

# **Documentation**

## **Survey**

**A customer survey tool. Version 4.0.1 Edition**

**Build Date:**

**2014-11-21**

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## Preface

Adds the functionality to create Surveys that customers of closed tickets are invited to take part.

Shows graphical statistics of completed Surveys.

If you have questions regarding this document or if you need further information, please log in to our customer portal at [portal.otrs.com](https://portal.otrs.com) with your OTRS ID and create a ticket. You do not have an OTRS ID yet? Register [here for free](#).



## Chapter 1. Feature List

This Module enables you to create new Surveys, add questions to a created Survey, set a Survey live in order to send requests, modify existing Surveys to a certain extent, and view statistics of submitted Survey answers as well as the answers themselves.



## Chapter 2. System Requirements

### 1. Framework

The following OTRS framework is required:

- 4.0.x

### 2. Packages

The following packages are required:

- None

### 3. Operating System

This package requires one of the following operating systems:

- None

### 4. Third Party Software

This third party software is required to use this package:

- None.

## Chapter 3. Installation

The following instructions explain how to install the package.

### 1. Admin Interface

Please use the following URL to install the package utilizing the Admin Interface (please note that you need to be in the "admin" group).

<http://localhost/otrs/index.pl?Action=AdminPackageManager>

### 2. Command Line

Whenever you cannot use the Admin Interface for whatever reason, you may use the following command line tool ("bin/otrs.PackageManager.pl") instead.

```
shell> bin/otrs.PackageManager.pl -a install -p /path/to/Survey-4.0.1.opm
```

## Chapter 4. Configuration

The package can be configured via the SysConfig in the Admin Interface. The following configuration options are available:

### 1. **Frontend::Module###AgentSurveyAdd.**

Group: Survey, Subgroup: Frontend::Agent::ModuleRegistration.

Frontend module registration for survey add in the agent interface.

### 2. **Frontend::Module###AgentSurveyEdit.**

Group: Survey, Subgroup: Frontend::Agent::ModuleRegistration.

Frontend module registration for survey edit in the agent interface.

### 3. **Frontend::Module###AgentSurveyEditQuestions.**

Group: Survey, Subgroup: Frontend::Agent::ModuleRegistration.

Frontend module registration for survey zoom in the agent interface.

### 4. **Frontend::Module###AgentSurveyOverview.**

Group: Survey, Subgroup: Frontend::Agent::ModuleRegistration.

All parameters for the Survey object in the agent interface.

### 5. **Frontend::Module###AgentSurveyStats.**

Group: Survey, Subgroup: Frontend::Agent::ModuleRegistration.

Frontend module registration for survey stats in the agent interface.

### 6. **Frontend::Module###AgentSurveyZoom.**

Group: Survey, Subgroup: Frontend::Agent::ModuleRegistration.

Frontend module registration for survey zoom in the agent interface.

### 7. **PreferencesGroups###SurveyOverviewSmallPageShown.**

Group: Survey, Subgroup: Frontend::Agent::Preferences.

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

### 8. **PublicFrontend::Module###PublicSurvey.**

Group: Survey, Subgroup: Frontend::Public::ModuleRegistration.

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

### 9. **Survey::AmountOfSurveysPer30Days.**

Group: Survey, Subgroup: Core::Survey.

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



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**10. Survey::CheckSendConditionService.**

Group: Survey, Subgroup: Core::Survey.

Enable or disable the send condition check for the service.

**11. Survey::CheckSendConditionTicketType.**

Group: Survey, Subgroup: Core::Survey.

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

**12. Survey::Frontend::AgentSurveyOverview###ShowColumns.**

Group: Survey, Subgroup: Frontend::Agent::ViewSurveyOverview.

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

**13. Survey::Frontend::HTMLRichTextHeightDefault.**

Group: Survey, Subgroup: Frontend::Agent::SurveyZoom.

Defines the default height for Richtext views for SurveyZoom elements.

**14. Survey::Frontend::HTMLRichTextHeightMax.**

Group: Survey, Subgroup: Frontend::Agent::SurveyZoom.

Defines the default height for Richtext views for SurveyZoom elements.

**15. Survey::Frontend::MenuModule###000-Back.**

Group: Survey, Subgroup: Frontend::Agent::Survey::MenuModule.

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

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

Group: Survey, Subgroup: Frontend::Agent::Survey::MenuModule.

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

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

Group: Survey, Subgroup: Frontend::Agent::Survey::MenuModule.

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

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

Group: Survey, Subgroup: Frontend::Agent::Survey::MenuModule.

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

**19. Survey::Frontend::Overview###Small.**

Group: Survey, Subgroup: Frontend::Agent::SurveyOverview.

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

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## **20. Survey::Hook.**

Group: Survey, Subgroup: Core::Survey.

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

## **21. Survey::NotificationBody.**

Group: Survey, Subgroup: Core::Survey.

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

## **22. Survey::NotificationRecipientBlacklist.**

Group: Survey, Subgroup: Core.

Surveys will not be sent to the configured email addresses.

## **23. Survey::NotificationSender.**

Group: Survey, Subgroup: Core::Survey.

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

## **24. Survey::NotificationSubject.**

Group: Survey, Subgroup: Core::Survey.

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

## **25. Survey::SendInHoursAfterClose.**

Group: Survey, Subgroup: Core::Survey.

Defines the amount in hours a ticket has to be closed to trigger the sending of a survey, ( 0 means send immediately after close ).

## **26. Survey::SendNoSurveyRegExp.**

Group: Survey, Subgroup: Core::Survey.

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

## **27. Survey::SendPeriod.**

Group: Survey, Subgroup: Core::Survey.

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.

## **28. Survey::ShowVoteData.**

Group: Survey, Subgroup: Core::Survey.

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.

## **29. Ticket::EventModulePost###99-SurveySendRequest.**

Group: Survey, Subgroup: Core::Survey.

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



## Chapter 5. Usage

### 1. Create new Survey

This feature lets OTRS users create new Survey by selecting the menu "SURVEY" and choosing "New".

New Surveys require a title, an introduction text, a sender mail address, a mail subject, a mail body and an internal description of the Survey.

Additionally the new Survey can be created for just some queues, ticket types or services. If none are selected, it will be valid for every queue, ticket type and service. As default the send condition check for ticket types or services are disabled. So the fields aren't displayed in the mask (new and edit mask for a survey).

### 2. Add Questions

As soon as a new Survey is created, the user can add questions to this Survey by clicking "Edit Questions" in the displayed Survey.

A new window will pop up. In there the user can add questions.

Four types of questions are selectable. These are:

"YesNo" questions a user can answer by selecting "Yes" or "No" of a drop down select.

"Radio (List)" questions a user can answer by selecting exactly one and just one of the possible answers.

"Checkbox (List)" questions a user can answer by selecting none to all listed answers.

"Textarea" questions a user can write answers by typing regular text.

For each answer type the OTRS user can choose if he wants a customer to be required to answer this question or if a customer can ignore the question.

As soon as questions of type "Radio (List)" or "Checkbox (List)" got added, the question will be shown in the "Survey Questions"-List. By clicking on the question the user can add answers, change the answer order by clicking the "UP" or "DOWN" icon, or delete the answer by clicking the "DELETE" icon.

Questions of type "Radio (List)" or "Checkbox (List)" needs to have at least two answers to be valid.

### 3. Start sending Survey requests

When the OTRS user has finished adding or modifying questions and possible answers, he can leave the "Edit Questions" area by clicking "Close window".

Back on the Survey detail page the user can select "Master" from the "- Change Status -" select.

As soon as the Survey has the state "Master" the Survey is set live.

Only one Survey can have the state "Master".

If a Ticket got closed, the customer gets an E-Mail invitation to fill the Survey by clicking a link inside the invitation E-Mail.

## 4. Survey Results Graph

By selecting "SURVEY" from the menu, choosing "Overview", clicking on a Survey that customers already submitted and scrolling down, you can see the "Survey Results Graph".

This displays the statistically a summary of questions (e.g. YesNo, Radio and Checkbox).

As soon as the Survey has the state "Master" the Survey is set live.

Questions where answers were configured as "required" will have one vote for each customer submitted Survey.

Questions where answers were not configured as "required" are optional for the customer. This means that for example 200 customers submitted the Survey but in the statistic in total only 10 or 20 answers may occur, if customers did not select any of the Radio (List), YesNo or checkbox answers or haven't put anything in a textarea answer.

Statistics for required Checkbox (List) questions will have at least one checked value for every submitted Survey but due to it's nature of been multiple clickable there may be more answers than the total amount of submitted Surveys. Example: 200 Surveys submitted by customers, 350 answers on one Checkbox (List) question.

Statistics for not required questions may have less votes than the total amount of submitted Surveys (answer is optional).

## 5. Statistics Details

By selecting "SURVEY" from the menu, choosing "Overview", clicking on a Survey that customers already submitted and choosing "Stats Details" you can see a list containing the time the Survey invitation was sent to the customer, the time the customer submitted his filled Survey, the Ticket (clickable) and a magnifying glass that shows the selected votes for this customer.

In there you can find the answers the customer chose or typed in question by question.

Especially Textarea answers are of interest in here.

## 6. Modifying Survey

As soon as a Survey had the Status "Master" the possible modifications are limited. So please make sure to have especially the amount of questions as well as the amount of answers correctly configured before changing it's status to Master.

### Warning

In a Survey of type "Master" you can not add or delete questions any more.

In a Survey of type Master you can change the general info (e.g. Title, Introduction, Sender,...), the question text, the answer text, as well as the order of the answers.

You can change the "Answer Required" part of a question too, but this may just make sense as long as there are no submitted customer Surveys.

Changing a "Answer Required" Question to answer not required makes the answer optional, so the statistic for this question may not have an answer for each submitted customer Survey any more.

Changing a "Answer not Required" Question to answer required will require future Survey customers to give a vote for this question, but will not add votes for already submitted Surveys. So statistics will render rather useless too.



## Chapter 6. Technical Implementation Details

This module adds the following database tables: survey, survey\_answer, survey\_question, survey\_queue, survey\_request, survey\_vote.

The survey table holds the general information of a survey and the send condition information for a survey.

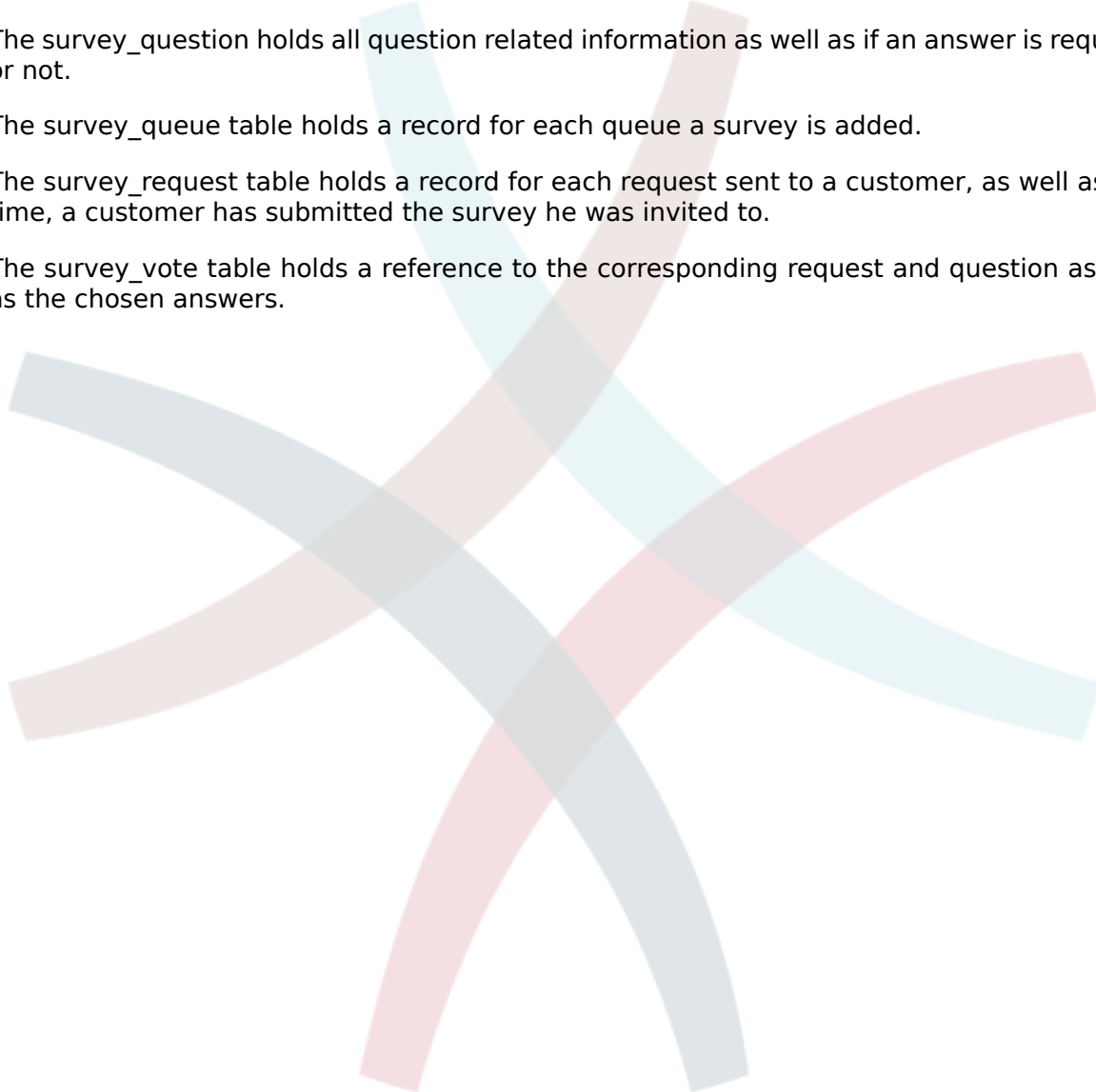
The survey\_answer holds the answers for a survey questions.

The survey\_question holds all question related information as well as if an answer is required or not.

The survey\_queue table holds a record for each queue a survey is added.

The survey\_request table holds a record for each request sent to a customer, as well as the time, a customer has submitted the survey he was invited to.

The survey\_vote table holds a reference to the corresponding request and question as well as the chosen answers.



## Chapter 7. File list

This list shows all included files and the referring permissions.

- (755) bin/otrs.SurveyTriggerSendRequests.pl
- (644) doc/survey-database.png
- (644) Kernel/Config/Files/Survey.xml
- (644) Kernel/Language/da\_Survey.pm
- (644) Kernel/Language/de\_Survey.pm
- (644) Kernel/Language/es\_Survey.pm
- (644) Kernel/Language/es\_MX\_Survey.pm
- (644) Kernel/Language/fi\_FI\_Survey.pm
- (644) Kernel/Language/it\_Survey.pm
- (644) Kernel/Language/ja\_Survey.pm
- (644) Kernel/Language/ms\_Survey.pm
- (644) Kernel/Language/nb\_NO\_Survey.pm
- (644) Kernel/Language/nl\_Survey.pm
- (644) Kernel/Language/pl\_Survey.pm
- (644) Kernel/Language/pt\_BR\_Survey.pm
- (644) Kernel/Language/pt\_PT\_Survey.pm
- (644) Kernel/Language/ru\_Survey.pm
- (644) Kernel/Language/sr\_Cyrl\_Survey.pm
- (644) Kernel/Language/sw\_Survey.pm
- (644) Kernel/Language/zh\_TW\_Survey.pm
- (644) Kernel/Language/zh\_CN\_Survey.pm
- (644) Kernel/Modules/AgentSurveyAdd.pm
- (644) Kernel/Modules/AgentSurveyEdit.pm
- (644) Kernel/Modules/AgentSurveyEditQuestions.pm
- (644) Kernel/Modules/AgentSurveyOverview.pm
- (644) Kernel/Modules/AgentSurveyStats.pm
- (644) Kernel/Modules/AgentSurveyZoom.pm
- (644) Kernel/Modules/PublicSurvey.pm



- (644) Kernel/Output/HTML/LayoutSurvey.pm
- (644) Kernel/Output/HTML/SurveyMenuGeneric.pm
- (644) Kernel/Output/HTML/SurveyOverviewSmall.pm
- (644) Kernel/Output/HTML/Standard/AAASurvey.tt
- (644) Kernel/Output/HTML/Standard/AgentSurveyAdd.tt
- (644) Kernel/Output/HTML/Standard/AgentSurveyEdit.tt
- (644) Kernel/Output/HTML/Standard/AgentSurveyEditQuestions.tt
- (644) Kernel/Output/HTML/Standard/AgentSurveyOverviewNavBar.tt
- (644) Kernel/Output/HTML/Standard/AgentSurveyOverviewSmall.tt
- (644) Kernel/Output/HTML/Standard/AgentSurveyStats.tt
- (644) Kernel/Output/HTML/Standard/AgentSurveyZoom.tt
- (644) Kernel/Output/HTML/Standard/PublicSurvey.tt
- (644) Kernel/System/Survey.pm
- (644) Kernel/System/Survey/Answer.pm
- (644) Kernel/System/Survey/Question.pm
- (644) Kernel/System/Survey/Request.pm
- (644) Kernel/System/Survey/Vote.pm
- (644) Kernel/System/Ticket/Event/SurveySendRequest.pm
- (644) scripts/test/Survey.t
- (644) var/cron/survey\_trigger\_send\_requests.dist
- (644) var/httpd/htdocs/js/Survey.Agent.SurveyZoom.js
- (644) var/httpd/htdocs/skins/Agent/default/css/Survey.Agent.Default.css
- (644) var/httpd/htdocs/skins/Customer/default/css/Survey.Customer.Default.css
- (644) var/package/setup/Survey.pm

## Chapter 8. Tests

This module has been tested on the current state of the art in quality.

### 1. Test Cases

To tests this package please follow the examples described in the Usage section, all the tests cases should return the expected results defined at the beginning of each example.

### 2. Unit Tests

To ensure the quality of the module, several so-called unit tests were created, to test the functionalities of this module. These unit tests can be run via command line.

**ATTENTION:** Please never run unit tests on a productive system, since the added test data to the system will no longer be removed. Always use a test system.

Run the package specific unit tests

To run only the unit test which will be delivered with this package, use the following command on the command line:

```
shell> perl bin/otrs.UnitTest.pl -n Survey
```

Run all available unit tests

To run all available unit tests, use the following command on the command line:

```
shell> perl bin/otrs.UnitTest.pl
```

## Chapter 9. Change Log

### **4.0.1 / 2014-11-21 09:23:20**

- Build for Survey 4.

### **3.3.92 / 2014-11-13 06:36:51**

- Build for Survey 4 rc1.

### **3.3.91 / 2014-10-02 20:33:50**

- Build for Survey 4 beta1.

