INFORMATION TECHNOLOGY SUPPORT SERVICE
Level I

Learning guide #38

Unit of Competence	: Record Client Request Requirements
Module Title	: Recording Client Request Requirements
LG Code	: ICT ITS1 M11 L01-LG-38
TTLM Code	: ICT ITS1 M11 TTLM 1019v1

LO 1: Log request for support

Instruction Sheet	**Learning Guide # 38**

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

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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