



## **Download Management Studio**



## DMS: Onboarding Guide

[DMS]

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<i>Author(s):</i>	Fernando Rafasquino (v-ferafa@microsoft.com)

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## **1. Document Organization and Objectives**

The document is divided in 9 sections:

- **Document Organization and Objectives:** this section.
- **Roles & Responsibilities:** -
- **Introduction:** tool purpose and architecture.
- **Pre-Requisites:** requirements.
- **Create a Download site:** steps required to create a new download site.
- **Search for download site:** steps to find a download site.
- **Bulk Signoff:** steps to perform bulk approvals/Discard of the updates/new sites.
- **Bulk Change Download Ownership:** steps to update the owner of a download site.
- **Appendix:** Detailed information (document change history, reference documentation, etc.).

### **a. Objectives:**

The current document illustrates the steps required to create a Microsoft download site and all the management tasks around it.



**2. Roles & Responsibilities:** (this section is dynamic and must be completed according the project own resources, escalations paths and type of issues/bugs that can happen)

Contact	Name	Email	Phone	Cell Phone	Responsibilities
MSC Manager					
Factory Lead					
Tool Owner (MS)					

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a. Escalation Path (for issues during implementation):

Issue Level	Description
Low	Describe possible Issues/Bug (i.e.: the task has been delayed due to a holiday )
Medium	Describe possible Issues/Bug
Blocker	Describe possible Issues/Bug

<i>Low Issue(example)</i>		
<i>Time Line(After executioner informs)</i>	<i>Level</i>	<i>Contact To</i>
<i>2 hour</i>	<i>6</i>	Infrastructure Crew (Email) with copy: Infrastructure Lead
<i>3 hour</i>	<i>5</i>	Infrastructure Crew (Phone or Communicator)
<i>4 hours</i>	<i>4</i>	Infraestructura Lead (Email)
<i>6 hours</i>	<i>3</i>	Infrastructure Lead (Phone or Communicator)
<i>&gt;6 hours</i>	<i>2</i>	Project Lead (Email) with copy: Infrastructure Lead
<i>&gt;8 hours</i>	<i>1</i>	MSC Manager (Email) with copy: Infrastructure and Project Leads

<i>Medium Issue (example)</i>		
<i>Time Line(After executioner informs)</i>	<i>Level</i>	<i>Contact To</i>
<i>30 minutes</i>	<i>6</i>	Infrastructure Crew (Email) with copy: Infrastructure Lead
<i>45 minutes</i>	<i>5</i>	Infrastructure Crew (Phone or Communicator)
<i>1,5 hours</i>	<i>4</i>	Infraestructura Lead (Email)
<i>2 hours</i>	<i>3</i>	Infrastructure Lead (Phone or Communicator)
<i>3 hours</i>	<i>2</i>	Project Lead (Email) with copy: Infrastructure Lead
<i>5 hours</i>	<i>1</i>	MSC Manager (Email) with copy: Infrastructure and Project Leads

<i>Blocker Issue(example)</i>		
<i>Time Line(After executioner informs)</i>	<i>Level</i>	<i>Contact To</i>
<i>10 minutes</i>	<i>6</i>	Infrastructure Crew (Email) with copy: Infrastructure Lead
<i>20 minutes</i>	<i>5</i>	Infrastructure Crew (Phone or Communicator)
<i>30 minutes</i>	<i>4</i>	Infraestructura Lead (Email)
<i>35 minutes</i>	<i>3</i>	Infrastructure Lead (Phone or Communicator)
<i>60 minutes</i>	<i>2</i>	Project Lead (Email) with copy: Infrastructure Lead
<i>120 minutes</i>	<i>1</i>	MSC Manager (Email) with copy: Infrastructure and Project Leads

Note: all the issues that aren't present in the document will be assigned as "Medium" Issue Level.

### **3. Pre-Requisites:**

Anyone with Corpnet Access can become an owner of a Download utilizing the Download Management Suite. At least one FTE must sign off on the download and it is always good practice to have an FTE as an owner.

- MS Alias
- Connection to corpnet (Direct Access or Ras Enable)
- MSCOMM – Download Management Studio installed(<http://downloadservice/managementconsole/>)

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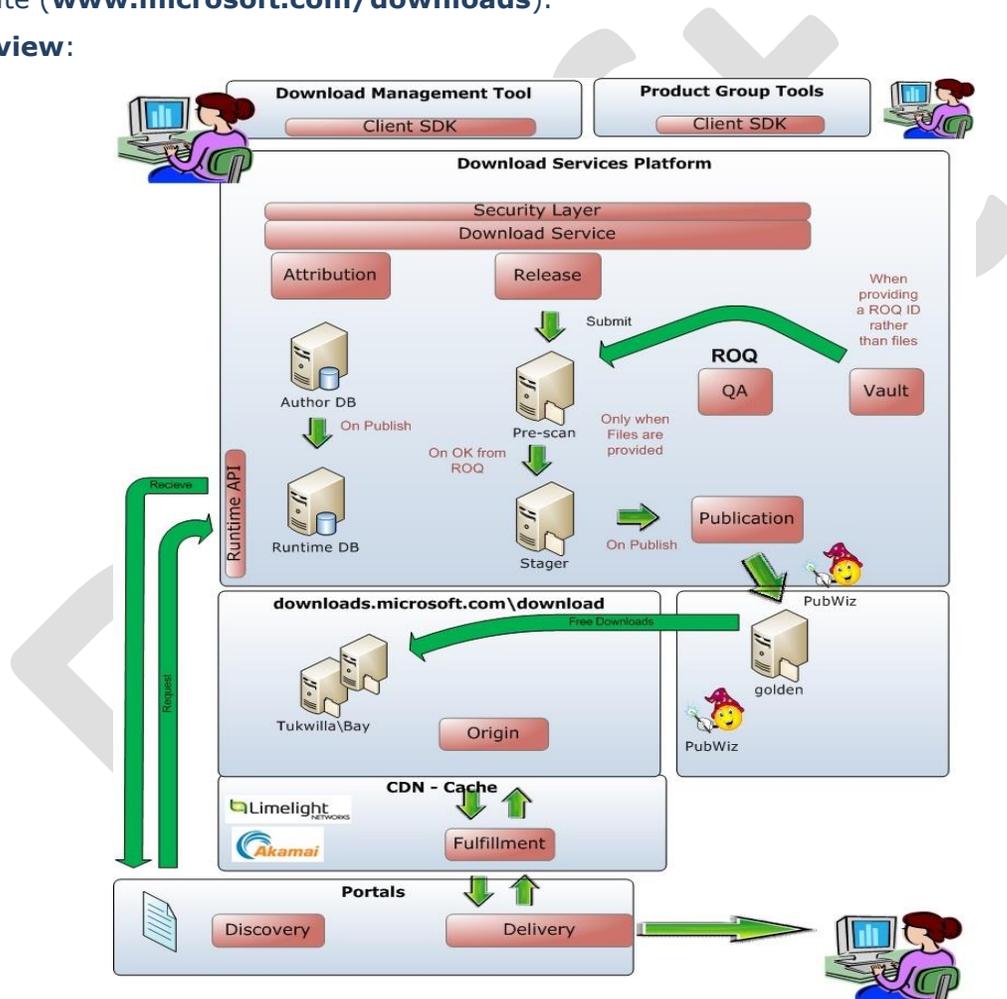
### 4. Introduction

The Downloads Management Studio is a single destination where Microsoft Internet content providers (ICPs) can publish, manage, and release software downloads and data about those downloads.

ICPs upload data once, initiate localization, attach downloadable files, and publish data and files to the World Wide Web.

Downloads then can be assessed by our external customers via the Download Center Website ([www.microsoft.com/downloads](http://www.microsoft.com/downloads)).

**Overview:**



The Download Services Platform (DSP) is primarily defined by three entities: Download, Details and Release. These entities are the foundation behind the Download Management Studio (DMS) that orchestrates the effective Attribution, Release, Quality Assurance and Publication of electronic content which represents Microsoft products. This content needs to be delivered expeditiously and efficiently to a global audience from the Microsoft Download

Center. The Download Management Tool is the foundational tool that enables this process to be realized and is the major focus of this document.

A Download describes content that can be delivered electronically such as: documents; add-ins; administrator kits; applications; drivers; hot-fixes; patches; resource kits; service packs; amongst others. The more granular attributes of a Download can also be represented in different Locales known as Details. Although this practice is desired, it is not essential that Details are associated to a Download. What is essential is the need to have at least one Release associated with a Download. A Release mainly represents the Files that apply to one or more Languages as well as other meta-data that describes the Release. A Language can only feature in one Release for a particular Download. The Download Management Studio (DMS) enables internal Microsoft customers to effectively initiate and manage the life-cycle process of a Download. Internal Microsoft employees are responsible for the initial creation, attribution, validation and publication of a Download; as well as the un-publishing and deletion of a Download once the content is no longer relevant or useful.

Prior to capturing a Download into the DSP, users have significant preparatory work to complete with regards to assembling the required software Files. Once the Files are assembled, the user will access the DMS to create a Download and one or more Releases. The user may also choose to add Details on a per-locale basis, so as to provide a comprehensive description of a Download and to have these details become accessible on the Microsoft Download Center. This is an optional step in the process; in many cases, users simply want to create a Release and access the URL and make that available on another site (such as MSDN).

As mentioned above, the key step is for the user to create a Release for a language-set and associate the Files to that Release. When Files are added to the Release, the Files are stored on a DSP Stager location. The user typically assigns two or more approvers to the Release (with at least one FTE) and these approvers are required to sign-off on the Release, before it can be published. The user will then proceed to activate a compliance check on the Release which contains brand-new Files that have never entered the Quality Assurance domain. The Release-only Quality service (ROQ) is leveraged to execute the compliance check and that service will kick-off a workflow process for getting the compliance segment of the Release completed and approved. That process entails a comprehensive corporate QA process and is well documented at <http://roq>. When creating a ROQ release, the Files are passed in from the DSP Stager location through ROQ and end-up in the ROQ Publication Stager. Once the compliance Release is approved within the ROQ process, a signal is sent to the DSP system which then moves the Files from the DSP Stager and onto the DSP Publication Stager. The Release is now ready for publication, pending sign-off from all the approvers on the Release.

The owner will attempt to publish the Release once all approvers have signed-off and the compliance check has been completed and approved by ROQ. Upon publication, the Files in

the Release are copied from the DSP Publication Stager onto the DSP “golden” production servers, which then copied to the origin server locations. At this point, the Release becomes officially live and the URL to the files becomes a working hyperlink. If Details for the Download exist, the owner will typically publish all the Details for the Locales that match the Locales for the published Release. This now enables discoverability of the Download in a locale-specific format (represented by Details) on the Microsoft Download Center.

## **5. Creation a DMS Site**

In this section the user will be instructed with the necessary steps to create a Microsoft Download site.

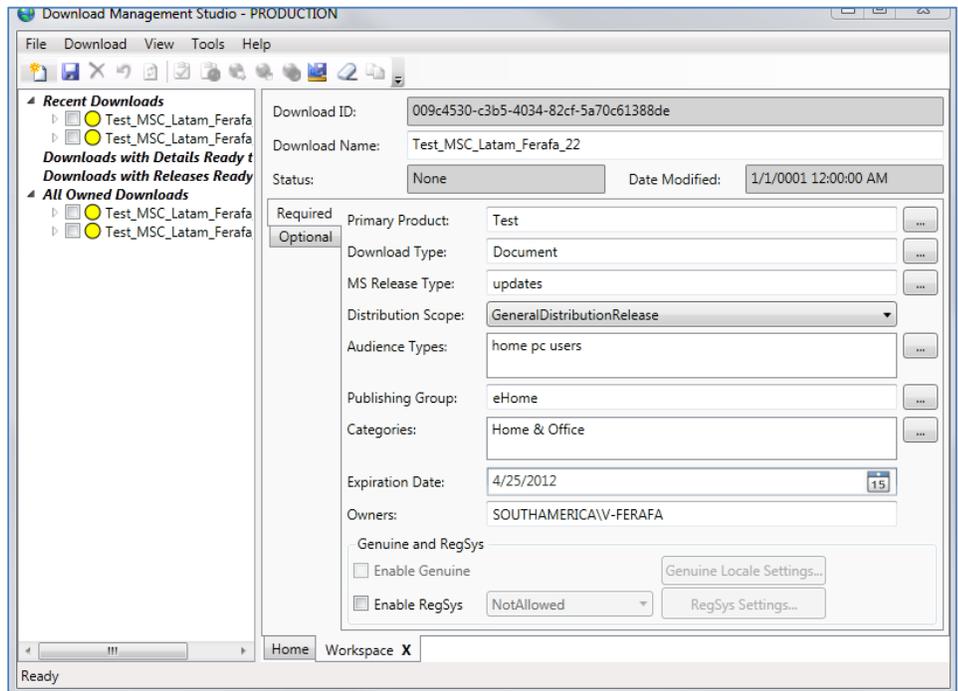
### **a. Create and Publish a new Download on the Download Center:**

#### **i. Steps:**

1. Go to the menu and click on “File\New Download”
2. Insert the name of the download in the Input Box and click on the “Create Button”. (it will take about 2 minutes, and user will be redirect to another page on the right panel)
3. Fill the fields with the information provided by the Requestor:
  - a. **Primary Product:** A required attribute that enables the categorization of the Download across a product line. This attribute is factored into the algorithm which determines whether the Download qualifies for a Genuine check.
  - b. **Download Type:** A required attribute that enables the categorization of the Download into a general download type category. This attribute is factored into the algorithm which determines whether the Download qualifies both for a Genuine check and for Regsys information gathering.
  - c. **MS Release Type:** A required attribute that enables the categorization of the Download within a particular Microsoft release type.
  - d. **Distribution Scope:** A required attribute which defines the distribution scope of the Download. Currently, the only value that applies to Downloads available on the Download Center is “General Distribution Release”. (This attribute is provided to prepare for future

enhancements to the Download Platform Services and the DMS itself).

- e. **Audience Types:** A required attribute which defines the target audiences for this Download.
- f. **Categories:** A required attribute which defines the target download category for this Download.
- g. **Regsys:**
  - i. **Enable Genuine:** The WGA and OGA teams are responsible for assigning Primary Product, Download Type, and Locale settings and OS exclusions for their programs. The Primary Product and Download Type attribute form part of the internal algorithm which determines whether Genuine should be enabled for a Download. If the Download qualifies for a Genuine validation, the check box will be automatically checked. The Download owner has the option to override the default by, either: disabling the Genuine setting overall; or, by disabling a Genuine validation on a per-locale basis. Only the Download owner can disable a Genuine validation.
  - ii. **Owner:** Microsoft FTE (i.e: Claudia Monteiro) and Executtor or factory lead.
  - iii. **Genuine Locale Settings:** This command button navigates the user to the Genuine Settings Form.
  - iv. **Enable Regsys:** Regsys profile collection can be enabled for a particular Download Type, by the Administrator. When a Download is associated to a Download Type that supports Regsys, the check box will be automatically checked. The Download owner has the option to override the default setting by, either: disabling the Regsys setting overall; or, by disabling a Regsys profile collection on a per-locale basis.



**h. Notes:**

- i. IF the requestor request to add a Regsys form to be used as input for the download you will need the WizardID of the same and set the same on the "Genuine & Regsys" section.
  - ii. In the field "Owners" you must add at least one Microsoft FTE, i.e.: Claudia Monteiro or the requestor if he has the rights.
4. Click on the save icon of the menu bar. (this will add the download site to the object browser, it will take about 2 minutes).
  5. Go to the created download item on the object browser (left panel) and make right click on it.

**6. Add Details:**

- a. Select "Add Detail" (this will create the site)

**i. Notes:**

1. You will need to add a Detail for each site language that you need to create.
- b. Select the language and make click on "OK". (this action will create a page for the language selected)
- c. Fill the fields with the information sent by the requestor:

**i. Required Fields Section:**

1. **Download Title:** This is the Main title of the HTML Detail page, and the title in the main frame or section of the details page associated with this download.
2. **Short Name:** Used to populate Brief Description in the details page, HTML tags are allowed in this input field
3. **Long Description:** Used to populate Overview in the details page, HTML tags are allowed in this input field.
4. **System Requirements:** Used to populate System Requirements in the details page, HTML tags are allowed in this input field. An idea of supporting OS's, technologies and other pertinent data can be provided here.
5. **Instructions:** Contains special instructions that needs to be share with the customer downloading the file(s); HTML tags are allowed.
6. **Keywords:** We use the Keywords field by indexing this column on the SQL Search index, so you can search DMS using these tags later on. This is your field to add tags to which you can search this product on later, without that information showing up on the download center details pages.

The screenshot shows a web form for a download entry. At the top, there are fields for 'Download Name' (Text\_MSC\_Latam\_Ferifa\_22), 'Language' (Spanish (Traditional Sort) - Spain), and 'Status' (None). A 'Date Modified' field shows 2/2/2001 12:00:00 AM. Below this is a 'Required' section with a 'Customer' tab selected. The form contains several text input fields: 'Download Title', 'Short Name', 'Short Description', 'Long Description', 'System Requirements', 'Instructions', and 'Keywords'. The 'Keywords' field contains the text '#Test'. At the bottom left of the form, there is a 'Home' link and a 'Wordpress' link.

**ii. Optional fields Sections:**

1. **Download Subtitle:** Sometimes an additional subtitle can be useful in the overall presentation of the download item – feel free to navigate to the Optional tag and add this subtitle if required.
  2. **Additional Information**
  3. **Atlas Action Tag:** If this download item is being tracked using ATLAS, please provide the action tag here.
  4. **Custom Categories**
  5. **Related Links Button:** Supports providing more information which is out of scope for the details page. The domains (URLs) we can link to are limited to very high profile, trust worthy websites, primarily those owned by Microsoft.
  6. **Related Links Name and URL:** Up to four related links can be added in the download details. User fills in the title of the link as well as the full URL (including the http://) and these links are displayed in the order they are entered. The user should also test the page to determine if it is live (http status = 200) and if a link is determined not to be live with the link checker, it will be inhibited until it is retested and returns a status = 200 (either the URL is removed or changed). The domain of each link entered will be verified against a White List by DSP on publish. If the domain you entered is not on the White list the related link will not display on the download details page once published. To have a new domain added a request must be sent the MSCOMHLP.
- d. Click on Save Icon of the menu. (This will the description on the object browser for the selected language).

Note: to make a preview of the site open the description, go to workarea and then click on Download\Preview.

## 7. Add a new Download Release:

- a. Right Click on the Download Site and select add "Release". (this has as purpose configure the download files which will be called by the description sites created on the step 8)
- b. Select the language (same as in point 8 or the amount of languages that you have created as descriptions) and make click on "OK".
- c. Fill the fields of the general section with the information that the requestor sent:
  - i. **General Fields Section:**
    1. **Description:** This interface is the first step in the Release creation process and it enables the user to provide the meta-data describing the software being downloaded and to also attach and validate the software files that will be downloaded (by the end-user on the Microsoft Download Center). A Release is specific to one or more locales that are being supported by the software files that are bound to the Release.
    2. **Steps:**
      - a. Locales: languages of the description (need to have same amount than the amount of descriptions for the site).
      - b. Operation Systems: systems required for the download to work or for which OS the download is.
      - c. Version: version of the system.
      - d. CPX ID: The CPXID will have a Download Type specific default for those Download Types that do not need a CPXID. As example: Documents, Media Files, etc (you can Request a CPX ID with the button "Create CPX ID").
      - e. Signers: on this field you need to add the approvers of the site and at least one should be a Microsoft FTE (i.e.: Claudia Monteiro). Select

also the role for the users otherwise you won't be able to save the site.

### 3. Files Section:

- a. Add the fields that would be downloaded from the site.
  - i. **Name:** Once selected the file names will be stored in this location (one row per file). A release must have at least one File to be saved and activated with an upper limit of (5000 files).
  - ii. **Path:** This is the Path to the selected file(s).
  - iii. **Display:** Checking this box indicates that on the Download Center this file will be enabled. At least on file must be indicated for Display but you can have multiple files on the details page displayed each on selectable uniquely by the end user (Multi File Download). In most cases an MSI or Setup file will be selected with the rest left unchecked. The single file selection will be enabled by the Download Button on the Quick Details section of the Download Center Details page. In a multi-file Details page the button will be a bookmark to a lower section on the details page which will have each file with a unique download button.
  - iv. **Primary File:** This is the primary file by which this release will be tracked in by the metrics system (currently **http://webmetrix** ).

v. **Maximun Downlaod Size:**

This defaults to the sum total of all file sizes for the release however it can be overwritten for a smaller amount.

vi. **Minimun Downlaod Size:**

This field defaults to the smallest size file however may be overwritten to be larger than the smallest file up to the sum total of all files for the release.

vii. **Add Folder Button:** By selecting this option you will bring up a Windows Explorer box which enables the user to select a folder (including all subfolders and files) to be uploaded to the client.

viii. **Add File Button:** By selecting this option you will bring up a Windows Explorer box which enables the user to select browse to a folder and select individual files to be uploaded to the client.

ii. Click on save button of the menu. (This will upload the files to the MS server).

**8. Publish:**

- a. Check the Site on the object explorer panel.
- b. Click on Download menu.
- c. Select "Activate".
- d. Select the Consistency Agreement: I certify that this release will be released only to the download center portal at this time.
- e. Click on Submit.

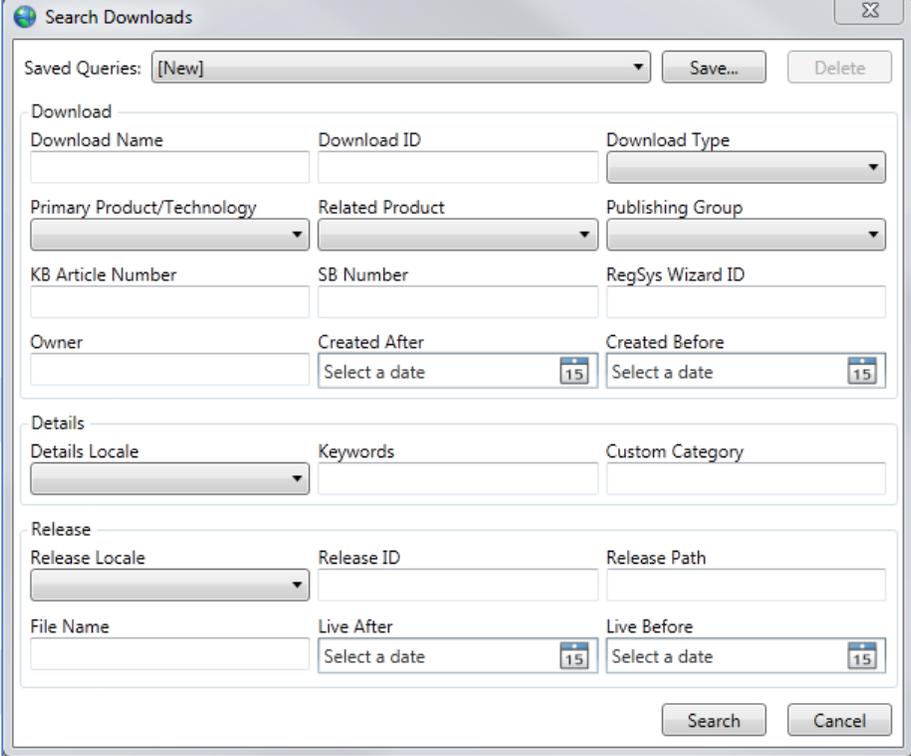
**Note:** after the Submit is performed an email is sent to the FTE that the user has set as Signer and he will need to follow the steps described to publish the site on productin.

## 6. Search for a Download Site

In this section the user will be instructed with the necessary steps to search a Microsoft Download site.

### a. Search Feature:

- i. **Description:** the feature is used to look for a certain Download Site no matter the status of the same (published, draft,..).
- ii. **Steps:**
  1. Go to the menu and click on File.
  2. Select "Download Search".
  3. Filter and make click on the "Search" button.



Search Downloads

Saved Queries: [New] Save... Delete

Download

Download Name Download ID Download Type

Primary Product/Technology Related Product Publishing Group

KB Article Number SB Number RegSys Wizard ID

Owner Created After Created Before

Details

Details Locale Keywords Custom Category

Release

Release Locale Release ID Release Path

File Name Live After Live Before

Search Cancel

## 7. Bulk Signoff

The Bulk Signoff allows the signer to sign off on one to all releases, either: granularly at the release level; or, for all releases associated to a specific Download or any combination of Downloads.

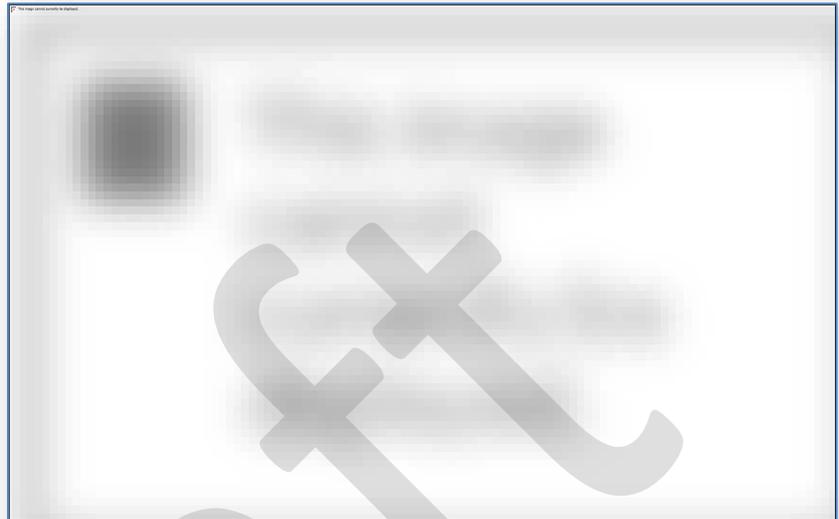
### a. Search Feature:

#### i. Steps:

1. Go to the menu and click on Tools.
2. Click on "Bulk Signoff".
3. Insert your MS alias with the taxonomy "Domain\Alias".

#### a. Fields:

- i. **Alias TextBox:** User enters alias that identifies the user as an approver.
- ii. **Approve/Deny Buttons:** When alias entered, buttons are enabled which allows the user to approve or deny the selected Releases
- iii. **Download Name check box:** Allows selection of Download which in turn selects all Releases that are currently in need of a signoff action (either approval or denial)
- iv. **Locales checkbox:** Allows user to select certain Releases (within a Download) that are currently in need of a signoff action (either approval or denial).
- v. **Version:** Version associated with the release
- vi. **Status:** Status associated with the release
- vii. **View File Location Hyperlink:** Link to the file path which will allow for read only access to the files so that the user can check the files and their certificates for correctness.
- viii. **Signer:** Listing of the signers.
- ix. **Role:** Role of the signer.
- x. **Locale:** This is specific only to the Support Localization Role and specifies the locale to be supported by PSS.
- xi. **Signature Date:** This is the date time of the sign off. If Null it means that the signer has not signed off yet (approved or denied).

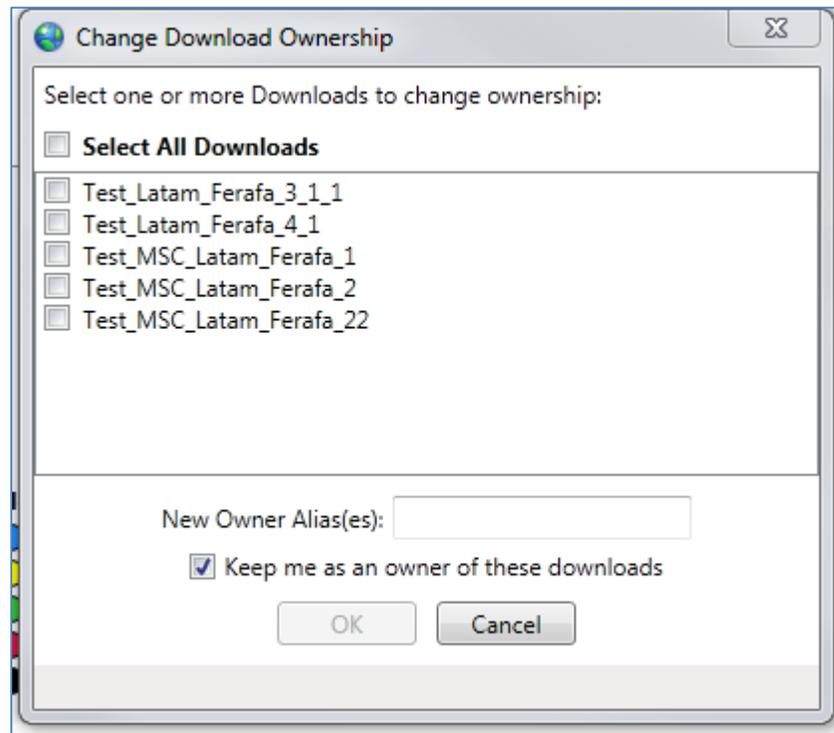


## **8. Bulk Change Download Ownership**

In this section the user will be instructed with the necessary steps to perform a change in the ownership of a Download Site.

### **a. Bulk Change:**

- i. **Description:** This feature allows the owner of downloads to either: change the ownership of currently owned Downloads; add additional owners in addition to the user's ownership.
- ii. **Steps:**
  1. Go to the menu and click on Tools.
  2. Click on "Bulk Change Ownership".
  3. Select the sites.
  4. Set the new Owner.



Approval process video → <http://academy/Pages/dsredir.aspx?d=EVDS-10-70956>

## 9. When create a PDF download

In this section the user will be instructed with the necessary steps to create a PDF download.

When you generate a download for a PDF file should upload two files: one is the pdf and the other is compatible with Microsoft PDF (XPS) and this is sets as main.

The XPS file is generated by opening the pdf file and sending to print by selecting the Microsoft XPS Document Writer.

### **Observaciones:**

*Cuando se genera un Release, se deberá colocar 2 usuarios para su aprobación. Estos usuarios deberán ser: 1 de Microsoft (esapoz) y 1 vendor (el site manager correspondiente).*

Una vez que estos 2 usuarios aprueben el release, se deberá esperar a que dicho release quede en el estado "Post-Compliance"  Post-Compliance (será recibida esta notificación por medio de un e-mail)

Appendix:

b. Document Change History

Version No.	Name (Alias)	Role	Contact	Description of Change	Date
1.00	v-ferafa	Analyst	v-ferafa@microsoft.com	Creation of document	4/25/2011
1.1	v-jaberl	Analyst	v-jaerl@microsoft.com	Update of document	7/25/2011

c. Review and Sign-off

Version No.	Name (Alias)	Role	Contact	Reviewed Date

a. Glossary/Definitions

Below is a list of common terms and their definitions that are used throughout this document:

Term	Definition

b. Related Documents/References

Document	Document Location
DMS User Guide (MS)	http://sharepoint/sites/CDI/Downloads/Download%20Services%20Platform/4.%20Projects/1.%20Bravo/User%20Guide/DMS%20User%20Guide.latest.docx
Quick Start Guide (MS)	http://sharepoint/sites/CDI/Downloads/Download Services Platform/4. Projects/1. Bravo/User Guide/DMS QuickStart Guide_v1.docx