



# OTOB Installation Guide

Release rel-10.0

Rother OSS GmbH

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# CHAPTER 1

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## Description

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A customer survey tool.





## 2.1 Framework

OTOBO 10.0.x

## 2.2 Packages

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## 2.3 Third-party software

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## 3.1 Setup

## 3.2 Configuration Reference

### 3.2.1 Core::Event::Survey

#### Ticket::EventModulePost###99-SurveySendRequest

Ticket event module to send automatically survey email requests to customers if a ticket is closed.

### 3.2.2 Core::Stats

#### Stats::DynamicObjectRegistration###SurveyList

Determines if the statistics module may generate survey lists.

### 3.2.3 Core::Survey

#### Survey::ShowVoteData

Enable or disable the ShowVoteData screen in the public interface to show data of a specific survey result when the customer tries to answer a survey the second time.

#### Survey::SendPeriod

Amount of days after sending a survey mail in which no new survey requests are sent to the same customer. Selecting 0 will always send the survey mail.

### **Survey::DeletePeriod**

Results older than the configured amount of days will be deleted. Note: delete results done by the OTOBO Daemon, prior activation of 'Task###SurveyRequestsDelete' setting.

### **Survey::CheckSendConditionTicketType**

Enable or disable the send condition check for the ticket type.

### **Survey::CheckSendConditionService**

Enable or disable the send condition check for the service.

### **Survey::NotificationSender**

Default sender for the notification email to customers about new survey.

### **Survey::NotificationRecipientBlacklist**

Surveys will not be sent to the configured email addresses.

### **Survey::NotificationSubject**

Default subject for the notification email to customers about new survey.

### **Survey::NotificationBody**

Default body for the notification email to customers about new survey.

### **Survey::SendNoSurveyRegExp**

If this regex matches, no customer survey will be sent.

### **Survey::SendInHoursAfterClose**

Defines the amount in hours a ticket has to be closed to trigger the sending of a survey, ( 0 means send immediately after close ). Note: delayed survey sending is done by the OTOBO Daemon, prior activation of 'Daemon::SchedulerCronTaskManager::Task###SurveyRequestsSend' setting.

### **Survey::AmountOfSurveysPer30Days**

Defines maximum amount of surveys that get sent to a customer per 30 days. ( 0 means no maximum, all survey requests will be sent).

### **Survey::Hook**

The identifier for a survey, e.g. Survey#, MySurvey#. The default is Survey#.

#### **Survey::CheckSendConditionCustomerFields**

Defines the columns for the dropdown list for building send conditions (0 => inactive, 1 => active).

#### **Survey::SendOnlyToRealCustomer**

Defines if survey requests will be only send to real customers.

### **3.2.4 Daemon::SchedulerCronTaskManager::Task**

#### **Daemon::SchedulerCronTaskManager::Task###SurveyRequestsSend**

Trigger sending delayed survey requests.

#### **Daemon::SchedulerCronTaskManager::Task###SurveyRequestsDelete**

Trigger delete results (including vote data and requests).

### **3.2.5 Frontend::Agent::ModuleRegistration**

#### **Frontend::Module###AgentSurveyAdd**

Frontend module registration for survey add in the agent interface.

#### **Frontend::Module###AgentSurveyEdit**

Frontend module registration for survey edit in the agent interface.

#### **Frontend::Module###AgentSurveyOverview**

All parameters for the Survey object in the agent interface.

#### **Frontend::Module###AgentSurveyStats**

Frontend module registration for survey stats in the agent interface.

#### **Frontend::Module###AgentSurveyZoom**

Frontend module registration for survey zoom in the agent interface.

#### **Frontend::Module###AgentSurveyEditQuestions**

Frontend module registration for survey zoom in the agent interface.

### 3.2.6 Frontend::Agent::ModuleRegistration::Loader

#### Loader::Module::AgentSurveyAdd###002-Survey

Loader module registration for the agent interface.

#### Loader::Module::AgentSurveyOverview###002-Survey

Loader module registration for the agent interface.

#### Loader::Module::AgentSurveyEdit###002-Survey

Loader module registration for the agent interface.

#### Loader::Module::AgentSurveyStats###002-Survey

Loader module registration for the agent interface.

#### Loader::Module::AgentSurveyZoom###002-Survey

Loader module registration for the agent interface.

#### Loader::Module::AgentSurveyEditQuestions###002-Survey

Loader module registration for the agent interface.

### 3.2.7 Frontend::Agent::ModuleRegistration::MainMenu

#### Frontend::Navigation###AgentSurveyAdd###002-Survey

Main menu item registration.

#### Frontend::Navigation###AgentSurveyOverview###002-Survey

Main menu item registration.

#### Frontend::Navigation###AgentSurveyEdit###002-Survey

Main menu item registration.

#### Frontend::Navigation###AgentSurveyStats###002-Survey

Main menu item registration.

#### Frontend::Navigation###AgentSurveyZoom###002-Survey

Main menu item registration.

### 3.2.8 Frontend::Agent::SurveyOverview

#### Survey::Frontend::Overview###Small

Defines an overview module to show the small view of a survey list.

### 3.2.9 Frontend::Agent::View::Preferences

#### PreferencesGroups###SurveyOverviewSmallPageShown

Parameters for the pages (in which the surveys are shown) of the small survey overview.

### 3.2.10 Frontend::Agent::View::SurveyOverview

#### Survey::Frontend::AgentSurveyOverview###ShowColumns

Defines the shown columns in the survey overview. This option has no effect on the position of the columns.

### 3.2.11 Frontend::Agent::View::SurveyStats

#### SurveyStats::ShowDelete

Defines the groups (rw) which can delete survey stats.

### 3.2.12 Frontend::Agent::View::SurveyZoom

#### Survey::Frontend::HTMLRichTextHeightDefault

Defines the default height for Richtext views for SurveyZoom elements.

#### Survey::Frontend::HTMLRichTextHeightMax

Defines the maximum height for Richtext views for SurveyZoom elements.

#### Survey::Frontend::ChangeSurveyStatusGroups

Defines groups which have a permission to change survey status. Array is empty by default and agents from all groups can change survey status.

### 3.2.13 Frontend::Agent::View::SurveyZoom::MenuModule

#### Survey::Frontend::MenuModule###000-Back

Shows a link in the menu to go back in the survey zoom view of the agent interface.

#### **Survey::Frontend::MenuModule###010-EditGeneralInfo**

Shows a link in the menu to edit a survey in its zoom view of the agent interface.

#### **Survey::Frontend::MenuModule###020-EditQuestions**

Shows a link in the menu to edit survey questions in its zoom view of the agent interface.

#### **Survey::Frontend::MenuModule###030-StatsDetails**

Shows a link in the menu to zoom into the survey statistics details in its zoom view of the agent interface.

### **3.2.14 Frontend::Public::ModuleRegistration**

#### **PublicFrontend::Module###PublicSurvey**

Frontend module registration for the PublicSurvey object in the public Survey area.

#### **Loader::Module::PublicSurvey###002-Survey**

Loader module registration for the agent interface.



## 4.1 Contact

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## 4.2 Version

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