

# Unit 9: Customer support (LEVEL 2)

## Learning outcomes

By completing this unit candidates will develop the ability to identify and provide the basic types of technical information and support required by end-users by using appropriate communication methods to collect information.

Candidates will be able to:

- identify and provide basic types of technical information and support required by end-users using appropriate communication methods
- use appropriate methods to record specific details of problem/requirements identified by end user
- select technical information from a variety of sources
- participate in reviews and produce reports detailing existing hardware and software provision and identify existing frequently used automated procedures
- identify and use appropriate methods to produce recommendations for potential improvements in the use of hardware and software, and automated procedures
- create and test routine automated procedures and assist others to create more complex automated procedures.

**It is anticipated that a candidate will require 60 guided learning hours to complete this unit.**

Assessment objectives	Knowledge, understanding and skills
1 Identify and provide basic types of technical information and support required by end-users using appropriate communication methods	Determine requirements for different types of end-users, including: <ul style="list-style-type: none"><li>• data operators</li><li>• managers</li><li>• technical</li></ul> Determine differing end-user requirements including: <ul style="list-style-type: none"><li>• training</li><li>• location of technical information</li><li>• FAQs</li><li>• hints and tips</li></ul>
2 Use appropriate methods to record specific details of problem/requirements identified by end-user	Method of recording requirements: <ul style="list-style-type: none"><li>• manual logs</li><li>• call logging software</li><li>• electronic submission</li><li>• verbal</li></ul> Information collated to include: <ul style="list-style-type: none"><li>• dates/times</li><li>• identification of support staff</li><li>• location</li><li>• problem/requirement</li><li>• solution/outcome</li><li>• who the problem is to be referred to if specialist advice is required</li></ul>

Assessment objectives	Knowledge, understanding and skills
3 Select technical information from a variety of sources	Sources: <ul style="list-style-type: none"> <li>• on-line</li> <li>• written/verbal</li> <li>• others (telephone-help lines, manufacturers)</li> </ul>
4 Participate in reviews and produce reports detailing existing hardware and software provision and identify existing frequently used automated procedures	Appropriate method of collating the required information: <ul style="list-style-type: none"> <li>• questionnaires</li> <li>• audit trails</li> <li>• network access logs</li> <li>• application access logs</li> <li>• internet/email access logs</li> <li>• support logs</li> </ul> To include: <ul style="list-style-type: none"> <li>• workstations</li> <li>• peripherals</li> <li>• network hardware</li> <li>• consumables</li> <li>• operating systems (workstation, server and network)</li> <li>• applications installed</li> <li>• components of applications</li> <li>• versions</li> <li>• licence provision</li> <li>• utilities including virus checkers</li> </ul>
5 Identify and use appropriate methods to produce recommendations for potential improvements in the use of hardware and software, and automated procedures	Appropriate method of collating the required information including: <ul style="list-style-type: none"> <li>• questionnaires</li> <li>• verbal</li> <li>• observation</li> <li>• keystroke monitoring</li> <li>• audit trails</li> </ul> Based on findings, areas where potential improvements could be made may include: <ul style="list-style-type: none"> <li>• utilities</li> <li>• email</li> <li>• internet/intranet</li> <li>• back-ups</li> <li>• data transfer</li> <li>• macros</li> <li>• menus</li> </ul>

Assessment objectives	Knowledge, understanding and skills
6 Create and test routine automated procedures and assist others to create more complex automated procedures	<p>Routine automated procedures may include:</p> <ul style="list-style-type: none"> <li>• automatic back-ups</li> <li>• scheduled utilities including virus scans, disk scanning and defragmenting</li> <li>• shortcuts</li> <li>• hyperlinks</li> </ul> <p>Testing of routine automated procedures following an agreed plan with full records of testing including the actual outcome of the test, data used and any remedial action to be taken</p> <p>End-users' needs for complex automated procedures including:</p> <ul style="list-style-type: none"> <li>• macros,</li> <li>• network/work station log-in screens,</li> <li>• batch files</li> </ul> <p>Existing system configurations which may be affected by the development of automated procedures</p> <p>Testing of complex automated procedures following an agreed plan with full records of testing including the actual outcome of the test, data used and any remedial action to be taken</p> <p>Documentation for the automated routine which may assist in future end-user support</p>

## Assessment

This unit is centre assessed and externally moderated.

In order to achieve this unit, candidates must produce a portfolio of evidence showing that they have met all of the assessment objectives.

Portfolios of work must be produced independently. They will need to be made available, together with witness statements and any other supporting documentation, to the OCR Visiting Moderator when required.

Centres must confirm to OCR that the evidence produced by candidates is authentic. An OCR Centre Authentication Form is provided in the Centre Handbook and includes a declaration for assessors to sign. It is a requirement of the QCA Common Criteria for all Qualifications that proof of authentication is received.

## Guidance on assessment and evidence requirements

This unit requires candidates to provide support to end-users. The end-user may be the tutor. Candidates may work in a group to complete some of the assessment objectives, however, all work submitted by a candidate must be their own. The group may be a minimum of two people, one of whom may be the tutor or the group may comprise a number of candidates. Tutors should record the performance of each candidate within a group where groups are larger than two. The witness statements must reflect the contribution that the candidate has made during the development, production and implementation of the procedure, candidates within the same group may be awarded different grades.

The evidence presented should relate to a single business scenario. The context for this assignment may be derived from candidates' experience in the workplace, or may be a case study devised by the centre.

For Assessment Objective 1 candidates must use appropriate communication methods to identify and provide basic technical support. They should ascertain the needs of different types of end-

users, for example, managers, data operators and determine their differing requirements including training, help guides, FAQs and how to access technical information and support.

For Assessment Objective 2 candidates must record specific details of requirements and problems identified by end-users. Recording may be manual logs, call logging software, electronic or verbal recording. Information gathered must include dates, times, location, problems, requirements, identification of support staff or who a problem was referred to and the solution or outcome.

For Assessment Objective 3 candidates should locate technical information that meets the needs of end-user problems and requirements from a variety of sources. The sources may include on-line help, written/verbal support or telephone help lines.

For Assessment Objective 4 candidates must participate in reviews and produce reports detailing hardware and software provision. They may work in teams for this objective. They should use appropriate methods of gathering this information, for example network, application, internet, email, access logs, questionnaires or audit trails. Candidates should identify existing, frequently used automated procedures. They could include the following in their review and identification: workstations, peripherals, hardware, consumable, operating systems, applications and components and license provision of these and utilities (eg virus checkers).

For Assessment Objective 5 candidates will need to identify and use appropriate methods of producing recommendations for improvements in hardware and software use and automated procedures. They could gather collate information using questionnaires, observation, keystroke monitoring or audit trails. Areas of potential improvement could include utilities, email/internet/intranet, back-ups, data transfer, macros or menus.

For Assessment Objective 6 candidates must create and test routine automated procedures. These may include automatic back-ups, scheduled virus and disk scanning, defragmenting, shortcuts, hyperlinks. They should test the routine procedures following an agreed plan and should record the actual outcome of the test, the data used and any remedial action they have taken. They will also need to assist others to create more complex automated procedures including macros, log-in screens and batch files.

Candidates may provide evidence for the assessment objectives of this unit using a range of presentation techniques. This may include forms, written data, the use of video, audio or computer based presentation, photographs and assessor testimony/witness statements. Where candidates demonstrate competence, centres should record skills demonstrated on appropriate recording documentation.

## Signposting to Key Skills

- ✓ The unit contains opportunities for developing the Key Skill, and possibly for generating portfolio evidence, if teaching and learning is focused on that aim.

Key Skill reference		Key Skill reference		Key Skill reference	
C2.1a		ICT2.1	✓	N2.1	
C2.1b		ICT2.2	✓	N2.2	
C2.2	✓	ICT2.3	✓	N2.3	
C2.3	✓				

## Mapping to National Occupational Standards

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National Occupational Standards	Reference ID	Title
IT Professional (e-skills UK)	IDR2	Investigating and defining requirements
IT Professional (e-skills UK)	CC2	Customer Care Level 2

## Resources

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This section provides suggestions of suitable resources. The list is neither prescriptive nor exhaustive, and candidates should be encouraged to gather information from a variety of sources. Some suggested resources are intended for Tutor use. The resources in this section were correct at the time of production.

### Books

Banks, Harber-Stuart & Parry	<i>Applied ICT</i> Folens
Walmsley, Seargent & Hinder	<i>ICT for GCSE</i> Hodder & Stoughton
Doyle & Penrose	<i>IS for you (series)</i> Nelson Thorne
Lawson (editor)	<i>ICT</i> Longman
CGP	<i>GCSE ICT (Revision Guide)</i> CGP
BCS	<i>A Glossary of Computing Terms</i> Addison Wesley

### Websites

Computer Information <http://www.compinfo.co.uk/>

A portal to website relating to specified areas of computing e.g. software, hardware, routines.

BT Internet <http://www.btinternet.com/~c.j.duley/>

A useful website written by a teacher, there are links to other websites, student areas, glossary's.

The Free dictionary <http://www.thefreedictionary.com>

A free dictionary site, with clear definitions, links to other words/terms held in the dictionary.

Business Link <http://www.businesslink.gov.uk>

Business Link website details different types of training suitable for end-users.

## Grading

Assessment Objective	Pass	Merit	Distinction
<b>AO1</b> Identify and provide basic types of technical information and support required by end-users using appropriate communication methods	Candidates will identify at least one type of end-user and the associated end-user requirements.	Candidates will identify at least two different types of end-user and their associated end-user requirements.	Candidates will identify more than two different types of end-user and their associated end-user requirements. Candidates will provide support to end-users using clear communication methods.
<b>AO2</b> Use appropriate methods to record specific details of problem/requirements identified by end-user	Candidates will use basic information gathering techniques to record details of problems reported by end-users but these will be limited and will not enable all needs/requirements of the end-users to be recorded. They will use basic methods of recording problems and the record will have essential information (problem/requirement and date/time).	Candidates will use appropriate information gathering techniques to record details of problems reported by end-users, these will be well documented and will enable most of the needs/requirements of the end-users to be recorded. They will record information clearly and using electronic methods of recording (eg call logging software).	Candidates will use complex information gathering techniques to record a detailed analysis of problems reported by end-users, these will be of a high standard and will enable all of the needs/requirements of the end-users to be recorded. They will record information clearly and fully and will include suggested solutions and identification of support staff. They will use efficient electronic methods of recording (eg call logging software, electronic submission).
<b>AO3</b> Select technical information from a variety of sources	Candidates will select a few sources for technical information; not all sources identified will be appropriate (eg written or verbal).	Candidates will select a range of mostly appropriate sources of technical information (eg online, help lines).	Candidates will select a wide range of appropriate sources of technical information (eg online, written, verbal, help lines, support sites).

Assessment Objective	Pass	Merit	Distinction
<b>AO4</b> Participate in reviews and produce reports detailing existing hardware and software provision and identify existing frequently used automated procedures	As a member of a team, candidates will create and use appropriate methods to gather information to identify the current usage of hardware and software, and existing frequently used automated procedures. However their contribution will be limited to basic suggestions and may not always be the most appropriate. Their contribution to the report on the existing hardware and software provision and the use of frequently used automated procedures will be limited. They will use basic methods of gathering information eg questionnaires.	As a member of a team, candidates will create and use appropriate methods to gather information to identify the current usage of hardware and software, and existing frequently used automated procedures. Their contribution will be significant and appropriate. They will make a significant contribution to the report on the existing hardware and software provision, and the use of frequently used automated procedures. They will use basic methods of gathering information and present this information clearly.	As a member of a team, candidates will create and use appropriate methods to gather information to identify the current usage of hardware and software and existing frequently used automated procedures. Their contribution will be instrumental and their suggestions will be appropriate and detailed. They will take leading roles in preparing the report on the existing hardware and software provision and the use of frequently used automated procedures. The report will be appropriate and comprehensive and will provide detailed explanations. They will use appropriate methods of collating information eg audit trails, network access logs.

Assessment Objective	Pass	Merit	Distinction
<b>AO5</b> Identify and use appropriate methods to produce recommendations for potential improvements in the use of hardware and software, and automated procedures	Candidates will identify and use appropriate methods to produce recommendations for potential improvements in the use of hardware, software and automated procedures. They will identify a limited number of potential improvements to the problems they have identified. The method selected may not be the most appropriate and may not fully record the needs/problems of the end-user. They will make broad recommendations for improvements based on their investigations; however their suggestions will be limited and will lack detail. The recommendations for potential improvements will not fully cover all the needs of the end-user. There will be little or no explanation of these procedures.	Candidates will identify and use appropriate methods to produce recommendations for potential improvements in the use of hardware, software and automated procedures. They will suggest a number of potential improvements to the problems they have identified and some will be appropriate. They will record most of the needs/problems of the end-user. Record keeping/audit trails will be included. Candidates will identify the techniques used for information gathering and the information collected will be clearly shown; a brief explanation as to the suitability of each method used will be given. All record keeping will be detailed and will include mostly relevant information. The recommendations for potential improvements will cover most of the needs of the end-user. There will be some explanation of these procedures.	Candidates will identify and use appropriate methods to produce recommendations for potential improvements in the use of hardware, software and automated procedures. They will suggest potential improvements to all the problems they have identified, and most will be appropriate. Candidates will identify the techniques used for information gathering and the information collected will be clearly shown; a detailed explanation as to the suitability of each method used will be given and suggestions for future improvements will have been made. All record keeping will be comprehensive and will include all relevant information. Candidates will make comprehensive recommendations for improvements based on their investigation, and these suggestions will be described in detail. The recommendations for potential improvements will cover all of the needs of the end-user and will be detailed.



Assessment Objective	Pass	Merit	Distinction
<b>AO6</b> Create and test routine automated procedures and assist others to create more complex automated procedures	<p>Candidates will create and install one automated procedure based on the recommendations identified.</p> <p>They will develop and use a test plan for this procedure, but this will be limited with no remedial action taken.</p> <p>As a member of a team, candidates will participate in discussions to identify end-user requirements of complex automated procedures; their contribution will be limited and based on their own knowledge.</p> <p>Candidates will assist in the selection, creation and installation of one complex procedure and will assist in developing a test plan but their contribution will be limited. They will assist in the production of end-user documentation but their contribution will be limited.</p>	<p>Candidates will create and install one automated procedure based on the recommendations identified. They will develop and use an appropriate test plan for this procedure, and will attempt to take remedial action when necessary.</p> <p>As a member of a team, candidates will make significant contributions, during discussions, to identify end-user requirements of complex automated procedures and will draw upon some external knowledge as well as their own knowledge base.</p> <p>Candidates will identify some existing configurations that may be affected by these procedures, and will explain why these may be affected. Their ability to identify how any problems could be remedied may be limited.</p> <p>Candidates will play a significant role in the selection, creation and installation of a procedure and in developing a test plan. They will assist in the production of end-user documentation and will make a significant contribution to ensure that the documentation is fairly comprehensive.</p>	<p>Candidates will play a leading role in discussions to identify end-user requirements for complex automated procedures, and will draw upon external knowledge as well as their own knowledge base.</p> <p>Candidates will identify all existing configurations that may be affected by these procedures and will explain why these may be affected identifying how any problems could be remedied.</p> <p>Candidates will play a leading role in the selection, creation and installation of this procedure and in developing a test plan. They will assist in the production of end-user documentation and will ensure that the documentation is comprehensive.</p>