Ethiopian TVET-System

INFORMATION TECHNOLOGY SUPPORT SERVICE

Level I

Based on May 2011 Occupational Standards

October, 2019

Module Title: Recording Client Request Requirements

TTLM Code: ICT ITS1 TTLM1019 v1

This module includes the following Learning Guides

LG38: Log request for support

LG Code: ICT ITS1 M11 L01-LG-38

LG39: Prioritize support requests with appropriate personnel

LG Code: ICT ITS1 M11 L02-LG-39

Instruction Sheet	LG38: Log request for support

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics –

- Identify client support organizational standards
- Recording Client support requests and requirements
- Reviewing Client support history and details
- Checking and requesting information for accuracy and urgency

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, upon completion of this Learning Guide, you will be able to –

- Identify client support organizational standards
- Record Client support requests and requirements according to organizational standards
- Review Client support history and details
- Check and request information for accuracy and urgency according to organizational standards

Learning Activities

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below 3 to 6.
3. Read the information written in the information "Sheet 1, Sheet 2, Sheet 3".
4. Accomplish the "Self-check 1, Self-check t 2, Self-check 3 " **in page -4, , 12 and 15** respectively.
5. If you earned a satisfactory evaluation from the "Self-check" proceed to "Operation Sheet 1 " **in page -16.**
6. Do the "LAP test" **in page – 17**.

- Your teacher will evaluate your output either satisfactory or unsatisfactory. If unsatisfactory, your teacher shall advice you on additional work. But if satisfactory you can proceed to the next

Information Sheet 1	Identify client support organizational standards

1.1. Organizational standrds

Organizational standrds are bench marks with which your organization can reflect on clent engagement with your product or service. It helps companies to managae clients interactions to increse client satisfaction. This in turn leads to higher satisfaction rating and ultimately higer profits for your organization.

Organisations often have a set of **standards** which are required to be adhered to when it comes to purchasing equipment. Standards allow organisations to:

- Ensure that all equipment used within the organisation meets satisfactory levels of operation.
- Ensure that the equipment used is compatible with other equipment in use.
- Ensure that support staff are trained to service and maintain the equipment in use.
- Budget for and plan the timely upgrade of equipment

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. **Define organizational standards.**

Note: **Satisfactory rating - 3 points** **Unsatisfactory - below 3 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Information Sheet 2	**Record client support requirements**

2.1. Introduction

Information technology is an integral part of the operation of modern organisations. Users of information technology need timely, high-quality support. These readings cover some of the skills and knowledge that you will need in order to provide that support. In addition to sound technical skills, IT support staff should have a range of skills that improve their ability to successfully provide IT services to their clients.

The circumstances in which you are required to provide advice on IT problems will depend on the nature of your organisation. Small organisations often do not have IT technical staff. They may rely on local IT businesses to provide support, or take out a contract with a company which provides IT support services. A growing area of IT is businesses specifically set up to provide IT support to organisations. These companies provide employment opportunities for individuals with the right skills and knowledge.

Many medium and large organisations provide a centralised help desk support service. Clients with IT problems report these to the help desk. Support is typically provided for areas such as hardware and software faults, networking problems (including login problems), and email and Internet problems. Help desks will often provide additional services to those listed here, depending on the needs of the organisation. They often provide training for clients as well. This can be performed in-house, or external training providers can be called in.

2.2. Definition of terms

2.2.1. **Client -** can be an individual, an organization, business or an institution that may come in person or communicate using any communication means like telephone, e-mail, fax or online help desk to get technical support, consultation on technologies etc

2.2.2. **Log –** means recording client support requirements based on organizational rule, regulation and policies.

2.2.3. **Escalate -** transferring a helpdesk that cannot be resolved to personnel at a lower level such as an IT specialist or IT manager.

2.2.4. **First level Support -** usually refers to the initial support offered to a customer by a help desk operator; in this initial point of contact, the officer determines the nature of the call and will try to solve the problem if it is straightforward; support organizations usually have quite clear outlines of what constitutes first level support.

2.2.5. **Priority -** the value given to an incident, problem or change to indicate its relative importance in order to appropriately allocate resources and specify an appropriate time-frame for resolution.

2.2.6. **Service Level Agreement -** an agreement between a service provider and a customer detailing the level of service that is provided, usually including what *is* covered, what *is not* covered, the response time for resolution.

- **SLA (Service Level Agreement)**

This is a contract that defines expectations between an organization and the service seller to provide an agreed-upon level of support. As an employee of the service company, your job is to honor the SLA that you have with the customer.

- ✓ Service monitoring
- ✓ Contingency
- ✓ Maintenance windows
- ✓ Response time guarantee

An SLA typically is a legal agreement that describes the responsibilities and liabilities of all parties involved. Some of the contents of an SLA usually include the following:

- ✓ Response-time guarantees (often based on the type of call and the SLA)
- ✓ Equipment and/or software that will be supported
- ✓ Where service will be provided
- ✓ Preventive maintenance
- ✓ Diagnostics
- ✓ Part availability (equivalent parts)
- ✓ Cost and penalties
- ✓ Time of service availability

There may be exceptions to the SLA. Be sure to follow your company business rules in detail. Some of the exceptions may include the customer's ability to upgrade the service level and the ability to intensify to management for review. Escalation to management should be reserved for special situations. For example, a long-standing customer or a customer from a very large company might have a problem that falls outside the parameters stated in his or her SLA with your service company. In these cases, your management may choose to support the customer for customer-relations reasons.

2.3. Overview of Client support requirements

Providing good IT supports for clients is vital to the effective operation of any organisations, so you may find there are established procedures for determining and addressing client support issues. In this Learning guide you will learn about these procedures, as well as the general skills and knowledge needed to record clients' support need with IT problems**.**

2.4. Client Support Roles

Information technology is an integral part of the operation of modern organisations or businesses. Users of information technology need timely, high-quality support. In addition to sound technical skills, IT support staff should have a range of skills that improve their ability to successfully provide IT services to their clients.

The most important skills needed by the IT professional who is working as a help desk person to record the clients' support requirement are:

- Technical skill
- Active listening skill
- Professional act
- Following organizational rules and regulations

- Good conduct
- Following call handling processes
- Customer handling skill, etc

The circumstances in which you are required to provide advice on IT problems will depend on the nature of your organisation. Some organizations may rely on local IT businesses to provide support, or take out a contract with a company which provides IT support services. A growing area of IT is businesses specifically set up to provide IT support to organisations. These companies provide employment opportunities for individuals with the right skills and knowledge.

Many medium and large organisations provide a centralised help desk support service. Clients with IT problems report these to the help desk. Support is typically provided for areas such as:

- Hardware and software faults
- Networking problems (including login problems)
- Email and Internet problems
- Consultation on purchasing information technologies
- Installation and configuration hardware
- Training needs
- Printing problems
- Software installation and upgrade etc

Help desks will often provide additional services to those listed here, depending on the needs of the organization. This can be performed in-house, or external training providers can be called in.

2.5. First level support

Clients may request support:

- By calling a telephone or by email
- They may come in person /coming to office/
- They may fax

The one in charge of recording client support request log the request and enter them into a **centralised database program** that is designed to track client support requirements. There are many commercially available programs which have been designed specifically for IT support requirement operations. In many organisations, help desk operators attempt to fix straightforward problems. This is known as **first level support**.

In some organizations, operators simply log calls, which are then allocated to the appropriate technical staff. In the case of organizations with only a few employees, IT problems may be handled by an employee who combines support duties with other functions.

The proportion of problems that can be handled at the first point of contact will depend on the skill and training of the help desk staff. As a large proportion of calls to any help desk are trivial problems, first line support can ensure that the time of the specialists in the various skill groups is not wasted and is only used when there is a problem that requires their attention.

2.6. Escalating a call

A call remains open until the client is completely satisfied that the problem has been solved.

If a help desk operator cannot immediately solve a problem, it will be passed to a member of the technical support staff. For example, you may receive requests from clients that:

- are too complex or outside your expertise
- require a software upgrade to be done by a support officer
- require a system modification that would need to be done by an analyst/programmer
- require a change to the database requiring the skills of the database administrator.

In such cases, the help desk staff will:

- apply a priority rating to the call
- escalate the call to an appropriate support person
- provide the client with a **reference number** for the job, and an idea of **when** the problem will be solved, based on the initial priority
- record the referral details.

All open calls must be monitored and reviewed until they are closed. Often the initial priority rating has to be revised.

2.6.1. Call escalation procedures

Call escalation procedures are defined by each company depending on such things as size and organisational guidelines, but for call escalation to be effective, you will need well-trained and adequate support staff who:

- respond quickly to calls
- know when to escalate a call to an IT specialist
- know which IT specialist to escalate the call to
- coordinate follow-up with the user.

2.7. Recording Client's support Request

If you are on the help desk and a client rings, fax, e-mail or come in person and request for support, what details do you ask them to provide? In larger organisations, particularly there is usually specialist software in which these calls are recorded.

Below is a sample of a typical data entry form for recording details of client requests. Examine the type of information you need to record.

Sample of a typical data entry form

Data required	Entry

Log number:	
Help Desk Operator’s name:	
Date and time of client request:	
Client’s name:	
Client’s contact details:	
Section and location:	
Problem logged:	
Date and time problem occurred:	
Computer/peripheral affected:	
Impact of the problem on operations/business:	
First line support provided (if any):	
Escalate to support staff? Yes/No	
Support staff request details: Date and time reported:	
Name of support staff:	

2.8. Document the Client's Requirements and Report

After analysis of the client's requirements, you should fully document the client's requirements and report them to your supervisor.

This document may take the forms, but would include the following:

- background information such as company details
- problems and issues that may have led to the client's request
- questions asked during your meeting with the client and their answers to those questions, as well as a list of any essential criteria
- other options or possibilities of which the client may not have been aware
- any information for the client that will help them understand what they're getting into before you go ahead with the job (or project).

A covering memo should be attached, stating the purpose of your report and asking the supervisor for their acceptance of the report

Self-Check -2	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

2. Match column "A" with column "B"

A	B
A. Client	1. Agreement b/n service provider and client
B. Log	2. Ranking or rating customer problem
C. Priority	3. Relocating a problem to higher level IT technician
D. Service Level Agreement (SLA)	4. Primary support provided for request
E. Escalate	5. Business, organization or individual who seek support
F. First Level support	6. Recording client support request
	7. Initial support provided to a client
	8. IT help desk professional

Note: **Satisfactory rating - 4 points** **Unsatisfactory - below 34points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: ________________________ Date: _______________

Short Answer Questions

1. List skills required by a help desk IT professional to record client support requirements

-
-
-

2.What are the most common support requests that will be raised by the clients to IT help desk? (list at least 10 problem areas)

-
-
-
-

3. Assume you are a help desk IT professional working for FBC company. What are the details you must record while receiving your clients' support requirements? (list at least 10)

Information Sheet 3	Review client support history

3.1. Review

A review by the help desk relates to the effectiveness and appropriateness of the client's Support requirements history. A help desk may set a review date of the Support requirement at the time of the assessment. A review may also be requested by a client or a service provider. It may be completed over-the-phone with the client.
A review by an assessor will look at the following aspects:

- The reason a review has been requested and its impact on the client's existing assessment information and Support requirement..
- The appropriateness of the services in meeting the client's goals.
- Any new goals for the client, and associated referral(s) for service.
- The appropriateness of setting another review date or an end date for service delivery

3.2. Reviewing Client Support History

Reviewing client support history means checking the client support request database for the same problems. This is very important to overcome the following main challenges one may face while working as a Help Desk IT professional.

- It enables to find easily how the previously logged problem is solved
- It eliminates redundancy of recording the same problem
- It enables easily identify the problems solved from the one in queue
- It enables the responsible IT staff for the resolution of the problems logged etc

Self-Check -3	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. A help desk may set a review date of the Support requirement at the time of the assessment.
   A. True B. False
2. A review may also be requested by a client or a service provider.
   A. True B. False
3. _____________enables to find easily how the previously logged problem is solved.

Note: **Satisfactory rating - 3 points** **Unsatisfactory - below 3 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________
Rating: ____________

Name: _________________________ Date: _______________

Operation Sheet 1	Recording client support requirements Techniques

Technics to record client support requirements.

- active listening strategies
- sort and sift information received from the client
- effective questioning skills
- direct observation
- research a range of possibilities

LAP Test	Practical Demonstration

Name: _____________________________ Date: ________________

Time started: ________________________ Time finished: ________________

Instructions: Given necessary templates, tools and materials you are required to perform the following tasks within 1.30 hour.

Instructions: You are required to perform the following individually.

Procedure:

1. Assume that you are a help desk officer
2. Log the request support into the database which can be found in the Exam Folder in your desktop.
3. Include priority and reason for giving that priority

First Request:

Details:

The 1st client who's name is Terefe from the Ministry of Education, Arat Kilo with a contact number 0912345678 call you today at 12 o'clock and asking help for *network server failure* he encounter the problem yesterday at 4 o'clock so he cannot connect to the website.

Second Request:

Details:

The 2nd client who's name is Mispin from the ECBP, Bole Road with a contact number 0913756347 send you an email today at 11 o'clock requesting for support of upgrading his Microsoft Office 2003 to 2007 he has problem using his Microsoft Office 2003 since yesterday at 3 o'clock so he cannot type his reports in Microsoft Word.

Third Request:

Details:

The 3rd client who's name is Sirac from the TVET Agency, Piassa with a contact number 0920856947 send you a fax today at 6 o'clock requesting for installation of a new processor. His computer is not working since yesterday at 5 o'clock so he cannot use his computer.

Fourth Request:

Details:

The 4th client who's name is Melaku from the GTZET, Cabana with a contact number 0919866877 come personally to you yesterday at 11 o'clock requesting for support because he cannot print his payroll on network printer since yesterday at 2 o'clock.

Line of Support

- Network Technician – For Network Problem
- Computer Technician – For Computer Hardware and Peripherals Problem
- Software Technician – For software Installation and upgrade

Next line – support staff with the name, day and time reporting for work.

- Network Engineer (Tariku – Segno – 2 o'clock) – For Network Problem
- Computer Engineer (Henuk – Hamos – 3 o'clock) – For Computer Hardware and Peripherals Problem
- Software Engineer (Ermias – Erob– 4 o'clock) – For software Installation and upgrade

Instruction Sheet	LG39: Prioritize support requests with appropriate personnel

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics –

- Identifying Relevant guidelines
- Prioritizing Client requests
- Referring Requests to an appropriate person or department
- Involving Appropriate persons with client support to be communicated

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, upon completion of this Learning Guide, you will be able to –

- Identify relevant guidelines for prioritizing or rating client requests.
- Prioritize client request based on its criticality or impact on the business.
- Refer the request to an *appropriate person* or department for assistance.
- Communicate to appropriate persons involved with client support.

Learning Activities

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below 3 to 6.
3. Read the information written in the information "Sheet 1, Sheet 2, Sheet 3 and Sheet 4".
4. Accomplish the "Self-check 1, Self-check t 2, Self-check 3 and Self-check 4" **in page -4, 6,,8 and 16** respectively.
5. If you earned a satisfactory evaluation from the "Self-check" proceed to "Operation Sheet 1 " **in page -17.**
6. Do the "LAP test" **in page – 18**.
   - Your teacher will evaluate your output either satisfactory or unsatisfactory. If unsatisfactory, your teacher shall advice you on additional work. But if satisfactory you can proceed to the next topic

Information Sheet 1	Identify Relevant Guidelines

1.1. Organizational Guidelines

Organizational guidelines are the **policies or procedures** that are used to correctly perform a specific activity or operation within an organization. Here, we used the organizational guidelines to prioritize client support requirements.

- Polices are basically guides to the organization's philosophy and mission and help to interpret those elements to the officers.
- Procedures are more specific than polices; they serve as guides to action.

1.2. Identifying Relevant Guidelines For Prioritizing Or Rating Client Requests

There should be some mechanism used to prioritize service request that come from clients. In many organizations there are rules and policies that govern prioritization issues. The most important factor taken into consideration is:-

- **Business Critical System** – the interruption of such system directly affects the production, profit of the organization or the business. It results in bankruptcy, frustration, disappointment etc
- **Urgency of the service requested-** This method requires you to sort tasks into the following categories and rate them according to the level of priority.
    - ✓ important and urgent
    - ✓ important and not urgent
    - ✓ not important but urgent
    - ✓ not important and not urgent

Self-Check -1	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. which of the following is used as a guide to the organization philosophy and mission.
   A. Policy B. Procedure C. Standards
2. __________used to sort tasks in to categories according to the level of priority.
   A. Urgency of the service requested B. procedure C. organization
3. _________are more specific than polices.

A. Policy B. procedure

Note: **Satisfactory rating - 3 points** **Unsatisfactory - below 3 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Information Sheet 2	**Prioritize client requests**

Name: _________________________ Date: _______________

2.1. Prioritize client requests based on criticality or impact on the business

Some client support requests will be allocated a high priority, as they involve critical IT functions which cannot be carried out until the problem is resolved. Extra resources may have to be allocated to high priority support needs, and the progress of these support needs to be closely monitored.

The most common ways of prioritization mechanisms are using the following general guidelines but its best to respond to all requests as quickly as possible.

1. **High Priority:** - high priority is given where the business critical system has got a problem.
   - A significant number of people are affected by an issue, a customer's computer crashed, the network server is down, a virus attack, or there is a security concern.

Example:

The user is unable to login; the computer crashed; a customer's account is locked or the password needs to be reset; a computer has been infected by a virus; an entire student lab is down; if the network is inaccessible.

2. **Medium Priority:** A single customer is affected by a problem but is still able to work, or there are problems with a service but it is still functional.

Example:

A customer is experiencing intermittent computer problems; is unable to open or work within a software program; is having printer problems; has lost access to a file share; or requires data recovery/backup.

3. **Low Priority:** Routine or maintenance tasks.

Example:

A customer asks "how to" questions or requests new software installations or computer set up. The department requests account creations or updates, directory changes, or new file shares.

Self-Check -2	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. Which of the following priority is a routine task.

A. High
B. Middle
C. low
D. All

2. It is best to respond to all request as quickly as possible.

A. True B False

Note: **Satisfactory rating - 3 points** **Unsatisfactory - below 3 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

Information Sheet 3	**Refer Request to appropriate person**

3.1. Referring requests to appropriate person or department for assistance

- This stage is the step at which we refer client support requirements to respected technician or department to give the support needed by the client.
- Appropriate person in the contest of IT is a supervisor, teacher, vendor business representative, help desk person or subject matter expert Technician that is responsible for answering the technical question of clients and the goal is to create value for clients that will help preserve company's reputation and business.
- We are looking for a competent **Help desk technician** to provide fast and useful technical assistance on computer systems
- An excellent Help desk technician must have good technical knowledge and be able to communicate effectively to understand the problem and explain its solution. They must also be customer-oriented and patient to deal with difficult customers.

- The goal is to create value for clients that will help preserve the company's reputation and business

3.1.1. Responsibilities of It Help Desk

- Serve as the first point of contact for customers seeking technical assistance over the phone or email.
- Perform remote trouble shooting through diagnostic techniques .
- Walk the customer through the problem solving process.
- Direct unresolved issue to the next level of support personnel.
- Provide accurate information on IT products or service.
- Record events and problems and their resolution in logs.
- Follow-up and update client status and information.
- Pass on any feedback by clients to the appropriate internal team.
- Identify and suggest possible improvement on procedure.

3.1.2. Requirement of IT Help Desk

- Proven experience as a help desk technician
- Good understanding of computer system.
- Ability to diagnose and resolve basic technician issues
- Proficiency in English
- Excellent communication skill
- Customer oriented and cool tempered.

Self-Check -3	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. Which of the following is not the responsibilities of help Desk Technician?
   A. Direct unresolved issue to the next level of support personnel.
   B. Provide accurate information on IT products or service.
   C. Record events and problems and their resolution in logs
   D. nonek
2. Good understanding of computer system is one aspect of Help Desk Requirment.
   A. True B. False
3. One is not the requirement of an IT help desk.
   A. Excellent communication skill
   B. Good understanding of computer system
   C. Customer oriented
   D. None

Note: **Satisfactory rating - 3 points Unsatisfactory - below 3 points**
You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ____________
Rating: _____________

Name: _____________________________ Date: _________________
Short Answer Questions

1.List at least three responsibilities of an IT Help Desk Technician

4.1. Contacting the client

If you are the support person who has been contacted by the help desk, you need to contact the client soon after receiving their request from the help desk. You'll also need to investigate and document the issues raised by the client.

The contact with the client may be just letting the client know that you're on the way to see them at their workstation. As mentioned previously, non-complex client problems can be resolved quickly. The solution may be as simple as providing a short set of instructions, which the client can follow to fix their problem.

At other times, you may need to contact the client for other reasons, including the following situations:

- If the problem is more complex, and likely to take time to resolve, the client needs to be informed of this.
- You want to clarify with the client exactly what their needs are. To do that effectively, you'll need good communication skills, including skills in active listening and reflective questioning.
- You cannot meet the initial target completion date because of other competing deadlines and you want to re-negotiate the priority (or the completion date) with the client. Successful changes to completion dates come about through successful negotiations. This is the result of building up good client relations.

It is important for you to keep the client informed about the progress of their call. Frustration over delays in solving IT problems can be a major cause of concern to people. This frustration can be made worse by poor communication from IT support staff. As a result of your investigations, you should be able to inform the client about the nature of the solution. You should also be able to tell the client how long it will take to resolve the problem.

Clients can often make requests which they perceive as simple, but which are not easily carried out by IT support staff, as they involve excessive cost, or will result in a breach of organisational guidelines. In these circumstances, you will need to be able to explain to the client why it is not possible to carry out their requests. You should be able to suggest alternative actions, which will allow the client to perform the same tasks.

4.1.1. Obtaining client feedback

There are a number of reasons why it is important for you to obtain client feedback. Is the solution you are proposing workable? Clients may be aware of issues which you have not considered, which may mean that your suggested solution will not be practical. These can be many and varied, but could include budgetary constraints, specific needs of clients such as clients with a disability, disruption of client access to IT systems, or loss of client data.

4.1.2. Listening to the client

When you're dealing with clients and colleagues, it's vital that you listen carefully and respond appropriately. To do this, people often use the **active listening** technique.

Active listening occurs when you focus on the message you're receiving from the other person, without thinking about what you want to say next. Your response to the sender is one that paraphrases what you've heard. That is, you summarise what you've heard, and say it back to the sender in your words. This ensures that you have understood the idea the sender wants to give you.

You can often tell if someone is really listening to you, if they are:

- smiling
- nodding
- staying silent
- making eye contact
- using a friendly and interested tone of voice
- encouraging you to continue
- asking open questions
- reflecting how you (the speaker) are feeling.
- leaning towards you (the speaker).

4.1.3. Asking reflective questions

A reflective question allows the other person to correct and clarify any misunderstandings you may have about what is being said. If you echo back what a client has told you, the client then has a chance to either agree with you, or point out things you have missed or misunderstood.

4.1.4. Documenting client feedback

The Help Desk Operator has given you a client's request to attend to. The Help Desk Operator had filled in a few general details about the client request. It wasn't possible to resolve the problem by telephone, so you need to investigate the problem further and record more details. You'll need to contact the client to find out more.

You've seen an example of the initial details recorded at the help desk. The following is a sample of a form that a support person might use to record further information.

Table 4.1.4. Document Client request

Data required:	**Entry**
Name of support person:	
Date and time client was contacted:	
Alternate arrangements for client while problem is being solved:	
Problem details (incl. nature and degree):	
Date and time investigation of problem commenced:	
Date and time overall system down:	
Support required for resolution of problem:	
Research required to solve problem: (Provide details.)	

Can problem be resolved by support person? (Provide details.)	
External service required? (Provide details if 'yes'.)	
Purchase of parts required? (Provide details if 'yes'.)	
Date and time parts or service person arrived:	
Date and time problem was solved:	
Date and time of commencement of recovery action/configuring:	
Date and time recovery action/configuring completed:	
Date and time of restoration of normal service:	
Details of staff involved in the investigation and resolution (include names, roles, dates of involvement):	
Name of staff who closed the incident:	

4.1.5. Resolving client's problems

Where possible, client's problems should be resolved with minimum disruption to their work.

The time taken to resolve the problem may mean that IT functions which are important to the organisation will not be able to be carried out if equipment is not operational. In this case, some alternatives need to be considered, to allow the affected client to carry out their tasks.

Many organisations provide support remotely. Software can be installed by support staff using the organisation's network. You may need to organise a suitable time for this to happen, to minimise disruption to the client.

If warranty repairs are to be performed a staff member may have to be present to provide access to the IT equipment to be repaired. You will have to make sure that someone will be available at this time. This will avoid delays and extra charges from vendors.

If training is to be provided, you will need to organize a suitable time. This is particularly important when clients need to attend group training sessions, which involve taking them away from their normal duties for extended periods of time

4.1.6. Confirming client requirements

Confirming the client's requirements involves developing documentation to ensure you and the client have the same understanding of requirements. This documentation may be based on pre-existing documents that can be used as a template. The example below shows what such a document would look like.

Table 4.1.6. Client Requirements Confirmation

CLIENT REQUIREMENTS CONFIRMATION	
Client name:	
Project name:	
I understand your requirements as follows:	
Requirement	**Scope (if appropriate)**
Good A	To be delivered within one week of contract being signed Twelve lots of Good A required
Service A	To be provided at the time of delivery of Good A
Good B	To be compatible with your existing network
Good C	Must be able to be used in outdoor locations without risk of damage Must be cheaper than existing provider

Our signatures on this document confirm our shared understanding of the above requirements in this project.	
Client signature:	
Service provider signature:	
Date:	

4.1.7. Obtaining approval

Obtaining approval might occur in a number of ways. It might be a verbal approval to go ahead with work based on the confirmation document. As mentioned earlier, you should *never rely on a verbal approval*. Memories of events can differ very much and lead to confusion and conflict later.

One way of obtaining approval is to have the client provide a written purchase order for the work. Alternatively, the client might write a letter outlining their agreement to your requirements document, asking you to go ahead with the work.

Any approval document that is produced should include agreement on:

- the standard of the goods or services to be provided
- the price of the goods or services to be provided
- the timelines for the project (either broken down into timelines for specific tasks or for the entire project)
- any ongoing or follow up services required or foreseen.

4.1.8. Recommending appropriate training and support

The technical support identified with the client might include areas such as:

- installation
- troubleshooting
- updating and maintenance of a system
- initial training
- provision of manuals for using and maintaining software, hardware or networks.

4.1.9. Negotiating a training and support timetable

Many IT operations need to take place when people don't need access to the system. Remember that the prime focus of the client is to keep the business running! That business will provide the funds to pay you.

This means that you need to be very flexible when arranging times for support with the client. Think of the types of training and support outlined above and what they involve. For example, consider what could happen if you have to stop access to a client's database system to update the software, or to backup the system. It could create chaos!

If you are to provide training or support you will also need to consider the priorities of the client. There are two important things to keep in mind when negotiating times to provide support:

- the need to avoid any interruption to the client's ongoing operations
- the need to have the right people from your organisation free at a time suitable for the client.

Self-Check -4	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. What does it mean documenting client request?
2. List the element in communicating clients.

Note: **Satisfactory rating - 3 points** **Unsatisfactory - below 3 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

Operation Sheet 1	Identify client requirement

2.1. Steps for identifying client requirements.:

The general steps to follow in identifying clients' needs are summarised below. Note: not all these steps are performed every time.

1 Preparation

2 Understand the business goals. This would include knowing if any budget is applicable or if there are there plans for future expansion.

3 Understand the organisational guidelines. Ask questions to determine what organisational guidelines are to be adhered to.

4 Define the client's requirements clearly. This will be done in conjunction with the next two steps and can involve interviewing, preparation of questionnaires or direct observation. Your questioning skills are very important at this stage and are discussed in detail in the next section.

5 Identify the roles of stakeholders — those people who have an interest in identifying the requirements. This can include end-users or customers, managers and other technical staff.

6 Identify sources of information

7 Investigation

8 Develop an understanding of the existing system

9 Investigate alternatives to the existing system

10 Document the client requirements.

Lap Test	Practical Demonstration

Name: ___________________________ Date: _________________

Time started: __________________________ Time finished: _________________

Time allowed 1.30 hr

Please ask your teacher for the instruction for this Lap Test

Assume you are an IT help desk professional in ABC Company and you recorded the following problems to be solved reported by your clients. Your task is to prioritize each of the problems. Provide a reason for your answer.

3. **Request of network server failure**

   Priority: ___________

   Reason : ____

4. **Request of upgrading of software**

   Priority: ___________

   Reason : ____

5. **Request for printing problem of one user.**

   Priority: ___________

   Reason : ____

6. **Request of consultation on the upgrading of Windows XP to Windows 7**

   Priority: ___________

   Reason : ____

7. **Request for maintenance of computer**

   Priority: ___________

Reason : ____

List of Reference Materials

Samuel P. Harbison III & Guy L. Steele Jr, **C: A Reference Manual**, Fifth Edition, Prentice Hall, 2002, http://www.CAReferenceManual.com, http://vig.prenhall.com/catalog/academic/product/0,1144,013089592X,00.html

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The development of this Learning Gide for the TVET Program Information technology support service Level I.

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