

Tech Training: Intro to Client Services

What is Client Services?

Client Services (our nickname is 4040) is one of several departments that function within the Technology & Learning Connection (branded internally as The Connection). CS is made up of two groups: Help Desk and the T&LC desk. Help Desk provides remote support to clients; most often faculty, staff, alumni, and parents. The T&LC desk provides walk-up support to clients; most often students and guests. If someone asks you where you work, answer Client Services.

Student Techs are assigned a separate Active Directory username and password as a work account for use on the job. Your work credentials allow you elevated privileges and access to network resources not accessible by normal student accounts. You need these privileges to work on Taylor-owned computers, for example. Do not abuse this privilege by using your work account outside of working hours or by using it to access resources you shouldn't. Doing so could cost you your job. It is your responsibility to keep your work account secure.

We use two different modes of communicating; tech mode and client mode. They are essentially two different languages, and we serve as interpreter. When communicating (email, phone, etc.) with other Techs, use tech lingo to accurately explain the problem and/or solution. When communicating with clients, tech lingo should be avoided as it tends to overwhelm those who are less technically inclined.

Client Services has three full-time staff members:

Geri Bradford
Help Desk Technician
grbradford@taylor.edu
765.998.4043

Beth Kaylor
Academic Technology Program Assistant
btaylor@taylor.edu
765.998.5139

Tony Wormgoor
Academic Technology Support Technician
anwormgoor@taylor.edu
765.998.5399

See our Meet the 4040 Team page for more info on your new team:

<http://4040.taylor.edu/meetthestaff.html>

Support Model

We run a Generalist/Specialist model. We are Generalists. We know a bit about a lot of technology areas. This has historically allowed us to resolve 50-60% of total service requests. Requests we are unable to resolve are escalated to a Specialist, whether that be the Academic support team, Audio/Video/Event support team, or Information Technology.

It is our responsibility to receive the request, gather sufficient information, and either resolve the request or escalate it to the proper Specialist in a timely, thorough, and professional manner.

What is the Technology & Learning Connection?

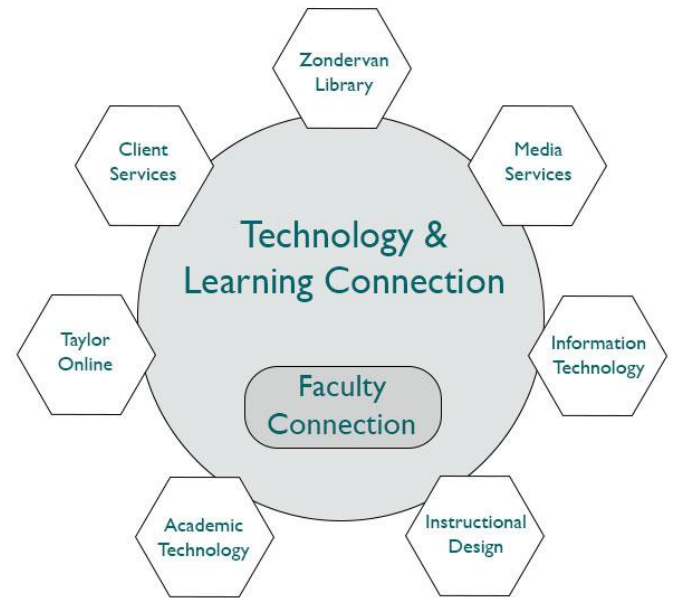
The Technology & Learning Connection (T&LC or The Connection) is a collaboration and co-location of several Taylor service departments in an attempt to provide a one-stop-shop of technology support for students,
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faculty, staff, and guests. The T&LC focuses on academic support, although there is much crossover to general technology support as well.

T&LC Partners:

- Academic Technology / Instructional Design
 - Academic Technology support personnel under the direction of Dan Bowell
 - Blackboard & classroom support
- Client Services
 - Help Desk and TLC personnel under the direction of Dan Bowell
 - User accounts and permissions, level 1 computer support, audio/video/print projects, first-response classroom support
- Media Services
 - Event and classroom support under the direction of Jon Ochs
 - Event support, A/V projects
- Taylor Online
 - Marketing and distance learning personnel under the direction of Carrie Meyer
 - Distance learning technology support
- Zondervan Library
 - Checkout and Ask Desk personnel under the direction of Lana Wilson
 - Academic research assistance
 - Checkout of library resources and Audio/Video equipment
- Information Technology (not housed inside T&LC)
 - Enterprise Application Services under the direction of Rod Eib
 - Banner, myTAYLOR, TOWER, and other university-wide software
 - Enterprise Infrastructure Services under the direction of T.R. Knight
 - Network, servers, telephone, network security
 - Technology Services under the direction of Nick Corduan
 - Computers, printers, desktop security



Job Conduct/Details

As a Client Services Technician, you represent Client Services, Zondervan Library, and Taylor University. As such, you are expected to be dependable, clean, properly dressed, pleasant, professional, and helpful at all times. Our Clients and Specialists rely on us to be thorough in diagnosing problems and in recording appropriate details in the tickets we create.

Conduct

Techs are expected to arrive on time or early for shifts and stay the entire scheduled time. Alert Tony or Geri if you are going to be late for your shift. We understand that attendance in class is a priority and that you may have to leave a few minutes early in order to get to your next class. If you are working with a client and must leave for class and the Tech working the next shift hasn't yet arrived, leave a note in the Shift Change Journal, and let the client know that another Tech will arrive in a few minutes. Alert Tony or Geri if this happens during normal University hours (generally, 8am-5pm, M-F).

Techs are expected to work the shifts they are assigned and to keep their work shift preferences up-to-date. We understand that your class schedules can change throughout each term. It is your responsibility to update your work shift preferences as needed in our scheduling software, WhenToWork.

Clients are always our priority, both at the T&LC Desk and in Help Desk. Focus on resolving/completing one task before moving on to the next one. We want to show clients they are a priority and that our complete attention is on resolving their technology issue. If multiple clients are waiting for assistance, assure them we can help, and ask for their patience while you finish what you are working on (helping another client, creating/resolving a ticket). Clients are generally patient if they know you will be able to focus on them soon.

Techs should not let their personal electronics (phone, computer, tablet) distract them from work. We ask Techs to avoid using personal phones/tablets/computers while working. This includes watching movies or other videos during a shift. You are expected to keep an eye on the T&LC with an emphasis on making eye contact with clients entering the area.

If there are no clients and everything is completed and up to date, you are free to work on homework or other personal tasks. If a client arrives or a new ticket or email comes in, you are expected to put down personal tasks to assist them.

Details

During your shift, you are responsible for the T&LC desk and all technology inside the Connection. This includes making sure computers and printers are operational as well as handling printing/laminating and other project requests made by clients.

Start of Shift Tasks:

1. Badge/Picture/Notepad—put on your badge and put up your picture so clients can identify who you are and that you are available to help them. Use your notepad to take notes while assisting clients.
2. Disinfect—use a sanitizing wipe to disinfect the desk area, mouse, keyboard, and phone. We want to help keep Techs healthy, especially in “cold” season.
3. Login—use your work credentials. When you step away from the T&LC desk, be sure to lock your computer (Windows key + L). When your shift is over, make sure you log out so the next Tech can log in.
 - a. We currently have one work station inside the Help Desk office (Tech 1) and two stations at the T&LC desk (Tech 2 & Tech 3). Tech 3 is set up for project work and has a direct connection to the photo printer. Log in to Tech 3 using our shared project account, TlcMedia. Log in at Tech 2 using your worker account.
4. Shift Change Journal—this is a way for all of us to communicate between shifts. Use this to advise others if a system is down or a project is in-progress when you have to leave. It is also a way to pass on important information regarding a recurring technology problem to the entire team. Please read all entries in the Shift Change Journal since your last shift, being sure to check for updates from previous days. Sign each of your entries with your initials so we know who said what.
5. Rounds—these should be done at the top of every hour of your shift. In rounds, check each computer and each printer in the Connection (Unfiltered Access, Flood Lab, Guest, and T&LC Lab) to be sure they are operational and ready for client use. Make sure printer paper trays and staplers are filled. Chairs, mice, and keyboards should be straightened and any trash cleared from around work stations.

Printers: make sure they are powered up, paper trays are full, and there is adequate toner. There are currently three printers inside the Connection: TLC1C, TLC2C (both outside Flood Lab), and TLC3 (elevator). If there are unclaimed prints in the output tray, move them to the Printed Work trays.

Computers: As you do your rounds, make sure all computers, Windows and Mac, are powered up and ready for log on with no error messages displayed. Use the shift key or mouse to wake up computers rather than any key that adds a character to the username field.

Flood Lab: make sure all laptops are powered up and ready for log on with no errors.

Make the Connection Appealing: straighten chairs, keyboards, and monitors. Clear trash and recycling. We want students, faculty, and guests to have a clean, organized space to work in.

Make Yourself Approachable: look up when someone is entering the Connection. Make eye contact. Be proactive in offering your assistance. (It's okay to study if things are slow, but you are expected to put your books away when the Connection is busy.)

If equipment is not working properly and you don't know how to fix it, create a ticket using 4040connect and post the "Computer Offline" sign (stored in the bottom drawer of the T&LC desk).

Client Interaction

When working with clients, Rule #1 is critical. Once you've identified your client, try to accomplish our Four Objectives.

Rule #1: Identify the Client

You need to know who you are trying to help. The solution you deliver to a student with a malware problem on their personally-owned computer will differ greatly from a Taylor employee with the same problem on a Taylor-owned computer. There are three parts to identifying your client:

1. **Who** – What is their client role? Student, faculty, staff, guest, etc.
2. **What** – What device are they having trouble with? Mac or Windows? Smartphone, tablet, printer, etc.? Equally important, is it personally-owned or Taylor-owned?
3. **Where** – Are they on-campus or off-campus? Taylor's network or other? If on-campus, are they connected to Taylor's network via wired or wireless connection?

4 Objectives of Every Client Interaction (VEST):

1. **Validate** – Make the client feel comfortable. Assure them they have come to the right place and we can help.
2. **Educate** – Explain what you're doing. Help them learn what went wrong and how to avoid the situation in the future.
3. **Solve** – Solve the problem.

NOTE: You are not expected to know how to solve every problem you will face. Focus first on validating your client. It is okay to say "I don't know" as long as you add "but I can find out." You have resources available to find solutions:

- **Resources Page:** Designed with Techs in mind. Links, links, and more links to technology solutions. You need to become intimately familiar with this site.
 - **4040 Support Site:** Designed with clients in mind. Tutorials, utilities, and other resources designed to address common questions. You need to become familiar with this site.
 - **4040 Mailbox:** Look at the Suggested Responses folder for many copy-and-paste solutions.
 - **4040connect FAQs:** Designed with clients AND Techs in mind. Useful for Taylor-specific issues.
 - **Google:** useful for generic technology issues and solutions for specific error messages.
 - **Ask** another Tech or staff member.
4. **Ticket-** Tickets help us track workload, Tech effectiveness, and also provides a way to help clients solve future problems.

4040connect Tickets

We track most every request for assistance using our ticket-tracking solution, WebHelp Desk, which we brand as 4040connect. Clients also can enter, check the status of, and update their requests by logging into 4040connect directly or by email.

When to Enter a Ticket

The general rule is to enter a ticket for any issue that you cannot immediately solve or that needs to be escalated to a specialist. We do not create a ticket for quick client questions or simple requests such as filling a printer with toner or paper. But requests concerning a more involved technology issue should be entered.

When in doubt, enter a ticket.

There are some issues you cannot resolve in a few minutes, such as a malware issue. In these cases, enter a ticket and start the process. Keep the ticket updated as you work so that other Techs can continue the process you started and have a clear understanding of steps you have already completed.

Difference between 4040 and 4040connect

4040 is the team. 4040connect is our automated ticket tracking software.

- 4040 has its own phone number, email address, and website. When clients contact 4040, a member of the CS team will respond. Encourage clients to contact 4040 with quick questions or requests for updates.
- 4040connect has its own email address and website. However, 4040connect is automated software. When clients contact 4040connect, the software will create or edit a ticket. Encourage clients to contact 4040connect if they are reporting a new problem and want a ticket created.

Scheduling of Shifts

We currently use WhenToWork.com as our scheduling software. Use this software to enter your semester schedule and shift preferences and to see your work schedule for the current week/term. You can pick up additional shifts through WhenToWork when another Tech has made them available. If you need to miss a shift, use this software to find a Tech to replace you. It is your responsibility to find a replacement Tech for shifts you have been assigned. If you cannot work a shift, use WhenToWork to Trade or Drop the shift. You have up to 24 hours before your shift to work out a trade. If you cannot arrange a trade 24 hours before your shift, change the shift from Trade to Drop, and email/text Tony to ask for help in finding a replacement.

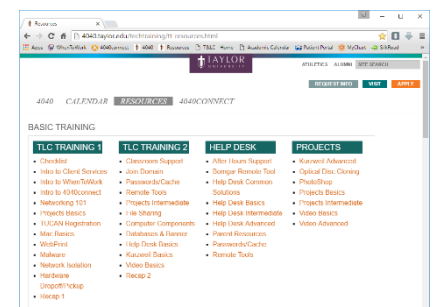
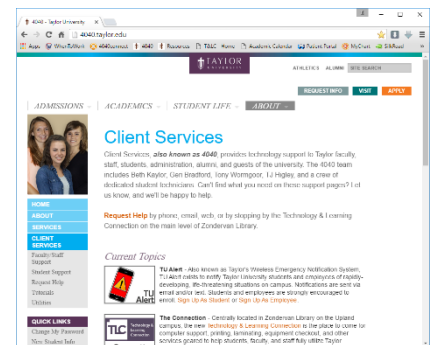
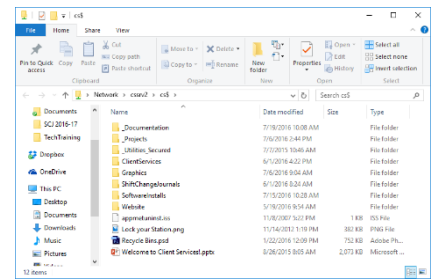
Pay Period

Techs are paid every two weeks. You are responsible for entering your hours into TOWER (look for Time Reporting channel in the employee tab inside myTAYLOR) and submitting your time sheet for approval. It is suggested you enter your hours after your last shift every day. Locate the proper 2-week pay period, and enter your start time and end time for every shift you work (could be one hour or four as a single entry). It is also suggested you submit your time sheet for approval on Sunday mornings. If you forget to submit your hours, Human Resources is unable to produce a paycheck. This will result in a 2-week delay in getting paid.

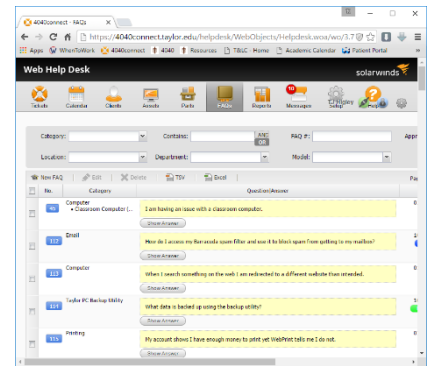
Tech Resources

Take time over your first couple weeks to get familiar with these resources. We use them to find solutions and to point clients to solutions:

- CS File Share: [\\cssrv2\cs\\$](\\cssrv2\cs$)
 - Hosts our support site, tutorials, utilities, projects, documentation, etc.
- 4040 Support Site: <http://4040.taylor.edu>
 - Written with clients in mind.
 - Tutorials, utilities, and other helpful information
 - Clicking the staff pic takes you to our Resources Page
- 4040 Resources Page: http://4040.taylor.edu/techtraining/tt_resources.html
 - Step-by-step tutorials, training materials
 - Clicking 4040 takes you to our Support Site



- 4040connect FAQs: <http://4040connect.taylor.edu>
 - Written with clients and Techs in mind
 - Clients can email it to create a new ticket
 - Techs log in to create and modify tickets



Clients can request help in several ways. Learn the differences:

- Client Services
 - (765) 998-4040 – rings at Help Desk
 - (866) 694-1385 – rings at Help Desk, toll-free
 - 84040 – rings at Help Desk, from Taylor phones only
 - 4040@taylor.edu – email address of Help Desk. Staff read and respond.
 - 4040connect@taylor.edu – email address of our automated ticket tracking software
 - T&LC Desk – walk-up support
- Faculty Connection
 - (765) 998-4444 – rings at Beth’s desk
 - 84444 – rings at Beth’s desk, from Taylor phones only
 - 4444@taylor.edu – email address of Faculty Connection. Staff read and respond.

Once again, welcome to Client Services. We’re glad to have you on the team.