



Don't Miss Your Help Desk Connection:
Troubleshooting and Reporting

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Session Take Aways



1. Understanding the problem being reported.
2. Troubleshooting the problem.
3. Improve efficiency by clearly communicating the problem to the Foothold Help Desk.
4. Tips for a more effective Help Desk.

Understanding the Problem



- Never assume you know the details of a customer issue/request without “seeking to understand”.
- Ask the right questions:
 - What information do you need to see the problem being reported.
 - Be specific about what additional information you need from the user.

Troubleshooting the Problem

- Eliminate any possible non-AWARDS issues.
 - Check Internet connection, printer settings, screen resolution, empty cache, etc.
- Attempt to replicate the issue.
- Use the Online Help to find an answer.

Troubleshooting the Problem



- Use all available resources at your agency to try to solve the user's issue on the first contact.
 - Other internal help desk members
 - Past experience/similar issues
 - Test or training programs in your database to replicate and troubleshoot the problem
- Contact the Foothold Help Desk

Brief Overview of Online Help



- The Help Menu button
 - Context sensitive
 - FAQs
- Navigation Pane
- Additional Resources
- How Do I...

Communicating the Problem

- AWARDS is very configurable.
- Every AWARDS database has elements that are different from other AWARDS databases.
- The Foothold Help Desk staff is not familiar with your acronyms, program nicknames, form nicknames, etc.
- Guide the Foothold Help Desk to the issue that you are reporting.

Communicating the Problem



Sending a message to the Foothold Help Desk:

- Be concise
- Be specific
- Include a path

Communicating the Problem



- Be concise
 - What was the user trying to do/what did they expect to happen?
 - What happened instead (aka the problem)?
 - Is it possible to give too much information?
 - Summarize the issue for the Foothold Help Desk.

Communicating the Problem

- Be specific
 - Include data elements exactly as they appear in AWARDS.
 - Module being used and path taken
 - Full program name (don't use acronyms or abbreviations)
 - Full client name (avoid using initials)
 - Full FormBuilder form name and exact field labels
 - Page title (located at the top of the page)
 - Other Help Desk ticket numbers, when applicable
 - Quote error messages or pop-ups

A Note About the Help Desk Form

Record/Data Details:

If your problem or question is related to specific records or data in AWARDS, please record the details using the fields and options that follow. Enter "N/A" in the Consumer Name field if you are not working with the records for a specific consumer(s). When working with reports, be sure to include the full report date range you used in the Data Date(s) field.

Data Date(s):

Consumer Name:*

User Information:

Please identify yourself (or the user submitting the problem or question if not yourself) and let us know what steps you took to gather information prior to contacting the Help Desk. Note that if you work with more than one program, the program you select below should be the one related to your question or problem.

Name/Login ID:*

Communicating the Problem



- Include a path
 - Why it's good practice
 - How to write a path

Let's Practice



“I’m running a Progress Notes Report to look at notes written by *Moody Blues*, but I’m not seeing any notes.”

- What’s missing?
- Troubleshooting
- Writing the path

Tips for a More Effective Internal Help Desk

- Communication between internal Help Desk members.
 - Coordinate ticket management
 - Divide tasks by expertise
 - Scheduled meetings to discuss outstanding issues and close any loops
- Create folders for reference in your AWARDS inbox.
- Consider a rotation schedule.
- Include representatives from different programs.

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Questions?

World Travelers,



Join us at the Rosenthal Pavilion on the 10th floor at 4:10 for the ice cream social, and enter our raffle for a chance to win an iPad Mini!

-Foothold Technology

Expo2014 Attendee

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