

# **IT Support: Documentation**

**Modality: On Demand**

**Duration: 20 Hours**

## **About this course:**

This course dives deep into the case management process and how to identify key issues that need to be documented throughout the evolution of a case. You will examine the reasons why documentation is so critical in the field of IT Support, and why it is so crucial for capturing all viewpoints within case documentation, from the support agent, to the customer, and to any other internal resource who may get involved.

The course begins with an analysis of how to document different types of support cases, from advisory cases to reactive cases to escalated cases. The course then introduces you to various types of tools used to document cases. And finally, the course concludes with an examination of the different types of questions that a support agent needs to ask and document based on specific workflow situations.

At the completion of the course, the student will have a greater appreciation for the importance of maintaining complete, detailed, and accurate documentation and when and how to apply that knowledge.

This is the last in a series of four courses that are targeted to individuals who are considering a move into IT Support. This course is a follow up on the IT Support Troubleshooting course.

## **Course Objective:**

- Understand what an advisory case is and identify the key requirements that should be documented for such a case
- Understand what a reactive case is and identify the key requirements that should be documented for such a case
- Understand what the key requirements are that should be documented when escalating a case, as well as when to conduct warm transfers
- Examine the types of tools that are commonly used to capture customer data
- Identify key questions that should be asked during different phases of the case management life cycle
- Identify key questions that should be asked when encountering specific problem situations

## **Audience:**

- IT Support officer

## **Prerequisite:**

- There are no prerequisite required for this course

## **Course Outline:**

### **Documentation Requirements**

- Why Document?
- What Are You Documenting?
- Who Cares About Documentation?
- Module Assessment Exam

### **Documenting Cases**

- Assignment
- Scoping
- Graded Exercise: Scoping Agreement
- Solution Development
- Solution Validation
- Closure
- Graded Exercise: Closing a Case
- Module Assessment Exam

### **Knowledge Management & Documentation Tools**

- Case Management
- Process and Procedure System
- Knowledge and Intellectual Capital (IC) Repository
- Customer Relationship Management
- Module Assessment Exam

### **Performance Measures and Indicators**

- Key Performance Indicators
- Scorecards and Dashboards
- Other Metrics
- Module Assessment Exam

### **Course Conclusion**

- Final Exam?