ISPConfig GDPR Plugin Manual

Version 1.2 for ISPConfig 3.1
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Last update 14/09/2018

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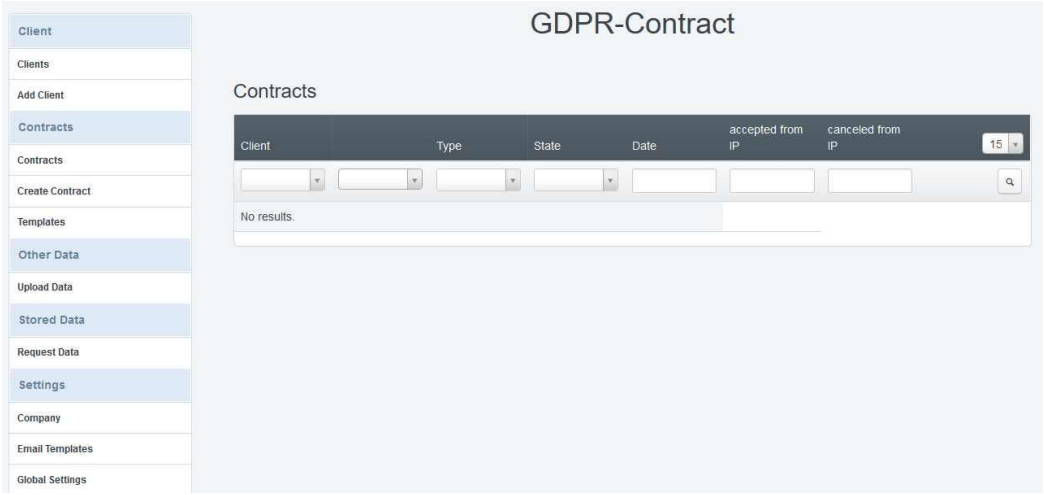
ISPConfig GDPR Plugin Manual

The ISPConfig GDPR Plugin is an extension for ISPConfig 3 and is not under the BSD license.



Functions of the GDPR Plugins

- Automatic generation of order processing (GDPR) contracts by a client
- Automatic generation of order processing (GDPR) contracts by the admin for a client
- Generated order processing (GDPR) contracts are saved directly as PDF files
- Ability for the client to revoke an existing agreement
- Upload option for the admin to provide additional contracts / data for a client
- Support of several companies
- Individual templates for generating contracts
- Individual templates for sending email
- Ability to store contracts and other data on the hard disk or directly in the database
- Export function for the data stored for a client (PDF or XML)
- The GDPR Plugin is integrated in ISPConfig and can be accessed via the ISPConfig Admin/Client Login
- Standard templates for companies

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License and Terms of Use

The ISPConfig DS-GMO Plugin is subject to the following license:
The licensee has the right to use the software on a single ISPConfig 3 Control Panel server.

In an ISPConfig 3 multi-server installation, a license for the "Master" server is required, the slave servers do not require their own licenses.
Modifications of the source code for your own use are permitted. The source code of the GDPR Plugins may not be passed on or published to third parties.

A license contains updates for one year after activation. To continue receiving updates afterwards, the license must be renewed.

If you have any questions about the license, please contact info@schaal-24.de

System requirements

- ISPConfig >= 3.1
- PHP >= 5.6 with ionCube-Loader
- PHP Curl

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1 Installation and Update

1.1 System Requirements

The GDPR Plugin requires the ionCube Loader. For more information, please visit https://www.ioncube.com/loaders.php.

For the following steps you must be logged in as root user on the shell.

Upload the archive to the server with the ISPConfig GDPR Plugin (e.g. with WinSCP).

For the following steps you must be logged in as root user on the shell.

Unpack the file with this command:

tar xfz gdpr-module.tgz

…change into the directory:
cd ispconfig-gdpr

… and start the installation of the ionCube Loader:
php –q install_ioncube.php

If an error occurs, you have to install ionCube manually (e.g. as described at https://www.howtoforge.com/tutorial/how-to-install-ioncube-loader/).

Afterwards restart the web server:

service apache2 restart

If you use nginx:

service nginx restart

If you have problems with the installation, feel free to send us an email.

As long as the ionCube Loader is not installed, the GDPR Plugin does not work!

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1.2 Installation of the GDPR Plugin

Prerequisite for the GDPR Plugin is a working ISPConfig 3 installation. If ISPConfig 3 is not yet installed, first perform the ISPConfig 3 installation.

Upload the archive to the server with the ISPConfig GDPR Plugin (e.g. with WinSCP).

For the following steps you must be logged in as root user on the shell.

Unpack the file with this command:

tar xfz gdpr-module.tgz

…change into the directory:
cd ispconfig-gdpr

… and start the installation:
php –q install.php

If clients have already been created in ISPConfig, the following appears at the end of the installation:

Allow the GDPR Module for all clients? Y/n

With Y the module is created for all clients, so that they can use the functions immediately. If you select n here, you have to enable the GDPR-Plugin for the clients manually.

For clients created in ISPConfig after installation, the module is automatically available.

The next steps must be performed in the ISPConfig Control Panel Interface:

Log into ISPConfig as an admin user and click *System* > *CP User* > *Edit User* and select the admin user.
Activate the GDPR checkbox in the list of the user's modules and click on Save.

Now click on *Logout Admin* in the upper right corner of ISPConfig and log in as admin user again. You will find the GDPR Plugin under GDRP in the upper menu.

If your ISPConfig already contains clients that were created before the installation of the GDPR plugin and you did not import them during the installation, they must be imported using the Resync function.
Go to *Settings* > *Resync Tool* > *Resync*, tick "Clients and Resellers" and click "*Start*".

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Afterwards all customers are available in the DS-GVO Plugin. This will not automatically allow existing customers to use the DS-GVO plugin (see above) - manual activation is required.

1.3 Update the GDPR Plugins

An update can be performed at any time under "Global Settings" or on the shell by running

/usr/local/ispconfig/server/scripts/gdpr/gdpr_update.sh

The Update-Option in the interface is not available as long as your version is up-to-date.

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2 Functions of the GDPR Plugin

2.1 Clients

Under this menu item all settings for clients are made.

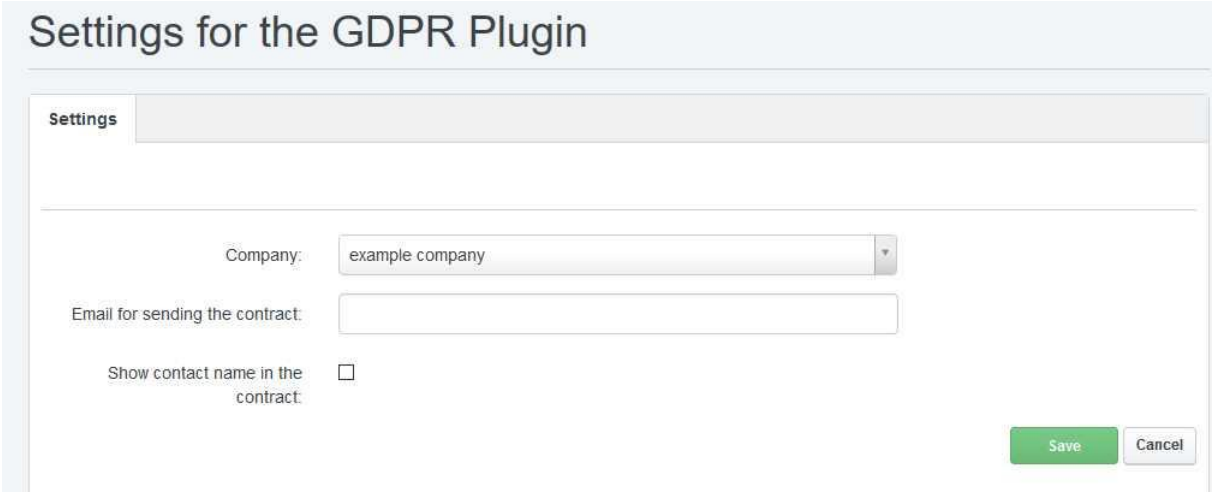
2.1.1 Clients

This menu item displays the list of clients and resellers. A click on the client's name opens the client details and limits known from ISPConfig. A click on the *Settings* button at the end of the line opens the client's settings for the GDPR plugin.

2.1.2 Add Client

A click on this menu item creates a new client data record. On the first tab card, the master data of the client such as address, telephone, etc. is created. The limits of the client account are defined on the *Limits* tab card. These settings are identical to the forms that can be accessed via the ISPConfig client module. Specific details of the GDPR plugin can be accessed via the client list and the *Settings* button.

2.1.3 GDPR Settings of the client



The settings for the client's GDPR plugin can be accessed via the Settings button in the client list.
These are settings that are used when the client creates an agreement. If an agreement is generated manually by the admin, these settings can be partially overwritten.

Company: Company used to create an agreement.

Email for sending the contract: optional email address to which agreements should be sent. If this field remains empty, the email address stored in ISPConfig under "*Clients*" will be used.

Show contact name in the contract: Whether the client's name is to be displayed in the agreement. This only applies if ISPConfig contains a company and a client name. If the company name is missing, the client name is always used.

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2.2 Contracts

2.2.1 Contracts

Under "Contracts" you will find all existing contracts, can generate contracts automatically, send them by email or download them. In the following, all functions are presented, even if not all of them are - of course - visible to the client. For the view of the GDPR Plugin from the client's point of view see 3.

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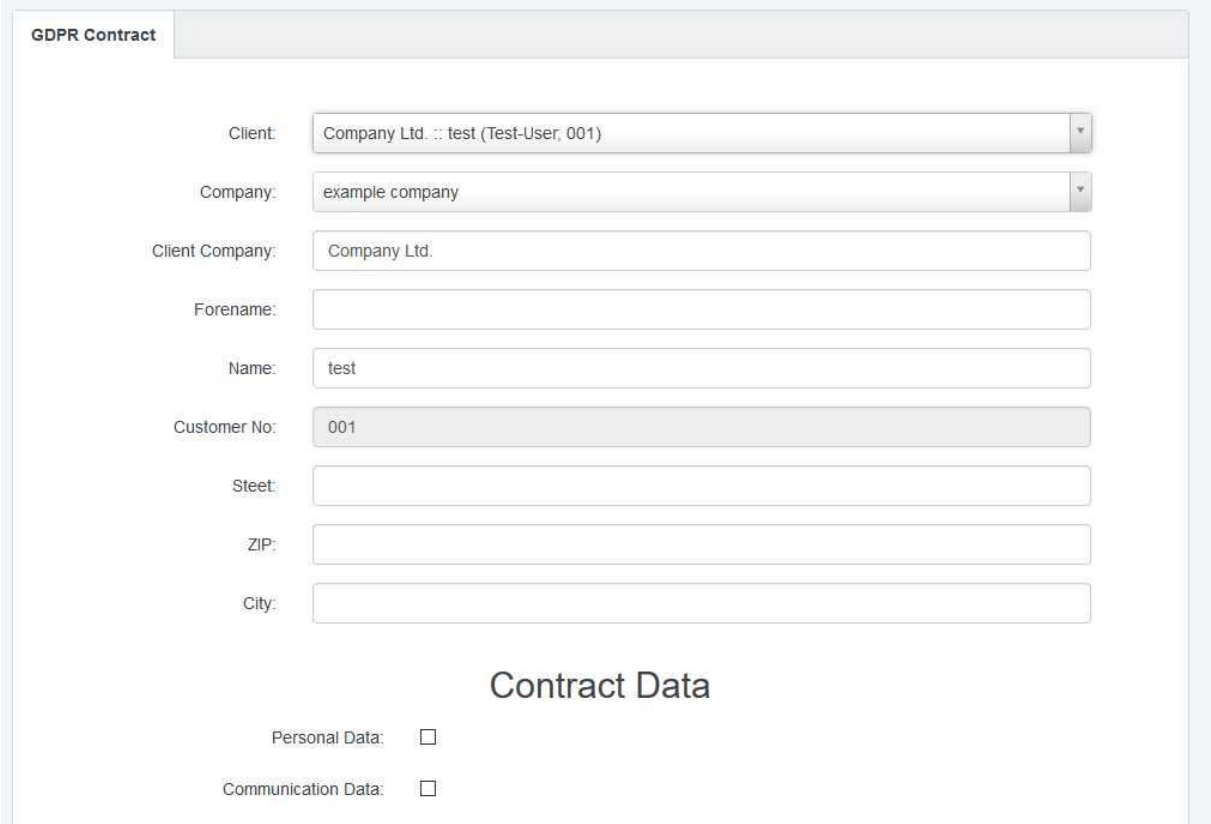
2.2.2 Create Contract



The client and, if applicable, the "GDPR company" can be selected.

The corresponding agreement is generated based on the settings for the "GDPR company" (see 2.5.1).

If you make changes to the client's contact data (e.g. street), this change is also applied to the client in ISPConfig.

The lists with the **Contract Data** and the group of **Affected People** cannot be changed.

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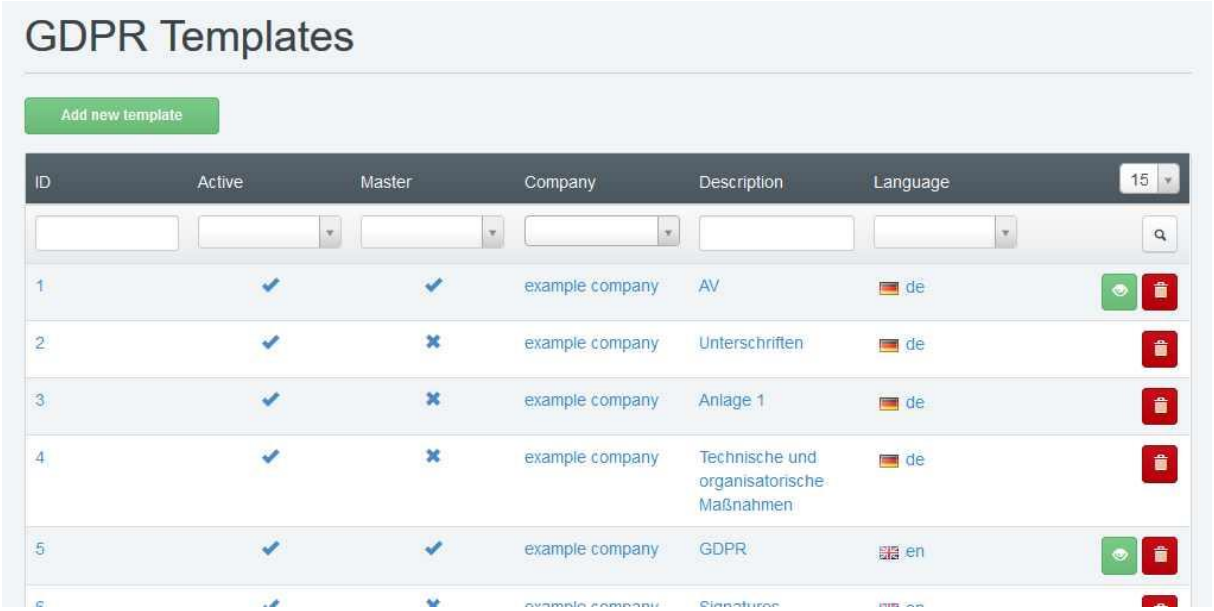
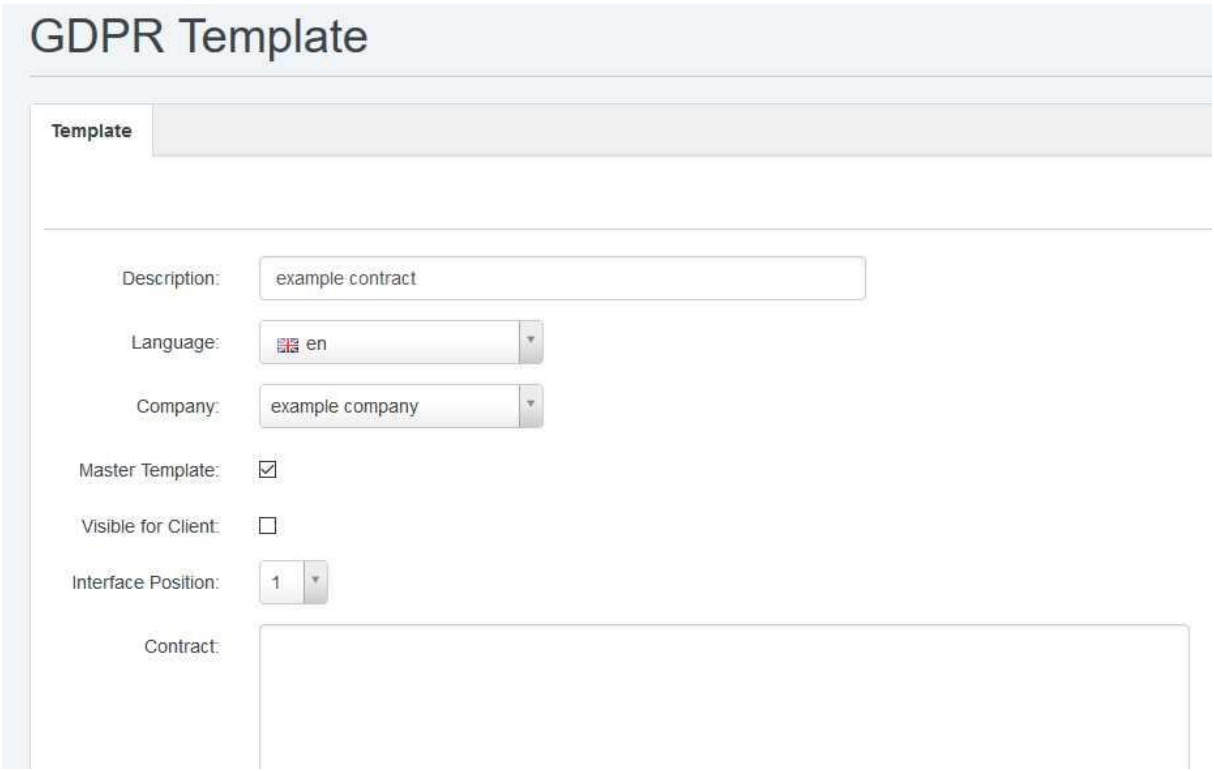
2.2.3 Templates



The preview button generates a PDF from the template and displays it.

2.2.4 Edit GDPR Template



Under Templates you can create individual GDPR templates. For details on the use of templates, see 4.1.

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Description: The specified description is only used internally (e.g. for other templates).

Language

Company

Master Template: This template is to serve as a master template (see also 4.1). There must be at least one master template per company and only one master template per company and language. The master template is used when the client creates an agreement.

Visible for Client: Whether the client sees this template when creating an agreement.

Interface Position: At which position this template is to be displayed when a contract is created.
Here you can deviate from the sequence in the template.
If templates are linked and they all have the same "Interface Position", they are displayed in one field.

Contract

Variables
See 4.3

Textblocks
See 4.1

Text Formatings
See 4.3

Include additional templates
See 4.1

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2.3 Other Data

2.3.1 Upload Data

Under this point, you as the admin user can provide a client with additional contracts / data, which he can then view and download via the GDPR plugin.

Under **Type** you can choose between "Own data" and "GDPR contract". The **description** is displayed under contracts if you have selected "Own data" as the type.

The client can only revoke online uploaded files of type "GDPR contract".

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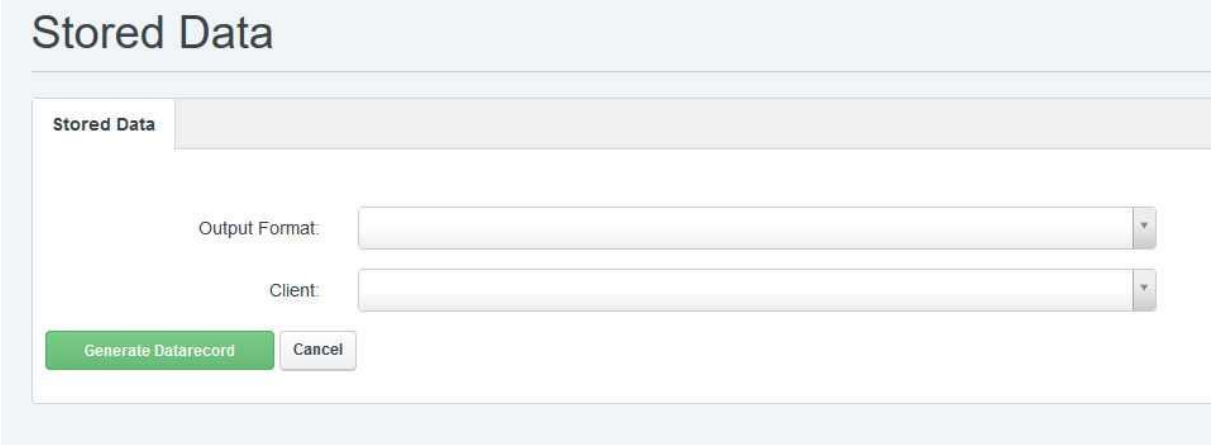
2.4 Stored Data

2.4.1 Request Data



Under this point the admin can query and output the data stored for a client in ISPConfig. Three formats are available:

- PDF (see also 4.5.2)
- XML (see also 4.6)
- XML full (see also 4.6)

The export includes the essential data and shows the values of the billing module.

In addition, a complete data set can be exported from ISPConfig, which contains the values from all tables that are linked to the client in any form.

The exported data can then be sent by email or downloaded. After sending or downloading, the exported data record is deleted.

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2.5 Settings

2.5.1 Company

Most of the information about a company is only used to generate PDF files. Therefore, only those fields are listed below that the GDPR Plugin uses for other actions or that are decisive for the generated PDFs. When generating a PDF, the logo and signature are reduced in size if necessary so that the graphics match the template.

Company: Name of the company as it should be displayed in the generated files.

Default Company for new Clients: When a new client is created in ISPConfig, the company activated here is used for GDPR agreements. If only one company exists, the value is ignored and new clients are always linked to the existing company.

Description: Description of the company. This value is used in selection fields for the company (e.g. when creating a new agreement).

The following fields are decisive for the generated data:
Logo (File): Your logo, which is displayed in the generated PDFs.

Signature (File): Your signature, which is included in the generated agreements.

PDF Template GDPR: This template is used to create PDFs for agreements.

PDF Template Data: This template is used to create PDFs of the stored data.

XML Template Data: Analogous to PDF template data. Here, no PDF is generated, but an XML file.

Default Language Templates/ Emails: Agreements and emails are always created in the language of the respective client. If there is no template matching the language, then "Default Language" is used.
This is a "fall-back language".

Active: Set the company to active / inactive. This only applies to the creation of new agreements and the sending of an agreement by mail.

The settings for sending emails are defined in these fields:

Enable Email sending: Activates the email sending for the company.

Send contracts with this sender's name
Send contracts with this email address
Send contracts by BCC to this email address
Standard language templates / emails

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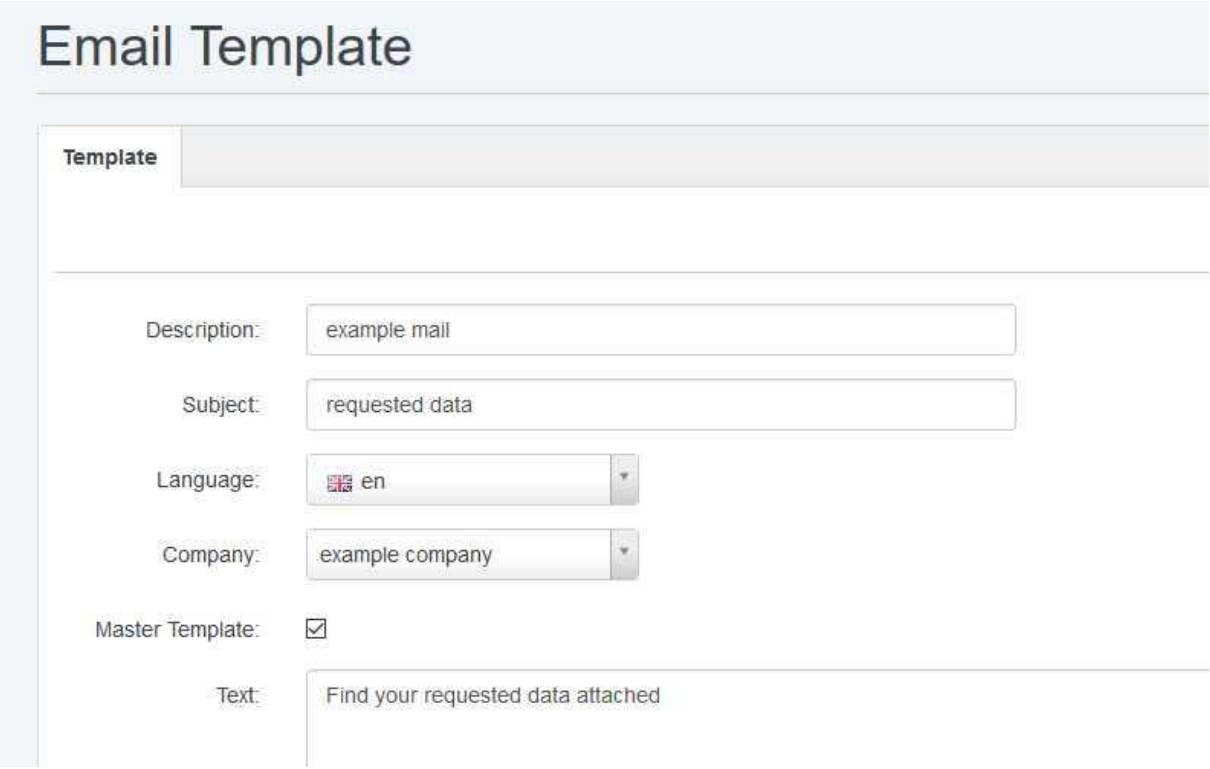
2.5.2 Email Templates



Description: The specified description is only used internally (e.g. for other templates).

Subject

Language

Company

Master-Template: This email template should serve as a master template (see also 4.2). There must be at least one master template per company and only one master template per company and language. The master template is used when the client has an agreement sent to him by email.

Text

Variables for Client
See 4.4

Variablen for Company
Siehe 4.4

Include additional templates
See 4.2

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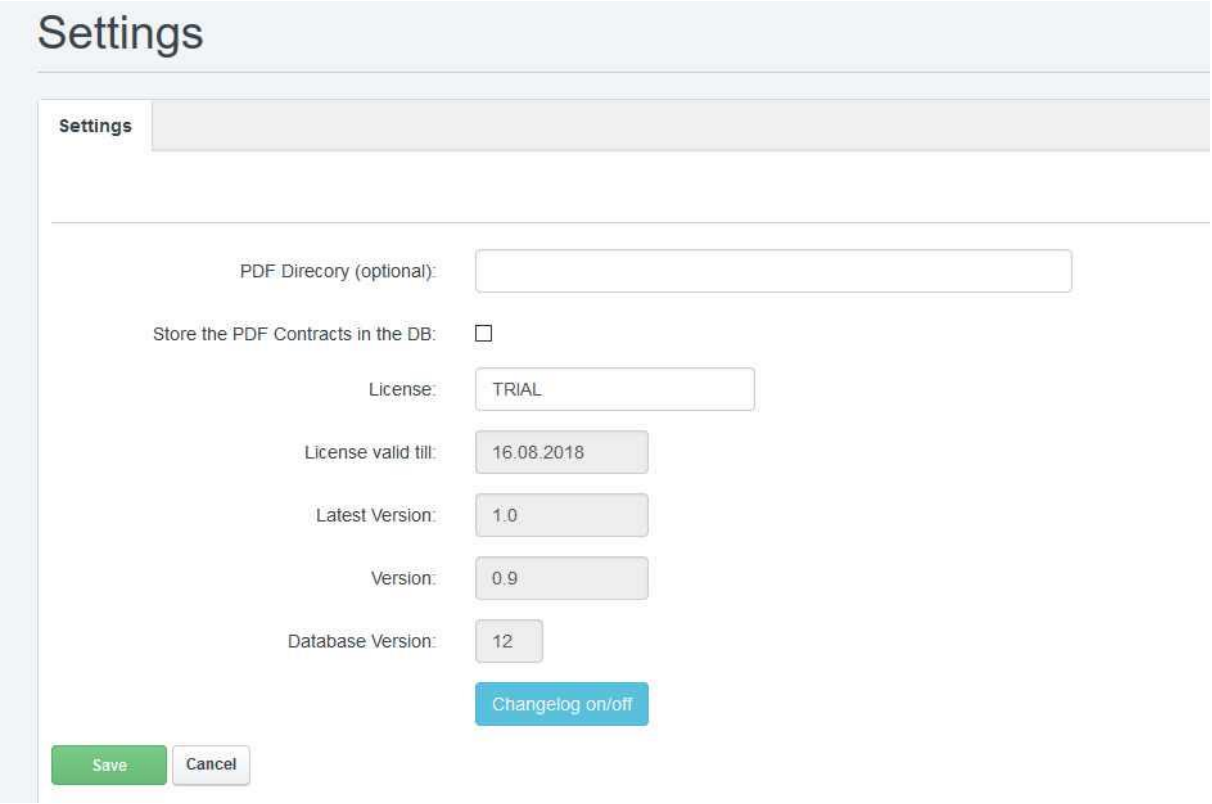
2.5.3 Global Settings



PDF Directory (optional): Directory in which the generated data is to be stored. The default directory is
/usr/local/ispconfig/interface/gdpr

Store the PDF Contracts in the DB
When this field is selected, the agreements and uploaded data are stored in the database. The PDF directory will then only be used temporarily.
If this value is changed, the existing agreements are written to the database or to the hard disk.

License
If you have purchased a license, register it here. Please use TRIAL for testing purposes.

Latest Version: The currently available version. This field is only displayed if the installed version is no longer current.

Version
The installed version of the GDPR Plugin.

Database Version: The database version of the installed GDPR plugin. Please include this information in case of problems.

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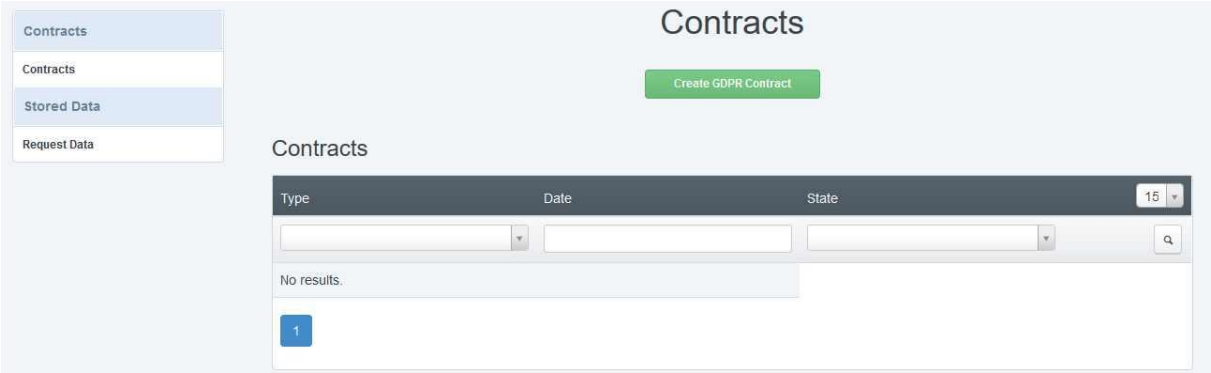
Changelog on/off: This item is only visible if a new version exists. You can view the changes directly in the interface and then start the manual update (see 1.3).

3 GDPR-Plugin as a Client

3.1 Contracts



3.1.1 Create a contract

The Client can Download a Preview Version of the contract. The preview is „watermarked" and does not contain your signature.

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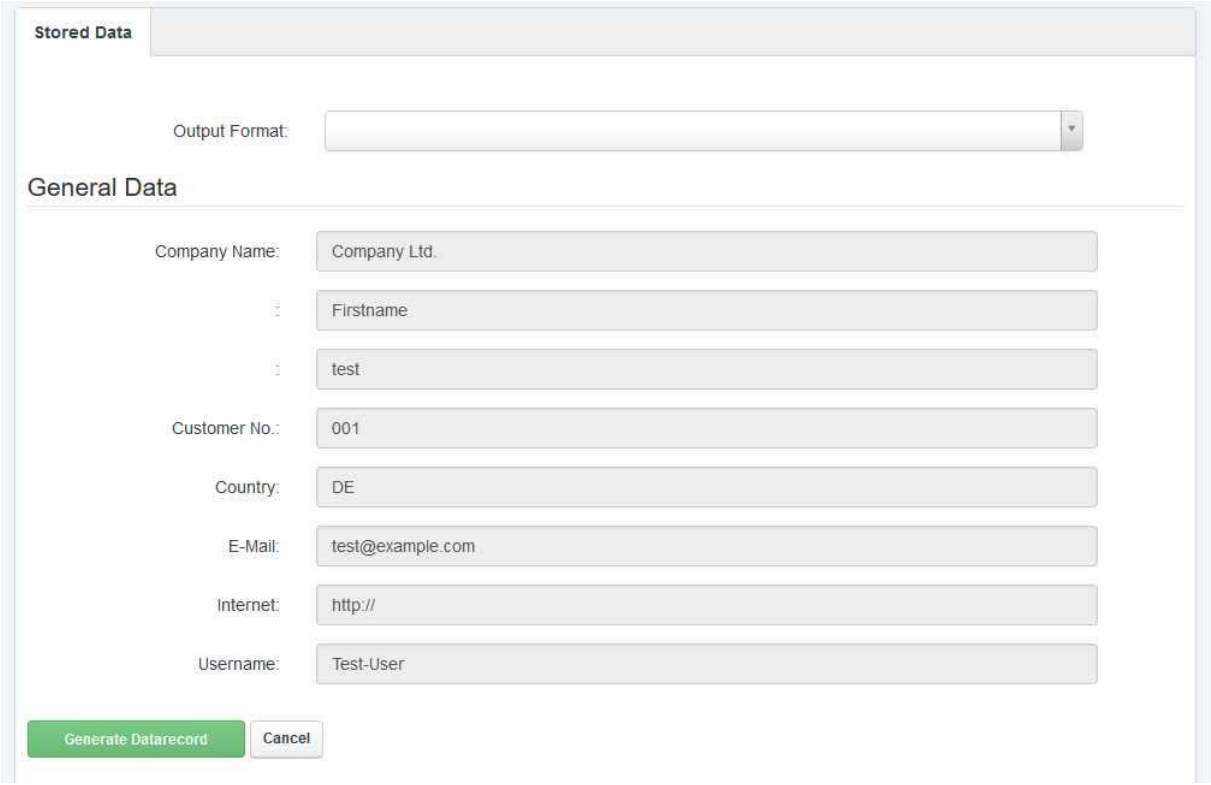
3.2 Stored Data



In contrast to the export function for the Admin, the client gets the data stored for him directly displayed and can afterwards generate a data record for sending by email or for downloading.

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4 Templates

The templates for contracts (4.1) und for Emails (4.2) do not differ significantly.

With templates for contracts, the visibility for the client can be hidden and a partial formatting of the text is possible. With email templates this is not possible, because the client cannot see the content of the email in ISPConfig, but can just have the agreement sent to him by email.

To customize the generated PDF or XML files, see 4.5 and 4.6.

In order to make the function more understandable, you will find the templates below, which we use ourselves for contracts. Our templates will be installed with the GDPR-Plugin. Do not forget to adjust the templates.

4.1 GDPR Templates

We use four Templates:

- GDPR
- Signature
- Appendix 1
- TOM

The "GDPR" Template is our Matser-Template with the position 1 and is shown to the client (Template 1).
The content looks something like this:

{HEADING1} Order according to Art. 28 DS-GVO
Agreement{UN_HEADING1}

between
{BOLD}{CLIENT}{UN_BOLD}
- hereinafter referred to as client -

and
{BOLD}{COMPANY}{UN_BOLD}
- hereinafter referred to as the contractor -
{PAGEBREAK}
{BOLD} 1. Subject and duration of the contract{UN_BOLD}

(…)

{TEMPLATE2}
{PAGEBREAK}
{TEMPLATE3}
{PAGEBREAK}
{TEMPLATE4}

With {TEMPLATE2} we include the signatures. {TEMPLATE3} is appendix 1 and {TEMPLATE4} contains our TOM.
{PAGEBREAK} causes a page break.

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Template 2: Invisible for the client.

{CLIENT_CITY}, {DATE}

.....

{COMPANY_CITY}, {DATE}
{SIGNATURE}

Using {SIGNATURE} the signature file (3.4.1) is embedded into the PDF.

Template 3: Is visible for the client and has the position 3

{HEADING1}Annex 1 to the order
according to Art. 28 DS-GVO:
Listing of personal data
and the purpose of their processing{UN_HEADING1}

{CONCERNED_DATA}

{CONTRACT_DATA}

{CONCERNED_DATA} and {CONTRACT_DATA} are the datas that the client selected when accepting the contract.

Template 4: Is visible for the client and has Position 2

HEADING1}Annex 2 to the order according to Art. 28 DS-GVO:{UN_HEADING1}

(…)

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4.2 Email Templates

We use two templates:

- Send Data
- Email-Signatur

The Template „Send Data" is our Master-Template und looks like this:

{CLIENT_SALUTATION} {CLIENT_CONTACT_FIRSTNAME}
{CLIENT_CONTACT_NAME},

enclosed we send the requested data.

With kind regards,
{COMPANY_NAME}
{TEMPLATE2}

Template 2:

--
{COMPANY_NAME}
{COMPANY_STREET}
{COMPANY_ZIP} {COMPANY_CITY}
CEO {COMPANY_CEO}
Handelsregister {COMPANY_REGISTER}
Tel {COMPANY_TELEPHONE}
Fax {COMPANY_FAX}
Email {COMPANY_EMAIL}
Internet {COMPANY_INTERNET}

Of course, you can also enter fixed values instead of placeholders. In this case, however, these must be changed, if there are changes to the company data. In addition, templates with placeholders can also be used for different companies. All you have to do is create a new template for another company and copy the content of the template.

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4.3 Placeholder with GDPR Templates

The following placeholders are available for GDPR agreement templates:

Variable

{COMPANY}	Name of the company
	This placeholder is generated automatically and contains the full address of the company
{SIGNATURE}	Signature file
{CLIENT}	Client
	This placeholder is generated automatically and contains the full address of the client
{CLIENT_CITY}	City of the client
{DATE}	Date

Text formatting

{BOLD}	**Bold**
{UN_BOLD}	no more **Bold**
{UNDERLINE}	underline
{UN_UNDERLINE}	no more underline
{HEADING1}	Heading 1
{UN_HEADING1}	End Heading 1
{HEADING2}	Heading 2
{UN_HEADING2}	End Heading 2
{PAGEBREAK}	Page Break

Include additional templates

Here you will find further templates that you can integrate directly.

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4.4 Placeholder with Email Templates

The following placeholders are available for email templates:

Variables for clients

{CLIENT_SALUTATION}	Salutation
{CLIENT_CONTACT_FIRSTNAME}	First name (if defined)
{CLIENT_CONTACT_NAME}	Name
{CLIENT_COMPANY_NAME}	Company name of the client (if defined)
{CLIENT_EMAIL}	E-Mail Address

Variables for company

{COMPANY_NAME}	Company name
{COMPANY_STREET}	Street
{COMPANY_ZIP}	ZIP
{COMPANY_CITY}	City
{COMPANY_COUNTRY}	Country
{COMPANY_EMAIL}	E-Mail Address
{COMPANY_INTERNET}	Homepage
{COMPANY_TELEPHONE}	Telephone
{COMPANY_FAX}	Fax
{COMPANY_CEO}	CEO
{COMPANY_VAT-ID}	VAT ID
{COMPANY_TAX-ID}	TAX ID
{COMPANY_REGISTER}	Company Register

Include additional templates

Here you will find further templates that you can integrate directly.

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4.5 Customizing PDFs

4.5.1 Customize GDPR PDF.

The PHP class for the PDFs is located in
/usr/local/ispconfig/interface/web/gdpr/templates/pdf_gdpr

To create your own class, copy the template:

```
cp -Rp default own
```

And customize the file *own/make_pdf_gdpr.php* according to your needs.

4.5.2 Customize Stored Data PDF

The PHP class for the PDFs is located in
/usr/local/ispconfig/interface/web/gdpr/templates/pdf_stored_data

To create your own class, copy the template:

```
cp -Rp default own
```

And customize the file *own/make_pdf_stored_data.php* according to your needs.

To adjust the scope of the exported data, copy the file *gdpr_stored_data_get.conf.php.example* form the folder *gdpr/lib* to *gdpr_stored_data_get.conf.php* and adjust it. This overwrites the exported data for all export functions (PDF and XML).

4.6 Customize XML

The PHP class for the XMLs is located in
/usr/local/ispconfig/interface/web/gdpr/templates/xml_stored_data

To create your own class, copy the template:

```
cp -Rp default own
```

And customize the file *own/make_xml_stored_data.php* according to your needs.

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