

# **The Global Supportability Review Library: A User's Guide**



**Enterprise Customer Supportability Center**  
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## The Global Supportability Review Library

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In response to a need expressed by Premier TAMs, PSS Support Engineers, and others for a single, searchable repository of Premier Supportability Reviews, the Enterprise Customer Supportability Center, working with World Wide Technical Services and Microsoft Consulting Services, has established the **Global Supportability Review Library**. The library is located at MCS's InSite Knowledge Repository, on the World Wide Technical Services Web site (<http://wwts/insite>; the library is found on the tree view on the left under PSS\Premier\Supportability Review). The library is designed to meet the following needs, which were identified as critical by the project team:

1. Making completed Supportability Reviews easily accessible and searchable for TAMs and SEs
2. Making it possible to set security
3. Allowing the library to be replicated for easier access for all Microsoft locations globally

As stated in the project-needs analysis document, "InSite has the added benefit that all MCS documentation would be located in the same repository, therefore making it a simpler process for Premier and MCS to share information regarding the customer."

### The TAM's Role

#### Benefits

For TAMs, the Global Supportability Review Library provides a convenient way to leverage the content of completed Supportability Reviews, whether written by the TAM, a friend in the same region, or a colleague on the other side of the world. Because these reviews will now be gathered in one location in a searchable environment, a TAM can now rapidly find and inspect content from past reviews, zeroing in on a specific technology, a particular customer, or both.

#### Responsibilities

The Global Supportability Review Library is designed to help TAMs but will only work with their cooperation. **TAMs need to incorporate uploading reviews into the library as a new, final step in the review-completion process.** Uploading reviews is fast and easy. TAMs are encouraged to contact their Supportability Review leads for information on incorporating review uploading into their Supportability Review work process.

### Accessing the Library

As mentioned above, the Global Supportability Review Library is located at MCS's InSite Knowledge Repository, on the World Wide Technical Services Web site. To access the library:

1. Go to the InSite Knowledge Repository Web site at <http://wwts/insite>.
2. Click on the plus sign next to PSS (Product Support Services) to display the options under that heading.
3. Click on the plus sign by the Premier folder.
4. Click on Supportability Review.

Use the buttons along the top of the screen (**Home, Search, Content, Help, Talk Back!**) in working with the library. (The operation of the main buttons is described below.)

The rest of this document describes:

- How to upload a completed review into the library
- How to modify the metadata associated with a review already in the library
- How to delete a review from the library
- How to search for material in the library

## Uploading a Completed Supportability Review

**Note:** This material is adapted from instructions available under the **Help** button (choose "Workflow Form Help").

To upload a completed Supportability Review:

1. Within InSite, click on the Content button in the header toolbar.
2. Select Add. The Add Document form will appear (it may take a few seconds to open). The form is shown below.

**Warning:** To exit the Add Document form, click either the **Submit** or **Cancel** button at the bottom left corner of the form. Switching away from the form without clicking one of these buttons may cause your computer to fail.

The screenshot displays two sections of a web form: 'Project-Specific' and 'File-Specific'.

**Project-Specific Section:**

- Project:** [Text input field]
- Customer Type:** [n/a] (dropdown)
- Engagement:** [n/a] (dropdown)
- # Locations:** [Text input field]
- # Desktops:** [Text input field]
- Officer:** [n/a] (dropdown)
- Action:** Submit (dropdown)
- Approver:** a-willr (dropdown)
- Valid From:** 1/27/99 (calendar)
- Valid Until:** 1/27/2000 (calendar)
- Referencable?**  Yes  No
- Referencible to:** [Text input field]
- Request for Comments?**  Yes  No
- Notify of Comments?**  Yes  No
- Desktop Model:** (n/a), Intel 386, Intel 486, Intel Pentium, Intel Pentium PRO (dropdown)
- Server Model:** (n/a), Intel 386, Intel 486, Intel Pentium, Intel Pentium PRO (dropdown)
- Project Summary:** [Text area]
- 3rd Party Components:** [Text area]

**File-Specific Section:**

- Document Type:** [n/a] (dropdown)
- Author:** [Text input field]
- Title:** [Text input field]
- Version:** [Text input field]
- Security:** (n/a), Microsoft employees, Microsoft employees and local partners, Public, Partners with NDA (dropdown)
- Technology or Product:** (n/a), Exchange 4.0, Exchange 5.0, Exchange 5.5, NTS 3.5x (dropdown)
- Language:** (n/a), Cee, Den, Fin, Fr (dropdown)
- Abstract/Description of project or document(s):** [Text area]

On the left side of the 'File-Specific' section, there is an upload icon with the text: "Click or drop files on the upload icon above!". Below this are "Submit" and "Cancel" buttons.

3. Fill in the **eight required fields** as explained in the tables below. There are about 20 fields on the Add form, but most are unnecessary for Supportability Reviews or can be left at their defaults. The fields that TAMS must complete are labeled **Required** in the Action column of the tables. The first table discusses the **Project-Specific** half of the form (the top), the second describes the **File-Specific** half (the bottom).

**Tip:** Only concern yourself with the fields labeled **Required** in the **Action** column.

#### Project-Specific Portion of Add Document Form

Field	Action	Explanation
"Project"		Enter a project description (this could be the name of the customer or a project code).
"Customer type"	<b>Required</b>	Select "Premr," for Premier.
"Engagement"		Select "TAM."
"# Locations"		Enter the appropriate value to convey the size of the customer's environment.
"# Desktops"		Enter the appropriate value to convey the size of the customer's environment.
"Office"	<b>Required</b>	Select US Premier West, East, or Central, or another country, as appropriate to show author's physical location.
"Action"		Leave as "Submit," the default choice.
"Approver"	<b>Required</b>	Select the alias of the Lead TAM for your team. (If unsure who your Lead TAM is, contact your Premier Support Manager.)
"Valid From"		Default is today's date.
"Valid Until"		Default is one year from today.
"Referenceable"		Leave at default, which is No.
"Referenceable to"		Default is grayed out. Leave blank.
"Request for Comments"		Default is No. Select Yes if you would like others to comment on the document; it will be flagged RFC and displayed on the opening InSite page requesting feedback.
"Notify of Comments"		Default is No. Select Yes if you would like e-mail notification when comments are entered.
"Desktop Model"		Select as many as apply. (To add more than one, press CTRL while left-clicking with your mouse.)
"Server Model"		Select as many as apply. (To add more than one, press CTRL while left-clicking with your mouse.)
"Project Summary"		Type in a summary of the project.
"3 <sup>rd</sup> Party Components"		List any third-party products discussed in the document.

#### File-Specific Portion of Add Document Form

Field	Action	Explanation
Upload Control Icon	<b>Required</b>	Click on the icon. This will open an Open dialog box. Browse for the Supportability Review document want to upload. Click Open to upload document.
"Document Type"	<b>Required</b>	Select Supportability Review.
"Author"		Click the List button and select the TAM's e-mail alias.
"Title"		Field will fill with the current title of the source document. Edit this as necessary to give your document a title that will be meaningful to other users of the library.
"Version"		Leave blank.



"Security"	<b>Required</b>	Select "Microsoft employees."
"Technology or product"	<b>Required</b>	Select the Microsoft technology or technologies this document applies to. (To add more than one, press CTRL while left-clicking with your mouse.)
"Language"		Defaults to the language your browser is configured for.
"Abstract/Description of product or document(s)"	<b>Required</b>	Enter a phrase such as "Supportability Review on <product(s)> for <customer>."

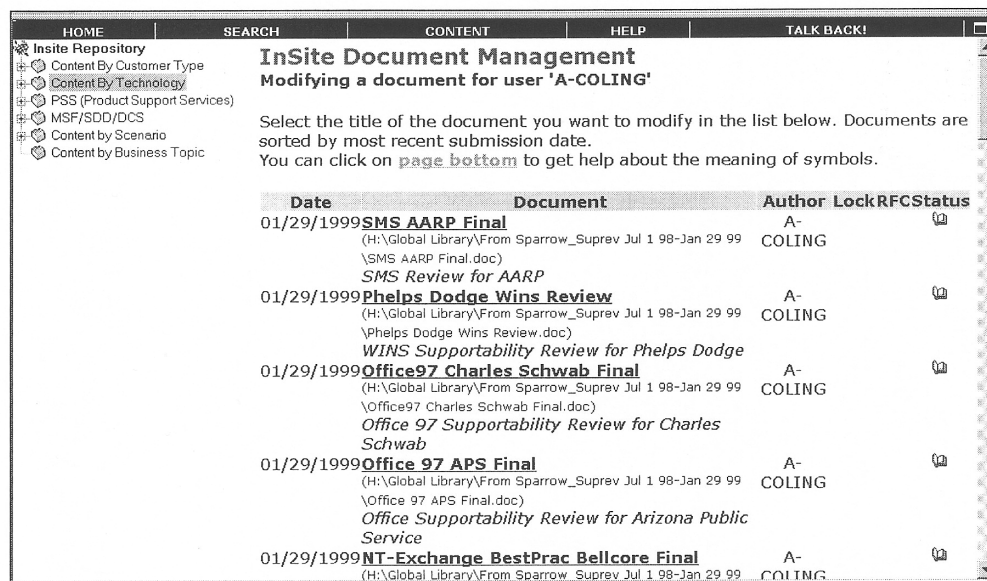
4. Click the **Submit** button.

After a few moments, a message will appear reporting on the success of your submission. If the submission was successful, an e-mail will be sent to the person listed in the "Approver" field notifying them of the submission. That person will either accept, reject, or hold the submission; you will be notified by e-mail of the result as well as any further action you must take to complete the submission.

## Modifying a Review's Metadata

To modify the metadata associated with a Supportability Review in the library, complete the following steps: (**Note:** You can only modify the metadata for reviews for which you are the submitter or approver.)

1. Within InSite, click on the **Content** button in the header toolbar.
2. Select **Modify**. The InSite Document Management Modify screen will appear as shown below.



3. Click on the document you wish to modify. This will open the Modify Document form. This is almost identical to the Add Document form discussed in the section on document uploading, but the "Action" field in the Modify form always says "Modify."
4. To modify the information associated with the review, make the necessary changes and click the **Submit** button.

## Deleting a Review from the Library

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To delete a Supportability Review already in the library, complete the following steps: (**Note:** You can only delete reviews for which you are the submitter or approver.)

1. Within InSite, click on the **Content** button in the header toolbar.
2. Select **Delete**. The InSite Document Management Delete screen will appear. (The screen is similar to the **Modify** screen shown above.)
3. Click on the document you wish to delete. This will open the Delete Document form. This is almost identical to the Add Document form discussed in the section on document uploading, but the "Action" field in the Delete form always says "Delete."
4. Click the **Submit** button.

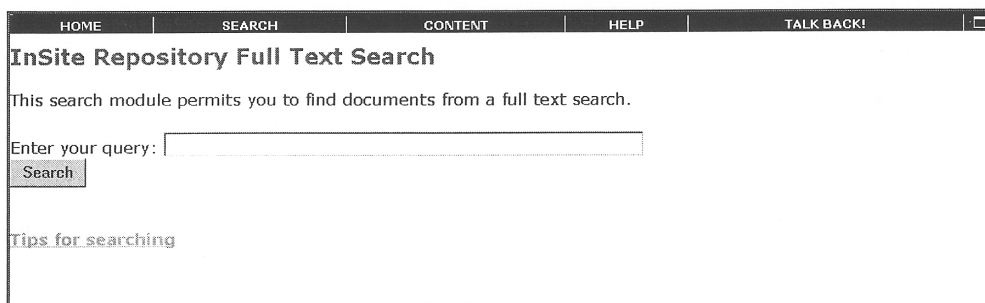
## Searching the Library

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There are two ways of searching the library, **Full-Text Search** and **Multi-Criteria Search**.

To do a **Full-Text Search**:

1. Within InSite, click on the **Search** button in the header toolbar.
2. From the drop-down menu, select **Full Text Search**. The search screen shown below will appear.



The screenshot shows a web browser window with a navigation bar at the top containing links for HOME, SEARCH, CONTENT, HELP, and TALK BACK!. Below the navigation bar is the title "InSite Repository Full Text Search". The main content area contains the text "This search module permits you to find documents from a full text search." followed by a text input field labeled "Enter your query:" and a "Search" button. At the bottom of the search area, there is a link labeled "Tips for searching".

3. Enter your query in the search window and click the **Search** button. For additional information, click on "Tips for searching" at the bottom of the screen.

To do a **Multi-Criteria Search**:

1. Within InSite, click on the **Search** button in the header toolbar.
2. From the drop-down menu, select **Multi criteria Search**. The search screen shown below will appear. (The fields in the form correspond to those in the Content Submission form described above.)

HOME	SEARCH	CONTENT	HELP	TALK BACK!
<b>Multi-Criteria Search</b>				
This search module permits you to find documents by matching metadata values. Date format is (MM/DD/YYYY)				
Type of document:	<input type="text" value="(n/a)"/>			
Status:	<input type="text" value="(n/a)"/>			
Client Type:	<input type="text" value="(n/a)"/>			
Engagement Type:	<input type="text" value="(n/a)"/>			
Engagement Start:	<input type="text"/>	End:	<input type="text"/>	
Submitted after:	<input type="text"/>			
Technology or Product:	<input type="text" value="(n/a)"/>			
Security Level:	<input type="text" value="(n/a)"/>			
Language:	<input type="text" value="(n/a)"/>			
Submitter:	<input type="text"/>			
Author:	<input type="text"/>			
Title:	<input type="text"/>			
Abstract:	<input type="text"/>			
Office:	<input type="text" value="(n/a)"/>			
<input type="checkbox"/> Referenceable				
Only				
<input type="checkbox"/> Comments				
Requested				
<input type="button" value="Search"/>				

1. Under "Type of document," select Supportability Review. **Note:** This is the only required field.
2. Fill out the other fields as appropriate. Refer back to the instructions on uploading a document to see how the fields will have been completed for the typical Supportability Review. Three new fields are:
  - "Status": Currently status is either Open (pending approval) or Closed (approved).
  - "Submitted after": Refers to the date the document was submitted to InSite.
  - "Submitter": E-mail alias of person who submitted the review.
3. Click the **Search** button.