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Web Developer

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Client Relationship Specialist

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BI⟨⟩RAFT

D⟨⟩RUPAL NIGHTS

BioRAFT

- The BioRAFT platform is a scientific research management system that provides an integrated portal, compliance oversight, and productivity solutions.
- Centrally hosted, multi-site application
- BioRAFT.com

We're Hiring!

- BioRAFT.com/careers
- Multiple technical & non-technical positions

Introduction

- The Life of a Support Issue
- Tools & Relevant Processes

What works for us may not be the best system for your organization.

- Small iterative process changes

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Support Timeline

1. Receive Issue
2. Initial Response
3. Determine Support Level
4. Start Investigation
5. Determine Action Needed
6. Report Projected Resolution Date
7. Report Resolution

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1. **Receive Issue**

Customer Service Software

- Zendesk
- UserVoice
- Salesforce Desk

Support Software Features

Zendesk

- Sleek, easy to use interface
- Extensive reporting capabilities

UserVoice

- Good value for small teams

Salesforce Desk

- Customer management integration with Salesforce

2. **Initial Response**

- Automated Reply
- Personal Acknowledgement

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3. **Determine Support Level**

- Critical feature does not work; requires immediate action
- Non-critical feature does not work; next update/release
- Minor issues, cosmetic, typographic, add client specific content
- Troubleshooting, user queries, guidance, feedback
- Sales/Other

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4. **Start Investigation**

Do we need to ask for more information?

- What was the action attempted?
- What was the URL?
- What was the expected outcome?
- What happened instead?
- Screenshots?
- OS & Browser?

4. **Start Investigation**

Try to reproduce the issue.

-Create a user for each role on your site

-Admin vs. Non-Admin (Admin is not always a representative model)

4. **Start Investigation**

QA Instance

- Server is exact replica of production
- Rebuilt nightly
- Back-up & Migrate Module
- Hosting Provider

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5. **Determine Action Needed**

Talk to development team about possible resolutions.

Real time internal communication is imperative!

- Skype room
- IRC room
- Campfire
- Slack

5. **Determine Action Needed**

- Answer question/guide user through steps
- Use GUI interface to make change
- Code solution

5. **Determine Action Needed**

Answer question/guide user through steps.

- Respond to client.
- Be polite, patient & prompt.

5. **Determine Action Needed**

Development Tracking Software
- Trello
- Jira
- Unfuddle

5. **Determine Action Needed**

Use GUI interface to make change.

- "Configuration Management" board
- Practice making change
- Take screenshots
- Get Review
- Complete on production

https://trello.com/b/55mFPfqN/configuration-management-tasks

Search

Boards | Trello | Dan Andrews

Configuration Management Tasks ☆ 🔒 Private

To Do

[Client] change shibboleth redirect on logout
📄 🔗 2

[Clean] turn off bio related forms from form manager. #cache-clear
📄 💬 1 🔗 3 ☑ 0/5

(1) fix inspections that exist without a type
📄 💬 4 🔗 3

[Client] "Hide" unneeded training classroom courses from catalog
📄

[Client] Import Buildings
📄 💬 9 🔗 10

Add a card...

Doing

(0.5) [Client] configure training rule for student shop safety course
📄 💬 2 🔗 4

[Demo] unpublish labs from usability study
📄

Add a card...

In Review (Get a 2nd Party to Review your Testing)

[Client] Temporary Account for Animal User
📄 💬 2 🔗 2

Add a card...

Ready for Production

[Space cleanup] Need to remove/edit botched spaces
📄 💬 1

Add a card...

Complete (December 2014)

[Client] Add Course Manager Information for Classroom Courses
📄 💬 3 🔗 7

(3) [client] disable biological authorization portion of the Laboratory Compliance block
📄 💬 2 🔗 4

(2) [Client] Import findings and corrective actions
👁 💬 6 🔗 5

Add a card...

Add a list...

Menu

Members

👤 Add Members...

Activity

Rosalie Keane added [Client] Import Laboratories to To Do and archived.
yesterday at 2:22 pm

Rosalie Keane moved (3) [client] disable biological authorization portion of the Laboratory Compliance block from To Do to Complete (December 2014).
yesterday at 2:21 pm

Rosalie Keane moved (0.5) [cmu] configure training rule for student shop safety course from To Do to Doing.
yesterday at 2:21 pm

Rosalie Keane archived (3) [penn] disable biological authorization portion of the Laboratory Compliance block.
yesterday at 2:20 pm

Rosalie Keane left (1) fix inspections that exist without a type. yesterday at 2:20 pm

Rosalie Keane on (2) [Client] Import findings and corrective actions
• added 🖼 Dan Andrews
• moved from To Do to Complete (December 2014)
yesterday at 2:20 pm

Rosalie Keane archived [CMU] Add Course Manager Information for Classroom Courses. yesterday at 2:19 pm

Rosalie Keane moved [CMU] Add Course Manager

▲ https://trello.com/c/QaMf4xpm/16-3-platform-clean-up-expired-demo-accounts-and-earth-ehs

🔍 Search

Boards | 🔍

Configuration Management Tasks ☆ 🔒 Private

To Do

[Client] change shibboleth redirect on logout
☰ 2

[Clean] turn off bio related forms from form manager. #cache-clear
☰ 1 💬 3 ☰ 0/5

(1) fix inspections that exist without a type
☰ 4 💬 3

[Client] "Hide" unneeded training classroom courses from catalog
☰

[Client] Import Buildings
☰ 9 📎 10

Add a card...

Doing

(0.5) [Client] configure training rule for student shop safety course
☰ 2 💬 4

[Demo] unpublish labs from usability study
☰

Add a card...

In Re Revie

[Clie Anim
☰

Add a

+ Dan Andrews 🔔

Menu

Members

👤 Add Members...

Activity

Rosalie Keane copied (3) [Platform] Clean up expired demo accounts and Earth EHS from (3) [Platform] Clean up expired demo accounts and Earth EHS in list Complete (December 2014). a minute ago

Rosalie Keane added [Client] Import Laboratories to To Do and archived.
yesterday at 2:22 pm

Rosalie Keane moved (3) [client] disable biological authorization portion of the Laboratory Compliance block from To Do to Complete (December 2014).
yesterday at 2:21 pm

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Rosalie Keane on (2) [Client] Import findings and corrective actions
  • added Dan Andrews
  • moved from To Do to Complete (December 2014)
yesterday at 2:20 pm

---

(3) [Platform] Clean up expired demo accounts and Earth EHS ✕

in list Complete (December 2014)

Labels

🔴 +

Description Edit

Process

1. Open http://ldap.bioraft.com/ldapadmin/htdocs/index.php
2. Open https://earth.bioraft.com/? (login as oneal)
3. Access https://docs.google.com/spreadsheet/ccc?key=0Av69HeooUlWMdFJTNHVETlNQzZGalVGRVZuNC1PdXc&usp=drive_web#gid=0 (Google doc for demo accounts on Earth)
4. Identify accounts (bold) on the google doc that need to be removed
5. View accounts as Oneal on earth and remove the following:
   • EHS membership (and any associated inspection queue items)
   • lab membership (inactivate laboratory, remove members)
   • Look at user on researchers list and make sure there are no other lab associations
6. Move LDAP record to "Archived" and delete record from "Sample".

📎 **Attachments**

Screen Shot 2014-07-16 at 8.31.54 AM.png
Added Jul 16, 2014 at 8:33 am
⬇ Download ✕ Delete

Add an attachment...

☰ **Additional items**   Delete...

0%

☐ Moved Max Cadbury, Ameranda Buchord, and Ginger Rocket into Earth's LDAP (merged accounts and Jeremy deleted original record to keep things clean). Same login credentials as Oneal.

☐ Removed all extraneous 'demo' accounts that were previously given to anyone (e.g. Saul Pena, Sandra Larson, Laura Thompson) - records are in removed section of google doc

☐ Cleaned up sample list to include missing people (penn sandbox demo accounts)

☐ Moved MNA people to be 'Chemical Hygiene Officers' and removed extraneous BioRAFT officers (unused) of same.

Add an item...

☰ **Activity**

Write a comment...

Add

👤 Members

🏷 Labels

☑ Checklist

🕐 Due date

📎 Attachment

Actions

→ Move

⧉ Copy

👁 Subscribe

🗄 Archive

Share and more...

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5. **Determine Action Needed**

Code solution - Patch

● Kanban Board

  http://en.wikipedia.org/wiki/Kanban_board

5. **Determine Action Needed**

Code solution

- "To Be Evaluated" - reviewed every morning
- Patch
- Current Release
- Next Release
- Following Release
- Backlog

5. **Determine Action Needed**

Code solution - Patch

- Push code every Wednesday
- Rotating firefighter
- "Emergency" could be of 2 varieties
  - Bug in code
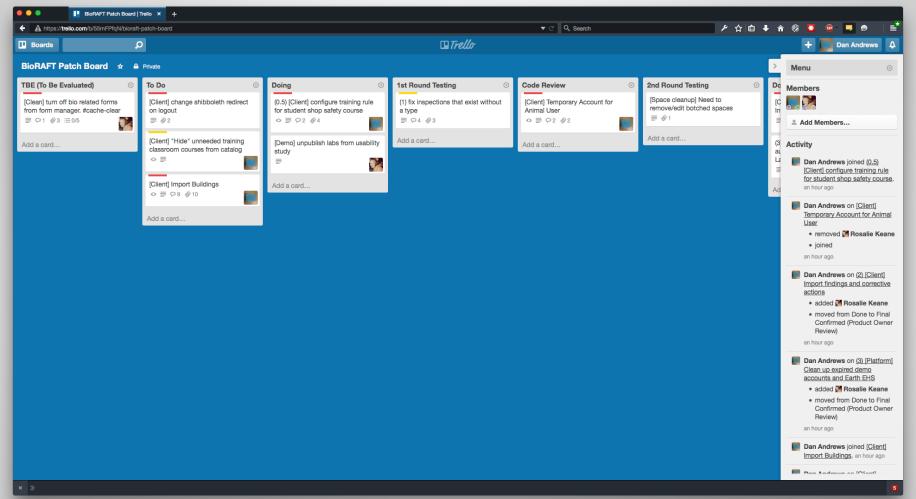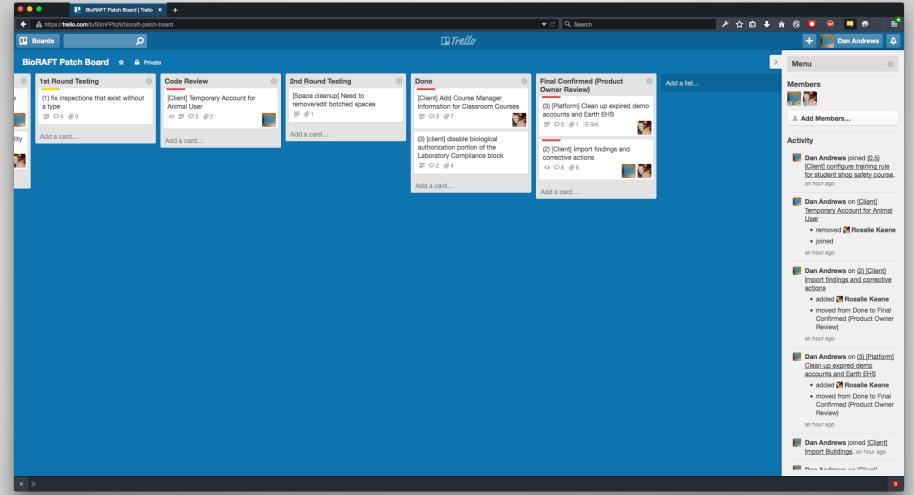 - Urgent need at customer site (e.g. an unplanned regulatory visit)

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5. **Determine Action Needed**

Code solution - Patch

- To Do
- Doing
- First Round Testing
- Code Review
- Second Round Testing
- Done
- Final Confirmed

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https://trello.com/b/55mFPfqN/bioraft-patch-board

Search

Boards

Trello

Dan Andrews

BioRAFT Patch Board ⭐ 🔒 Private

Menu

TBE (To Be Evaluated)

[Clean] turn off bio related forms from form manager. #cache-clear

📄 💬 1 🔗 3 ☰ 0/5

Add a card...

To Do

[Client] change shibboleth redirect on logout

☰ 🔗 2

[Client] "Hide" unneeded training classroom courses from catalog

👁 ☰ 📄

[Client] Import Buildings

👁 ☰ 💬 9 🔗 10

Add a card...

Doing

(0.5) [Client] configure training rule for student shop safety course

👁 ☰ 💬 2 🔗 4

[Demo] unpublish labs from usability study

☰

Add a card...

1st Round Testing

(1) fix inspections that exist without a type

☰ 💬 4 🔗 3

Add a card...

Code Review

[Client] Temporary Account for Animal User

👁 ☰ 💬 2 🔗 2

Add a card...

2nd Round Testing

[Space cleanup] Need to remove/edit botched spaces

☰ 🔗 1

Add a card...

Members

Add Members...

Activity

Dan Andrews joined (0.5) [Client] configure training rule for student shop safety course.
an hour ago

Dan Andrews on [Client] Temporary Account for Animal User
- removed 🔲 Rosalie Keane
- joined
an hour ago

Dan Andrews on (2) [Client] Import findings and corrective actions
- added 🔲 Rosalie Keane
- moved from Done to Final Confirmed (Product Owner Review)
an hour ago

Dan Andrews on (3) [Platform] Clean up expired demo accounts and Earth EHS
- added 🔲 Rosalie Keane
- moved from Done to Final Confirmed (Product Owner Review)
an hour ago

Dan Andrews joined [Client] Import Buildings, an hour ago

Dan Andrews on [Client]

5. **Determine Action Needed**

Code solution - Patch.

- Roll patch
- Push to prod branch
- Turn on maintenance mode
- Update codebase on production
- Run update.php
- Clear caches
- Turn off maintenance mode

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5. **Determine Action Needed**

What is a patch?

Source Control
- Git
- SVN

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6. **Report Projected Resolution Date**

- 0-2 weeks: Configuration Management
- 0-2 weeks: Patch
- 3-4 weeks: Current Release
- 5-8 weeks: Next Release
- 9-12 weeks: Following Release
- unknown: Backlog

7. **Report Resolution**

- Make sure the client is satisfied with the resolution
- Close support ticket

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Support Timeline

1. Receive Issue
2. Initial Response
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7. Report Resolution

Tools

- Customer Service Software
- Replica Server
- Real-time Internal Communication Software
- Development Tracking Software
  - Kanban Board
- Source Control

Questions?

- Slides and Video will be posted to DrupalNights.org