

Customer Support

New Team Member

Orientation

|  |  |
| --- | --- |
| Employee Name | Brandon Stevens |
| Start Date | 8/3/2015 |
| Position | Technical Support Specialist |
| Team | Support |

Welcome to Seapine Software and the Customer Support Team. Seapine is highly interested in assisting your transition into your new position quickly and successfully. This startup plan is provided to help you quickly become comfortable with Seapine, our policies, and our work environment. Additionally this orientation program will allow you to contribute to the success of Seapine Software as quickly as possible.

As you complete tasks, check off these completed items on this startup plan. It is possible that you may complete activities in a different order than specified in this document. People or resources may not be available when you get to a particular activity, so it is OK to move onto another activity. Checking off activities only after they are complete will allow you to track what activities need to be revisited later. Your manager will meet with you weekly to monitor progress on these tasks.

While this startup plan will provide you with a solid foundation of knowledge for your role in the company, it does not cover every piece of knowledge that you will ever need at Seapine. Don’t be afraid to ask questions or to dig deeper in certain topics. The more knowledgeable you are about our products, our technologies, and our industry, the more valuable you are to Seapine in assisting the company along the road to success!

From a high level perspective, these are the goals for the first three weeks of employment. Specific tasks for each of these goals will follow.

Week 1

Learn the solutions that Seapine is selling

Install all products

Attend “Support 101” with Jeni

Learn Seapine’s Supports process (SugarCRM and Support Issues)

Week 2

Attend product Demos

Sit with a support specialist 9am to 11:30 AM Monday through Friday

Learn how to escalate to Support Engineers

Begin to answer support questions that you are assigned (Feature Requests and basic How-To)

Week 3

Intro to RDBMS (SQL Server, SQLite, PostgreSQL)

Learn Select Statements and Row Count

Continue to expand product knowledge

Install Products on other platforms (Mac & Linux)

Week 4

Intro to Web Servers  
 Install Web Clients

Begin to take phone calls from customers (3 max with assistance)

Week 5

Continue to be assigned tier 1 type cases and take phone calls

# People

## Customer Support Team

The Customer Support team is spread out among the project teams. This allows the Support Specialist to better interact with the developers on the team. While Support Specialists are required to support all of our products they have one product that they have become expert in. The following is a list of the Customer Support department members and their respective specialties.

* Mark Mason (Vice President World Wide Sales)
  + Support Manager reports to Sales
* Jeni Questa (Manager of Technical Support)
  + All day-to-day management activities for Customer Support
* Shane Coates
  + QA Wizard Pro (specialty)
  + Good grasp of all products
* Trish Cordes (International Support Specialist)
  + TestTrack Studio
  + SOAP
  + Good grasp of all products

## Software Engineers

|  |  |  |
| --- | --- | --- |
| **Team** | **Role** | **Leader** |
| TestTrack | Software Support Engineer | Mark Diesburg |
| Surround SCM | Software Support Engineer | Paul Vincent |
| QA Wizard | Software Support Engineer | Todd Peak |
| License Server | Senior Software Engineer | Michael Tackett |

## Leaders for each Development Team

|  |  |  |
| --- | --- | --- |
| **Team** | **Role** | **Leader** |
| TestTrack | Senior Product Development Manager  Development Manager | Mark Diesburg  Andy Hoffmaster |
| Surround SCM | Development Manager  Senior Software Architect | Rich Clyde  Paul Vincent |
| QA Wizard | Development Manager | Rich Clyde |
| License Server | Senior Software Engineer | Michael Tackett |

## Senior Management

|  |  |
| --- | --- |
| **Department** | **Manager** |
| Chief Information Officer | Matt Disher |
| Chief Financial Officer | Judy Test |
| VP of World Wide Sales | Mark Mason |
| VP of Marketing | Rick Riccetti |
| VP of Product Development | Rich Clyde |
| VP of Sales | Mark Mason |

## Need Assistance?

|  |  |
| --- | --- |
| **Topic** | **Person to talk to** |
| Office supplies | Bill Heiselman |
| IT help | LJ Sowder |
| Benefits question | Bill Heiselman |
| Payroll issue | Judy Test |

# Week 1

Goals

Complete paperwork and learn about Seapine policies

Setup PC

Learn about the various Seapine solutions

Learn how to use products from a user perspective

Activities

* Orientation with Bill Heiselman
* Look at the Resource list provided at the end of this document. Many of the activities in this startup plan will direct you to locations that are defined in this Resource section of the plan.
* Look over the JumpStart webpage to get familiar with what information is available: <http://jumpstart.seapine.com>
* Read the employee manual (available on JumpStart)
* Review and sign the position description for your specific role
* Cisco Phone documentation: <http://jumpstart.seapine.com/Cisco/SeapinePhoneTraining-final.pdf>
* Your manager will give you a tour of the building, which will include the following
* Introduce you to all team members on your team
* Meet Rick Riccetti, Judy Test, and Mark Mason.
* Show you the location of office supplies, outgoing mail, etc…
* Explain kitchen details of coffee, free soda, and use of the refrigerator
* Review Seapine’s policies with your manager. Topics include flex time, expectations of working hours, explanation of working hours vs. non-working hours, dress code, smoking on the premises, streaming music, requesting vacation time (email me), calling in sick, and floating holiday policy.
* Setup your PC with the appropriate software.
  + Install TestTrack
  + Install Surround SCM
  + Install QA Wizard Pro
  + Install/Configure IIS
* Read the Email Signature Guidelines on JumpStart and then create an email signature for yourself.
* Read corporate IT policies (available on JumpStart).
* Read the Corporate Style Guide (available on JumpStart).
* Familiarize yourself with the various company blogs defined in the Resources section of this document.
* Learn about the Seapine License Server by reading the documentation and using the software. Obtain a working knowledge in the following areas:
  + Add licenses - obtain serial numbers from <http://camelot.seapine.com/Supportutilitywebapp/>
  + Global user actions including add, edit, and setting security
  + Server options
* Learn about Eskimo. (login is network credentials)
  + <http://quotes.seapine.com/Login.aspx?ReturnUrl=%2fsearch.aspx>
* Log into SugarCRM
  + <http://crm.seapine.com>
* Create an account and log into Slack (corp messaging board)
  + Web based: <https://seapine.slack.com>
  + Or download the desktop client: <https://slack.com/apps>
  + Read and become familiar with the information located on the QA & Support wiki- <http://supportqawiki.seapine.com>
  + Read the SugarCRM SOP – available at [http://supportqawiki.seapine.com/lib/exe/fetch.php?media=SugarCRMsop.doc](http://supportqawiki.seapine.com/lib/exe/fetch.php?media=maximizersop.doc)

# Week 2

Goals

Continue to learn products

Sit with a support specialist 9am to 11:30 AM Monday through Friday

Attend “Support 101” with Jeni

Learn how to escalate to Support Engineers

Begin to answer support questions that you are assigned

Activities

* Log into Support Issues Project and product projects
* Learn how to properly enter Support Issues, Defects, and Feature Requests
* Learn how to properly create a SugarCRM Support Case
* Work some Support questions – Feature Requests and How-To’s

# Week 3

Goals

Intro to RDBMS (SQL Server, SQLite, PostgreSQL)

Learn Select Statements and Row Count

Continue to expand product knowledge

Install Products on other platforms (Mac & Linux)

Activities

* Install SQL Server
* Install SQLite editor
* Learn basic queries
  + Select
  + Count
  + Update
* Install products on Mac OS X (Support teams Mac is in Kayla’s cube at the moment)
* Continue to expand knowledge of products by working cases

# Week 4

Intro to Web Servers  
Install Web Clients

Begin to take phone calls from customers (3 max with assistance)

Activities

* Install product web clients into IIS and Apache
* Configure IIS and Apache for our Web Applications
* Log into Cisco Desktop Agent
* Answer calls that come to your phone

# Week 5

Goals

Continue to be assigned tier 1 type cases and take phone calls

# Resources

## JumpStart

When looking for general Seapine information, JumpStart is a great place to start looking. A link to JumpStart is automatically added to your browser favorites for your convenience.

<http://jumpstart.seapine.com/>

## Wikis

Support QA Wiki - <http://supportqawiki.seapine.com>

Seapine Labs – <http://labs.seapine.com>

## Network Locations

The following list of network locations might be useful for you.

[\\DevFiles\Software\_Releases](file:///\\kansas\Software_Releases) - contains all Seapine products that have been officially released. This does not contain versions that are currently under development. This is a read-only directory, because once something is released, it should never be changed.

[\\camelot\UpcomingReleases\SoftwareBuilds](file:///\\camelot\UpcomingReleases\SoftwareBuilds) - contains all the versions currently under development. Once a product is officially released, the files will be copied to Software\_Releases.

[\\Mis750\apps](file:///\\Mis750\apps) - contains installers for various products. We have several binders full of CDs from Microsoft as part of our Microsoft partnership, but the more commonly used CDs are placed on the network in this location.

[\\DevFiles\public](file:///\\kansas\public) - public dumping ground used to transfer/share files. Mostly junk on this network drive.

[\\DevFiles\QA](file:///\\DevFiles\QA) - contains certain QA files and utilities (Clonezilla, Acronis, etc).

## Seapine Servers

Use your Windows username and password to log into Surround SCM and TestTrack. The production servers for these products are in the following locations.

**Surround SCM TestTrack**

Server Address: pendragon.seapine.com Server Address: galahad.seapine.com

Port Number: 4994 Port Number: 2345

## Blogs

Externally accessible blogs - <http://www.seapine.com/blogs.html>