Tech Training: Helpdesk Basics

Mission Statement
The Helpdesk staff aims to provide outstanding technical support, education, and resources to the Taylor community, including parents and guests, by communicating in a courteous and professional manner through interactions by phone, email, and remote sessions.

Expectations
Techs are expected to focus on the tasks at hand and clients. See the Intro to CS tutorial for more detail: http://4040.taylor.edu/Tutorials/TechTraining/tt_introtocs.pdf

The T&LC and Helpdesk share some expectations, but as the two positions are different, so are some of the expectations.

At Helpdesk, even if the phones aren't ringing there is still work to be done.

- Review 4040Connect tickets and resolve or follow up on existing tickets
- Review 4040 mailbox and delete, categorize, or move old emails
- Check with Geri for additional tasks
- Check with TJ/Tony for T&LC projects or tasks
- Review Tech Training documents

Five Things
At the start of each shift, the Helpdesk technician should do the following tasks:

1. Get your notepad and badge from cabinet. Do not put your photo up.
2. Sanitize the desk, keyboard, mouse, and phone
3. Login using your worker account, and launch Client Services resources. Bookmark websites and create shortcuts if needed.
    a. Bomgar Console
    b. 4040 mailbox
    c. Shift Change Journal
    d. 4040Connect (https://4040connect.taylor.edu)
    e. Tech Training website (http://4040.taylor.edu/techtraining/tt_resources.html)
4. Check 84040 voicemails
5. Check with Geri for urgent/important issues or tasks that need to be completed

Rule #1
This is a reminder that identifying your client is crucial before trying to provide a solution. There are three aspects of identifying your client:

1. Who
    a. Get their name and confirm the correct spelling
    b. Contact info (phone number and/or extension including area code)
    c. Client Role (faculty/staff, student, parent, guest)

2. What
    a. What type of device are they having trouble with?
    b. Is it university-owned or personally-owned?
3. Where
    a. Are they on or off-campus?
    b. If on-campus, are they using the wired or wireless network?

Telephone Etiquette

Proper telephone etiquette is very important. Always leave callers with a favorable impression of you, your department, and Taylor University. Keep our 4 Objectives (VEST) in mind and try to accomplish each one as you handle the call:

1. Validate – *Yes, we can help you with that.*
2. Educate – *I think this is why this happened. Here's how we're going to fix it.*
3. Solve
4. Ticket

Initial Greeting

- Speak clearly
- Acknowledge they have reached Client Services – *"Thank you for calling Client Services"*
- Identify yourself – *"This is Ashlyn"*
    - If asked, your title is **Client Services Technician**
- Offer to help - *"How may I help you?"*
- Ask the reason for the call
- Take notes. You'll need them when you create a ticket.

Responding in a professional manner

- Common caller expectations:
    - They want service - they're calling for a reason
    - They want their call answered promptly - they don't want the phone to ring on and on
    - They expect a friendly attitude, courteous manner, and a confident, professional response
    - They expect to receive knowledgeable service
    - They don't want to be given the runaround - endless transfers, put on hold, or have to explain the issue multiple times.
    - They expect to be valued and given consideration and respect

Telephone Mechanics

Answering the phone

Helpdesk calls ring in on 84040. ***Do not answer the 4040 phone or tie up the 4040 line.*** The call should be answered on a different phone and line in order to keep 4040 available for the next caller. To identify the caller and then pick up the call on the Tech 1 phone:

1. Leave the handset in place
2. Press the Helpdesk line (84040) to see who is calling (optional)
3. Press the Tech 1 line (84041) to prepare for call pickup
4. Pick up the handset
5. Press the first soft key, labeled PICK, to pick up the call. This transfers the call from 4040 to 4041.

Putting a caller on hold

- Prepare the caller
  - Most people do not mind being put on hold for a short time if they believe that their request for service is being taken care of.
  - Put the caller on hold while finding out information or confirming details.
  - Covering the mouthpiece and talking to others does not present a professional image.
    - Explain why you need to put them on hold - *"I need to confirm that,"* or *"I'll check on that for you."*
    - Ask permission to put the person on hold – *"May I put you on hold for a moment?"*
    - Check back and ask if they would like to continue holding
    - If it takes longer than expected, offer to call them back
    - Thank the person for holding - *"Thank you for holding", "I appreciate your patience"*
- Place the call on HOLD
  - Press the red **Hold** button, located at the bottom of the phone
  - Hang up the handset
  - The line button flashes red when a call is on hold
  - Press the line (84041) button again and pick up the handset to return to the call

Putting a call on speaker

- Prepare the caller
  - Putting a call on speaker is helpful if multiple people need to be a part of the conversation.
    - Always ask to put the person on speaker – *"May I put you on speaker for a moment?"*
    - Explain why you want to put them on speaker - *"I would like my colleague to hear what is happening."*
- Setting the phone to Speaker
  - Press the **Mic** button, located on the right side of the number keypad. A red light appears when the mic is turned on. The light is off when the mic is muted.
  - Press the **Speaker** button, located at the bottom of the phone
  - Return the handset to the cradle
  - Adjust the volume by pressing the large silver button located on the lower right corner of the phone
  - Pick up the handset to take the call off of speaker

Transferring a call

- Prepare the caller
  - Tell the client the name of the Specialist you are transferring them to, and give them the extension number in case something goes wrong
  - **Introduce the client to the Specialist and explain the reason for the transfer**
- Setting the phone to Transfer
  - Press the **Transfer** button located at the bottom of the phone
  - Enter the Specialist's **5-digit extension** – 84123
    - When transferring a call within the T&LC, you must enter the **5-digit extension** - do not press their name to transfer a call
    - To transfer a call to the IT Work Room, dial extension **84050**
    - Where to find an extension
      - myTAYLOR - Roster tab (Employee and Students)

        - Employee Roster (Phone lists – yellow pages)
        - Departmental Listings (Phone lists – teal pages)
    - Wait for the Specialist to answer
    - Introduce yourself – *"Hi, this is Ashlyn from Client Services"*
    - Let them know you're transferring a client to them – *"I have a call for you"*
    - Identify the client and why he/she is being transferred – *"The client's name is John Smith from the Art department, and he is having a problem with the projector in Reade 123."*
    - When you hang up the handset, the call will be transferred
- What to do if the caller requests to be transferred
    - If a client asks to be transferred to a specific person, you need to verify that person wishes to take the call
        - If they wish to take the call, hang up the handset, and the call will be transferred
        - If they do not wish to take the call or they are unavailable, return to the caller and offer to take a message or transfer them back to the person's voicemail. (*"He/she is out of the office. May I take a message or would you like his/her voicemail?"*)
    - Returning to a transferred call
        - Pick up the handset
        - Press the **Transfer** button located at the bottom of the phone
        - The call should return to the line that initiated the transfer and the caller should be on the line
        - Offer to take a message or transfer them back to the person's voicemail
            - Follow the procedure for Setting the phone to Transfer in order for the caller to leave a voicemail for the person

Ending a call

- Repeat any instructions or follow up procedures (*I have entered a ticket documenting the problem and assigned it to the appropriate person/team… You should receive email updates from 4040connect as the issue is being worked on…* etc.)
- Before hanging up, be sure that you have answered all of the caller's questions – *"Is there anything else we can help you with?"*

Checking 4040 voicemail

When a client leaves us a voicemail, the system generates an email notification and sends it to the 4040 mailbox. It also illuminates the lights on top of the 4040 phone.

To retrieve voicemails

- Dial the voice messaging system (84000) from Tech 1. Do not use the 4040 phone.
- Follow the prompts to hear the message(s)
    - Press * to exit the standard menu
    - Press 84040 to be transferred to the 4040 voice mailbox
    - When prompted, enter the password to the 4040 voice mailbox (currently 404040)
    - Press 1 to listen to new messages
    - Press 2 to store a message
    - Press 3 to delete a message (press 3 again to confirm deletion)
- Document the call. Record as much information as possible.
    - Caller's name

    - Phone number (including area code)
    - Client Role (faculty/staff, student, parent, guest)
    - Issue the caller is reporting
- Delete BOTH the message from the 4040 voicemail box AND the email notification.

Making a long distance call

- Dial 9
- 1 + area code + phone number
- After two quick beeps, dial 81006211

Scheduling an Appointment

Sometimes, an appointment needs to be scheduled for someone to take a look at a client's computer, printer, etc. This is reserved for Taylor Faculty and Staff, not students looking for help in setting up printers, TVs, or game consoles. When appointments are scheduled, a Tech from Information Technology will head to the location specified in the appointment at the scheduled time.

Creating an appointment in the Technology Services calendar requires four things:

- Client's name
- Client's office number/location
- Ticket number
- Client's availability for pre-defined time slots

Once the appointment has been created, note the appointment date and time in the ticket.

Remote Sessions

When a client calls in with a technology problem, it is sometimes necessary to see the client's screen so they can show you the error/problem they are having.

See the Remote Tools tutorial: http://4040.taylor.edu/Tutorials/TechTraining/tt_RemoteTools.pdf
See the Bomgar tutorial: http://4040.taylor.edu/Tutorials/TechTraining/tt_Bomgar.pdf

End of Shift

- Brief Geri on any urgent/important issues or outstanding tasks before you leave
- Update the Shift Change Journal
    - Add notes for anything the other techs should know about. If a ticket has been created, include the ticket number in the note.
        - Dr. Smith is bringing his computer to the T&LC Desk due to suspected malware infection. (Ticket 18123)
        - Coach Brown will stop by Saturday morning to pick up a loaner laptop from Technology Services. The loaner laptop is on the top shelf of the bookcase in the Helpdesk office. (Ticket 18124)
- Log out
- If you work the last shift of the day, please shut down the computer

- Return your notebook and badge to the cabinet