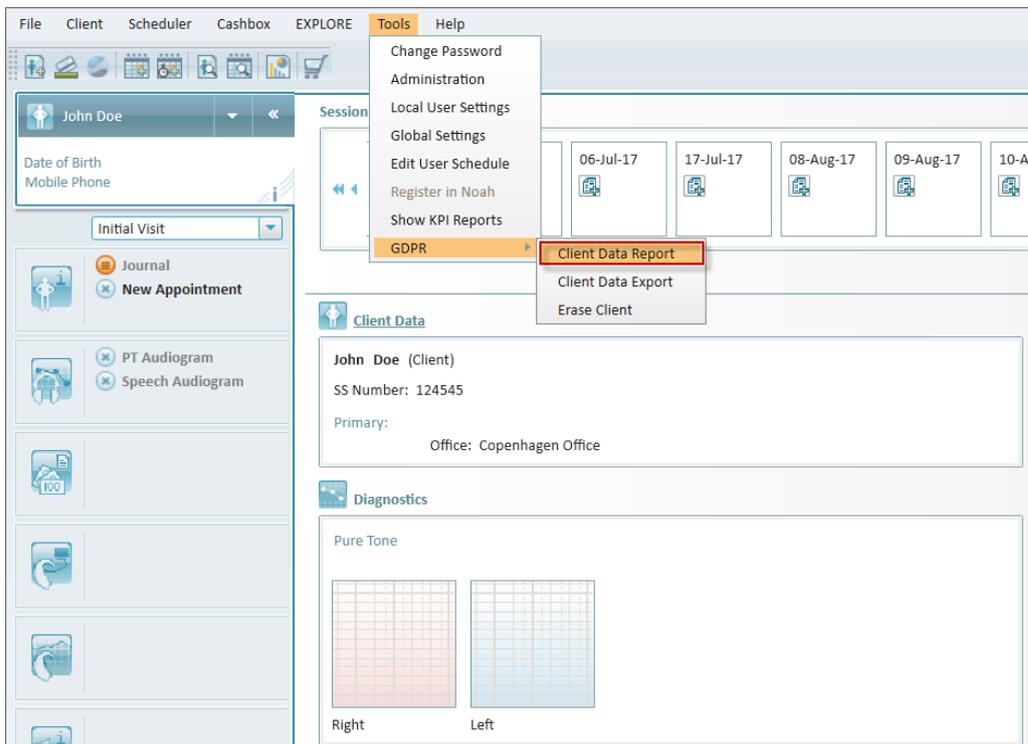


4. Finally, click **Export** to complete the procedure.

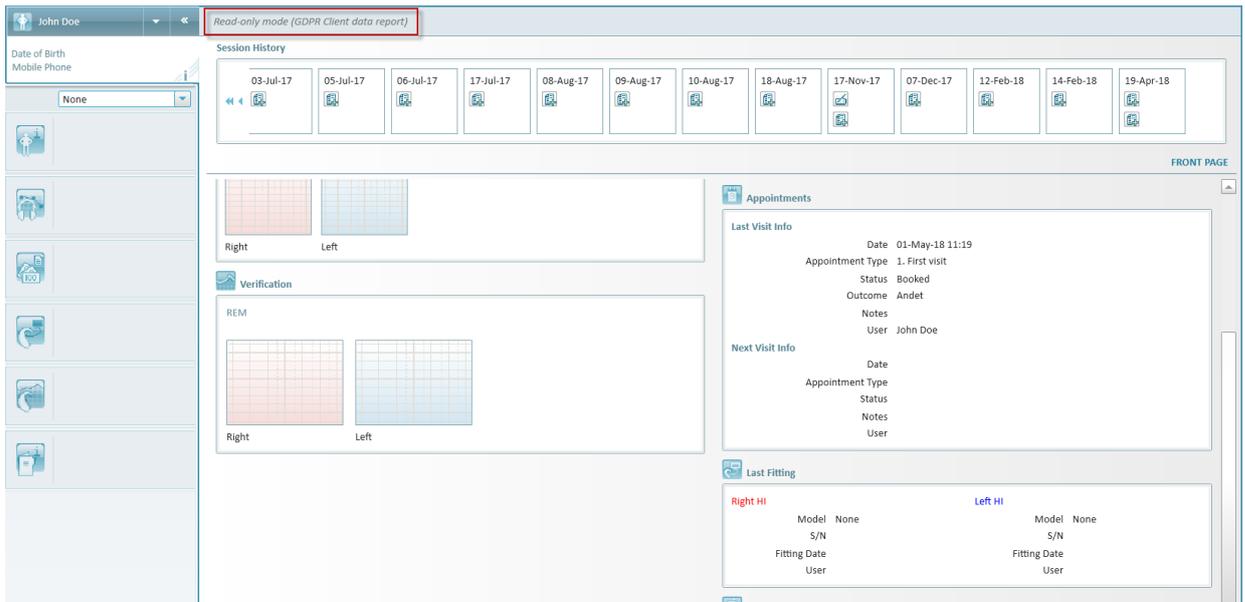
### 3.5 Client Data Report

Strato now includes Client Data Report functionality that allows the customers to have access to their personal data kept by the shop. After receiving customer's request, you need to do the following:

1. Open the client screen and then click **Client Data Report** under **Tools > GDPR**.



2. The client screen will open again. It contains all client data in a read-only mode. You can now display the client's data to the customer.



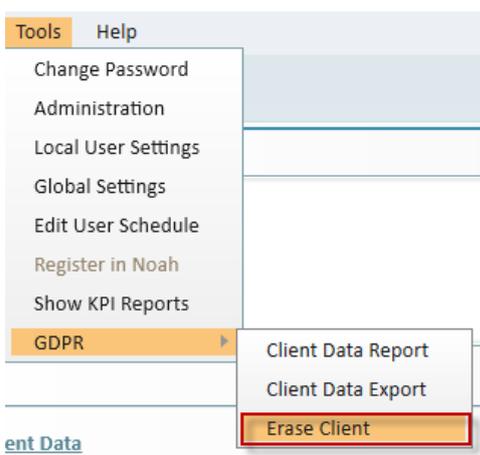
Note that this mode is used only for demonstration. All client fields are read-only and cannot be edited.

### 3.6 Erasing Clients

You can now erase client records from Strato if requested by the customer. Erased data includes all client information except the data that is relevant to the original purpose of processing. This means that client's sale documents or appointment records are still available in Strato.

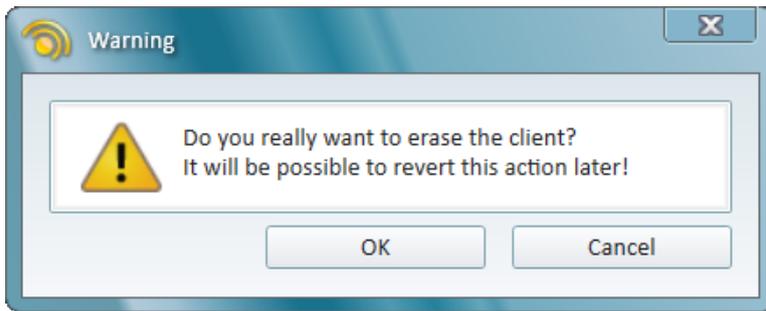
To erase a client:

1. Open their client screen.
2. Click **Erase Client** under **Tools > GDPR**.



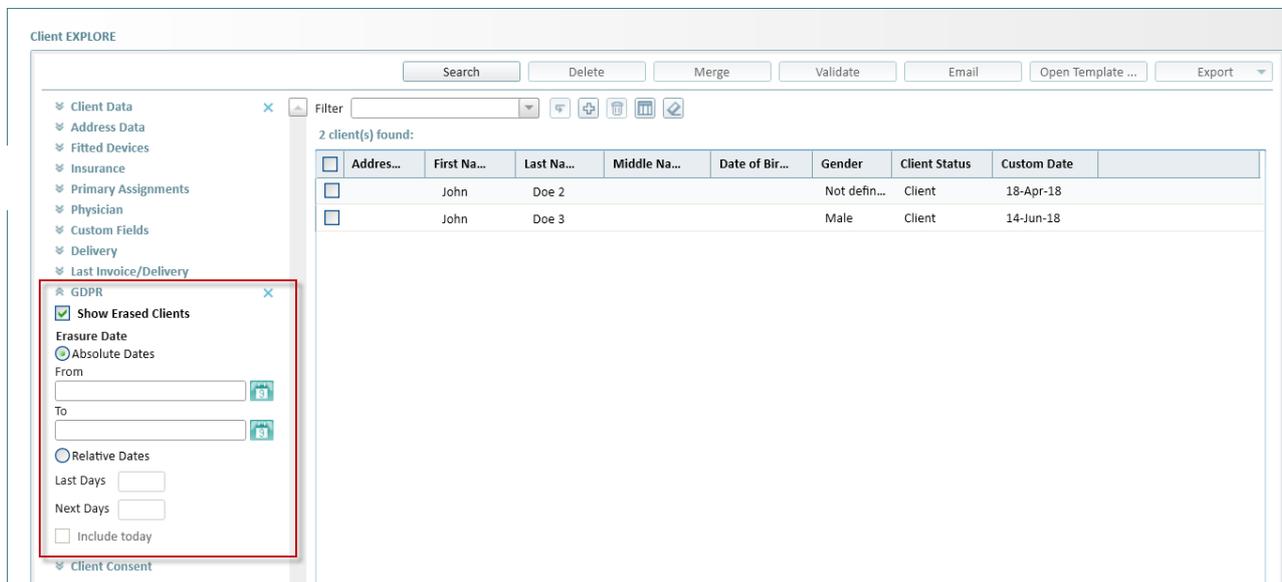
**Note:** The GDPR menu item is only visible if the user has the corresponding permissions in the Administration.

3. A warning message is displayed where you need to click **OK**.

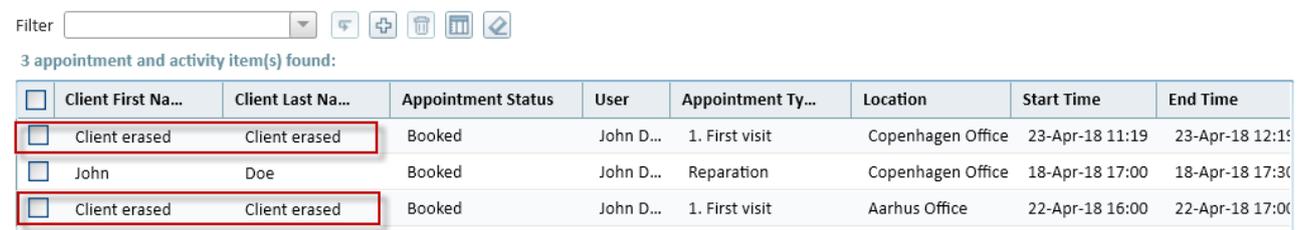


The erased client will no longer be found in the Client EXPLORE view.

Users with the **Client Erasure** permission can apply the **Show Erased Clients** filter to only display erased clients.



You can still find the erased client's appointments since those are records belonging to the shop. Even though they will be visible in the Scheduler EXPLORE view, the client's data is no longer displayed:



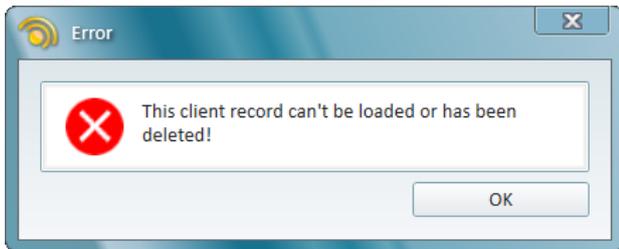
The same applies to the latest activity in the Activity Log EXPLORE:

Filter  [Icons]

More than 1000 log activity items were found; only the first 1000 are displayed. [Click here to get total count ...](#)

<input type="checkbox"/>	Log Time	User	Computer Na...	Client First Na...	Client Last Na...	Client Date of Birth	Client Address...	Client Addr...
<input type="checkbox"/>	04-Feb-16 11:54	John Doe	[Redacted]	Client erased	Client erased		Client erased	Client eras
<input type="checkbox"/>	08-Feb-16 12:32	John Doe	[Redacted]	Client erased	Client erased		Client erased	Client eras

The erased client will be visible in the rest of the EXPLORE views, since this is required for financial and reporting reasons. If you attempt to open their client screen, you will get an error message:



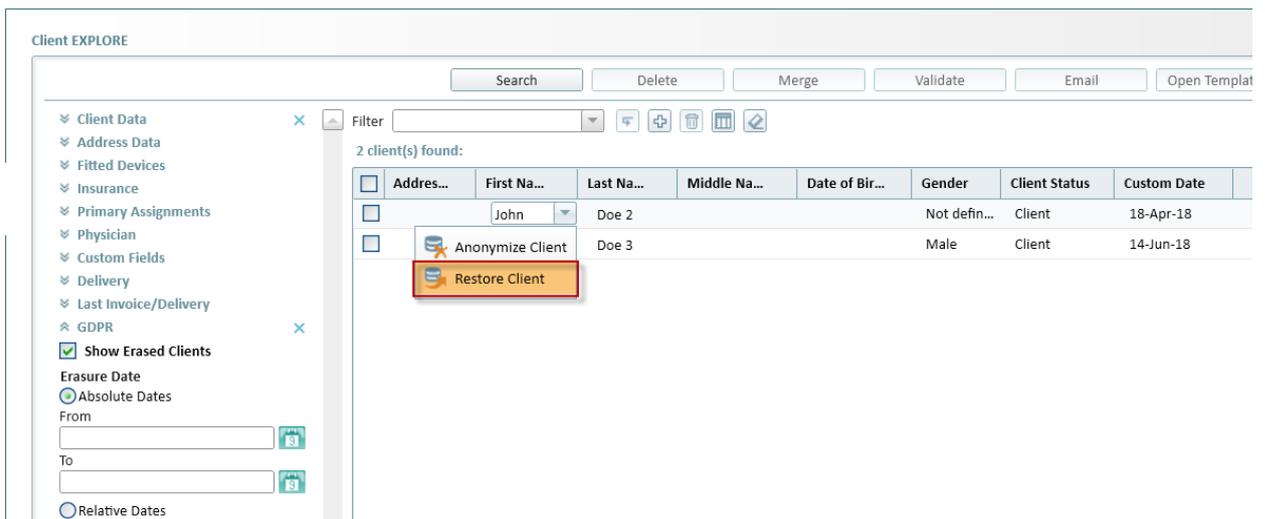
Finally, the clients cannot be erased if:

- they have future appointments
- they have active lend items
- their payment balance is not zero
- they have active repair orders

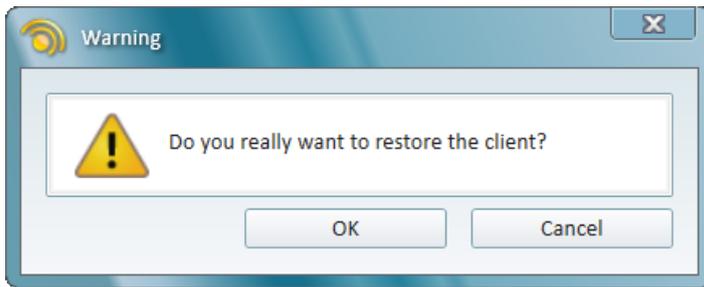
### 3.6.5 Restoring Erased Clients

If needed, you can restore an erased client. To do this:

1. Search for the erased clients using the **Show Erased Clients** filter in the Client EXPLORE.
2. Click the client record and then select the **Restore Client** option.



3. Select **OK** to confirm.



Your client is now restored.

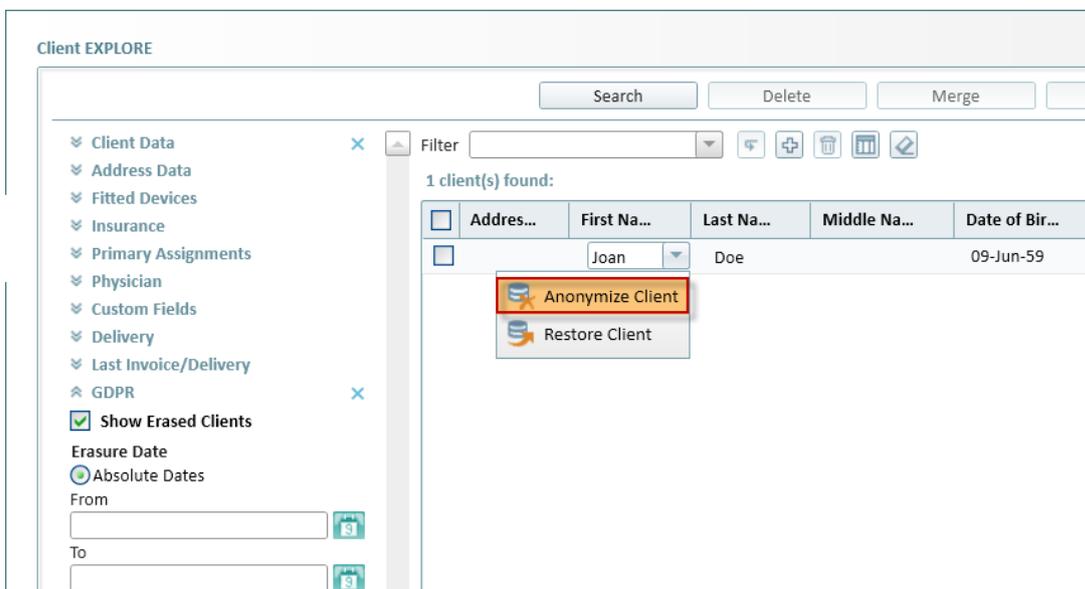
### 3.6.6 Anonymizing Erased Clients

After the client is erased, the store has the right to keep client's medical and diagnostic data. If you want to use this data for further processing, you need to anonymize the erased client. After you do this:

- the erased client's financial records and appointments are kept by Strato
- the anonymized copy of the client record is created
- client's medical records are transferred to the anonymized client record

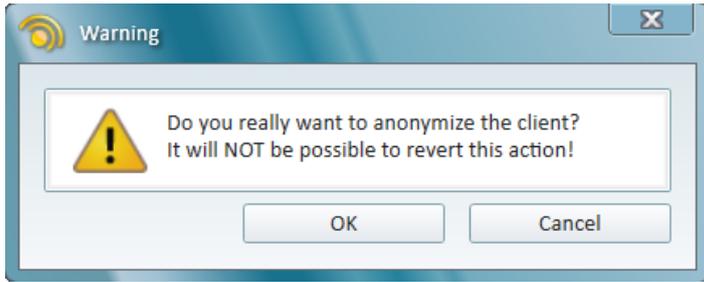
To anonymize the erased client:

1. Locate the erased client in the Client EXPLORE view
2. Click the client record and then select the **Anonymize Client** option.



3. A warning message is displayed where you need to click **OK**.

**Note:** This action cannot be reverted.



4. The anonymized client can be found in the Client EXPLORE view.

Filter  [Icons]

4 client(s) found:

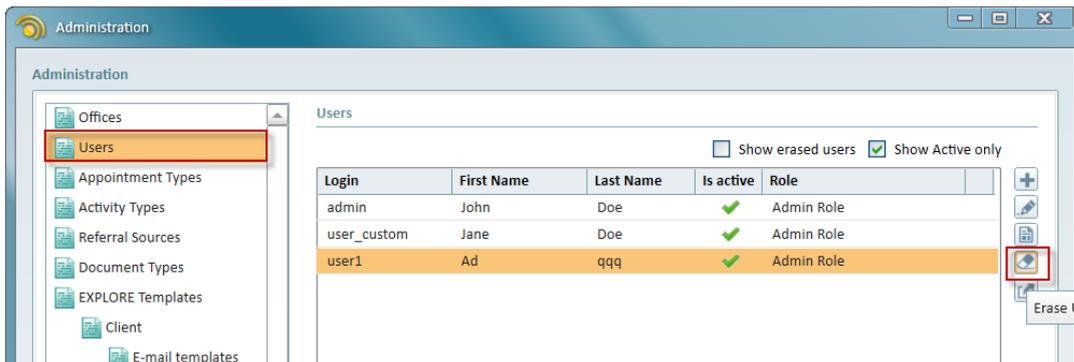
<input type="checkbox"/>	Address...	First Name	Last Name	Middle Na...	Date of Bir...	Gender	Client Status
<input type="checkbox"/>		Anonymized First Name 8	Anonymized Last Name 8			Not defined	Client
<input type="checkbox"/>		John	Doe			Male	Client
<input type="checkbox"/>		John	Doe 2			Not defined	Client
<input type="checkbox"/>		John	Doe 3			Male	Client

As you can see, the client's personal data is not available anymore. This record only contains client's diagnostic data that you can further use.

### 3.7 Erasing Users

You can now erase the data for the Strato users as well. This is useful if your employee leaves the company and wants their data to be removed. To erase user data:

1. Go to **Tools > Administration > Users**.
2. Select the user you want to erase and click the **Erase User** button.

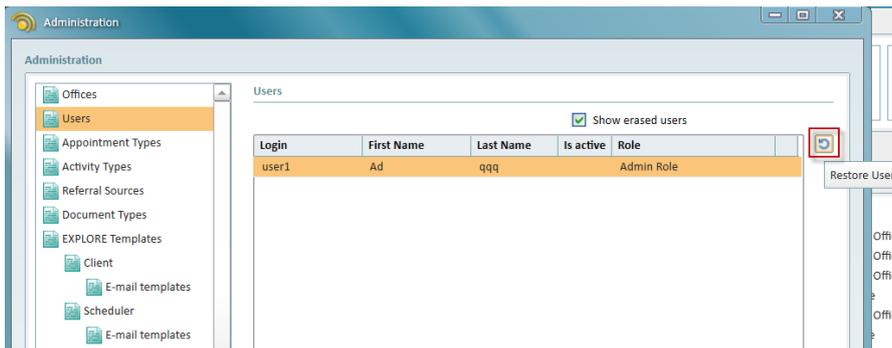


3. Click **OK** in the *Warning* window to complete the procedure.

The user is now erased from Strato. You can view all erased users by selecting the **Show erased users** option.



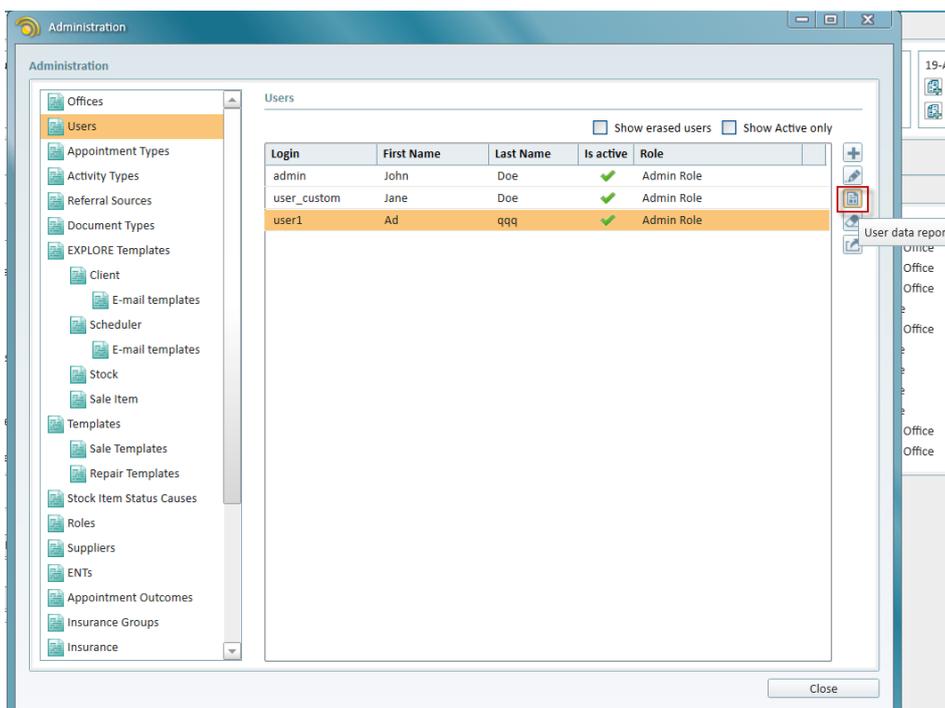
If you want to restore the user, select them from the list and then click the **Restore User** button.



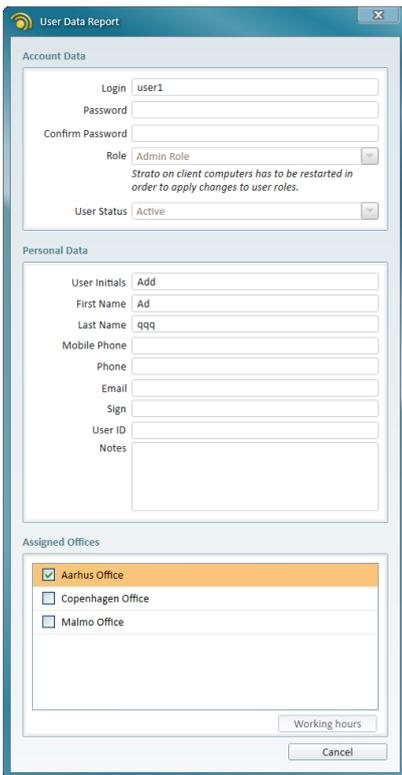
**Note:** The store appointments created by the erased user, as well as financial documents created by them are the property of the store and will not be deleted.

### 3.8 User Data Report

If requested by the user, you can display information which the store has on them. For this, locate the user in the Administration and click **User data report**.



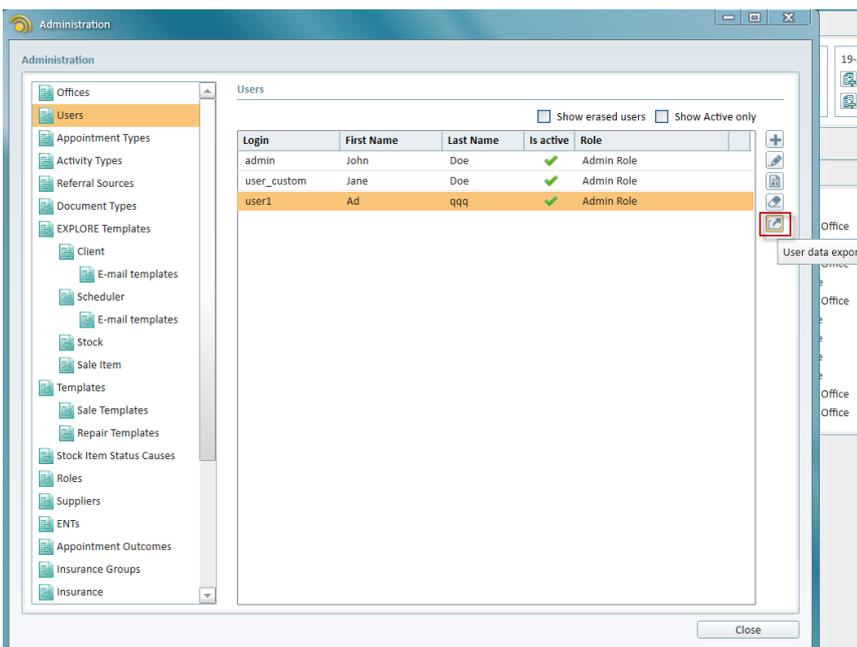
The *User Data Report* window is displayed with all the user information in a read-only mode.



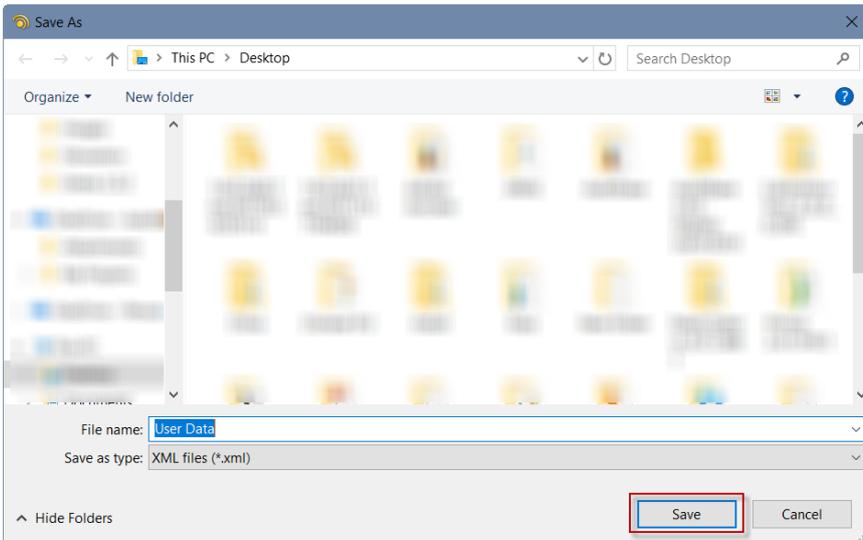
**Note:** You need to have the **Users - Manage** permission enabled to use this functionality.

### 3.9 Exporting User Data

Similar to the client data export, you can also provide the users with their information in the XML format. To do this, first select the user in the Administration and then click the **User data export** option.



Specify a local folder where you want to save the user data and click **Save**.

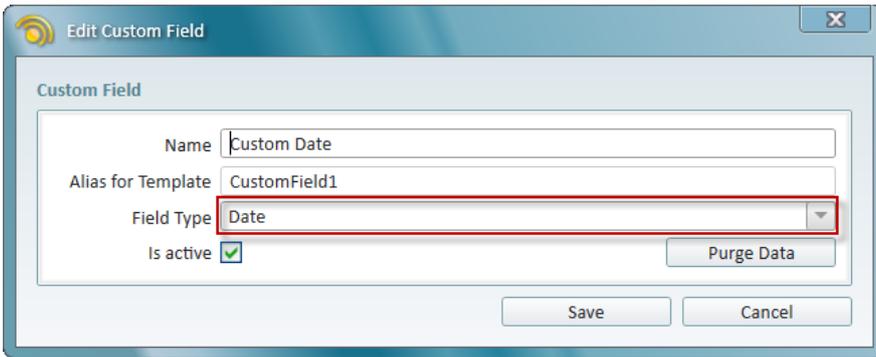


## 4 Other Improvements

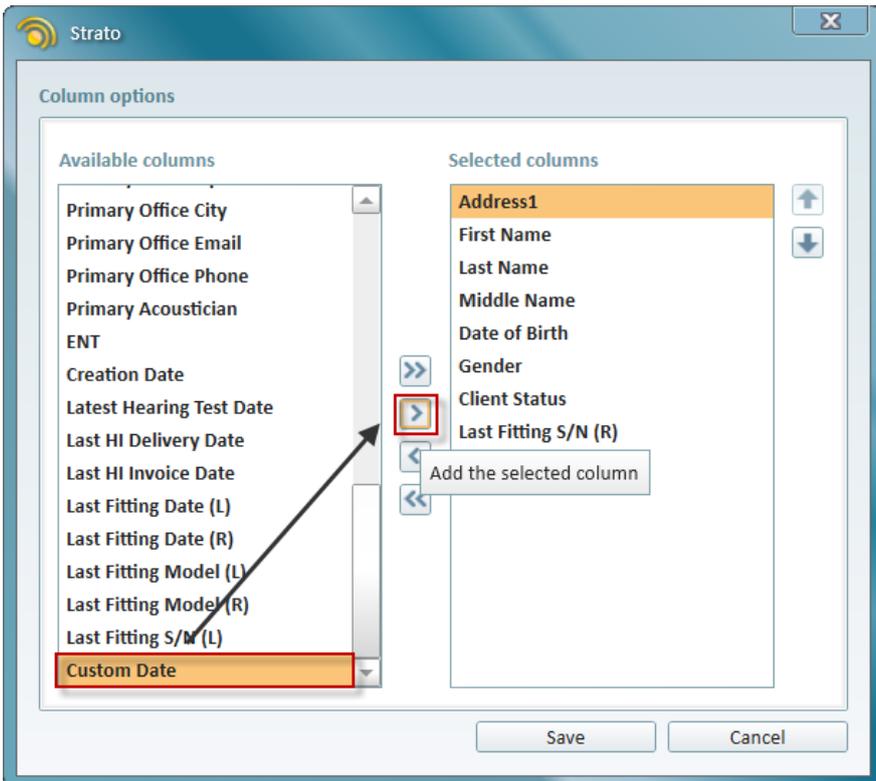
### 4.1 New field type for Custom Field

You can now use the **Date** field type for any custom field in the application. This may be a visit date, an HI replacement date or any other date you want to use to filter your clients.

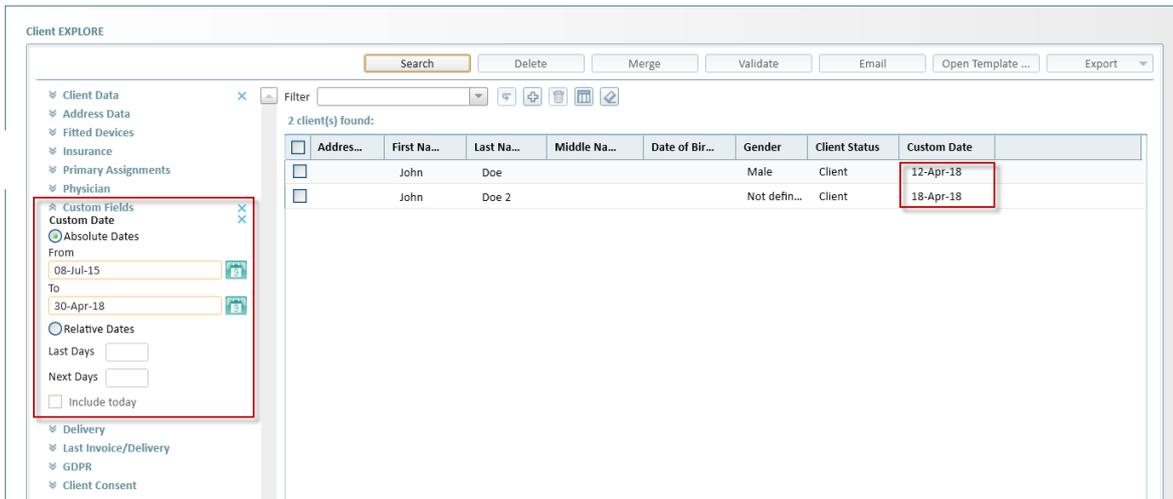
Start editing an existing custom field and select **Date** as your field type.



Make sure you select the **Is Active** check box and then save your changes. Now let's add this field as a visible column for the Client EXPLORE view.



You can now filter your clients using the **Date** filter under **Custom Fields**.



You can add this field as a visible column for the Client and Scheduler EXPLORE views. After this, you can use it to sort your clients and appointments.

## 4.2 Invoice enhancements

When printing an invoice, it contains client data relevant at the time when this invoice was created.

## 5 Additional Information

For further information, please contact [stratosales@auditdata.com](mailto:stratosales@auditdata.com) or visit [www.auditdata.com](http://www.auditdata.com).