

OCR Nationals in ICT. Unit 9: Customer Support

Recording Procedures in MatchWare OpenMind 2

- This lesson is how to use **MatchWare OpenMind 2** to collate information, record issues, produce reports, and record procedures.
- This lesson will fulfil the requirements of **Unit 9, Assessment Objectives 1 – 3, & 6.**
- **MatchWare OpenMind 2** is an excellent **planning** and **presentation** tool. It helps meet assessment objectives in at least units 1, 2, 4, 9, 10, 12 and 23, and any other unit requiring brainstorming, Mind Mapping and planning.

Assessment Objectives:

1. Identify and provide basic types of technical information and support required by end-users using appropriate communication methods.
3. Select technical information from a variety of sources.
4. Participate in reviews and produce reports detailing existing hardware and software provision and identify existing frequently used automated procedures.
6. Create and test routine automated procedures and assist others to create more complex automated procedures.

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|---------|-------------------------------------------|
| Step 1: | Getting Started with MatchWare OpenMind 2 |
| Step 2: | Collating information |
| Step 3: | Producing reports |
| Step 4: | Recording procedures |

MatchWare OpenMind 2 is an effective tool for collating and recording information from a variety of sources, producing reports and recording procedures.

It enables you to collate information by attaching data to a Mind Map and exporting to **Word** to produce a report.

AO1, AO3 and AO4 all make use of these features.

Using the timeline view for AO6, a procedure schedule is easy and intuitive to produce.

Step 1: Getting Started in MatchWare OpenMind 2

➤ Open **MatchWare OpenMind 2**.

➤ In the Welcome screen, select **New Document**.

You will be asked what **format** of Mind Map view you would like to start your presentation in.

Mind Map – This is excellent for planning, and can be used as a non-linear presentation tool.

Top Down – This view show hierarchies and workplace structures effectively.

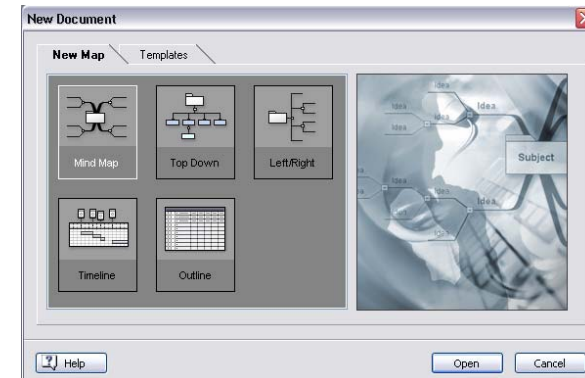
Left Right – This is the same structure as Top Down, but displays left to right.

Timeline – This creates left to right time plans.

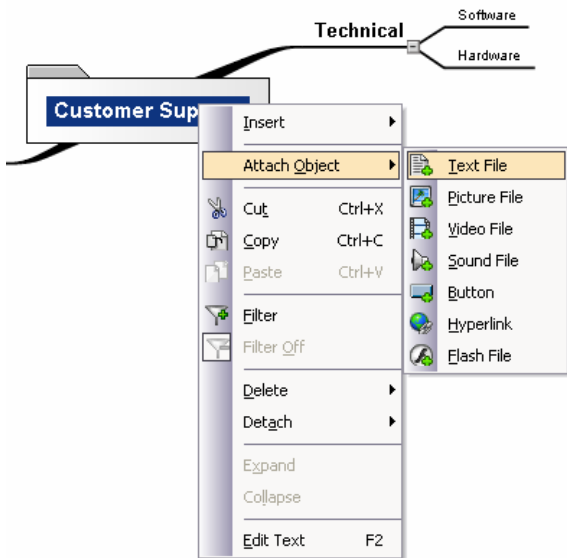
Outline – This is a table, ideal for showing time-dependent tasks.

You will be using the **Mind Map** view for the collation and report writing, and the **timeline** view for the procedure planning.

You are now ready to begin.



Step 2: Collating Information

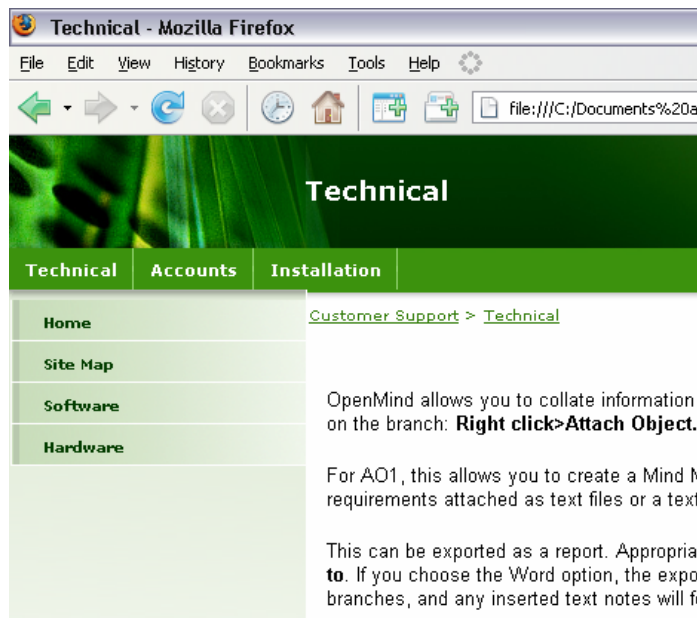
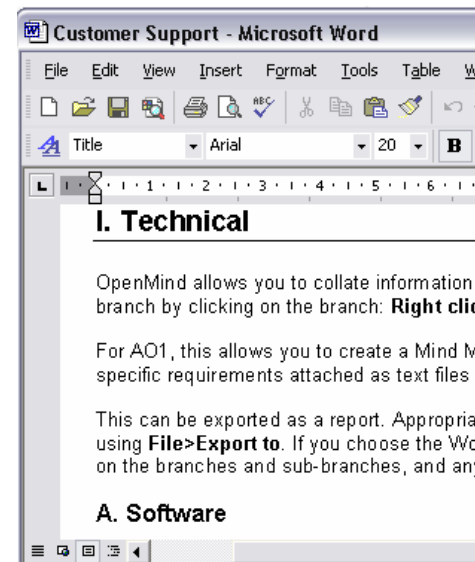


MatchWare OpenMind 2 allows you to collate information from a variety of sources. Information can be attached to any branch by clicking on the branch: **Right click>Attach Object**.

For AO1, this allows you to create a Mind Map of each type of user, with sub-branches for their needs, and specific requirements attached as a Text Note (**Right click>Insert>Text Note>New**)

This can be **exported** as a report. Appropriate formats would be an HTML document or a Word document, using **File>Export to**. If you choose the Word option, the export will create a table of contents in Word based on the branches and sub-branches, and any inserted text notes will form the content with headers.

An export as an HTML document would allow the information to be interactive, with each branch forming a link to the Text Note information. This makes it easy for customer support personnel or users to click through to the solution required based on categories of problems.

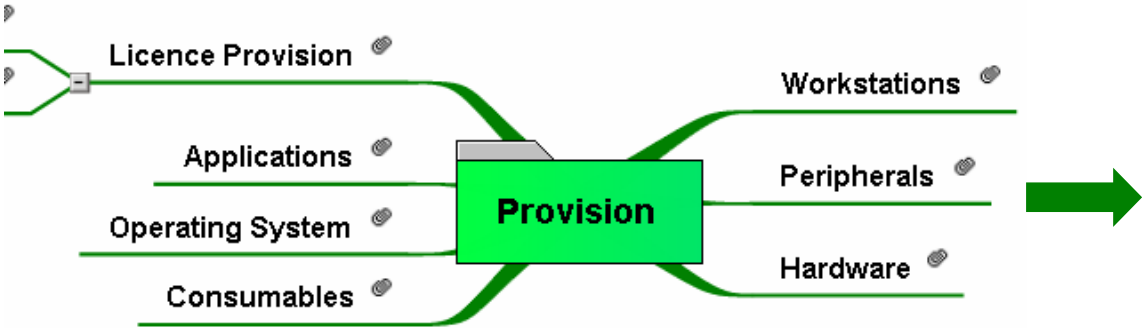


Step 3: Producing Reports

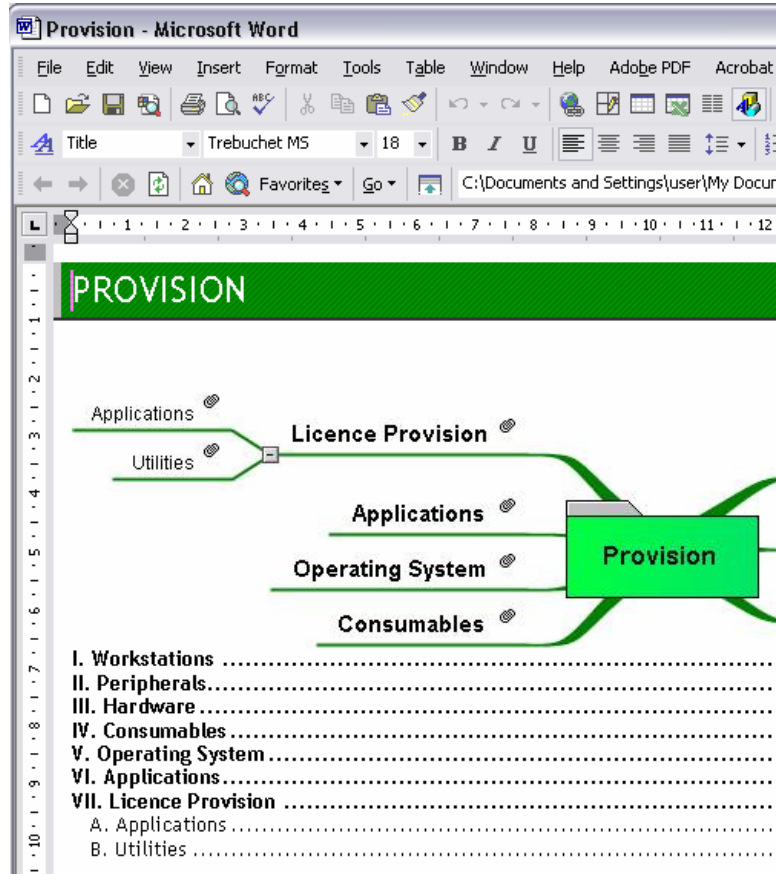
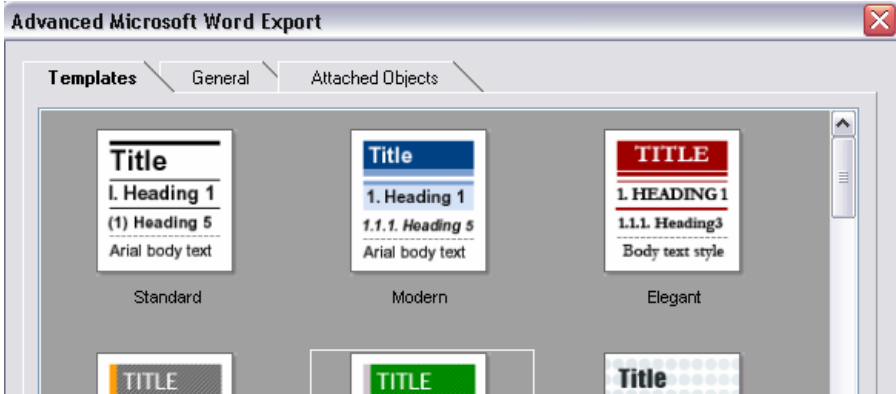
MatchWare Open Mind 2 allows a seamless transition from brainstorming an idea, to creating a structured Mind Map, to producing a report in Word for dissemination.

For AO4, students are required to write reports detailing hardware and software provision, including workstations, peripherals, hardware, consumables, operating system, applications and components and licence provision of these and utilities.

By assigning an area to each branch, content can be added. Text Notes will export as content, while attached files or URL's will appear as hyperlinks in the Word document.



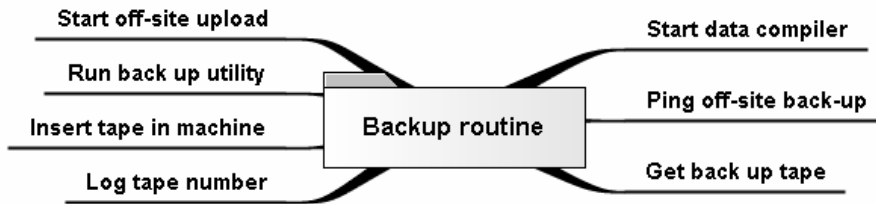
Attached pictures will appear in the document. If you wish to modify the export, click: **File>Export to>Microsoft Word>Advanced Export**. This allows you to choose from a variety of Word templates, or to use you own custom template. You can also alter which attachments are exported, and how they are presented in the document.



Step 4: Recording Procedures

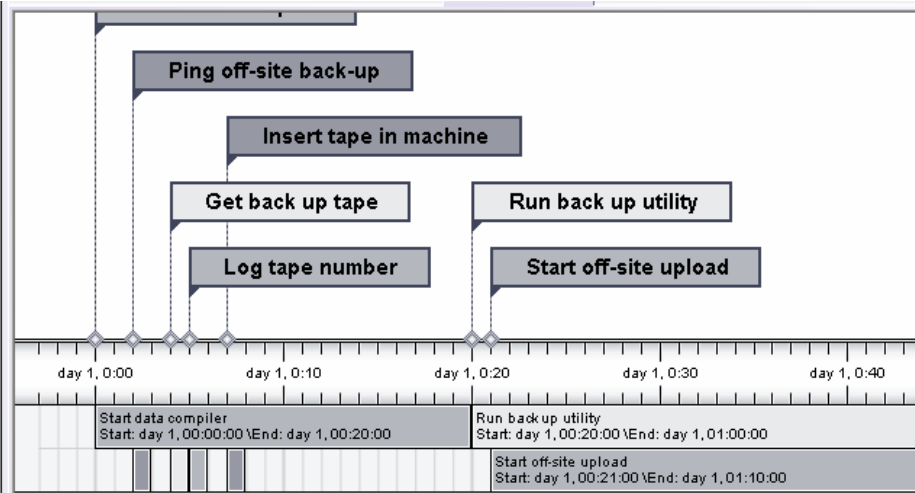
For AO6, you are required to create and implement automated procedures.

These procedures must follow an agreed plan, and outcomes must be recorded.



MatchWare OpenMind 2 allows you to create timelines, with a clear view of simultaneous tasks. Initial task planning can be carried out as a Mind Map. This can be transformed to a timeline view using **View>View Map As>Timeline**. Times can be assigned to each task using the **Timeline tab** (on the right hand side of the workspace), while in Mind Map view, or the **Timeline Outline** box on the left of the Timeline view. Tasks with overlapping timeframes are displayed as simultaneous tasks.

Branch Name	Start Time	End Time
Backup rou...		
Start data...	day 1, 00:00:00	day 1, 00:20:00
Ping off-si...	day 1, 00:02:00	day 1, 00:03:00
Get back...	day 1, 00:04:00	day 1, 00:05:00
Log tape...	day 1, 00:05:00	day 1, 00:06:00
Insert tap...	day 1, 00:07:00	day 1, 00:08:00
Run back...	day 1, 00:20:00	day 1, 01:00:00
Start off-s...	day 1, 00:21:00	day 1, 01:10:00



Outcomes can easily be added to each task as Text Notes. These can then form part of an export to Word, automatically creating a report on the Task, as described in Step 3.

Summary. You have:

Used a Mind Map to collate information and generate a report with this data; Produced a report in Word using a Mind Map to structure you resources; Used the timeline view to record procedures for tasks.

This meets the requirements specified by OCR for documenting customer support.