

## Desktop Support Task Checklist

### Preparation

- ☐ Read and understand the ticket description of the incident or request
- ☐ Understand both the urgency and priority of the issue
- ☐ Search the knowledge base for relevant articles
- ☐ Contact the customer/end-user for any missing details
- ☐ Confirm that the issue/request cannot be resolved using remote tools
- ☐ Set appointment
- ☐ Confirm correct location and route
- ☐ Check the ticket queue for other needs in the same physical area so that travel time can be consolidated
- ☐ Collect hardware and/or software tools needed
- ☐ Record pertinent information in ticket
- ☐ Bring (electronically or hard copy) the relevant knowledge article(s) or be prepared to access the knowledge base from the remote location

### At the deskside

- ☐ Greet the customer by name
- ☐ Confirm that the issue has not been resolved
- ☐ Perform the necessary work, keeping the customer informed but not overwhelmed with detail
- ☐ If the issue was somehow “self-inflicted,” educate the customer how to prevent recurrence
- ☐ Ensure that the work is complete before leaving the deskside
- ☐ Avoid, wherever possible, “drive-by” or “hallway” requests that delay completion of the tasks and/or your next assignment
- ☐ Check the ticket queue (again) for other needs in the same physical area so that travel time can be consolidated

### Upon return (or via mobile device/laptop)

- ☐ Update the ticket documentation
- ☐ Mark the ticket resolved or put it into the correct state
- ☐ Add any comments or corrections to the knowledge base articles