Maintenance Module "Ticket Anonymization"

Installation and configuration

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1 General advices

1.1 Document information

1.1.1 Objectives

This document contains all the information to install and configure the c.a.p.e. IT Maintenance Module "Ticket Anonymization" for KIX Professional.

1.2 Changes

1.2.1 Change history

Version	Date	Changed chapters	Short description	Changed by
1.0.0	11.02.15	all	document creation	Ricky Kaiser
1.0.0	23.03.15	all	minor updates	Rene Boehm
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17.0.0	05.04.17	all	Updated for KIX Professional 17.0.0	Rene Boehm

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1.3 List of abbreviations

CLI   Command Line Interface
GUI   Graphical User Interface

2 Installation

2.1 Requirements

To install and use the Maintenance Module "Ticket Anonymization" your installation environment needs to fulfill the following requirements:

- a KIX Professional 17.0.x installation

2.2 Package Installation

Just install the Maintenance Module „Ticket Anonymization" via your operating systems package management. The package name is „kixpro-anonymization". Please make sure you have fulfilled the necessary requirements (see 2.1).

3 Configuration

3.1 SysConfig Options

After you have installed the package, you can adjust the basic parameters if necessary.

To configure the extension just open the SysConfig in the admin area. Select the SysConfig group "KIXTicketAnonymization". After the page reload select the subgroup "Core".

A default configuration is already included in the package. You can change it to your needs. The following section lists all the relevant SysConfig options.

3.1.1 Anonymous agent

SysConfig Option: KIXTicketAnonymization###AnonymousAgent

With this option you can define an agent login to replace owner and responsible in depersonalized tickets.

Please note:
This configuration is also used as a fallback, so this agent should exist, otherwise no agent data will be depersonalized. The default value is "root@localhost". This option is required.

3.1.2 Attribute for an anonymous agent

SysConfig Option: KIXTicketAnonymization###AnonymousAgentAttribute

With this option you can configure an attribute of the current ticket agent, which content replaces owner and responsible in depersonalized tickets.

Please note:
This option is deactivated by default.

3.1.3 Email domain as anonymous agent

SysConfig Option: KIXTicketAnonymization###AnonymousAgentFromEMailDomain

With this option you can define whether the domain of the email attribute of the current ticket agent should be used as the login of the anonymous agent. This option will be used if it is set to yes and *AnonymousAgentAttribute* (see section 3.1.2) is not configured or there is no attribute value of the current agent.

Please note:
By default this option is deactivated and set to "no".

3.1.4 Create anonymous agent if necessary

SysConfig Option: KIXTicketAnonymization###AnonymousAgentCreate

If this option is active and the agent configured by the attribute content in *AnonymousAgentAttribute* or the *AnonymousAgentFromEMailDomain* does not exist, a new "invalid" agent will be created with the following attributes:

Attribute	Value
UserFirstname	Ano
UserLastname	Nymous
UserLogin	attribute value (see 3.1.2) or domain (see 3.1.3)
UserEmail	attribute value or domain @noreply.local

Please note:
By default this option is deactivated.

3.1.5 Anonymous CustomerID

SysConfig Option: KIXTicketAnonymization###AnonymousCustomerID

With this option you can define which CustomerID should replace the ticket customer IDs in depersonalized tickets. If you want to use a customer attribute value, use option *AnonymousCustomerIDByCustomerBackend* instead (see chapter 3.1.7).

Please note:
This option is used as fallback if *AnonymousCustomerIDByCustomerBackend* is not configured. As a fallback, if this option is not spezified, the CustomerID will not be depersonalized. The default value is "AnonymousCompany" and this option is required.

3.1.6 Match criteria for CustomerID

SysConfig Option: KIXTicketAnonymization###AnonymousCustomerID_MatchCriteria

With this option you can configure a regular expression. The CustomerID will be replaced with the value of *AnonymousCustomerID* (see 3.1.5) only in tickets, where the current ticket CustomerID matches the given regular expression.

Please note:
This option is also the fallback for *AnonymousCustomerIDByCustomerBackend_MatchCriteria* and it is required. The default value (.*) matches everything. If the CustomerID does not match, also the customer user will not be depersonalized!

3.1.7 Anonymous CustomerID by backend

SysConfig Option:
KIXTicketAnonymization###AnonymousCustomerIDByCustomerBackend

With this option you can define with what the CustomerIDs in depersonalized tickets will be replaced based on the backend of the current ticket customer. The backend is configured in the key. The content could be a CustomerID or an attribute name as "ATTRIBUTE_<SomeAttribute>" to use the attribute value of the current customer user.

Please note:
By default this option is deactivated.

3.1.8 Match criteria for CustomerID by backend

SysConfig Option:
KIXTicketAnonymization###AnonymousCustomerIDByCustomerBackend_MatchCriteria

With this option you can configure a regular expression for each backend configurred in the option *AnonymousCustomerIDByCustomerBackend*. The CustomerID will be replaced with the configured content only in tickets, where the current ticket CustomerID matches the given regular expression. The backend is configured in the key. The content has to be the relevant regular expression.

Please note:
By default this option is deactivated and the default value (.*) matches everything.

3.1.9 Anonymous CustomerUser

SysConfig Option: KIXTicketAnonymization###AnonymousCustomerUser

This option defines the customer user login which will replace the ticket customer user in depersonalized tickets. If you want to use a customer user attribute value, use option *AnonymousCustomerUserByBackend* instead (see chapter 3.1.11).

Please note:
This configuration is used as a fallback. If this option is not specified, the customer user data will not be depersonalized. The default value is "AnonymousUser" and this option is required.

3.1.10 Match criteria for customer user

SysConfig Option:
KIXTicketAnonymization###AnonymousCustomerUser_MatchCriteria

With this option you can configure a regular expression. The customer user will be replaced with the value of option *AnonymousCustomerUser* (see 3.1.9) only in tickets, where the current ticket customer user login matches the given regular expression.

Please note:
This option is also the fallback for *AnonymousCustomerUserByBackend_MatchCriteria* (see chapter 3.1.12) and it is required and the default value (.*) matches everything.

3.1.11 Anonymous customer user by backend

SysConfig Option: KIXTicketAnonymization###AnonymousCustomerUserByBackend

This option defines with what the ticket customer will be replaced in depersonalized tickets based on the backend of the current ticket customer. The backend is configured in the key. The content could be a customer user login or an attribute name as "ATTRIBUTE_<SomeAttribute>" to use the attribute value of the current customer user as the anonymous customer user.

Please note:
By default this option is deactivated.

3.1.12 Match criteria for customer user by backend

SysConfig Option:
KIXTicketAnonymization###AnonymousCustomerUserByBackend_MatchCriteria

With this option you can configure a regular expression for each backend in option *AnonymousCustomerUserByBackend*. The customer user will be replaced with the configured content only in tickets, where the current customer user matches the given regular expression. The backend is configured in the key. The content should be the relevant regular expression.

Please note:
By default this option is deactivated and the default content (.*) matches everything.

3.1.13 Email domain as anonymous customer user

SysConfig Option:
KIXTicketAnonymization###AnonymousCustomerUserFromEMailDomain

With this option you can define whether the domain of the email attribute of the current ticket customer should used as the login of the anonymous customer user. This option will work if it is set to yes and *AnonymousCustomerUserByBackend* (see section 3.1.11) is not configured or there is no attribute value of the current customer user.

Please note:
By default this option is deactivated and set to no.

3.1.14 Anonymous history comments

SysConfig Option: KIXTicketAnonymization###HistoryTypeAnonymousComments

This option contains all comments to be used in history in depersonalized tickets. The following default values are given:

Attribute	Value
CustomerUpdate	CustomerUpdate: comment replaced by KIXTicketAnonymization.
OwnerUpdate	OwnerUpdate: comment replaced by KIXTicketAnonymization.
ResponsibleUpdate	ResponsibleUpdate: comment replaced by KIXTicketAnonymization.
SendAgentNotification	SendAgentNotification: comment replaced by KIXTicketAnonymization.
SendAnswer	Sent Email to: comment replaced by KIXTicketAnonymization.
SendAutoReply	SendAutoReply: comment replaced by KIXTicketAnonymization.
SendCustomerNotification	SendCustomerNotification: comment replaced by KIXTicketAnonymization.
TicketLinkAdd	added involved person: comment replaced by KIXTicketAnonymization.

Please note:
By default this option is active and required.

3.1.15 Article email addresses

SysConfig Option: KIXTicketAnonymization###ReplaceEmailAddresses

With this option you can define the anonymous email address which will be used to replace email addresses (From, To, Cc) in articles of depersonalized tickets if the article email address is not a system email address.

Please note:
The default value is "kix@localhost" and this option is required.

3.1.16 DynamicField for anonymization flag

SysConfig Option: KIXTicketAnonymization###AnonymizationFlag

With this option you can configure which DynamicField will be be used to set the value for the anonymization flag.

Please note:
This option is active by default. A DynamicField "Anonymized" will be created during the installation of this extension, so you can use the given default configuration. Maybe you have to update your configuration if you want to show the DynamicField in some views.

3.1.17 Ignore tickets with anonymization flag

SysConfig Option: KIXTicketAnonymization###IgnoreTicketsWithAnonymizationFlag

This option allows you to specify that tickets which have already been made anonymous, are ignored in further anonymization procedures.

Please note:
This option is active by default.

3.2 Usage of Ticket Anonymization

There two different ways to depersonalize tickets. You can create a Generic Agent in the admin area as mentioned in the next section or you can use the command line script (see chapter 3.2.2).

3.2.1 Generic Agent Configuration

A Generic Agent to use this functionality has to be created manually. Just define a new Generic Agent which matches your anonymization criteria and use "Kernel::System::GenericAgent::KIXTicketAnonymization" as module in the section "Execute Custom Module"

3.2.2 Anonymize tickets by script

There is also the possibility to anonymize tickets using the command line. Just execute
"<KIX Home>/bin/kix.Console.pl Admin::KIXTicketAnonymization::Anonymize"
with one of the parameters "*--user agent_login*" or "*--customer cutomer_user_login*". If an agent login is given, all tickets with this agent as owner or responsible will be depersonalized based on the the parameters configured in the SysConfig. If a customer user login is given as parameter, all tickets of this customer user will be anonymized using the configured options in the SysConfig.