Identify and resolve client ICT problems

Assessment 3 of 6

Portfolio

Assessor Guide

Assessment Instructions

Task Overview

This assessment task is divided into four (4) parts. Read the scenario in Part A and complete the associated tasks in Parts B, C and D. Portfolio tasks may include demonstration of using simulated workplace systems and completion of documentation.

Important: Before commencing your work, you must update your *Student name* and *Student number* in the footer from **page 2** onwards.

Additional Resources and Supporting Documents

To complete this assessment, you will need:

- BF_ICT support system procedures.pdf
- BF_ICT support system database.accdb
- BF_Third-party escalation procedure.pdf
- BF_ICT support call validation procedure.pdf

Assessment Information

Submission

You are entitled to three (3) attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the Learning Platform. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

– the processes for conducting the assessment (e.g. allowing additional time)
– the evidence gathering techniques (e.g. oral rather than written questioning, use of a scribe, modifications to equipment)

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.

Please consider the environment before printing this assessment.

Part A: Simulated environment and resources

All tasks in this assessment refer to a simulated environment where conditions are typical of a work environment experienced in the ICT support field. The scenario relates to a fictitious business organisation called 'Bounce Fitness'.

Read the case study scenario carefully before completing the tasks in Part B.

A1. Scenario

- **Company background**

Bounce Fitness, a premier fitness centre in Australia is a fitness and wellness centre that delivers exceptional client services. It aims to provide innovative solutions and maintain the highest standards in its service offerings. Bounce Fitness offers various programs and facilities aimed at promoting a healthy lifestyle. Some of these programs and facilities use information and communication technology (ICT) systems.

- **Your role:**

You are a newly hired technical support at Bounce Fitness. Part of your tasks is to handle Bounce Fitness' helpdesk to assist your clients with common hardware and software issues in the workplace.

A2. Special-purpose tools, equipment and resources

To carry out the assigned job you must have access to special-purpose tools and equipment such as:

- a computer installed with an operating system (preferably Windows)
- a reliable internet connection.

A3. Industry software packages,

You must use the following industry software packages to carry out the job tasks assigned to you.

- Web browsing software (e.g. Microsoft Edge, Firefox, Chrome, Safari).
- Microsoft Office software (e.g. WORD, Excel, Access).
- A PDF reader.
- ICT Support System database (e.g. Microsoft Access)
  - **File name:** BF_ICT support system database.accdb

A4. Organisational guidelines and procedures

- **BF_ICT support system procedures.pdf** – outlines detailed step-by-step procedures for using the ICT Support System. (e.g. Adding new ICT support staff and case records to the database)
- **BF_Third-party escalation procedure.pdf** – outlines the procedures involved in deciding when and how to escalate ICT issues to third-party vendor or service provider support.
- **BF_ICT support call validation procedure.pdf** – outlines procedures for validating client details during a client engagement activity.

A5. Vendor documentation

CRM Software (Salesforce) vendor documentation

- [Customer Portal Guide (salesforce.com)](https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/customer_portal_guide.pdf) (Long URL: https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/customer_portal_guide.pdf)
- [Issues | Known Issues (salesforce.com)](https://issues.salesforce.com/) (Long URL: https://issues.salesforce.com/)

Part B: Examine logged requests

To complete this part of the assessment, you are required to:

- read the scenario carefully
- access the organisation's logged requests in the Bounce Fitness ICT Support System via the Microsoft Access database software
- refer to the relevant organisational procedure documents outlined in Part A, section A4 of this assessment.

Scenario:

Your colleague 'Phillip Johnson' who is also a Level 1 ICT Support Officer, has gone on leave for a few weeks. Therefore, your manager tasked you with the responsibility of looking into any open and pending cases in the ICT Support System's database.
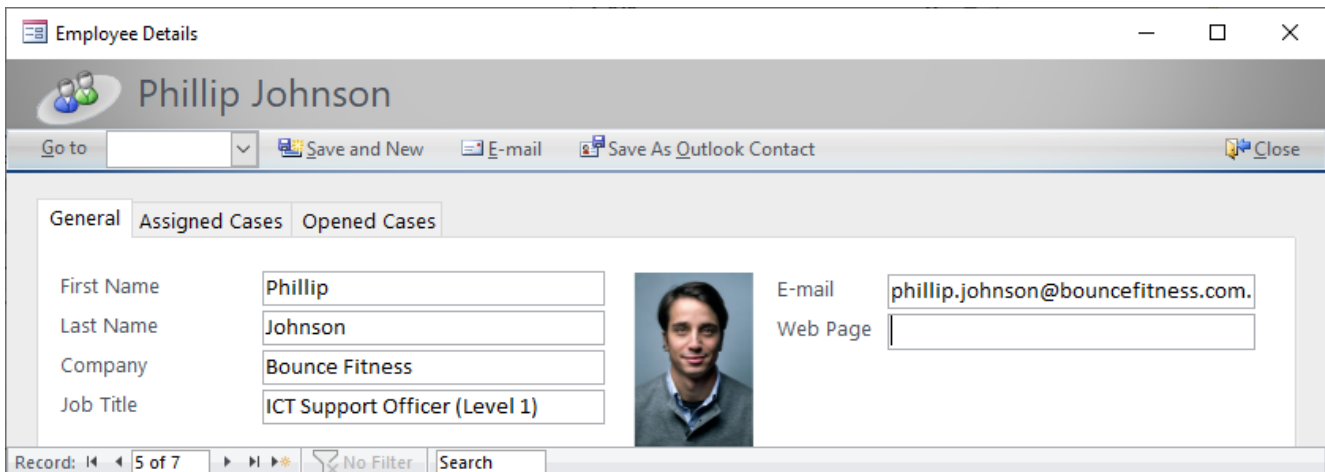
Figure 1 - Employee Details window in Access © Microsoft

You are tasked with examining a total of two (2) logged requests (i.e. cases) in the ICT Support system's database, which currently have a status of 'Open (Unassigned)'.

Examine any logged requests created by 'Phillip' having an 'open (unassigned)' status.

For each opened case (request) determine the customer requirements.

Tasks:

Task B1

To take responsibility for your allocated workload, complete the following activities using the main features and functions of the organisation's digital systems and tools.

a. Add your details as a new ICT Support staff member to the Bounce Fitness ICT Support System. When doing this task, you must:
   - follow the procedure for 'Adding a new ICT Support staff record' as outlined in the 'BF_ICT support system procedures.pdf' document.
   - record your first name, last name details, email address in the format of (firstname.lastname@bouncefitness.com.au) and your job title as 'ICT Supporter Officer (Level 1)'.

b. Using the Bounce Fitness ICT Support System, find the case list having the status 'Open [Unassigned]'. Then, for each of these cases,
    a. set the 'Opened Date' to yesterday's date, assuming that they were opened yesterday (by Phillip before he went on leave)
    b. assign it to yourself as the Level 1 ICT Support Staff looking into the customer's request
    c. change the 'Status' to 'Open [Assigned]'.

As evidence of performing the tasks, provide a screenshot of the list of open cases (logged requests) clearly showing the following details

- The 'Assigned To' field information for the two (2) cases assigned to you in the ICT Support System.
- The 'Status' field
- 'The 'Opened Date' field

Evidence of performing the task:

Provide your screenshot in the space provided below.

Assessor instructions:

Assessors are to indicate the task result as Satisfactory (S) or Not Yet Satisfactory (NYS).

Assessor comments:	☐ S	☐ NYS

In the course of the above, the student must demonstrate their ability to:

- examine logged requests
- interprets technical specifications and numerical data organisational documentation and sources to assist in rectifying problems
- use the main features and functions of the ICT Support System database (i.e. Microsoft Access) to complete work tasks.

A sample screenshot is provided below.
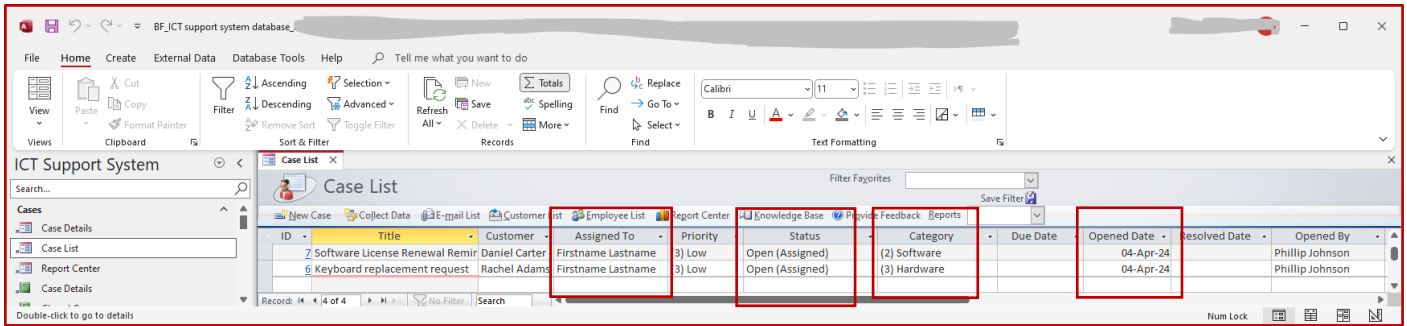
Task B2

Examine the logged requests of the two (2) open cases assigned to you and determine their requirements.

For each case, you must:

a. assign the appropriate 'Category', 'Priority' and 'Impact' details
b. make additional notes of the steps required for addressing the customer's request in the 'Case Information' tab, under 'Description'. This can be in the form of a sequenced list of at least two(2) to five (5) sub-tasks. (Approximate word count: 35-60 words)

As evidence of performing the task, provide a screenshot of each open case after recording the required information.

Evidence of performing the task:

Provide the two (2) screenshots in the space provided below.

Assessor instructions:

Assessors are to indicate the task result as Satisfactory (S) or Not Yet Satisfactory (NYS).

Assessor comments:	☐ S	☐ NYS

In the course of the above, the student must demonstrate their ability to:

- determine requirements of logged requests
- take responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes
- use the main features and functions of the ICT Support System database (i.e. Microsoft Access) to complete work tasks.

Students are likely to use different wording than the sample answer provided. However, the acceptable responses must:
- be within the specified word limit
- reflect the characteristics described in the exemplar answer.

Sample screenshots are provided below.

Case Details

Save and New **E-mail** **Print** **Close**

Title	Keyboard replacement request	ID	6

Customer	Rachel Adams	Category	(2) Hardware
Opened By	Phillip Johnson	Priority	(3) Low
Opened Date	04-Apr-24	Impact	(3) Low
Due Date		Knowledge Base Ref.	
Assigned To	Firstname Lastname-ICT Support Officer (Level 1)	Status	Open (Assigned)
		Resolved Date	
		Attachments	(0)

Case Information Related Cases Calls Impact Analysis Resources Resolution Client Feedback

New Comment

Description

Requesting a replacement keyboard for workstation WKS-101 in the marketing department. The current keyboard is malfunctioning intermittently, affecting typing efficiency. Low priority as there are spare keyboards available for temporary use.

To do:
1. Check for replacement keyboards in storage/inventory
2. If available, replace customer's keyboard with working keyboard
3. If not available in inventory, place an order for a new keyboard
4 Collect customer's existing keyboard - conduct tests to confirm malfunction
5. If keyboard is faulty and cannot be fixed, follow organisational procedure for equipment disposal.

History

Record: 5 of 7 ▸ ▸▹ ▸✱ ⟲ Unfiltered Search

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Case Details

Title	Software License Renewal Reminder	ID	7
Customer	Daniel Carter	Category	(1) Software
Opened By	Phillip Johnson	Priority	(3) Low
Opened Date	04-Apr-24	Impact	(3) Low
Due Date		Knowledge Base Ref.	
Assigned To	Firstname Lastname-ICT Support Officer (Level 1)	Status	Open (Assigned)
		Resolved Date	
		Attachments	(0)

Case Information | Related Cases | Calls | Impact Analysis | Resources | Resolution | Client Feedback

New Comment

History

Description

Reminder to renew the software license for the project management software (PMTool) installed on workstation WKS-202. The license is due for renewal by the end of the month. Low priority as renewal can be scheduled before the expiration date.

To do:
1. Find out details of the PMTool to be renewed, how many workstations it is installed on, any license details recorded in the software inventory.
2. Check future requirement for the software with department management.
3. If software is required to be renewed, check with vendor for license renewal options

Record: ◄ 6 of 7 ► ►I ►* Unfiltered | Search

Part C: Identify resolution options

To complete this part of the assessment, you are required to:

- read the scenario carefully
- access the 'Knowledge Base' (i.e. known problems database) in the Bounce Fitness ICT Support System via the Microsoft Access database software
- refer to the relevant organisational procedure documents outlined in Part A, section A4 of this assessment
- take responsibility for planning, sequencing and prioritising tasks and workload for efficiency and effective outcomes.

Scenario:

During the morning briefing, your manager advised you to be aware that:

- you are on duty at the ICT Support Center to handle all incoming customer requests as your colleague Phillip Johnson the other Level-1 ICT Support Officer, has gone on vacation till next week.
- all technicians have gone for a training workshop till lunchtime this afternoon; therefore, during this time, if there are any urgent customer requests, you will need to attempt to resolve them via remote troubleshooting.

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After the briefing, you arrive at your desk to find the following voicemail message from a client.

<Voicemail message received on [today's date] at 9:30 AM>

"Hello, this is **George Brown** calling from Bounce Fitness. I'm experiencing some trouble accessing the internet and any network resources from my workstation. I've tried restarting my computer, but unfortunately, I'm still unable to access any online services or shared drives.

Could you please assist me in resolving this matter? I rely heavily on these resources for my work, and the disruption is affecting my productivity. I also have an important online meeting in 2 hours, for which I need to access my presentation slides on my shared drive. If there are any troubleshooting steps I should follow or if you need additional information, please let me know.

You can reach me at +61 02 9002 1503.

Thank you, and I look forward to getting this issue resolved soon."

<End of voicemail message>

Tasks:

As the ICT Support Officer handling the customer request, plan and prepare for the task by doing the following.

C1. Open a new case (i.e. ticket) using the Bounce Fitness ICT Support System database to record the basic details of the client's ICT problem according to information from the client's voicemail message. When doing this task, you must:
   a. follow the procedure for 'Adding a new case record' as outlined in the 'BF_ICT support system procedures.pdf' document
   b. ensure details such as: 'Title', 'Customer', 'Opened By', 'Opened Date', 'Assigned To', 'Category', 'Priority' and 'Status' are documented
   Note: At this stage, the 'Impact' can be stated as 'Undecided' as it will be determined after contacting the client at a later time.
   c. include a brief description of the ICT problem (Approximate word count: 35-50 words).

C2. Establish and record required constraints (or limitations) for resolving this issue in terms of time and resources. You must document the required constraints within the 'Case Information' > 'Description' section of the case record under the comment "---Required constraints---" (Approximate word count: 15-45 words).

C3. Check the known problems database (i.e. the Knowledge Base) to identify resolution options that may help solve the client's ICT problem. When doing this task, you must:
   a. refer to the known problems database in the 'Bounce Fitness ICT Support System' > 'Knowledge Base Details and List'
   b. make notes of the problem-resolution advice and support you would need to provide the client by:
      i. indicating the appropriate knowledge base article reference in the new problem case (ticket) in 'Knowledge Base Ref,'.
      ii. using the 'Resources' > 'Resource Details' section of the new case record to make notes on any resources (i.e. Knowledge base document IDs, links to resources etc) that may be required for reference to resolve the problem during the customer service interaction.
      Note: As evidence of performing this task, provide a screenshot of the 'Resource' tab in 'Table 1' under the relevant criteria.

C4. Prepare a sequenced set of questions (5 – 10) you would want to ask your client to:

a. confirm additional information according to the 'BF_ICT support call validation procedure.pdf'.
    Note: You may check the Client's Employee ID number from the system's database and make a note of this for reference during call validation.
b. determine details of the ICT problem using basic problem-solving techniques.
c. obtain feedback on the ICT problem resolution.
d. confirm requirements have been met.

Note: As evidence of performing this task C4, document your prepared list of questions/notes using the following sections of the new case record.

o **'Case Information' > 'Description':** In this section, add the comment "---Notes for Customer Service Interaction---" and below the comment, list your notes and questions related to call validation (e.g. Task C4a) [Approximate word count: 25-50 words]

o **'Resolution' > 'Resolution details':** In this section add the comment "---Notes for Customer Service Interaction---" and below the comment, list your notes and questions for problem-solving (e.g. Task C4b). [Approximate word count: 25-50 words]

o **'Client Feedback' > 'Feedback details':** In this section add the comment "---Notes for Customer Service Interaction---", then below the comment, list your notes and questions for obtaining client feedback and to confirm meeting client requirements (e.g. Tasks C4c and C4d). Approximate word count: 25-50 words]

Evidence of performing the task:

Provide four (4) screenshots of the new case (i.e. ticket) opened in the Bounce Fitness ICT support system's database as evidence of performing the tasks in 'Table 1'.

Assessor instructions:
Assessors are to indicate the task result as Satisfactory (S) or Not Yet Satisfactory (NYS).

Assessor comments:	☐ S	☐ NYS

In the course of the above, the student must demonstrate their ability to:
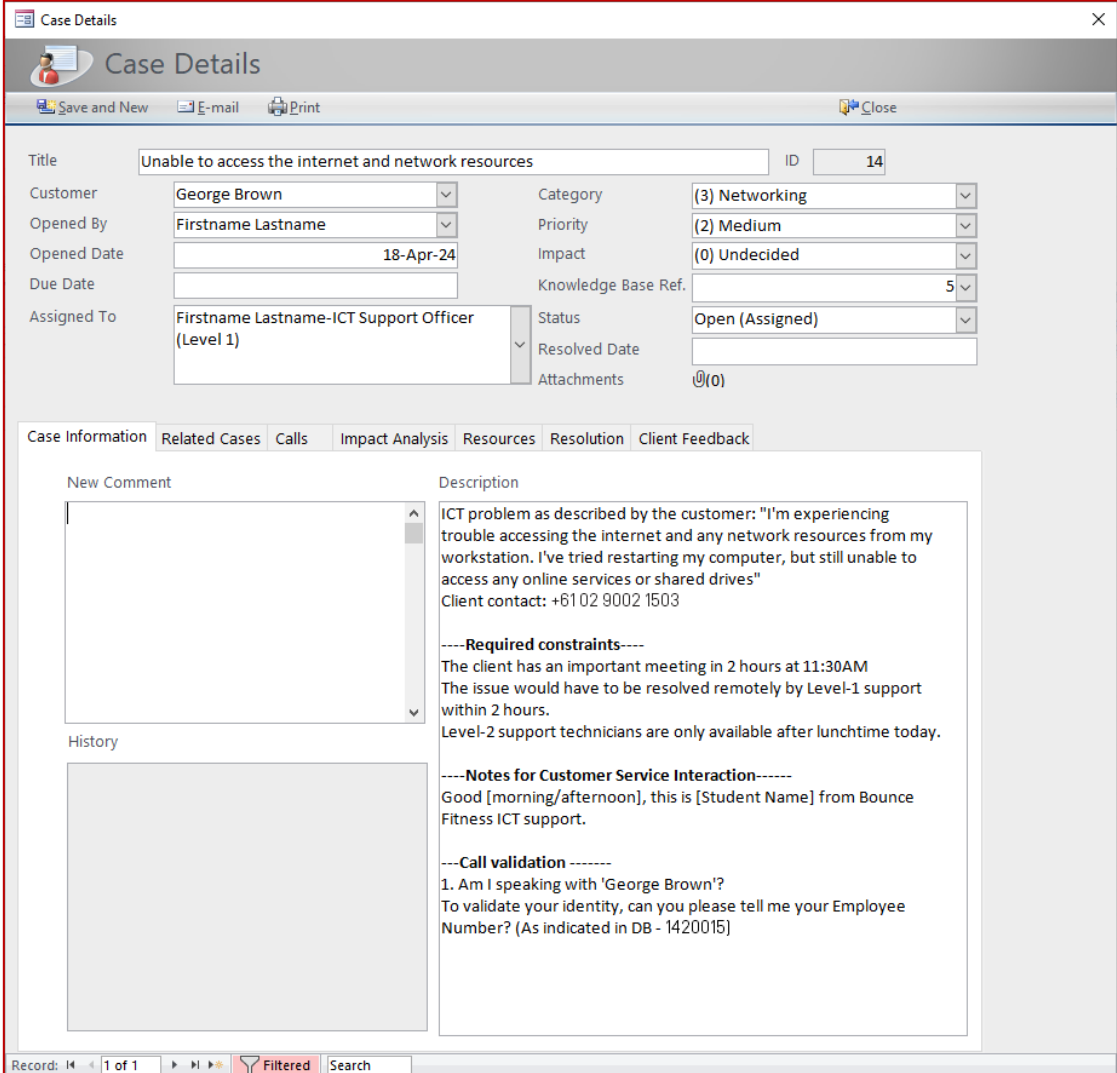
- record and prioritise client support activities
- establish and record required constraints
- refer to a database of known problems (i.e. knowledge base) and identify resolution options
- interpret technical specifications and numerical data from organisational documentation as well as the client's voicemail message to assist in rectifying problems
- takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes
- use main features and functions of the ICT Support System (i.e. Microsoft Access database) to complete work tasks.

Students are likely to use different wording than the sample answer provided. However, the acceptable responses must:
- be within the specified word limit
- reflect the characteristics described in the exemplar answer.

Sample screenshots are provided below.

Table 1 - Part C: Screenshot evidence

Criteria:	Screenshot evidence
Basic case details page, with the 'Case Information' tab selected with correct details recorded for: 'Title', 'Customer', 'Opened By', 'Opened Date', 'Assigned To', 'Category', 'Priority, 'Impact', 'Knowledge Base Ref.', 'Status', and 'Case Information' > 'Description'	

Criteria:	Screenshot evidence
Basic case details page, with the 'Resources' tab selected.	
Basic case details page, with the 'Resolution' tab selected.	
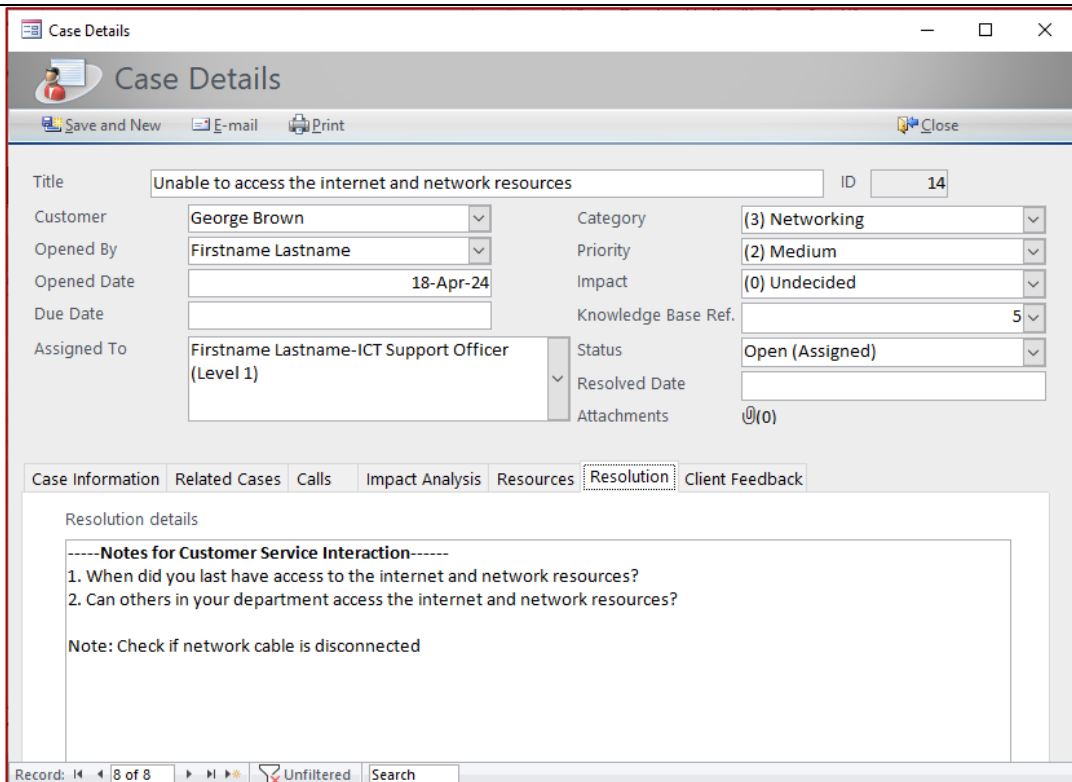
Criteria:	Screenshot evidence
Basic case details page, with the 'Client Feedback' tab selected.	

Part D: Prepare to investigate client ICT problem

To complete this part of the assessment, you are required to:

- read the scenario carefully
- access the Bounce Fitness ICT Support System via the Microsoft Access database software
- refer to the relevant organisational procedure documents (Part A, section A4) and vendor documentation (Part A, sections A5) of this assessment as required
- take responsibility for planning, sequencing and prioritising tasks and workload for efficiency and effective outcomes.

Scenario:

You have received the following email from a client.

From: jenny.taylor@bouncefitness.com.au
CC: michael.evans@bouncefitness.com.au
To: ictsupport@bouncefitness.com.au
Date and Time: Today, 10:15 AM

Subject: Urgent: CRM Software System (Salesforce) Issue

Dear ICT Support Team,

I hope this email finds you well. I am writing to report a critical issue with our Customer Relationship Management (CRM) software system (Salesforce) that requires immediate attention.

Since this morning, all department members (10 users) have not been able to access the CRM system.

As this issue is department-wide and significantly impacts our ability to perform duties, we urgently request your assistance in investigating and resolving this matter. Please prioritise this request and provide updates on the progress and expected resolution time as soon as possible.

Please contact Michael Evans, one of our Customer Relations Officers at +61 02 9002 2854 for further information or assistance from our end to facilitate the troubleshooting process.

Thank you, and I look forward to getting this issue resolved soon."

Jenny Taylor

[Customer Relations Manager]

After discussing this issue with your manager, you have been advised of the following guidelines for handling urgent and high-priority issues.

- Vendor Support: If internal troubleshooting efforts fail to resolve the issue within 2 hours, escalation to the CRM software vendor's support team is required for further assistance.
- Communication: Regular updates must be provided to departmental stakeholders, including managers and team members, regarding the progress of the investigation and expected resolution time.

Tasks:

As the ICT Support Officer investigating the ICT problem, plan and prepare for the task by doing the following.

D1. Open a new case (i.e. ticket) using the Bounce Fitness ICT Support System Database to record the basic details of the client's ICT problem according to information from the received email. When doing this task, you must:
  a. follow the procedure for 'Adding a new case record' as outlined in the 'BF_ICT support system procedures.pdf' document.
  b. ensure details such as: 'Title', 'Customer', 'Opened By', 'Opened Date', 'Assigned To', 'Category', 'Priority', 'Impact' and 'Status' are documented
  c. include a brief description of the ICT problem (Approximate word count: 35-50 words).

D2. Establish and record required constraints (or limitations) for resolving this issue in terms of time and resources. You must document the required constraints within the 'Case Information' > 'Description' section of the case record under the comment "---Required constraints---" (Approximate word count: 15-45 words).

D3. Check the known problems database (i.e. the Knowledge Base) to identify troubleshooting guidelines that may help solve the client's ICT problem. When doing this task, you must:
  a. refer to the known problems database in the 'Bounce Fitness ICT Support System' > 'Knowledge Base Details and List'
  b. make notes of the problem-resolution advice and support you would need to provide the client by:
    i. indicating the appropriate knowledge base article reference in the new problem case (ticket) in 'Knowledge Base Ref,'.
    ii. using the 'Resources' > 'Resouce Details' section of the new case record to make notes on any resources (i.e. Knowledge base document IDs, links to vendor resources and relevant organisational guidelines etc) that may be required for reference to investigate the problem during the customer service interaction.
       Note: As evidence of performing this task, provide a screenshot of the 'Resource' tab in 'Table 1' under the relevant criteria.

D4. Prepare a sequenced set of questions (5 – 10) you would want to ask your client to:

a. confirm additional information according to the 'BF_ICT support call validation procedure.pdf'.
Note: You should check the Client's Employee ID number from the system's database and make a note of this for reference during call validation.
b. determine details of the ICT problem using basic problem-solving techniques.

Note: As evidence of performing the above task D4, document your prepared list of questions/notes using the following sections of the new case record.

o **'Case Information' > 'Description':** In this section, add the comment "---Notes for Customer Service Interaction---" and below the comment, list your notes and questions related to call validation [e.g. Task D4a] [Approximate word count: 25-50 words]

o **'Resolution' > 'Resolution details':** In this section add the comment "---Notes for Customer Service Interaction---" and below the comment, list your notes and questions for investigating the issue [e.g. Task D4b]. [Approximate word count: 100-130 words]

Evidence of performing the task:

Provide three [3] screenshots of the new case [i.e. ticket] opened in the Bounce Fitness ICT support system's database as evidence of performing the tasks in 'Table 2'.

Assessor instructions:
Assessors are to indicate the task result as Satisfactory [S] or Not Yet Satisfactory [NYS].

Assessor comments:	☐ S	☐ NYS

In the course of the above, the student must demonstrate their ability to:
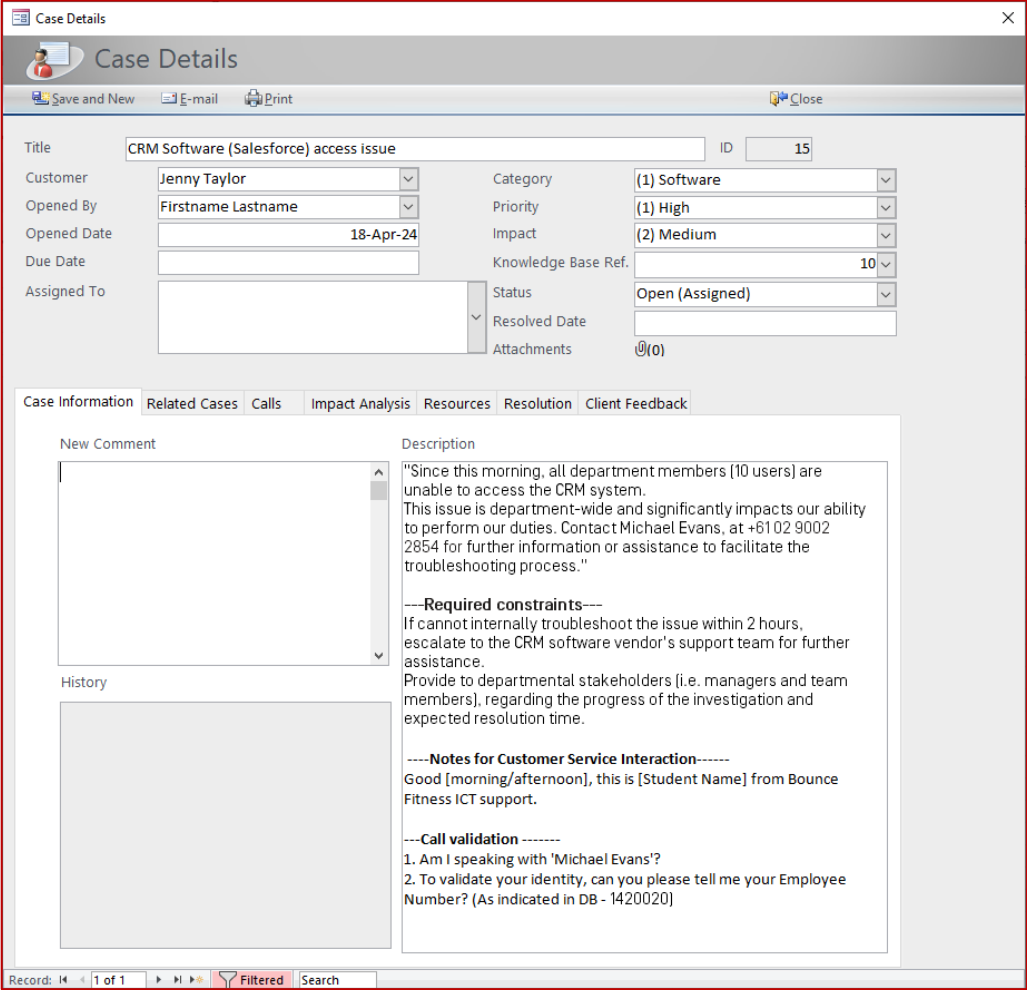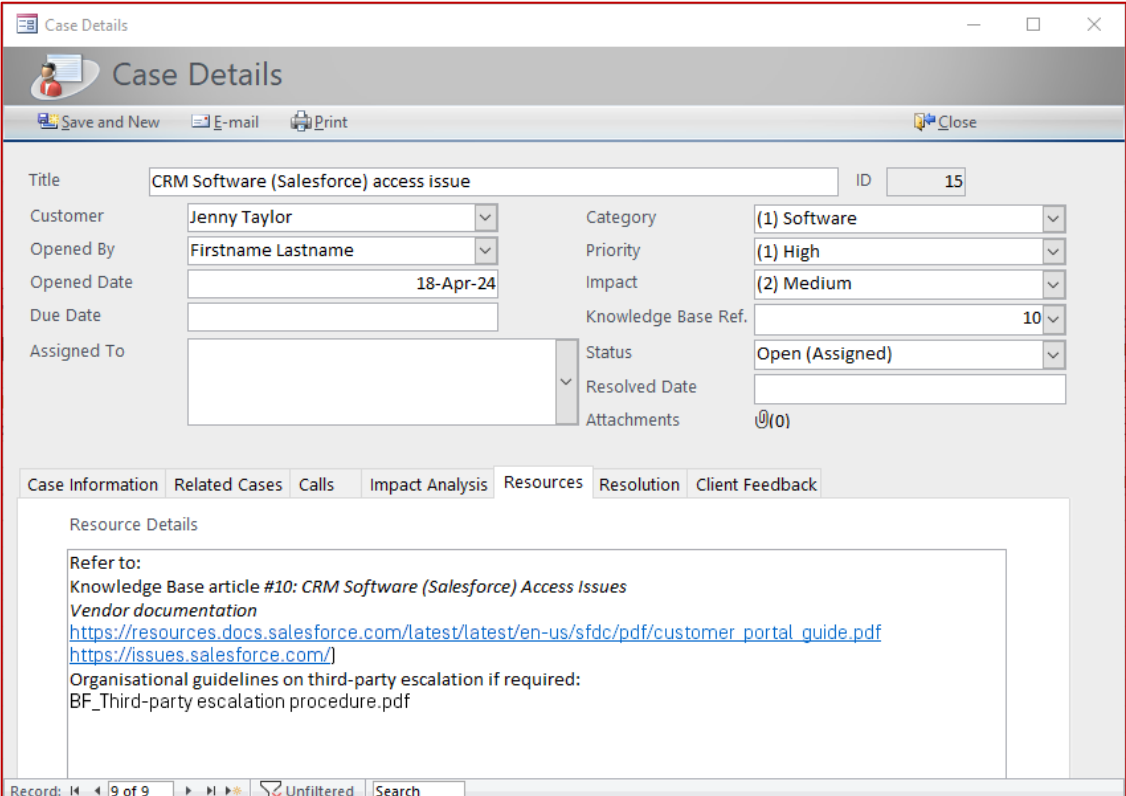
- record and prioritise client support activities
- establish and record required constraints
- interpret technical specifications and numerical data from organisational documentation as well as the client's email message to assist in rectifying problems
- takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes
- use main features and functions of the ICT Support System (i.e. Microsoft Access database) to complete work tasks.

Students are likely to use different wording than the sample answer provided. However, the acceptable responses must:
- be within the specified word limit
- reflect the characteristics described in the exemplar answer.

Sample screenshots are provided below.

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Table 2 - Part D: Screenshot evidence

Criteria:	Screenshot evidence
Basic case details page, with the 'Case Information' tab selected with correct details recorded for: 'Title', 'Customer', 'Opened By', 'Opened Date', 'Assigned To', 'Category', 'Priority, 'Impact', 'Status', and 'Case Information' > 'Description'	
Basic case details with the 'Resources' tab selected.	

Criteria:	Screenshot evidence
Basic case details page, with the 'Resolution' tab selected.	

IMPORTANT: Once you have completed all tasks, save and close the Microsoft Access database file (BF_ICT support system database.accdb) as you will continue to work on this file again in the next assessment.

Appendix 1: Assessment submission checklist

Students must have completed all case studies within this assessment before submitting. This includes:

Part B: Examine logged requests		
B1	One (1) screenshot	☐
B2	Two (2) screenshots	☐
Part C: Identify resolution options		
C1-4	Four (4) screenshots	☐
Part D: Prepare to investigate client ICT problem		
D1-4	Three (3) screenshots	☐

Assessment feedback

Assessors are to indicate the assessment outcome as Satisfactory (S) or Not Yet Satisfactory (NYS).

Assessor Name:

Date:

Assessor comments: ☐ S   ☐ NYS

Congratulations, you have reached the end of Assessment 3!