Tech Troubleshooting

Ten Tips for Addressing Your Firm's IT Challenges

BY JUDYE CARTER REYNOLDS

Trying to isolate and resolve technical problems in software programs frustrates many professionals. Many times, software applications touted as "easy to use" and "easy to problem solve" by their vendors can actually lead to hair-pulling experiences when it comes to getting technical assistance. However, there are simple ways to work with a vendor to ensure a smooth technical support experience.

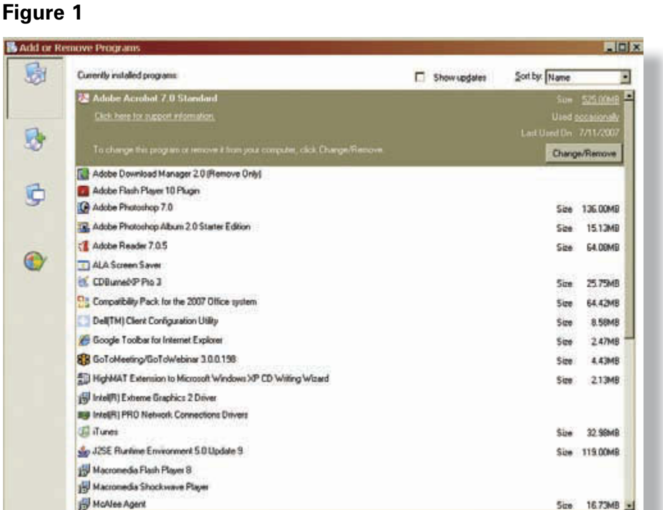
Firm administrators can pursue several strategies to obtain fast and effective help. Understanding what type of information is needed and how to work with the person on the other end of the phone call or e-mail to get help fast can be a great advantage when seeking technical help from a vendor. Consider the following 10 tips for seeking software support to obtain more satisfactory results.

Resolving technology-related issues in your firm need not be a frustrating experience.

1. **Identify the specific product.** Most software vendors have a range of products they manufacture, including multiple versions of each product. To ensure that the vendor provides answers related to the appropriate product, provide the product's name and full version number when calling for assistance.

   This information can usually be obtained from the Windows Control Panel under "Add/Remove Programs" or "Programs and Features," depending on the Windows version installed on your computer. The installed products are typically listed alphabetically by the manufacturer's name or by the product name. (See Figure 1.) By selecting "Click here for support information," you can view the software "Publisher" (manufacturer), "Version" and "Contact" information.

Figure 1



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Giving your software vendor remote access to a computer or server can facilitate efficient technical assistance. Coordinate a convenient time when the machine can be accessed and a window of time when no conflicts are likely to arise for the end-user.

2. **Select an internal contact person.** Identify one point of contact within your organization to work with software vendors on technical support issues. Having multiple people calling vendors to ask for help can result in confusion and will likely hinder your success at achieving a successful resolution.

   Your representative should provide the vendor with the firm's name as well as his or her name and role in the firm. This helps a vendor to confirm the type of installation you have and assists the vendor in disseminating information appropriately based on your representative's level of technical expertise, knowledge of your IT infrastructure and rights and permissions to network areas.

3. **Explain your computing environment.** In order to understand the extent of the problem, your vendor must understand your current computer environment, including the versions of Microsoft Office and Windows your firm utilizes and what document management system is installed. A vendor should also be aware of any recent updates to your environment, including newly installed programs or recent Service Packs for Microsoft Office. This enables the vendor to understand the environment the product has been running in and to determine if the problem is a result of updates or new programs.

4. **Articulate the problem's age.** A firm can unintentionally mislead a vendor regarding the duration of a technology-related challenge – suggesting, for example, that a problem has been occurring longer than it actually has.

   The age of a problem is important in diagnosing the root cause. Most software vendors maintain a database of past problems, bugs or conflicts, and what resolution is needed. If you have previously reported the problem, provide the vendor with a case number and/or ticket number so the technician can review the case history. The issue's age will determine what path is taken to troubleshoot and diagnose the issues.

5. **Assess the extent of the problem.** Similar to relaying the age of the problem, your contact should also reveal the extent of it. Does the problem occur on one machine, many or all? Does the problem occur with a specific document? Is the problem limited to a specific user? Providing such information will expedite problem diagnosis and resolution.

I recently spent considerable time with a firm attempting to resolve an issue that was reported to be company-wide. Two users reported that they were receiving error messages. For one user, the error messages were clearly the result of insufficient network rights, but the error messages given to the second user were unclear. (Error messages often are.)

Every logical resolution was applied, but failed to achieve success for the second user. After much conversation, the second user disclosed incidentally that he has many problems with his machine and believed he had a "bad profile." We then had several other users test and received successful outcomes. The bad profile was rebuilt, and the reported software problem disappeared with the corrupt profile.

6. **Identify the application(s) in which the problem occurs.** Third-party products are often integrated with multiple applications, such as Word, Excel, etc. Knowing which application the user was utilizing when the error occurred can help significantly in diagnosing the cause and finding a resolution. The customer should not only identify which application was being used, but also provide the step-by-step sequence of events when the error occurred. Reporting that an error occurs in Microsoft Word is not nearly as helpful as indicating that an error occurs when *launching* Microsoft Word.

7. **Replicate the problem.** The ability to reproduce a problem can help the vendor to analyze the problem and identify a solution. An issue that has occurred once or inconsistently requires a different type of investigation than one that occurs frequently. If a problem consistently occurs when a user repeats the sequence of events, the technician can more thoroughly analyze the situation and ascertain whether the problem can be resolved remotely.

8. **Take screen shots.** If an error message accompanies a technical problem, providing a screen shot of the error message is more

helpful that relaying a 15-digit number to the software technician. In some cases, the error number itself is vague, but the entire message can yield some clues.

A screenshot of the error message can be obtained by holding down the "Alt" key and pressing the "Print Screen" key. The screen shot – which is temporarily housed on your computer's "clipboard," an invisible holding area for content that is copied – can then be pasted into an e-mail message or into a document that is attached to the message.

If the problem involves a document, it may be beneficial to provide that document to the vendor. For confidential documents, most software company representatives are willing to sign non-disclosure agreements to maintain privacy.

9. **Allow remote access.** Giving your software vendor remote access to a computer or server can facilitate efficient technical assistance. Coordinate a convenient time when the machine can be accessed and a window of time when no conflicts are likely to arise for the end-user. The length of time needed for remote access typically requires only 20 minutes to an hour.

10. **Be patient.** While technical support is provided to resolve software problems and answer questions, a customer should realize that not all issues can be solved immediately. Your contact should work in partnership with technical support personnel so that all variables can be considered and evaluated, leading to an efficient resolution of your technology-related problem. ❇

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