03 – Onboarding Process

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# Metadata

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# Overview

This RFC proposes an onboarding process that can be used across the Platform teams.

# Objective

The objective of this RFC is to have an onboarding process that can be used by a new engineer to get up to speed with everything domain.

# Key Results

* A 90 day onboarding plan with target milestones
* A list of access items that every new hire should have and how to get them.

# Notes

## Confusing things

* Logging in via username vs email
* Service desk phone number – sometimes someone picks up but doesn’t say anything
* OneLogin apps vs onprem apps (via AD)
* Unable to change OneLogin password
* Some issues when setting a work e-mail different to generated one
  + Generated one uses full name as on contract
  + Option to set new one in dhOnboarding
* ServiceNow: no obvious team ‘landing page’
  + Define: incident; change; demand
* **IN OFFICE: don’t connect to DH-CORP network!!! Connect to DH-BYOD instead.**
  + DH-CORP DNS resolution is messed up, can’t connect to VPN, it also messes up zScaler, which breaks WSL
    - There are multiple support FAQs on these issues but the TLDR version is that support can’t solve the issue

New documents to create

* Landing page doc (Links to all services and processes used by team)
* Onboarding checklist (for new joiners)
* Onboarding checklist (for EM/buddy)

# Checklist

## Before joining

|  |  |  |
| --- | --- | --- |
| **Item** | **What** | **Who** |
| Order Laptop | Via ServiceNow | EM |
| Ensure that EM has new hire’s password & email |  | EM |
| Send email with link to all relevant onboarding info: [Welcome Pack - Global Support (April 2021).pptx](https://dunnhumby.sharepoint.com/:p:/r/sites/dhMediaForum/Shared%20Documents/General/Welcome%20Pack%20-%20Global%20Support%20(April%202021).pptx?d=wd8e579ac75b34092825dbc695977b581&csf=1&web=1&e=mIEngO) | TODO: simplify presentation to tech-specific things | EM |
| Send email with onboarding checklist | E-mail with a link to this RFC | EM |
| Send email with team ‘landing page’ doc | E-mail |  |

## After joining

|  |  |  |
| --- | --- | --- |
| **Item** | **What** | **Who** |
| Add new hire to servicenow ‘assignment’ groups:   * sre-<red, yellow, blue, green, orange> * Cloud Reliability   Roles / functionalities required   * Itil user * Valid ssl certs * Gcp data solution * Enhancement admin | Servicenow team landing page (Incidents; changes; demands)  Assign via ServiceNow form [iService Assignment Group Setup or Modification](https://dunnhumby.service-now.com/dh_sp?id=sc_cat_item&sys_id=f003d0babc17c100a1c31e2fd341164a&sysparm_category=0700094ffd9cec00f4fbd69897a5b2da)  [IService role request](https://dunnhumby.service-now.com/dh_sp?id=sc_cat_item&table=sc_cat_item&sys_id=52b6b0d22b43c500a1c3b14d59da15cb)  To view what groups you are part of [see this chat](https://teams.microsoft.com/dl/launcher/launcher.html?url=%2F_%23%2Fl%2Fmessage%2F19%3Abb5efa792a0a4e3dba988ed4410bfe17%40thread.skype%2F1660302026108%3FtenantId%3D457a65b9-e5e8-45e1-83fb-85aa42633e5b%26groupId%3Dac231853-8719-4649-84ba-1479160c8949%26parentMessageId%3D1660133208279%26teamName%3DSite%2520Reliability%2520Engineering%26channelName%3DPlatform%2520Engineering%2520-%2520Reliability%26createdTime%3D1660302026108&type=message&deeplinkId=30f5ecff-8556-4b90-b166-b2d22dc6dad4&directDl=true&msLaunch=true&enableMobilePage=true&suppressPrompt=true) | Anyone |
| Add new hire to team email distribution list | [Via Outlook web app](https://outlook.office.com/people/)   * Open settings -> search distribution groups -> wait forever... -> once it loads click Cloud Reliability -> edit -> membership -> add -> all members -> wait forever | EM |
| Add new hire to Teams channels: Technology Communities, Tech Team & Site Reliability Engineering | Asynchronous communication channels | EM |
| Gitlab permissions | * Developer access to [Cloud](https://dhgitlab.dunnhumby.co.uk/groups/Cloud/-/group_members) * Owner access to [clients](https://dhgitlab.dunnhumby.co.uk/Cloud/clients) | EM |
| Give access to Infrastructure team videos | Product team are happy to give verbal overview   * [Video 2](https://dunnhumby-my.sharepoint.com/:v:/r/personal/huwfry_dunnhumby_com/Documents/Recordings/Infrastructure%20dhHosting%20Platform%20PI3%20-%20Plan%20Review%20%26%20Commitment-20220525_150251-Meeting%20Recording.mp4?csf=1&web=1) * [Video 1](https://dunnhumby-my.sharepoint.com/:v:/r/personal/huwfry_dunnhumby_com/Documents/Recordings/Infrastructure%20dhHosting%20Platform%20PI2%20Showcase-20220518_130158-Meeting%20Recording.mp4?csf=1&web=1) |  |
| Overview of how dh works (technical) | * [How Domain works video](https://dunnhumby-my.sharepoint.com/:v:/p/deniseda/ER330mIZT_RFgxAFbdwQEhMBjcaMpHMgBUMemzcaYp9LUw) * [Backup link to above video](https://dunnhumby-my.sharepoint.com/:v:/p/deniseda/ER330mIZT_RFgxAFbdwQEhMBEg6qzTGi9O4DqNsCjM0Atg) * [Link 2](https://dunnhumby-my.sharepoint.com/:p:/p/deniseda/EbYCwOXID0RDro6vwomcYM4Bj0HJgxzqbJICzCIPsn5UBA) | New hire |
| Install Active Directory client | Follow [Active Directory install and configure guide](#_Install_and_configure) | New hire |
| Add new hire to Active Directory groups | Follow [Active Directory group membership guide](#_Group_membership) | EM / grant yourself once completing AD setup described above |
| Get admin access to Windows machine | Follow [admin access guide](#_Admin_access_for) | New hire |
| Bootstrap and configure personal machine for development | Follow [WSL guide](#_Bootstrapping_WSL) | New hire |
| Upload profile picture | [Microsoft Office Portal [direct link]](https://portal.office.com/account/?ref=MeControl#personalinfo) | New hire |
| Setup MFA via OneLogin | Set up multiple factors via OneLogin: [link](https://dunnhumby.onelogin.com/profile2/mfa)  OneLogin app is best | New hire |
| Complete “Do the right thing” course | See dhOnboarding email  Compliance training, to be completed **within a week** or you will be deactivated | New hire |
| Complete learning modules (KNOW) | Fundamental domain knowledge **within first month**   * [Link](https://dunnhumby.kallidus-suite.com/learn//#/course/a6591c84-6657-4a4f-afb0-525fe779ab8c) | New hire |
| Use equipment budget to upgrade your workstation | [Servicenow service request](https://dunnhumby.service-now.com/dh_sp?id=sc_cat_item&table=sc_cat_item&sys_id=202ed8d6db2fc0908213459d3b9619cc) | New hire |
| Review this document and change anything that did not work or is out of date |  | New hire |
| Create SSH key for Gitlab | [Docs](https://docs.gitlab.com/ee/user/ssh.html) | New hire |
| Request access to Confluence | [Service request](https://dunnhumby.service-now.com/dh_sp/?id=sc_cat_item&table=sc_cat_item&sys_id=765f602f1b1b30509a594337b04bcb07) | New hire |
| Familiarise yourself with team and company process | [Teams useful links/landing page](https://teams.microsoft.com/l/channel/19%3A54abe404f7334c4f9cc016e77036ca98%40thread.skype/tab%3A%3A20e99a1c-ba21-40ce-8488-f2687b8805e3?groupId=ac231853-8719-4649-84ba-1479160c8949&tenantId=457a65b9-e5e8-45e1-83fb-85aa42633e5b) | New hire |
| Add yourself to `gcp-cloud-reliability-read-only` role in Google Workspaces | This allows you to see group membership of all groups under the Google Cloud OU in Google Workspaces/GCP | Google Workspaces admin (currently Vijay, Martin Moseley) |

## List of Services to have access to

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **URL** | **Credentials** | **Who to ask if there are access issues** |
| VPN | Cisco AnyConnect client | Email / onelogin | Servicedesk |
| Jira – Link is to SRE Kanban board | [SRE kanban board](https://jira.dunnhumby.co.uk/secure/RapidBoard.jspa?rapidView=11980) | dh<id> / onelogin password | EM/Buddy |
| Confluence | [Reliability team](https://goaptaris.atlassian.net/wiki/people/team/da127fe9-d6a4-4135-a394-f1d10e32265a) | dh<id> / onelogin password | EM/Buddy |
| Gitlab |  | No login | EM/Buddy |
| Grafana |  | dh<id> / onelogin password | EM/Buddy |
| Dhintel |  | Email / onelogin | EM/Buddy |
| ServiceNow |  | Email / onelogin | EM/Buddy |
| OneLogin portal |  | Email / onelogin | EM/Buddy |
| SRE Sharepoint – Internal (need invite to join that teams channel) |  | Email / onelogin | EM/Buddy |
| GCP (+ data access) |  | Email / onelogin | EM/Buddy |
| Azure |  | dh<id>@/ onelogin | Request access via Teams channel (maybe needing  RES-AzureSubscriptionContributor) |
| Octopus |  | dh<id>@/ onelogin | SRE green |
| Artifactory |  | dh<id>@/ onelogin | EM/Buddy |
| Digicert | <https://www.digicert.com/account/sso/dhonelogin/login> | Create password via invitation e-mail “DigiCert User Account Created - Action Required”, then:  Email / onelogin | Maintainer of automated script: |
| Nagios | <http://nagios/adagios/status> | dh<id> / onelogin password | Create a support ticket to have you added to on-prem AD for the Nagios host   * Title the service request: “Please enable my <dhID> account to access on-premise linux Nagios server” * Contact SRE Green to link your account |

# Milestones (90-day plan)

## Week 1

* Introduction to buddy/team
* Complete all tasks in checklist
* Participate in stand-up

## Week 2

* Tech Overviews – Core/GCP - [videos](https://dunnhumby.sharepoint.com/:f:/r/sites/SiteReliabilityEngineering/Shared%20Documents/Platform%20Engineering%20-%20GCP/GCP%20Platform%20Overview%20Sessions?csf=1&web=1&e=R8mr2Y)
* Intro to OKRs, PIs, general workstreams
* Intro to servicenow, incidents, SRs, demands
* GCP Environment and projects overview(single-tenant, standalone, hybrid) Cloud Pages????
* Components and Products overview (CS-Core, DataPlatform, AnalystPlatform, dhPlatform, Media, dhAssortment) Cloud Pages - [search](https://cloud.pages.dunnhumby.co.uk/)
* Project creation, component deployment and upgrade Cloud Pages
* Data transfer setup from on-premise to GCP and vice-a-versa(postman) Cloud Pages
* Stackdriver monitoring and git repository Cloud Pages

## Week 3

* Pairing on incidents / tickets

## Month 1

* Monitor the incident queue for a week
* Amend at least 1 system alert

# Guides

## Admin access for your machine

Via [servicenow self-service portal](https://dunnhumby.service-now.com/dh_sp): search for ”admin” and complete the form “[Request Local Admin Access via Thycotic Privilege Manager](https://dunnhumby.service-now.com/dh_sp?id=sc_cat_item&table=sc_cat_item&sys_id=bc591e46139f1a40ba6958222244b087)”. You will receive an e-mail detailing the process once this is actioned. You can safely ignore the e-mail as the instructions don’t work. Follow along below

You will be assigned the Software Install - Thycotic Privilege Manager AD permission and will need to try a gpupdate /force in Powershell if the software does not show in Software Center.

***UPDATE August 2022: The entire ServiceNow process will most likely not work and you will have to chase whoever is assigned your ticket to remotely install the software for you.***  
  
Administrator access is enabled on a per-app basis. You will only be able to elevate an application to Administrator by navigating to it through File Explorer.

For example, for Powershell:

1. Open File Explorer
2. Navigate to C:\Windows\System32\WindowsPowerShell\v1.0
3. Right click the powershell .exe application and click “Request run as administrator (Thycotic – Privilege Manager)”
4. Once you restart, you may be able to bypass this process and just run the application as administrator normally

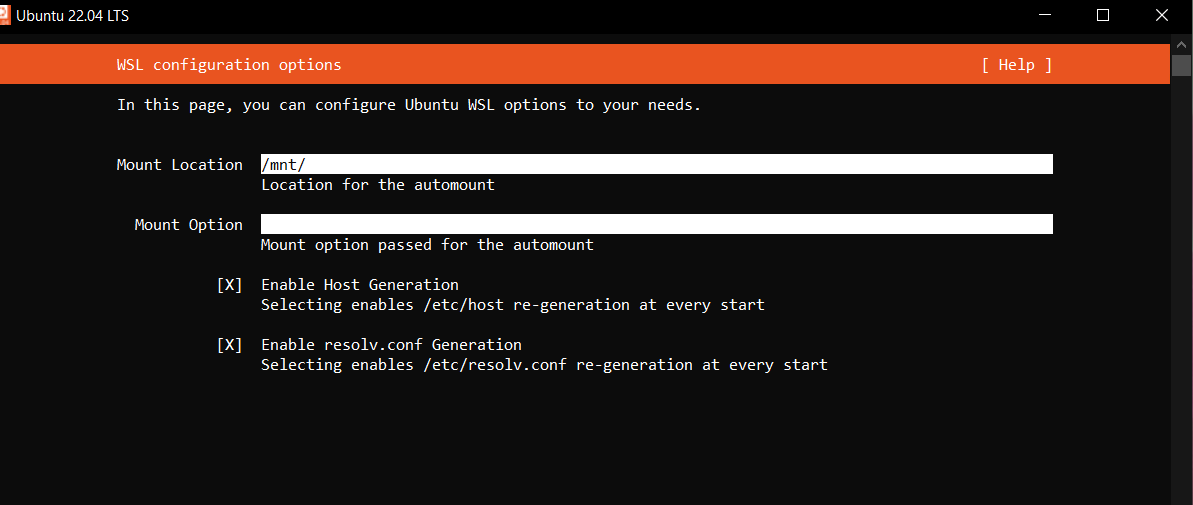
Some general *troubleshooting*tips below:

* *Open through Windows start menu: right-click then “run as administrator” on an app you need elevated access to, then re-type your own account details. This will error initally, but next time you “run as administrator” your app should open in administrator mode.*
* *General AD issues: restart machine or type `gpupdate /force` in powershell to force updating your permissions.*

## Bootstrapping WSL

**THIS HAS BEEN TESTED WITH *UBUNTU 22.04***

#### WSL [do this first]

1. [Install zScaler root CA certificate](https://teams.microsoft.com/l/entity/com.microsoft.teamspace.tab.wiki/tab::53655fc3-6c7d-4a1e-99d1-a7b7b9255c6f?context=%7B%22subEntityId%22%3A%22%7B%5C%22pageId%5C%22%3A56%2C%5C%22sectionId%5C%22%3A59%2C%5C%22origin%5C%22%3A2%7D%22%2C%22channelId%22%3A%2219%3Ada31268da6524b7f95a2fb3016f3ae30%40thread.skype%22%7D&tenantId=457a65b9-e5e8-45e1-83fb-85aa42633e5b) otherwise, anything TLS related won’t work
2. Install, either by:
   1. Manual method **[preferred as no waiting for service now team, after getting admin access]**
      1. Follow the “[admin access for your machine](#_Admin_access_for)” step above
      2. Example for latest Ubuntu LTS [22.04]
         1. Via UI
            1. Install via windows store [Ubuntu 22.04 LTS](https://apps.microsoft.com/store/detail/ubuntu-2204-lts/9PN20MSR04DW)
            2. Bypass Windows Store (if blocked) via [direct download](https://docs.microsoft.com/en-us/windows/wsl/install-manual#downloading-distributions)
         2. Via CLI [PowerShell (run as administrator)
            1. `wsl --list --online` to list available distributions
            2. `wsl –-install –-distribution Ubuntu` to install
      3. De-select ”Enable resolv.conf Generation”. This is needed for next step.
   2. Company managed method
      1. [Follow Teams wiki in WSL technology community instructions](https://teams.microsoft.com/l/entity/com.microsoft.teamspace.tab.wiki/tab::a2cf8113-d058-4d33-84c9-7f7ebf24bfc3?context=%7B%22subEntityId%22%3A%22%7B%5C%22pageId%5C%22%3A18%2C%5C%22sectionId%5C%22%3A21%2C%5C%22origin%5C%22%3A2%7D%22%2C%22channelId%22%3A%2219%3Ae806ad488969463794ae8d5d71c4ebe1%40thread.skype%22%7D&tenantId=457a65b9-e5e8-45e1-83fb-85aa42633e5b) to install your preferred Linux distribution
         1. Requires lots of back-and-forth with service now team who don’t always actually action the requests so it’s a little bit pointless even bothering with this method and you’ll be blocked for days
3. [***Follow DNS resolution section of Teams WSL Wiki.***](https://teams.microsoft.com/l/entity/com.microsoft.teamspace.tab.wiki/tab::a2cf8113-d058-4d33-84c9-7f7ebf24bfc3?context=%7B%22subEntityId%22%3A%22%7B%5C%22pageId%5C%22%3A4%2C%5C%22sectionId%5C%22%3A8%2C%5C%22origin%5C%22%3A2%7D%22%2C%22channelId%22%3A%2219%3Ae806ad488969463794ae8d5d71c4ebe1%40thread.skype%22%7D&tenantId=457a65b9-e5e8-45e1-83fb-85aa42633e5b)This is needed when using the VPN.  
     
   ***Steps:***  
   Open Teams > Go to “Technology Communities” > WSL channel > click burger menu on first page > WSL2 > DNS
   1. Domain Controller IP addresses **[may not be correct in future]**
      1. Watford
         1. 10.96.16.111
         2. 10.96.16.112
   2. Public DNS IP addresses
      1. Cloudflare
         1. 1.1.1.1
         2. 1.0.0.1
      2. Google
         1. 8.8.8.8
         2. 8.8.4.4
4. ***Enable the "Allow local (LAN) access when using VPN (if configured)" option within the configuration of Cisco AnyConnect***. This is so DNS works when on the VPN.  
     
   ***Steps:***  
   Open AnyConnect client > click cog on bottom left > preferences > tick “Allow local (LAN) access when using VPN (if configured)"
5. Install zscaler certs into Linux
   1. [zScaler Root CA in Wiki](https://teams.microsoft.com/l/entity/com.microsoft.teamspace.tab.wiki/tab::53655fc3-6c7d-4a1e-99d1-a7b7b9255c6f?context=%7B%22subEntityId%22%3A%22%7B%5C%22pageId%5C%22%3A4%2C%5C%22origin%5C%22%3A2%7D%22%2C%22channelId%22%3A%2219%3Ada31268da6524b7f95a2fb3016f3ae30%40thread.skype%22%7D&tenantId=457a65b9-e5e8-45e1-83fb-85aa42633e5b) - this is the actual cert that needs installing
   2. Place the crt file under /usr/local/share/ca-certificates/zscaler.crt
   3. Run `sudo update-ca-certificates`

#### Docker [optional]

##### Pre-Windows 11

1. [Install distrod](https://github.com/nullpo-head/wsl-distrod#option-2-make-your-current-distro-run-systemd). Docker needs systemd, which isn’t enabled in WSL, distrod installs systemd
   1. I had a weird apt dependency issue which I solved with: apt install systemd-container=249.11-0ubuntu3.3
2. Restart WSL
3. [Fix sshd systemd unit](https://github.com/arkane-systems/genie/wiki/Systemd-units-known-to-be-problematic-under-WSL#sshservice)

##### Windows 11

1. Add the following options to `/etc/wsl.conf`
   1. <https://learn.microsoft.com/en-us/windows/wsl/wsl-config#systemd-support>

[boot]

systemd=true

##### Then

1. [Install docker-engine](https://docs.docker.com/engine/install/ubuntu/)
2. [Install Docker](https://docs.docker.com/engine/install/ubuntu/)
   1. Don’t install rootless mode because it has a bug with iptables on WSL2 and breaks networking sporadically
   2. If you face issues like “Process: 1021 ExecStart=/usr/bin/dockerd -H fd:// --containerd=/run/containerd/containerd.sock (code=exited, status=1/FAILURE)”, follow the instructions under <https://github.com/microsoft/WSL/discussions/4872?sort=top> to update your iptables from “nf” to “legacy”
3. Run [post-install steps](https://docs.docker.com/engine/install/linux-postinstall/)
4. Login to Artifactory to use private mirrors of docker repos
   1. e.g., docker login images.artifactory.domain.com

#### Other tools [optional]

1. VSCode (on host Windows system) (+ ["Remote - WSL" extension](https://code.visualstudio.com/docs/remote/remote-overview))
2. [gcloud CLI](https://cloud.google.com/sdk/docs/install#deb)
   1. Use `gcloud init --no-browser` on final step
3. [Terraform](https://www.terraform.io/downloads)
4. Docker-compose

## Active Directory

### Install and configure

1. [Service now instructions](https://dunnhumby.service-now.com/dh_sp?id=form&table=kb_knowledge&sys_id=d5940f4f1b187010269b1fc3b24bcb76)
   1. Search for “Active Directory Installtion for Windows 10 version 1809 and HIgher”
2. Open “Active Directoy Users and Computers” app in Windows
   1. Right click main tree click “Change Domain”
   2. Enter domain.co.uk

### Running commands via powershell

Find the address of the ‘domain controller’ by right-clicking the connected domain.co.uk domain and clicking ‘Change Domain Controller’ (see above).

Then:

* Append –Server <DOMAIN CONTROLLER> to every Powershell command to bounce the command from the domain controller
  + e.g. Watford is gb-wat-svv-1100
* Or set a default server following this post: <https://serverfault.com/a/528834>

#### Helpful commands

* List AD groups <dhID> is a member of
  + Get-ADPrincipalGroupMembership <dhID> -Server gb-wat-svv-1100 | Select Name

### Group membership

Generic roles

* sre-green
* sre-red

GCP - ([see code for permissions](https://dhgitlab.dunnhumby.co.uk/Cloud/hybrid-network/dh-google-cloud-management/-/tree/master/))

* gcp-cloud-ops
* gcp-yellow-squad
* gcp-prod-ssh

GCP project creation

* project-creators

GCP project decommissioning

* gcp-cloud-reliability

Admin access to hybrid Grafana instance - ([see code for where this role is deployed](https://dhgitlab.dunnhumby.co.uk/search?repository_ref=master&scope=blobs&search=RES-DhMonGcpGrafanaAdmins-G+&snippets=false))

* RES-DhMonGcpGrafanaAdmins-G

Azure - ([see code for permissions](https://dhgitlab.dunnhumby.co.uk/Cloud/landing-zone-ops/azure/azure-rbac-and-policies/-/tree/master/))

* RES-AzureSubscriptionContributor
* dh-landing-zone-operator
* Azure AD Directory Readers – SRE (this is an Azure AD (AAD) Security Group – it can only be managed in Azure AD – it grants read access to Azure AD. This is required because EUT removed access to Azure for normal users. You must raise a request with EUT to be added to the group. Note at the time of writing it is not possible to nest AD groups inside AAD security groups).

Octopus - ([see docs](https://dhgitlab.dunnhumby.co.uk/Cloud/cloud.pages.dunnhumby.co.uk/-/blob/master/docs/cloud-ops/operational-docs/how-to-guides/octopus-azure-ad.md))

* RES-OctopusCengSpaceMgr
* RES-OctopusADPlatformSpaceManager
* RES-OctopusSelfServiceSpaceMgr

# Glossary

EM: Engineering Manager

Buddy: person designated to be point-of-contact for new joiner