9 Tech Support Q & A (as of 9/15/11)

Questions from Tech Support for the Online Scoring and Reporting System (OSRS)

Will Tech Support have access to the backend, and if so, what will those users have access to do?
Yes, Tech Support will have access to the backend. Based on the privileges assigned to Customer Support/Tech Support users, these groups will be able to access all customer accounts within our business unit to help customers with account related issues. You will not have access to any examinee information, including assessment data and reports.

What functionality for support will Tech Support be expected to provide?
Help customers with Technical issues, which may include but is not limited to resending user activation URLs, changing settings on accounts, creating sub-accounts, adding users, and any other questions customers may have while using the site. If there is something you are unsure about how to do, you can use the escalation procedure and escalate to 3rd level support.

Are we changing passwords, running reports, can we get reports if they fail on the customer side, change permissions, and who has the authority to request changes?
No, you will not be changing passwords - customers can change their own passwords by clicking on the 'Forgot Password' link on the log in page.
You cannot run reports if they fail on the customer side. This violates security standards. If a customer is having issues running a report, this should be escalated to 3rd level support as per the escalation document.
Customers who have the proper privileges in the system can change 'permissions'. You can assist customers with this, or do it for them after verifying who you are talking to.

What browsers are we compatible with and what program do we use to open the report on screen?
Supported browsers include: Mozilla Firefox 6, IE 7, 8, and 9, and Safari 5.1 for Mac.
The report will open as a .PDF file. If the customer is generating a batch report (containing more than one report), the user has the option of creating one .PDF or downloading a .ZIP file which will contain each report as a separate .PDF.

UPDATE: Although some of our QA Analysts did some testing on Chrome, it was not listed as a supported browser in our requirements. Therefore, complete QA was not done on Chrome. Customers reporting issues using this browser should be asked to use a supported browser and those issues should be sent to the OSRS development team (Dawn.Soest@pearson.com).

Is there a logout or timeout specific time setting?
Yes. When a user has been inactive for 10 minutes a warning appears:
"Due to no activity, your session will expire in 5 minutes. Do you want to extend it by 15 minutes?" If the user does not respond, the user will be logged out in the 5 minutes (total of 15 minutes of inactivity).

What is the password reset policy?
This is configurable by business unit, but the default is every 60 days the password must be changed and the password must meet the following criteria:
- Is at least 7 characters in length
- Has not been used in the past year
- Must be alphanumeric and contain at least three of the following character groups: upper case characters, lower case characters, numerals, special characters
- If a user enters an incorrect password 5 times, the user will be locked out of the system and will require a call to Customer Service/Tech Support.

UPDATE: At this time, there is not a feature in the back office to 'unlock' a customer who is locked out. Go to the login page and click the 'Forgot Password' link, enter the username which is locked out, and click the 'Submit' button.

The user will receive an email which contains a new URL/token to reset his/her password. (This will be modified in the next release which will require Customer/Tech Support to unlock the user account from the back office.)

How often are customers required to change/reset their password?
Every 60 days for the US Business Unit.

In the report can it be copy and pasted into their own report without headers and footers? If not is there a work around?
No, the report is only available at this time as a .PDF. We plan to eventually have the reports available in MS Word .doc format as well.

Is there an export of data available to the customer and in what formats are they available?
Yes, exports are available in .CSV format.

Can Customer Service/Tech Support log in as the customer, does that violates some type of confidentiality policy (HIPPA, FERPA)?
No, you cannot log into a customer account as it violates data security policies. You can, however, see the customer and user account settings from the back office.

In addition, each of you will be given access to a test account which is customer facing, so you can mimic what the customer is doing in their account.

Also, what types of issues have QA run into as far as browser issues or any other type of issue that the customer might run into?
We are currently seeing some performance issues with IE 7 and IE 8, especially when loading the WRMT-III assessment page. Suggest the user upgrade to IE 9 or user Firefox.

Update: In IE, users may experience issues downloading reports. If they are not able to download the report, even though they have allowed pop-ups and added our site as a trusted site, they will need to do the following:
Go to Tools > Internet Options > Security tab and click on 'Custom Level' button.
Scroll down to Downloads and set the 'Automatic prompting for file downloads' to 'Enable'. (*See screenshot below*)
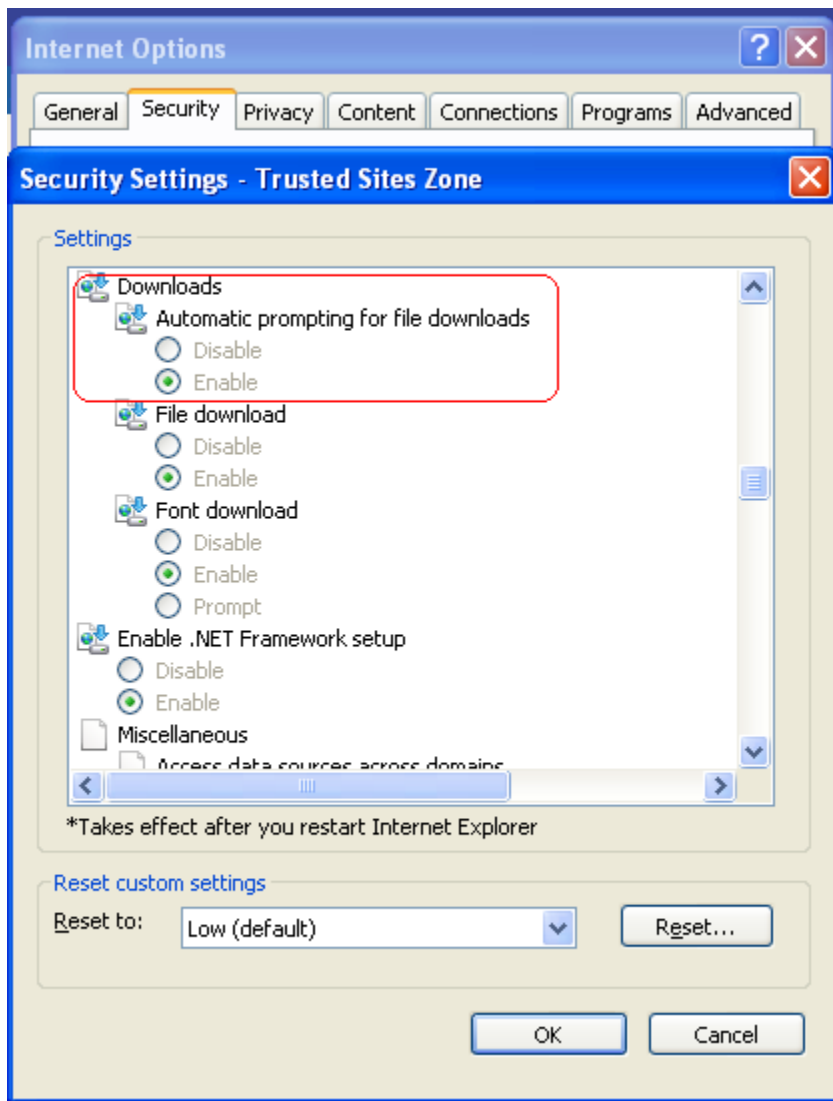
Are they the typical issues we face with other sites (delete cache etc…)?
I am not aware of any other browser issues which require the user to clear his/her cache.

What built in features are available for Tech Support to aid the customer?
Specifically what we can and can not do in the system in the background to discover what happened or to alter the outcome for the customer. Logs, password changing, "reset buttons" for the specific test or customer, and such.
Refer to question #1 for what Tech Support can do in the back office. In addition, there is an event log, which will provide information as to what events the customer was performing and the time each event took place. These logs do not have customer data which would violate the data privacy policies. There is not functionality to 'reset' a test or report.

Easy to understand error messages, with more details in the logs are another thing that helps support a product.
If you are aware of any instances where an error message should be updated to be more helpful to our customers and our support team, please be sure to send this information to the OSRS Development team, specifically to Dawn.Soest@pearson.com.

So any information on what errors might be presented to a customer, where we can check to see what happened, as well as what level of control we might have to fix things would be nice. I have a feeling it will be "We don't know, no place, and none."
All error messages presented to the customer should be explicit, unless an unexpected error occurs, which would require immediate 3rd level support. The event log should be captured detailing when and what the customer was doing when the error occurred.

The level of control Tech Support will have for the 1st release is limited. However, any and all feedback we get from all of you will help us improve the system so we can provide a great product to our customers as well as provide the means to quickly and easily support our customers.