SupportTicketWorkflow

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How customers can report issues

There are at least three ways how users of PreStack PRO can report issues (bugs, wishes, questions, etc.):

1. By sending an email to psprosupport@plan.io
2. By entering a ticket in the PSPRo Support issue tracker
3. In some way unrelated to plan.io, like calling, sending an email, etc.

Details on 1. method, sending an email

Everybody can send an emails to psprosupport@plan.io , no user account for pspro.plan.io is necessary. This means also spam is possible.
When plan.io receives such an email, it creates a new entry in the issue tracker with the subject and the body taken from the email. Additionally
 - a confirmation email is sent to the sender of the email
 - plan.io creates a (wiki) page containing all notes for this issue, which is also updated when a note is added
 - a link to this page is sent to the customer, so the customer can see everything for the issue he created, but **nothing** else in plan.io
 - whenever something is changed in the ticket, an email is sent to the customer, containg the link to the updated page
 - the customer can simply Reply to these emails, and the contents of his replied emails will be added as a new note to the issue

When the sender email address does not belong to any registered user of pspro.plan.io, a new entry in the "Customers tab" in the PSProSupport project is created. (This is handled by the "CRM" plan.io plugin/application.)

Details on 2. method, entering a ticket directly

This is only available for customers which have a login to pspro.plan.io.
They are also able to assign the ticket to somebody, to set a priority, etc.
I think we should use these settings, if done by a customer, at most as a hint, or simply ignore them.

Here also notification emails are sent to the reporter whenever something changes. They contain the change, and a link to the issue in the tracker. Customers can also reply to these notification emails, the reply will be appended to the issue as new note.

Details on 3. method, other ways of reporting a problem

In this case, support should enter the issue in the tracker and ask the customer to use option 1) or 2) the next time.

How the support handles customer issues

Taking care of new entries

Whenever a new issue has been reported, it has initially the status "New".
This status is reserved for new entries, which have not yet been seen by the support team.
When support sees a New ticket, it should do one of the following three actions:
 - Change the status to "Accepted" , which means we will take care of it. Even if this will not be the next day, the status should still be changed to "Accepted", since otherwise it will become hard to keep an overview over new issues.
 - Change the status to "Rejected". This should be done if the reported issue doesn't make sense and it should have some text why we we rejected it.
 - Answer the issue with some text and change status to "Closed". That only makes sense when somebody can answer/solve the issue directly.
There are two ways to find out whether a New issue has been added:
 - Regularly checking via the "NewIssues" custom query on the right border of the "Issues" tab
 - There is a user "psprosupport". This user has only one purpose: it has an email address (tracking@sharpreflectionz.com), it belongs to the project PSProSupport and it receives *all* notification emails for this project. So whenever a new issue is entered in some way, an email will arrive at this email address, which can be filtered by the subject for "New" issues. Currently Bill is checking this email account.

Handling accepted issues

When a new issue has been accepted, it needs to be processed.

Issue details

There are details for each issue like Priority, Assignee and to which tracker it belongs (PSProSupport has two trackers: Support and FeatureRequests). The support should set them properly, e.g. not every issue needs to have the highest priority.
Issues in the Support tracker can only be assigned to members of the support team, not to developers.

Getting more information

Support should find out what kind of problem it is. If more information is necessary, the customer should be asked via the tracker (which will send an email to the customer). The customer should then either answer directly in the tracker, or reply to the email (the reply will be added as a note to the issue). Files can also be attached to issues, like e.g. screenshots, log files, etc.

Always using the tracker has the big advantage that others or you yourself can later on see clearly what has been going on with this issue and all the information is in one place.

Solve the issue or move it to Internal

Support should try to solve the issue if possible. Basically this can be done for issues where the user doesn't know how to do something in PreStackPro, or doesn't know that some feature exists in PreStack Pro, or if he just messed something up, like weird algorithm parameters, broken installation, etc.

If this is not possible, i.e. if development work seems to be necessary to solve the issue, the issue must go in the Internal tracker. Once it is there, the development team will take care of it.
This is done this way:

- Use the "Copy to" function to create a copy of the issue from the Support tracker in the Internal tracker. When copying, the tracker to be used in the PSProInternal project has to be adjusted (PSProSupport has Support and FeatureRequests, PSProInternal has Bug, Task, Feature).
  The copied issue has to be marked as "Related to" the original issue, to keep the connection.
  The one who copied the issue, will be the author of the copied issue, and so receive all notification emails for the copied issue in the internal tracker.

How the development team handles incoming issues

What happens in status New

When a new issue is entered by support in the Internal tracker, it has the status "New". There are "Gatekeepers" in the development team (currently Alex and Clemens), which check regularly, once a day, whether "New" issues have been reported.
If that's the case, the Gatekeepers do a first step in handling this issue.
This means

- they check whether the bug report is complete enough. Ideally it should contain
  - a description what went wrong
  - how to reproduce it
  - logfiles for client and backend
  - the workflow file if a workflow was involved
  - maybe a screenshot
  - maybe some sample data if necessary and if possible

Once the bug report is complete enough for actually working on it, the Gatekeepers

- changed the status from *New* to *Seen*
- assign it preliminary to a developer which looks like a good choice for the issue
- assign it preliminary to a milestone
  - if it's a bug which causes serious problems, it will in most cases be assigned to the next patch release and may actually cause the next patch release
  - other bugs will usually go to the next patch or major release, depending on the effort and consequences of the bug
  - major feature requests which are not in the workplan will go to the ToDoList milestone

- minor feature requests may go to the next patch or major release, depending on the effort and usefulness
- otherwise, it goes to ToDoList

What happens in status *Seen*

Once the ticket is in status *Seen*, the developer it has been assigned to is responsible for it. He should check in more details what the bug is, whether he can reproduce it, etc. If he feels it should be assigned to somebody else, everybody is free to assign it to somebody else. Once he checked that the bug is valid, and that he is the appropriate assignee, he changes the status to *Accepted*.
The assigned milestone is still only an estimate, not more. It is basically preliminary until the bug has been actually fixed.

Furthermore, the development team will decide about the priority and who to assign the bug to.
The bug will be closed when the fix has been committed to svn.
If the bug was originally reported by a customer, support will receive a notification email that this Internal bug has been closed, and can the check the "Related to" issue, add a note there in which release the fix will be (according to the milestone to which the bug was assigned) and close the customer issue to.