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AXtension® Data Anonymizer

Quick start guide

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AXtension® Data Anonymizer is installed with a standard configuration, which makes it easy to get started.

Once you have installed AXtension® Data Anonymizer from Microsoft AppSource, you only need to perform two steps before you can start using this solution:
1. Install a (trial) license

2. Assign a security role

A standard configuration data set is automatically installed, allowing you to start without additional setup.

INSTALL LICENSE

Navigate to Settings > CRM Partners Licensing > License Administration. Register your CRM instance by filling out the registration details and click 'Register'. When registration is done, click the 'Request Licenses' button. This will automatically install a 30 day trial license.
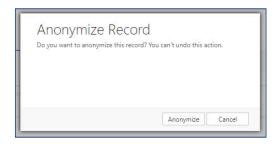

ASSIGN SECURITY ROLE

Only users with the security role 'Anonymization User' can anonymize records. Without this security role, the Anonymize button will not be visible. Assign this security role to all users who should be able to anonymize records (including users that already have the 'System Administrator' role).

ANONYMIZATION

Now you can start anonymizing Contacts and Leads, including their related records. Just open a record and click the Anonymize button:

It will show a dialog in which you can confirm this action:

Note: use the workflow 'Anonymize Contact' or 'Anonymize Lead' to anonymize multiple records in one go.

SCRAMBLING

In order to remove personal data from a test environment (while keeping representative test data), you can scramble Contacts and Leads by executing the workflow 'Scramble Contact' or 'Scramble Lead' on your records.
When you want to scramble your whole database, you need to setup batch processing.

*Records are scrambled by combining random values from other records. The more records in your database, the better the result. If you have too less data, you might get an error like '**Entity contact contains insufficient data to be used as sample data**'. Workarounds are:*

- *Remove or disable Field Configurations with a {sampledata} placeholder in the Replacement Format. For example, the address2… fields. (The less {sampledata} placeholders, the less sample records needed.)*

- *Avoid scrambling fields that always have the same value (including blank fields)*

- *Create or import more test data*

BATCH PROCESSING SETUP

Processing large numbers of records must be hosted outside your CRM system. AXtension® Data Anonymizer contains batch processing functionality, which runs the processing job on an Azure cloud service. Refer to the manual for instructions how to setup this batch processing.