

Meisterplan "Data Portability and Switching"

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1. Overview

This page informs customers about their rights and our procedures for switching to another provider, porting their data to their own IT infrastructure, as well as exporting data in accordance with Regulation (EU) 2023/2854 (EU Data Act).

2. Who has these rights

The rights described below apply to customers who are registered in a Member State of the EU and/or the EEA and use the application as a data processing service. These rights can be exercised independently (self-service) or requested from us.

3. How to initiate a switch, portability, or data deletion

- Self-Service: You can download your exportable data at any time yourself using the export function integrated into the application. [Import & Export Menu]
- Request: For assisted switching, portability, or deletion, please contact us at mail@meisterplan.com. When requesting a switch, please provide the required details about the target provider.
- Support: Upon request, we provide reasonable support to you and authorized third parties during the switching process and supply the relevant information for your exit strategy.

4. Available procedures, methods, and formats (Art. 26)

Customer data can only be exported using the following two methods:

- Excel-Export (XLSX format): via the integrated function "Import and Export" → "Export to Excel". Details on which data can be exported are available here: <https://help.meisterplan.com/hc/en-us/articles/4402092457618-Export-to-Excel>
- Meisterplan REST API (<https://api.eu.meisterplan.com/>): programmatic access and export, including transfer to another provider or to your own (on-premises) infrastructure.

5. Register of portable data categories

The following list provides a definitive specification of the categories of data and digital assets that can be ported during the switching process (at minimum all exportable data). The basis for this is the Excel export and the Meisterplan REST API. Details on the Excel export can be found at: <https://help.meisterplan.com/hc/en-us/articles/4402092457618-Export-to-Excel>. This list is continuously kept up to date.

Data Category	Description / Content	Format	Method
Projects	Projects with project information (including custom fields)	XLSX	Excel-Export / REST API
Resources	Resources with resource details	XLSX	Excel-Export / REST API
Roles & Roles Capacities	Roles with role details and role capacities	XLSX	Excel-Export / REST API
Allocations	Allocation matrix and allocation list	XLSX	Excel-Export / REST API
Actual Time Entries	Recorded actual time entries including notes	XLSX	Excel-Export / REST API
Milestones & Dependencies	Milestones and milestone dependencies	XLSX	Excel-Export / REST API
Planned Financial Events	Planned financial events / financial planning data	XLSX	Excel-Export / REST API
Part-Time Models & Absences	Part-time models and resource absences	XLSX	Excel-Export / REST API
OSP / OBS	Organizational Structure Plan (OSP / OBS)	XLSX	Excel-Export / REST API
Portfolios	Portfolios	JSON	REST API
Programs	Programs (including project assignments)	JSON	REST API
Scenarios	Scenarios (Pro/Premium)	JSON	REST API
Teams	Team details (excluding team membership)	JSON	REST API
Calendars	Calendars	JSON	REST API

6. Data categories excluded from portability

The following categories cannot be exported via Excel export and do not represent customer-generated or customer-relevant data. They relate to the internal operation of the service or administrative configuration:

- User and authorization data
- Change history
- Reports and dashboards
- System and integration configuration
- Technical IDs / internal metadata