SCOUT for TAMs

Version 1.0

A guide to the SCOUT content-management tool suite for Microsoft Premier Technical Account Managers

Applies to SCOUT Questionnaire Builder version 1.2.0004, SCOUT Data Collection, SCOUT Author, and SCOUT Survey

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Introducing SCOUT

SCOUT (Supportability Content Organization and Uniformity Tool) is a suite of Web-based content-management tools designed to provide technically validated, standardized Supportability Reviews to Microsoft Premier Support customers. It consists of five applets:

- **SCOUT Administrator** (SCOUT Admin) is the administrative applet. It is used primarily by PILs to enter Supportability Review questions, answers, and content into the tool. The material entered via SCOUT Admin is later manipulated through the SCOUT Questionnaire Builder and SCOUT Author applets to create and process data questionnaires and build Supportability
- Reviews.
- **SCOUT Questionnaire Builder** is the applet used by Product Information Leads (PILs) to build questionnaires for their reviews and by Technical Account Managers (TAMs) to customize those questionnaires for their individual customers.
- **SCOUT Data Collection** is the applet used by customers to fill in questionnaires and submit them to their TAMs.
- **SCOUT Author** is the authoring applet. It is used (primarily by TAMs) to build Supportability Reviews. SCOUT Author presents review writers with a tree view of suggested content sections and lets them choose which to include in the review. It then combines the review sections in the proper format and saves them as a single document.
- **SCOUT Survey** is the applet used after a Supportability Review is delivered to collect customer feedback on the review process.

The following table lists the main stages involved in building a Supportability Review, the party responsible at each stage, and the SCOUT applet used to complete that stage (if any).

Supportability Review Task	Responsible Party	SCOUT Applet Used
Identify subject of new standard review; design and prepare scope and content for new standard review	PIL	
Enter new standard material (questions, answers, and content documents) into SCOUT	PIL	SCOUT Admin
Open Supportability Review with customer; establish Supportability Review objectives with customer (in part, by referring to Supportability Review scope); lead customer-orientation meeting with customer	TAM	
Prepare, customize, and make accessible to customer the SCOUT Data Questionnaire	TAM	SCOUT Questionnaire Builder
Establish Supportability Review team of writer(s) and tech reviewer(s)	TAM	
Complete Data Questionnaire then submit back to Premier via Service Desk	Customer/ TAM	SCOUT Data Collection
Analyze customer data	TAM	
Assemble first draft of Supportability Review	TAM	SCOUT Author
Customize Supportability Review, editing first draft as necessary and adding appropriate executive summary, recommendations, and conclusion	TAM	
Submit document for tech review, editing, and so on, as	TAM	

required by the relevant Supportability Review process documentation		
Format, print, and deliver Supportability Review as required by the relevant Supportability Review process documentation	TAM	
Perform follow-up with customer as required by the relevant Supportability Review process documentation	TAM	
60-day customer evaluation and survey	TAM/Customer	SCOUT Survey

SCOUT and the TAM

Of the five SCOUT applications, four are of particular interest to TAMs: **SCOUT Questionnaire Builder, SCOUT Data Collection, SCOUT Author,** and **SCOUT Survey**. These are the applications TAMs use to create questionnaires for their customers (SCOUT Questionnaire Builder), publish them to the Web so they can be accessed and completed (either by the customer directly or the TAM assisting the customer) (SCOUT Data Collection), assemble Supportability Reviews based on the customer's answers (SCOUT Author), and seek the customer's feedback after the review is complete (SCOUT Survey). This guide explains the use of these three tools as they pertain to Premier Support TAMs. It also discusses such preliminary topics as what is a Supportability Review, standard versus custom reviews, and what is a Scope.

Getting Started

To load or log on to the various SCOUT applications, and to learn more about them through online tutorials and help files, visit the SCOUT home page at http://scoutfs/scout.

About Premier Supportability Reviews

A Microsoft Premier Supportability Review is an analysis of the configuration or implementation of a Microsoft product in use at the customer's organization, or, alternately, of a migration plan, upgrade plan, or rollout plan involving such products. A supportability review addresses issues related to product supportability, usability, and operational management.

The term Supportability Review applies to the whole process of gathering information about the customer's situation, analyzing the information, and producing a written document that discusses the customer's situation and gives recommendations on how to improve it. (The written document is also commonly referred to as the Supportability Review, though technically the Supportability Review encompasses the entire process, not just the review document.)

Supportability Review Objectives

The typical objectives of a Supportability Review can be summarized as follows:

- Improving or validating the supportability of the Microsoft product under review.
- Refining the usability of this Microsoft product.
- Identifying potential obstacles to a smooth product deployment.
- Identifying practices that minimize the product support burden.

Each Premier Supportability Review contains a series of recommendations. Typically, these recommendations are aimed at delivering the following benefits to the customer:

- Reducing the number of calls the customer needs to make to Microsoft Technical Support personnel.
- Improving the reliability of the customer's Windows NT Server and BackOffice application infrastructure.
- Suggesting easier ways to deploy a Microsoft product.
- Simplifying the management of the customer's Windows NT BackOffice applications.

Supportability Review Customers

Supportability Reviews are performed for organizations who hold Premier Support annual base contracts. Each contract includes one standard Supportability Review. Customers are also welcome to purchase additional standard reviews or one or more custom reviews.

Standard vs. Custom Reviews

A standard Supportability Review is a fixed-scope review on a topic taken from a list provided by Premier Support. Custom reviews are generally more wide-ranging and offer the customer greater flexibility in determining the review scope. The following table summarizes the basic components of standard and custom Supportability Reviews.

Standard Supportability Review	Custom Supportability Review
• One is included with each Microsoft Premier Support base contract. • Covers topics outlined in product review scopes. • Scope limited to a systems operational review of an existing installation or migration plan. • Premier Support Technical Account Manager (TAM) coordinates collection of data relevant to the review. • Review is conducted via conference calls and e-mail documentation transfer.	• Includes all features of standard Supportability Review. • Includes possible on-site visit to assess customer implementation. • Scope may be expanded to include multiple product or technology deployments across the enterprise. • Focus may be broadened based on specific needs of customer enterprise.

Available Standard Reviews

The following table shows the standard Supportability Reviews currently available from Premier Support.

Windows NT Server • Domain Architecture • WINS • Migrating to Windows NT Server 5.0 • DHCP	**Microsoft Exchange Server** • Client Configuration • Migration • Server Planning • Site Design
SNA Server • Configuration • Planning and Implementation • Upgrade and Migration	**Other BackOffice Products** • Internet Information Server (IIS) Deployment • Proxy Server Deployment

SQL Server	Desktop Products
• Configuration • Planning and Implementation	• Windows 9x Deployment • Office 97 Deployment • Office 97 Migration
Systems Management Server • Configuration • Planning and Implementation • Upgrade and Migration	

Note on Vocabulary: The term *standard review* should not be confused with the term "standard content." Standard review is the term for the fifteen or twenty basic review types offered by Microsoft Premier Support. *Standard review* can also have a slightly different meaning: a review built in SCOUT that uses only the content designated by the PIL as "standard." *Standard content*, then, refers to content within a particular review that has been designated by the PIL as "standard," or default, content. This designation causes SCOUT to include it by default when creating the review of which that content is a part. There is also a difference between *Custom Questionnaire* and *Customer Questionnaire*: a Custom Questionnaire is one that uses questions other than the standard, default ones; a Customer Questionnaire is a questionnaire built by a TAM for a particular customer. (Thus, a Customer Questionnaire prepared by a TAM, say for Acme Inc., can be either a Custom Questionnaire or a Standard Questionnaire.)

Understanding Scopes

The importance of scopes for SCOUT and for Premier Supportability Reviews in general cannot be overestimated. **Scopes are the backbone of Premier Supportability Reviews,** and anyone involved with SCOUT or with preparing Supportability Reviews must understand their design and function.

What Is a Scope?

A scope is a one-page document showing the recommended table of contents for a given review. Developed by the PIL in charge of the relevant product or product area, scopes are organized by module (units of content covering a subject area of medium breadth) and focus level (smaller units within a particular module). Shown below is the scope for Premier's most commonly performed Supportability Review, the Windows NT Domain Architecture Review.

Product: Windows NT Server
Standard Review Type: Windows NT Domain Architecture

Module	Focus
Topology	Physical Logical
Security	Account policies Local and global groups Trusts Permissions Logon Auditing C2 Security Physical access
Hardware	HCL Server functions Client requirements

Reliability	Disk management Capacity planning Available bandwidth considerations Performance monitoring SNMP monitoring

Note: Though not the case with the scope above, sometimes content within each focus level is broken down further by the use of bullets.

Role of Scopes

Scopes play a vital role at every stage of the Supportability Review process. Developing the scope is one of the first projects a PIL must tackle in preparing a new standard Supportability Review for a new technology. Content sections (and the associated questions and answers) are written to fit into specific modules and focus levels within the scope. Content is entered into SCOUT by module and focus. SCOUT sorts all review materials by module and focus, and its default means of arranging content sections in building actual review reports is by module and focus in the order dictated by the scope. Finally, TAMs are encouraged to build their reviews in scope order and in most cases will incorporate parts of the standard scopes even in preparing custom reviews. Scopes are the blueprints of the Supportability Review process, and are no less important to it than blueprints are to the construction of a building.

SCOUT Framework

The SCOUT tool suite is designed to make it easy to build supportability reviews, but the learning curve for new users is challenging. Among the issues that must be understood before a new user can move on to learning the individual applets is the SCOUT framework—the elements that comprise the Supportability Review material and how they are grouped and manipulated in SCOUT.

Supportability Review Material

The Supportability Review material used in SCOUT consists of three types of information, all entered via SCOUT Admin: **questions, answers**, and **content documents**. These are explained below:

- **Questions.** Written by the PIL, SCOUT questions are designed to gather specific information about a customer's implementation of a particular technology. SCOUT allows four types of questions (listed below, with examples and explanations):
  - **Yes/No:** "Do you currently have a Windows NT multiple-domain structure?" (Customer chooses yes or no in the data questionnaire.)
  - **Multiple Choice:** "Please indicate the importance of electronic mail to your organization's business: A) Very high B) High C) Average D) Low E) Very low." (Customer chooses one of the available answers.)
  - **Narrative:** "Please describe the network physical configuration and characteristics for each network segment where a WINS server or proxy agent is installed." (Customer answers by typing their response in a question field in the data questionnaire.)
  - **Request:** "Please provide information on the hardware and software configuration for each WINS server and proxy agent." (Customer sends the requested information to the TAM as an e-mail attachment.)
- **Answers.** In the case of Yes/No and Multiple Choice questions, the answers are supplied by the PIL, with the customer choosing one of a set of options in the data questionnaire. With Narrative questions, the customer types the answer in a field in the data questionnaire. With Request questions, the customers sends the requested information to the TAM as an e-mail attachment.

- **Content.** Written or developed by the PIL, SCOUT content consists of chunks of technically validated, pre-edited content stored as Microsoft Word documents and entered into SCOUT Admin by the PIL. These documents are named, organized, and sorted by scope, module, and focus.

Content Sets

The following information, on content sets, is primarily of use to PILs, but TAMs may benefit from knowing from the ground up how SCOUT information is built and structured.

As previously mentioned, the material in SCOUT is organized first and foremost by review scope, an organizing method that consists essentially of a list of focus levels stacked vertically. However, SCOUT also requires material to be organized horizontally, across each focus level. This is achieved by the use of **content sets**. Next to the scope, the content set is the most important concept for PILs to keep in mind in creating Supportability Review material.

A **complete content set** consists of the following:

- A question pertinent to a particular focus level
- The possible answers to that question
- The content sections that map to each of the possible answers

SCOUT also allows for the use of **partial content sets**, in which one or more of the above-listed items is omitted from the set or supplied by the customer. (As you can see, the PIL has great freedom, in both vertical and horizontal terms, to structure the material for each review in the manner that works best for that review.)

Note: Within SCOUT, there can be zero, one, or a multiplicity of content sets entered under each focus level listed on the scope document, and these content sets can be a variable mixture of complete and partial sets.

Designing Content Sets

Designing effective content sets requires foresight and imagination. This is because the results obtained by a given content set are not viewable until long after the set is created, when someone uses information from the content set in a questionnaire and subsequent review. (And even then the feedback received—a completed questionnaire and review—will be hard to interpret because it will in most cases apply to limited portions of dozens of content sets.) In designing content sets, a PIL, like a chess player, must think several steps ahead of the game.

Content Sets in Action

The wide variety of content sets usable in SCOUT means that it is impossible to give one universally applicable description of content sets in action. However, a description of the operation of a complete content set built on a Yes/No question will communicate the basic principle.

In a complete content set based on a Yes/No question, the PIL writes and enters into SCOUT a Yes/No question (such as, "Do you currently have a Windows NT multiple-domain structure?"), the possible answers to the question (Yes and No), and two different content sections, one mapping to the Yes answer, one to the No. (Naturally, all of this content set is entered under a particular focus level in a particular module of a particular scope.) The preceding operations are done in SCOUT Admin. Next, using SCOUT Questionnaire Builder, the PIL builds a standard questionnaire for this review and includes the Yes/No question just described. Next, using SCOUT Data Collection, the customer fills in the questionnaire, answering our Yes/No question in the process. Finally, as the TAM is assembling the review in SCOUT

Author, SCOUT will note whether the customer answered yes or no to our question, and will flow the associated content section into the first draft of the Supportability Review.

SCOUT allows an almost endless number of variations on this basic theme. For example, it is possible to have questions without content, content without questions, and questions that aren't really questions but rather requests for information which the customer supplies by sending an e-mail attachment back with their completed questionnaire. These variations, which will be discussed elsewhere in this guide, allow PILs and TAMs great freedom in designing and using SCOUT materials.

More SCOUT Concepts

A few other SCOUT concepts are worth being familiar with before you begin working with the tool:

- **Independent vs. dependent content.** *Dependent* content is the term for content chunks that are linked to specific answers on the data questionnaire. (The content sections in complete content sets are thus dependent by definition.) Content sections that are *not* linked to any particular answers are known as *independent* content. Reflecting this division, SCOUT Admin is divided into two modes, **Independent Content Mode** and **Dependent Content Mode**. PILs determine whether a given content chunk will be dependent or independent as they develop their material in the early stages of preparing it for SCOUT.

- **Standard and non-standard questions and content.** Questions and content sections designated "standard" can be thought of as default material; those not so marked are known as non-standard and can be thought of as non-default. Standard material is automatically included when SCOUT builds the relevant questionnaire or review (though the TAM has the option of removing specific items). Non-standard material will only be included if the TAM indicates it should be. It is the PIL who designates material standard or non-standard in the first place (using SCOUT Admin for content sections and SCOUT Questionnaire Builder for questions).

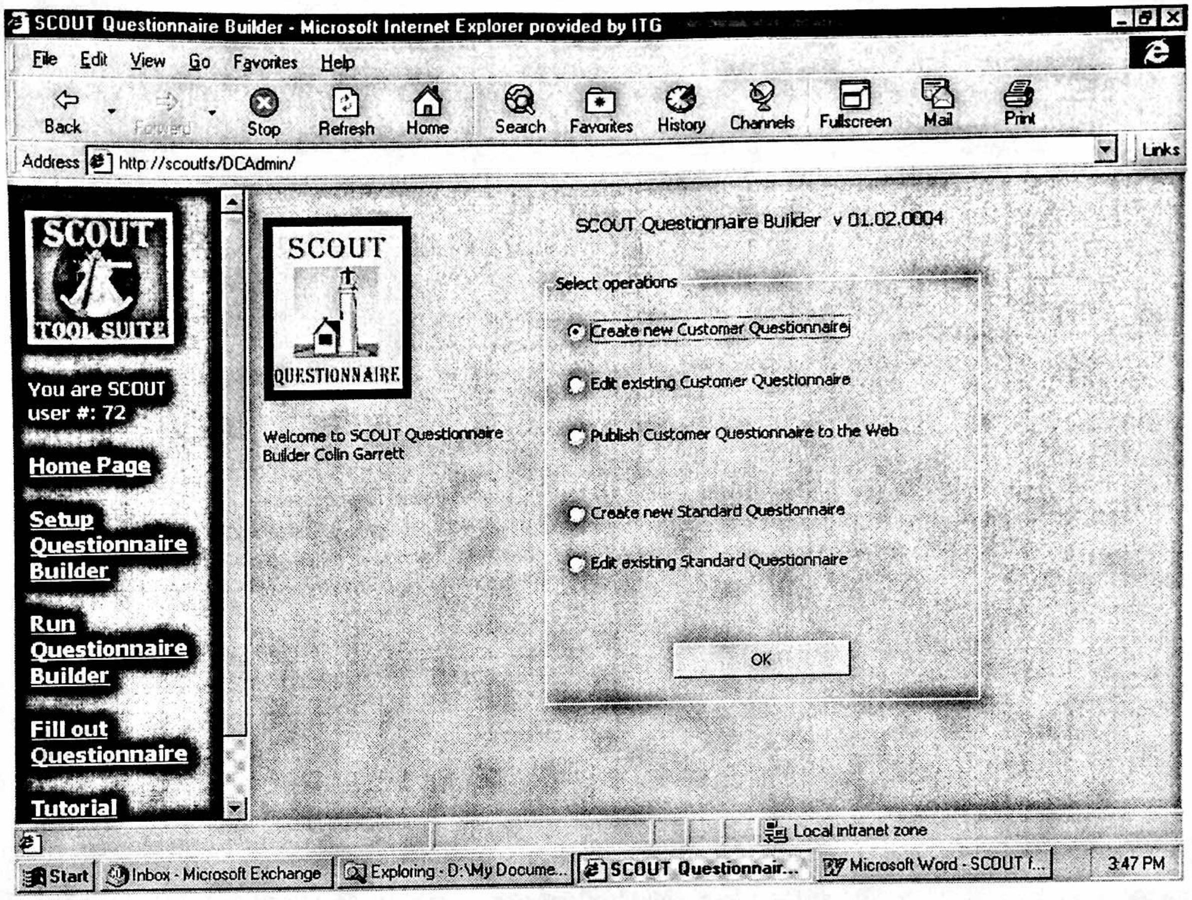
- **SCOUT question types.** As previously discussed, questions in SCOUT are categorized by answer format (Yes/No, Multiple Choice, Request, or Narrative). They are also categorized by dependency relationship, namely whether they are Root, Leaf, or Branch questions. These terms are defined later in this guide.

- **Content Mapping.** SCOUT is based on a concept known as mapping of information, which is a way of creating complex documents out of small blocks of information called chunks. In SCOUT's case, the starting point for mapping is a large library of short sections of Supportability Review content. SCOUT enables users to build customized Supportability Reviews by pulling the relevant content sections from this database and stringing them together. The content sections, as stated earlier, are labeled by product, review type, module, and focus, and in stringing the sections together, SCOUT automatically puts them in the order dictated by the scope.

Using SCOUT Questionnaire Builder

SCOUT Questionnaire Builder is the tool TAMs use to produce, publish, and print Customer Questionnaires for their customers. It is also used by PILs to create the Standard Questionnaires that are the starting point for the Customer Questionnaires.

When you launch SCOUT Questionnaire Builder from the SCOUT home page (http://scoutfs/scout), the following screen appears.



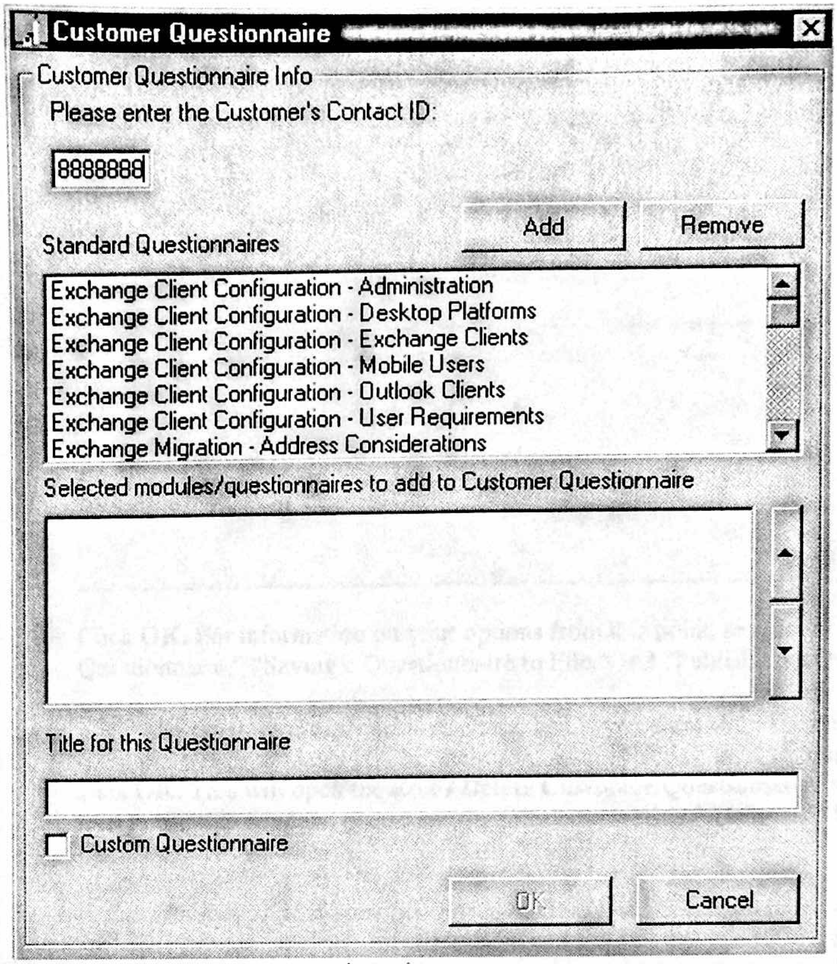
This screen offers a choice of five operations regarding the creation and editing of data questionnaires:

- **Create new Customer Questionnaire.** This option allows the TAM to create a new questionnaire for a specific Premier customer.
- **Edit existing Customer Questionnaire.** This option lets the TAM edit a questionnaire he or she previously created for a particular customer and then saved into the system (without publishing to the Web).
- **Publish Customer Questionnaire to the Web.** This option allows the TAM to publish to the World Wide Web a questionnaire intended for a specific customer. The customer can then access the questionnaire over the Web and fill it out.
- **Create new Standard Questionnaire.** (**PILs only**.)This option is for creating the Standard Questionnaire for each review. The Standard Questionnaire is the default questionnaire for a particular review and there is one Standard Questionnaire for each review type in SCOUT (for example, the system contains one Standard Questionnaire for the Windows NT Domain Architecture Review).
- **Edit existing Standard Questionnaire.** (**PILs only**.) This option allows PILs to edit the Standard Questionnaires they have previously created and saved into the system.

As stated above, of these five options, only the first three will normally be used by TAMs. Accordingly, this guide limits itself to discussion of those three options. (For information on the last two options, please see the guide *SCOUT for PILs*.)

Creating a Questionnaire for a Customer

To create a new data collection questionnaire for a specific customer, a TAM should choose the "**Create new Customer Questionnaire**" option then click **OK**. The following dialog box will appear.



To create a new customer questionnaire:

1. Type in the Customer's Contact ID number. (SCOUT accepts numbers only in this field, hence you cannot use the old-style, alphanumeric customer ID numbers.) When you have entered a valid number, the "Standard Questionnaires" window will populate with questionnaires available in SCOUT.

   Note: Some PILs group the questions for their reviews together in one big Standard Questionnaire; however, some prefer to break their questionnaires down into their component modules (examples of the latter approach are shown in the illustration above, where the questions for the Exchange Client Configuration Review have been entered by module). The basic operation of SCOUT Questionnaire Builder, as explained below, is the same for both approaches. The two methods merely reflect different strategies on the part of the PILs, who in many cases are working with highly dissimilar types of material.

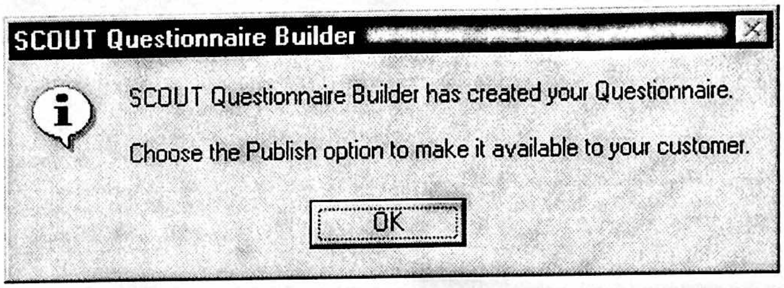
2. Select the Standard Questionnaire(s) and/or module(s) that, in combination, most closely cover the areas about which you want to get information from your customer. To select an entry, highlight it and click the **Add** button. The entry will appear in the "Selected modules/questionnaires to add to Customer Questionnaire" pane. (To remove unwanted entries from this pane, highlight them and click the **Remove** button.)

3. In the field "Title for this Questionnaire," confirm the name supplied by SCOUT or enter a new one, as appropriate. The tile should name the subject covered by the questionnaire; SCOUT will automatically add the customer's name.

4. Fill in—or leave blank—the .Custom Questionnaire box. This choice is explained below.

- **Leave the Custom Questionnaire box blank** if .you want to accept, and send to your customer, only those questions that were .designated as standard by the PIL who entered the material. Leaving it blank means you will use the Standard Questionnaire (or the standard versions of any module-level questionnaires you chose).

  If the Standard Questionnaire (or modules) meets your needs (and if you do not want to review or print your questionnaire), you are almost done. Leave the **Custom Questionnaire** check box blank and click **OK.** The following dialog box will appear:



  Click **OK.** For information on your options from this point, see the sections "Printing a Questionnaire," "Saving a Questionnaire to File," and "Publishing a Questionnaire to the Web."

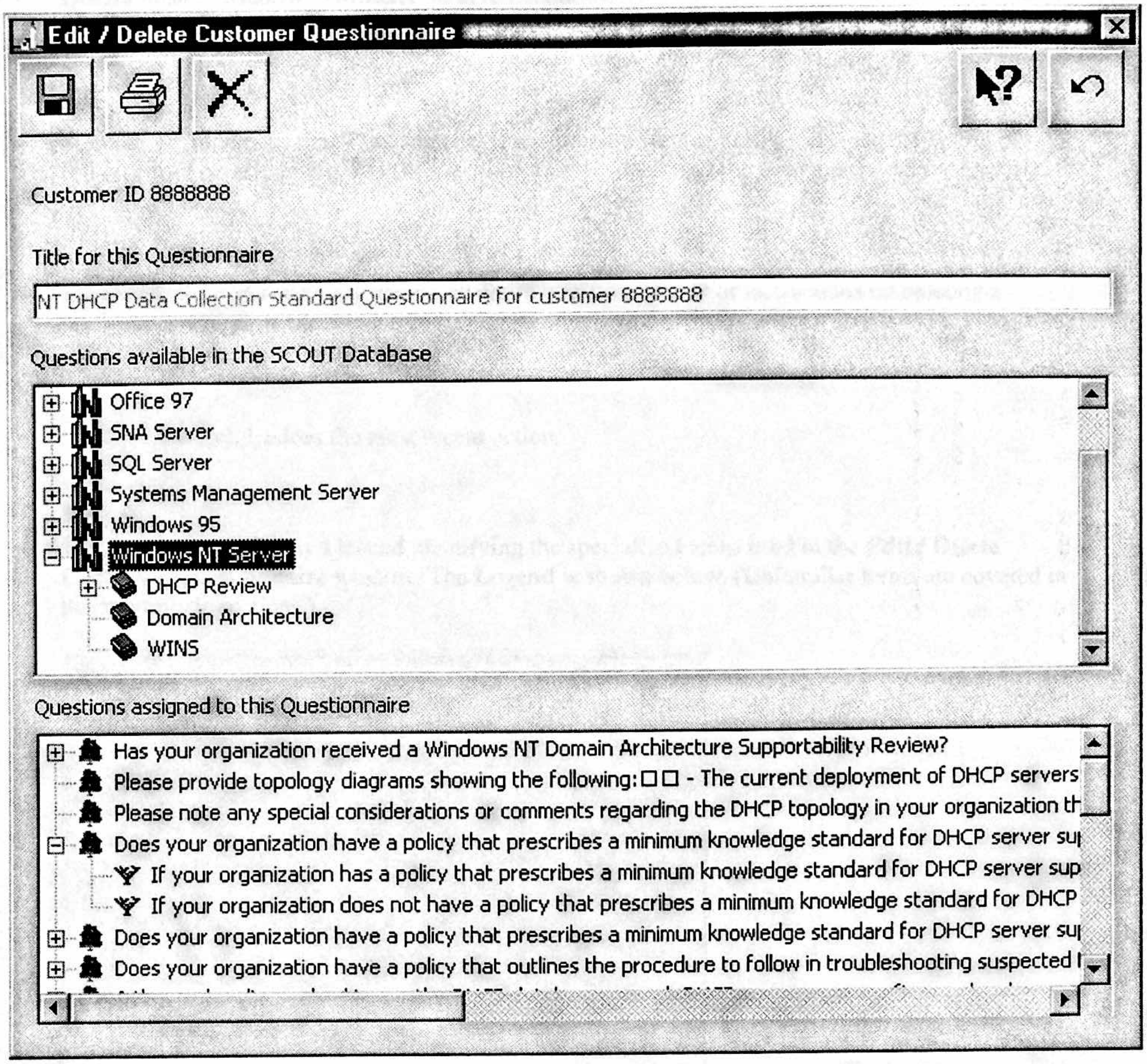
- **Fill in the Custom Questionnaire check box** if you want to add or delete questions to or from the questionnaire or modules you have chosen. After selecting the **Custom Questionnaire** check box, click **OK**. This will open the **Edit / Delete Customer Questionnaire** window. For instructions on how to use this window, please see the following section ("Using the 'Edit / Delete Customer Questionnaire' Window").

Note: A problem may arise if you choose two module-level questionnaires that share one or more questions. SCOUT may return an error message and bar you from proceeding with this operation. A possible workaround for this problem is to remove one of the conflicting modules, select the Custom Questionnaire check box, and add the questions you need individually in the **Edit/Delete Customer Questionnaire** window.

Using the "Edit / Delete Customer Questionnaire" Window

The **Edit / Delete Customer Questionnaire** window allows you to custom-build a questionnaire for a customer. You do this by adding and removing questions from the Standard Questionnaire—or standard module-level questionnaires, if you are preparing a questionnaire for a review whose PIL opted to build their questionnaires by this method—that are closest to the questionnaire you want to send your customer. This window, shown below, is also where you can direct SCOUT to print your questionnaire.

Warning: Do not hit your browser's **Refresh** button while building a questionnaire. Doing so will erase your work and eject you from the tool.



The **Edit / Delete Customer Questionnaire** window includes three panes:

- **Title for this Questionnaire.** Shows the name of the questionnaire you are creating.

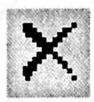
- **Questions available in the SCOUT Database.** Shows a list of all the Microsoft products included in SCOUT, arranged in an exploding tree view. By clicking and double-clicking, you can open up the tree to see the various reviews, modules, focus levels, and individual questions.

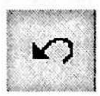
- **Questions assigned to this Questionnaire.** Shows all the questions included in the Standard Questionnaire (or standard module-level questionnaires) you chose as the basis for your customer's review. This is the list you will modify to make your custom questionnaire.

In addition to these three panes, the "Edit / Delete Customer Questionnaire" Window includes five buttons.

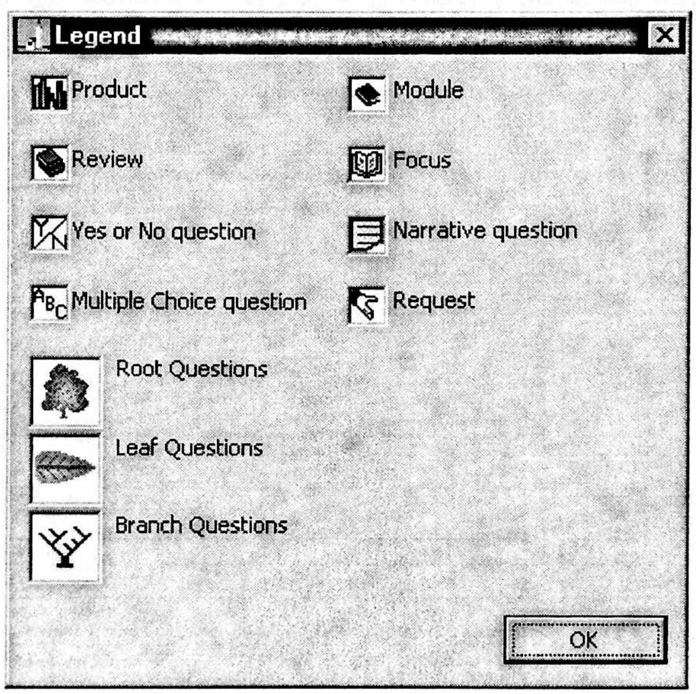
-  **Save.** Saves the questionnaire into SCOUT and closes the "Edit / Delete Customer Questionnaire" window. (However, to save the question as a file, you must use the **Print** button, as explained below.)

-  **Print.** Opens the "Print selected Questionnaire" dialog box, giving you the option of printing your questionnaire. *This is also the button you click to save your questionnaire as a file.*

-  **Delete.** Permanently deletes an entire questionnaire. (For instructions on deleting a particular question, see below.)

-  **Cancel.** Undoes the most recent action.

-  **Legend.** Opens a legend identifying the specialized icons used in the **Edit / Delete Customer Questionnaire** window. The **Legend** is shown below. (Unfamiliar terms are covered in the appropriate sections.)



Types of Questions

Questions in SCOUT Questionnaire Builder are characterized two ways, by **answer format** and **dependency relationship**.

Questions Grouped by Answer Format

SCOUT requires that all questions in the database fit into one of four categories in terms of the format of the answer. These are:

- **Yes or No.** A question the customer answers with either yes or no.
- **Multiple Choice.** A question the customer answers by choosing one answer from a list provided by Premier.
- **Narrative.** A question the customer answers by typing text into an answer field in the questionnaire.
- **Request.** A question the customer responds to by submitting or attaching a document or diagram.

The PIL determines the answer format to use with each question when writing the questions and inputting them in SCOUT Admin.

Questions Grouped by Dependency Relationship

SCOUT allows questions to be arranged in dependent or branching relationships such that a customer's answer to one question can determine which questions, if any, they are then offered from farther out on the same branch. In terms of dependency relationship, there are three types of questions:

-  **Root Questions.** The primary, dominant level of question. Root questions are independent, stand-alone questions whose presence in the questionnaire is not affected by the customer's answers to other questions. Though not dependent on other questions, Root questions can have other questions made dependent on *them.*

-  **Leaf Questions.** Questions attached to and dependent on Root questions, but not to any particular answer of the Root question. Use of this option is more a matter of organizational convenience than logical necessity.

-  **Branch Questions.** A Branch question is attached to and dependent on a particular answer of the preceding Root question (or of a higher-level Branch question). Branch questions allow you to ask the customer follow-up questions about a particular contingency. These questions are presented to the customer only if their answers indicate this line of questions is relevant to their situation. Branch questions can only be attached to Yes/No or Multiple Choice questions.

Note: You can attach either a Leaf or a Branch question to a Root question, but not both.

Deleting Questions

Two principle actions are involved in creating a custom questionnaire: Deleting questions from a standard questionnaire or standard module-level questionnaires, and adding questions *to* a standard questionnaire or standard module-level questionnaires. (Remember, these standard questionnaires were chosen by you earlier, in the Customer Questionnaire Info dialog box.) Adding questions is discussed in the next section. This section discusses how to delete questions.

To delete a question in the **Edit / Delete Customer Questionnaire** window:

1. In the **Questions assigned to this Questionnaire** window, highlight the question you want to remove.
2. Press the DELETE key on your keyboard. This will delete the highlighted item from your custom questionnaire.

   Important: Do not click the **Delete** button at the top of the window. This button is for deleting an entire questionnaire, not a particular question. (If you click this button by mistake, SCOUT will ask if you are sure you want to permanently delete the entire questionnaire. Click **No** and you will be returned to the **Edit / Delete Customer Questionnaire** window.)

   Note: If you delete a Root question to which any Leaf or Branch questions are attached, those questions will also be deleted.

Adding Questions

To add questions to your questionnaire:

1. In the **Questions available in the SCOUT database** window, find and highlight the question you want to import into your customized questionnaire.
2. Drag the question down to the **Questions assigned to this Questionnaire** window.
3. Drop the question in the desired location. When you do this, the **Select Question Type** dialog box will appear.
4. In the **Select Question Type** dialog box, and using the drop-down menu provided, choose whether you want the question to be a Root, Leaf, or Branch question, then click **OK**. (If you choose Branch question, you will then be given a list of the possible answers to the Root question and asked which answer you want the Branch question to descend from.)

Important: In importing questions into the **Questions assigned to this Questionnaire** window, note the following:

- Error messages will appear if you attempt such proscribed actions as adding a Leaf question to a Root that already has a Branch question or attaching a Branch question to a Root question that does not have any associated answers.
- If you want to add the new question to the very end of the current questions list, use the scroll bar to scroll to the end of the list and hold the insertion point below the last item.
- To insert the new question as a Root question between two current Root questions, drop it on the bottom-most of the two current questions.
- Root questions are listed in the published questionnaire in the order in which they are imported into the **Questions assigned to this Questionnaire** window, not the order in which they appear in that window. (This means that efforts to rearrange the order of the Root questions after pulling them into the **Questions assigned to this Questionnaire** window will appear to succeed but will in fact be undone when you save the questionnaire into SCOUT.)

You have finished building your Custom Questionnaire. For information on your options from this point, see the sections "Printing a Questionnaire," "Saving a Questionnaire to File," and "Publishing a Questionnaire to the Web."

Editing an Existing Customer Questionnaire

To edit a customer questionnaire that has previously been saved into the system (but not yet published to the Web):

1. On the SCOUT Questionnaire Builder Welcome screen, select the "Edit existing customer Questionnaire" option. This will open the "Customer Questionnaire Info" dialog box.
2. In the "Customer Questionnaire Info" dialog box, type in the customer's contact ID number. (SCOUT accepts numbers only in this field, hence you cannot use the old-style, alphanumeric customer ID numbers.) When you have typed in a valid number, the "Select Customer Questionnaire" window will populate with the names of saved customer questionnaires. Highlight the questionnaire you wish to edit and click OK. This will open the **Edit / Delete Customer Questionnaire** window. (The lower of the two panes will show the "Questions assigned to this Questionnaire.") Proceed as described above in the section "Using the 'Edit / Delete Customer Questionnaire' Window."

Printing a Questionnaire

You can print a questionnaire right after creating it or after saving it to SCOUT and returning to it at a later time. You must be in the "Edit / Delete Customer Questionnaire" window. (If you just created the questionnaire, you will have accessed the window by choosing the "Create new Customer Questionnaire" option. If you are printing a saved questionnaire, choose the "Edit existing Customer Questionnaire" option.)

1. In the "Edit / Delete Customer Questionnaire" window, click the Print button. This will open a dialog box called "Print selected Questionnaire."
2. In this dialog box, click the Print button to open the Windows Print dialog box and enter your print commands.

Saving a Questionnaire to File

As with printing, you can save a questionnaire to file right after creating it or after saving it to SCOUT and returning to it at a later time. Also as with printing, you must be in the "Edit / Delete Customer Questionnaire" window.

1. In the "Edit / Delete Customer Questionnaire" window, click the **Print** button. **Do not click the Save button** (doing so will save the questionnaire to SCOUT but does not provide access to the **Save Questionnaire as ...** dialog box). Clicking the Print button will open the "Print selected Questionnaire" dialog box.
2. In this box, click the **Save** button. This will open the **Save Questionnaire as ...** dialog box. This dialog box allows you to save the questionnaire as a file on your computer or network.

Publishing a Questionnaire to the Web

SCOUT allows you to publish your completed questionnaire to the World Wide Web, where the customer can access and fill it out before returning it to Microsoft. To publish your completed questionnaire to the Web:

1. In the SCOUT Questionnaire Builder Welcome screen, select the "Publish Customer Questionnaire to the Web" option.
2. In the "Publish Customer Questionnaire" dialog box, type in the customer's contact ID number. (SCOUT accepts numbers only in this field, so you cannot use the old-style, alphanumeric customer ID numbers.) The "Select Customer Questionnaire" window will populate with the names of saved customer questionnaires. Highlight the questionnaire you wish to publish and click OK.
3. A dialog box will appear indicating that SCOUT has published your customer questionnaire to the Internet.

Access to published questionnaires is through SCOUT Data Collection.

Note: Once a questionnaire is published to the Web, all traces of it vanish from SCOUT Questionnaire Builder.

Using SCOUT Data Collection

SCOUT Data Collection is the tool TAMs use to review questionnaires they have published and that customers use to access and fill out questionnaires prepared for them by their TAMs. (If the customer completes their questionnaire in hard copy, the TAM would use SCOUT Data Collection to enter their answers into SCOUT.) The answers entered into SCOUT Data Collection are then used by SCOUT in selecting the appropriate content for that customer's review from the SCOUT content library.

Access to SCOUT Data Collection

TAM Access

TAMs access SCOUT Data Collection either by clicking on the "Fill out Questionnaire" button on the left side of the SCOUT Questionnaire Builder screen or by going to the SCOUT home page.

Customer Access

As of this writing, the method by which customers will access SCOUT Data Collection is not yet finalized, but it is anticipated that it will be through Microsoft's Service Desk and work as follows:

1. The customer will log on to the Service Desk.
2. From the Service Desk, there will be a link to SCOUT Data Collection.
3. Once the customer clicks over to SCOUT Data Collection, they will be presented with a list of all the published questionnaires that have been prepared for them. (The information they provide in logging on to Service Desk will be used to search for and display any questionnaires that have been saved for them in SCOUT.)
4. The customer will then click on the appropriate questionnaire to open it and fill it in.

Completing a Questionnaire

To complete a questionnaire:

1. From the SCOUT Data Collection introduction screen (titled "Supportability Review Data Collection"), click Next.
2. From the "Select Review Questionnaires" page, fill in the seven-digit customer Contact ID and click the Lookup button. When a valid Contact ID number is entered, the "Available Customer Questionnaires" window will populate with the questionnaires saved to the database for this customer.
3. Highlight the appropriate questionnaire and click Next. This will open the questionnaire.
4. Answer the questions, clicking the Back or Next buttons to move through the various question screens. (The text above the question indicates the product, review, module, and focus level the question belongs to.)
5. When all the questions have been answered, the final screen appears. This includes a text box where the customer may type in any additional comments they would like to send the TAM.
6. Click Finish.

Warning: Do not hit the Refresh button when completing a questionnaire; doing so will eject you from the tool without saving your answers.

Note: It is possible to use the back and forward arrows to return to and preview questions. **It is not possible to start work on a questionnaire then save your work and return to it another time.**

Answering the Questions

The four types of SCOUT Data Collection questions are answered as follows:

- **Yes/No.** Click on Yes or No.
- **Multiple Choice.** Click the correct answer.
- **Narrative.** Type the answer in the free-form field.
- **Request.** Click the "Send Request" link, which will open an e-mail pre-addressed to the TAM who created the questionnaire. Send the requested item as an attachment in this e-mail.

Branch and Leaf Questions

For some questions (entered as Root questions in SCOUT Questionnaire Builder), supplying a particular answer may cause associated Branch or Leaf questions to appear. Answer these as presented, and SCOUT Data Collection will lead you accurately through the questionnaire.

Printing a Questionnaire

The SCOUT Data Collection online tutorial gives instructions for printing a completed questionnaire; however, as of this writing, the method described does not work. This problem has been entered into RAID as a bug.

The tutorial's instructions for printing are as follows:

1. From the last **Data Collection** screen, click **Finish**.
2. From the **Finish** screen, click the Internet Explorer **Back** button.
3. The completed questionnaire appears on your screen.
4. Click the Internet Explorer **Print** button.

However, when, as instructed, you click the Internet Explorer **Back** button, the tool returns a message saying, "Warning: Page has Expired." This happens regardless of how quickly you click the **Back** button.

Workaround: The workaround to this problem is clicking the Internet Explorer **Print** button for each page in the questionnaire after the answers are filled in.

Note: In the current version of SCOUT Data Collection, the TAM does **not** have the option of accessing and reviewing the customer's completed questionnaire. After the customer submits their completed questionnaire, the SCOUT Author tool consults it in assembling the draft review; however, the completed questionnaire is not available for review by the TAM. It is understood that this may pose problems for TAMs, and the issue is under review.

Using SCOUT Author

SCOUT Author is the tool TAMs use to build the *first draft* of a Supportability Review. SCOUT Author does not build finished reviews. To complete a review, the TAM must analyze the customer's information and make any appropriate additions, deletions, and changes to the first draft of the review. The TAM must also rework the Executive Summary, Conclusion, and recommendations so that they accurately reflect the customer's situation.

Warning: Do not hit your browser's **Refresh** button while building a review. Doing so will erase your work and eject you from the tool.

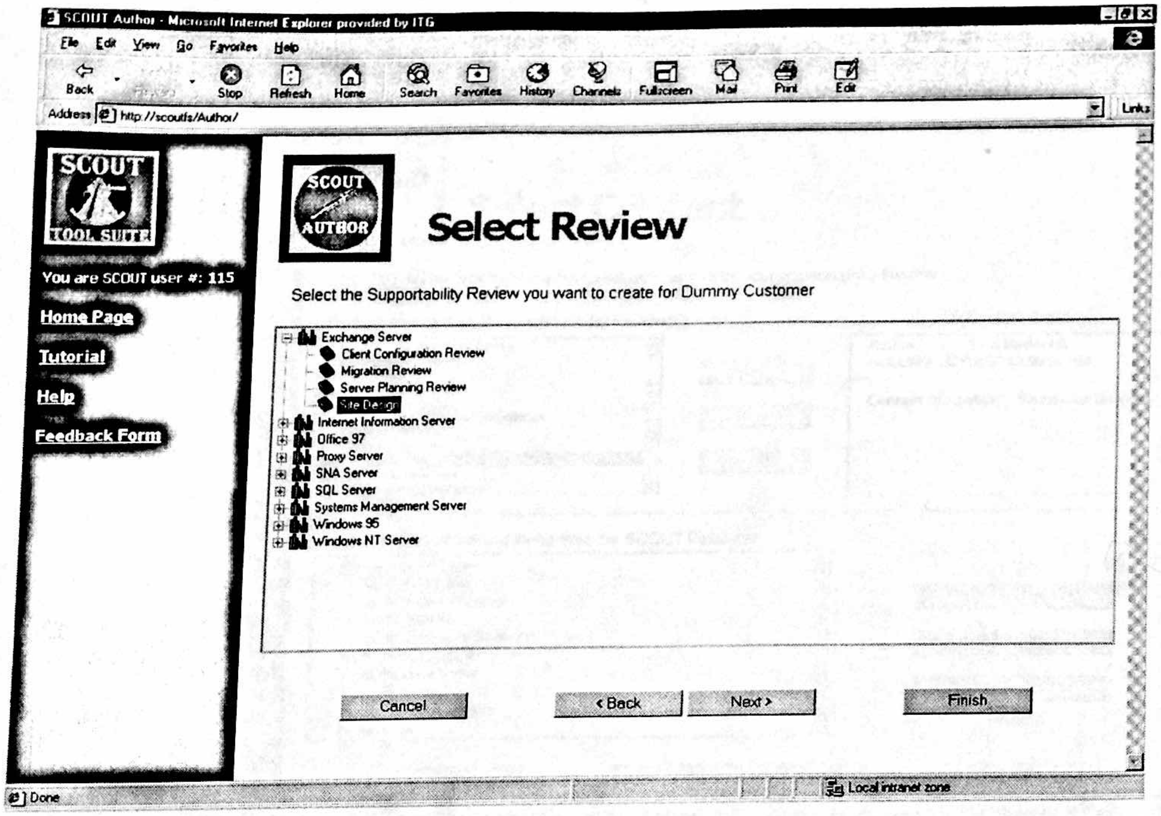
Building a New Review

This section assumes that a completed questionnaire for the customer has already been saved into SCOUT Data Collection.

To start building a new Supportability Review:

1. From the SCOUT Author introduction screen (titled "Building a Supportability Review"), type in the customer's Microsoft ID number and click Next. (SCOUT accepts numbers only in the customer ID field, hence you cannot use an old-style, alphanumeric customer ID number.)

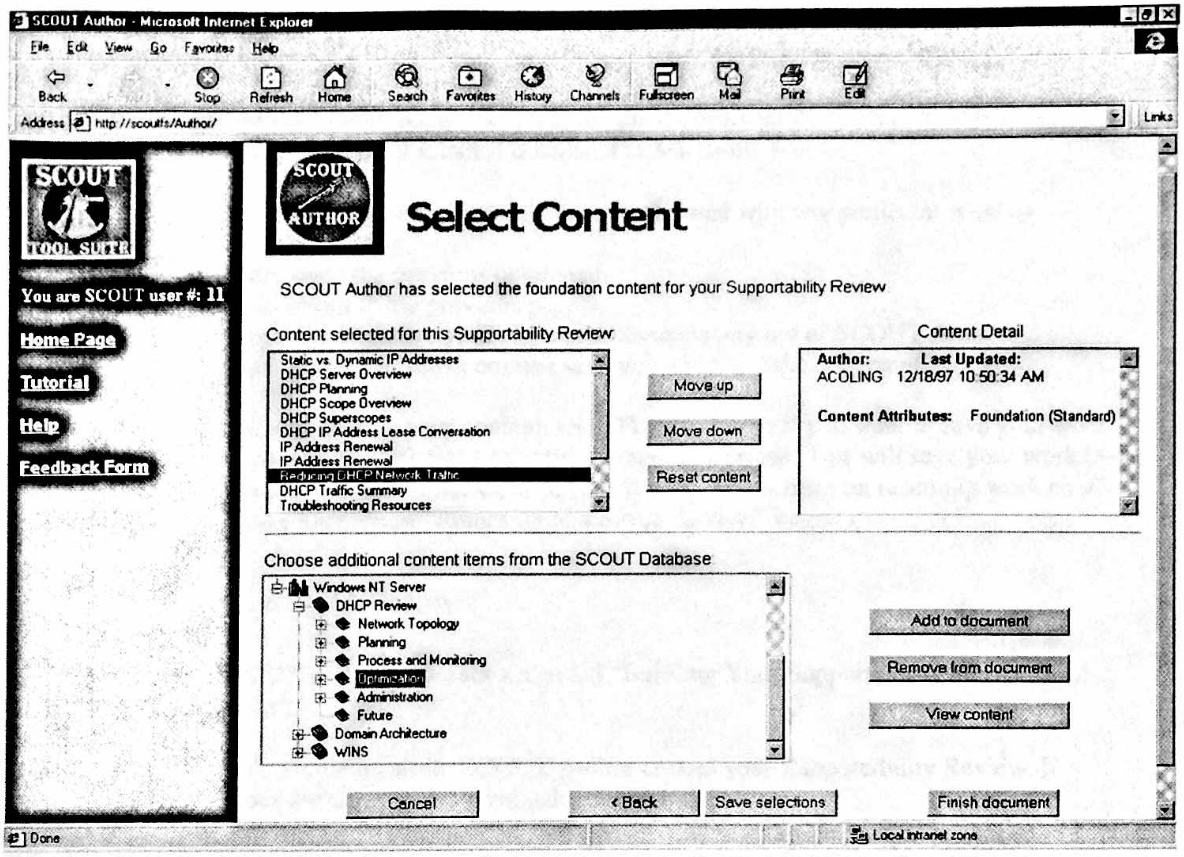
2. On the Document Properties page, choose from the "Completed Questionnaires" list the completed questionnaire you want to base this review on, then click Next. (Do not select the "Show reviews in progress" box.) The following screen will appear:



3. On the "Select Review" page, on the tree menu, find and highlight the name of the review you want to create.

4. If you want to accept the default (Standard) selections for content , then click **Finish** and skip ahead to the section "After Clicking the Finish Button." If however, you wish to customize or review the content selected for your review, proceed to Step 5.

5. Click Next. This will open the "Select Content" page, which is shown and explained below.



The Select Content page includes windows showing the content currently slated for inclusion in your review as well as all the content in the SCOUT content library (the latter organized by product, review, module, and focus level). The page allows you to add or remove content from your review, to arrange it in the optimal order, and to view it in Microsoft Word. The elements of the Select Content page are:

- **"Content selected for this Supportability Review" pane.** This lists all the documents slated for inclusion in the review you are building. When you first open the Select Content page, the documents listed in the window are those designated "Standard" by the PIL and which are called for by the customer's answers to the Questionnaire. Three buttons are associated with this window:
  - **Move up.** Click to make the selected document jump up one place.
  - **Move down.** Click to make the highlighted document jump down a spot.
  - **Reset content.** Click to restore the list to the Standard Content defaults that obtained when you first opened the Select Content page.

Note: Single-clicking on the items in this list will select them to the level necessary to use the Move up and Move down buttons. Double-clicking on them displays their attributes in the "Content detail" window and makes the tree view in the "Choose additional content items from the SCOUT Database" window open to show the selected document.

- **"Content detail" pane.** Shows the author, update date, and content attributes of the selected document.
- **"Choose additional content items from the SCOUT Database" pane.** Provides access to the entire SCOUT content library, organized by exploding tree view. This window has three buttons:

- **Add to document.** Click to add the selected document into the current review. The document will appear in the "Content selected for this Supportability Review" pane. If the document chosen already exists there, an error message will tell you so.
- **Remove from document.** Removes the highlighted document from the current review.
- **View document.** Opens the selected document in Microsoft Word.

- **Additional buttons.** The following buttons are not associated with any particular window.
  - **Cancel.** Click to undo the previous command.
  - **<Back.** Click to return to the previous page.
  - **Save Selections.** Click to save your choices without closing out of SCOUT Author.
  - **Finish document.** Click to finish content selection and build the document.

6. After you have selected and arrange your content, click **Finish**. (**Note:** If you want to save your work and continue working on it later, click **Save selections** instead of **Finish**. This will save your work into the SCOUT database and close the "Select Content" screen. For instructions on resuming work on a document-in-progress, see the section "Returning to a Saved Review" below.)

After Clicking the Finish Button

After you click **Finish,** SCOUT will shift to a screen called "Building Your Supportability Review" and display the following message:

> Please wait (approx. 1 minute) while SCOUT Author creates your Supportability Review. If SCOUT Author does not detect any errors, a document link follows.

When the link appears, you have the option of opening the document immediately or saving it as a file.

Important: The document associated with this link is not a completed review. It is best thought of as the first draft of a review. To complete it, the TAM must analyze the customer's information and make any appropriate additions, deletions, and changes. The TAM must also rework the Executive Summary, Conclusion, and recommendations so that they accurately reflect the customer's situation.

Returning to a Saved Review

To resume work on a partially built review that you previously saved into SCOUT Author:

1. From the SCOUT Author introduction screen (titled "Building a Supportability Review"), type in the customer's Microsoft ID number and click Next.

2. On the Document Properties page, select the "Show reviews in progress" box. This will cause a list box to appear and populate with the names of all the partially built reviews that have been saved into the system.

3. Highlight the review you wish to resume work on and click either **Finish** (to accept the content currently slated for inclusion in the review) or **Next** (to open the "Select Content" screen and make changes to the content).

4. From this point, the process for completing a saved review merges with the process for building a new one. For more information, see "Building a New Review," above. (In particular, refer to the section "After Clicking the Finish Button" and step 5 of the instructions, which explains the use of the "Select Content" screen.)

From SCOUT Draft to Finished Review

The document produced by SCOUT Author should be considered a first draft rather than a completed Supportability Review. Turning this draft into a finished Supportability Review requires critical input on the part of the TAM.

What SCOUT Provides

SCOUT Author assembles content sections relevant to your review (based on the various inputs from the PIL, TAM, and customer), flows them into a Microsoft Word document, formats this document, and appends the following items:

- Cover page
- Table of Contents
- Executive Summary section, which includes four subheadings: Introduction, Project Objectives, Validations (a list of all the Validations that appear in the document), and Recommendations (a list of all the Recommendations)
- Conclusion
- Appendix A – References and Recommended Reading
- Glossary (not a populated glossary, only a recommended place to put one)

However, the review built by SCOUT Author is not by any measure a finished Supportability Review. Completing the review requires energetic input on the part of the TAM.

The TAM's Role

To turn the draft Supportability Review provided by SCOUT Author into a finished Supportability Review, the TAM must **actively edit the substance of the document to ensure that the final Supportability Review is as accurate, valuable, pertinent, and customer-specific as possible.**

Typically, the TAM will perform the following activities in turning a SCOUT-produced draft into a completed Supportability Review:

- Analyzing the customer's information
- Studying the draft report
- Making any and all necessary additions, deletions, and changes to the content, recommendations, and validations
- Writing the Executive Summary
- Writing the Conclusion
- Adding a "Participants" section to the Executive Summary, if necessary and desired
- Fixing any formatting problems (see "Cleaning Up" below)

Cleaning Up

The document sections comprising SCOUT-produced Supportability Reviews have already been edited individually, and the number of errors within the text itself should be minimal. However, you are likely to encounter small problems in the formatting of the assembled document. Be sure to check the following and make the necessary corrections:

- **Line spacing.** For example, you may find there is insufficient space between a boxed recommendation and the subsequent body text.
- <*>. Search for the open bracket symbol and ensure that all placeholder text is replaced with real text.
- **Headings.** Check to make sure the size of each heading accurately reflects its place in the nesting of the content levels. Look especially at Heading 4 and Heading 5 (also known as TOC Heading 4 and

TOC Heading 5); these have been known to come out in the same size and font, when obviously headings designated Heading 4 should be larger than those in Heading 5.

- **Reference citations.** Thoroughly check "Appendix A - References and Recommended Reading" for irregularities (such as sets of empty quotation marks that need to be deleted). This appendix is assembled from information entered into a set of fields by the PIL, and on occasion there is imperfect congruity between the fields and the information, resulting in problems such as stray punctuation. Note also the section below, "Workaround for Appendix A Problem."

Workaround for Appendix A Problem

Due to a problem with the current version of SCOUT Administrator, PILs are sometimes obliged to include dummy, workaround text when inputting references. (This is because all the fields on this tab are currently coded as required even though it is possible to have a valid reference that does not include values for all fields.)

To complete the workaround this problem, the TAM must search "Appendix A - References and Recommended Reading" for the following:

- Workaround Title
- 99

and delete all instances where these strings are being used as dummy text (also delete any unneeded associated text, such as the word "Chapter" in "Chapter 99").

Adding Recommendations and Validations

The TAM may want to add customized recommendations or validations to any that were included automatically in the draft Supportability Review. Currently these must be formatted manually. To do this, imitate the style of the existing recommendations or validations. (Don't forget to copy the recommendation or validation in the proper place in the summary list of recommendations or validations at the front of the review.)

Eventually, SCOUT-produced draft Supportability Reviews in Microsoft Word will include customized commands to simplify the process of adding new recommendations or validations. Draft reviews will include a macro that adds a new menu name, called SupRev, to the right of the Word Help menu. The menu will include two commands, Recommendation and Validation, that will automate the process of formatting and rolling up recommendations and validations.

Using SCOUT Survey

SCOUT Survey is the application that Microsoft employees use to submit feedback on the SCOUT tool suite and that customers use to send in their feedback on the entire Supportability Review process. Typically, Microsoft employees should complete a survey after they have used any of the SCOUT applications. Customers should be asked to submit a survey 30 to 60 days after receiving a Supportability Review. The survey for both categories is one page long.

To complete a SCOUT Survey Feedback Form:

1. Open SCOUT Survey
2. Read the on-screen Introduction and click the **Next** button.
3. Answer yes or no to the question, "Are you a Microsoft employee?" When you select an answer, additional fields tailored to that answer will appear on the screen. These fields are for gathering information on your identity.
4. Fill in the fields and click the **Next** button.

5. The Supportability Review Survey Form will appear. Complete this one-page form.
6. Click the **Submit** button.

Warning: Do not hit the **Refresh** button when completing a survey; doing so will eject you from the tool without saving your responses.