



Installing and using the Quest Input Tool

STG uses the Quest Web Content Management System to populate and manage technical-support content, downloads, links, and webpages on our Systems Support Portal. Quest is a DB2 database that contains product and technical information for STG products. The Quest solution comes with a Java front-end application called the Quest Input Tool (QIT). This tool enables IBMers to author, manage, and store information in the database. Quest is used to manage thousands of technical documents and downloads for Modular Systems (System x, BladeCenter). It is also used to manage links for Power (System p, System i), Mainframe (System z, Blue Gene), and System Storage brands.

This document describes the process for installing and using the QIT, and includes the following sections:

- “Downloading and installing the QIT”
- “Before you begin using QIT” on page 2
- “Submitting a new document for publication” on page 3
- “Updating a document that has been submitted for publication” on page 12
- “Selecting task/topic pairings and categories for a document” on page 13
- “Deleting an existing document” on page 18

Downloading and installing the QIT

To download and install the QIT on your workstation, complete the following steps:

1. Authenticate and go to <http://pokgsa.ibm.com/projects/q/qit/>.
2. Click the **Download QIT installer** link.
3. When you are prompted, click **Save File**. Depending on the browser you are using, either you are prompted to designate a directory for the file `qit_62_ei.exe` and click **Save**, or the file is automatically saved to the default download directory for your browser.
4. After the file is downloaded, double-click the icon for the `qit_62_ei.exe` file. If a security warning message appears, click **Run**. The InstallShield Wizard opens.
5. Click **Next**. You are prompted to choose a location where the program files will be installed.
6. Click **Browse...** to choose a directory other than the default directory. Click **Next**. After the application is installed, the **Quest Input EI** icon appears on your computer desktop.
7. When you are prompted, click **Finish**.
8. Double-click the **Quest Input EI** icon on your desktop.
9. Type your user ID and password and click **Ok**.
Important:
 - a. Your QIT user ID and password are preset to the first part of your IBM intranet ID. For example, if your email address is `johndoe@us.ibm.com`, then your user ID and password is `johndoe`.
 - b. When you type your user ID and password, the characters will appear in ALL CAPS. Do not adjust your keyboard – QIT user IDs and passwords are displayed in ALL CAPS.
10. When you are prompted with the message, “There is a new version of Quest out. Press 'OK' to automatically install it”, click **Ok**. The update is downloaded and the QIT application is updated.
11. When you are prompted, change your password.
12. Type your new password and click **Ok**. The Quest Setup Wizard opens.
13. Click **Next**.
14. Complete the following steps in the new window:

- a. Change the default number of 14 in the **Number of days to keep Log Files** field to the number 1.
 - b. Clear the **Start my Favorite Quest Applet automatically** check box.
 - c. Clear the **Show the "What's New" Window** check box.
 - d. Click **Browse** next to the **External Browser used for Printing** field, and go to the directory of your web browser executable file (for example C > Program Files > Internet Explorer > iexplore.exe).
15. Click **Next**. When you are prompted with the Question message, click **Yes**. When a new message appears that confirms your settings, click **Ok**. The Favorite Brand and Family window opens.
 16. In the Favorite Brand and Family window, clear the **None** check box under the **Brand** list, and select the brand or brands (for example, **System x** and **BladeCenter**).

Note: To select multiple favorite brands, press and hold the Ctrl key while you click. Leave the **None** box under the Family window checked.

17. Click **Next**. The Favorite Countries window opens.
18. Click **Next**. The Skins window opens.
19. Click **Next**. The Internet Setup window opens.
20. Click **Next** (do not enter any socks information...you might be wearing sandals the next time you use QIT). The Favorite Word Processor window opens.
21. Click **Next**. The Preferred Language window opens.
22. Select English and click **Next**. The Wizard Finished window opens.
23. Click **Finish**.

Before you begin using QIT

Review the following list of general notes about QIT before you begin using the application:

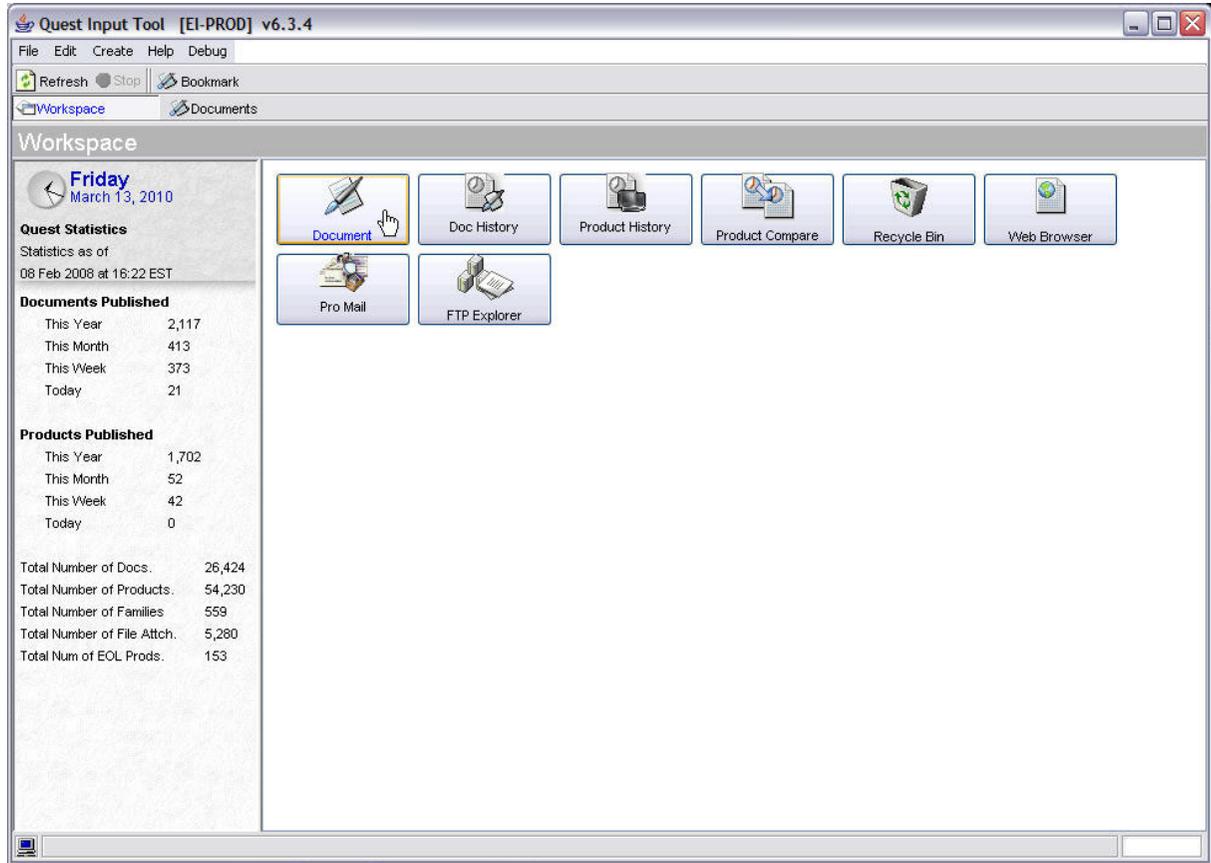
- QIT does not allow you to save a form until the entire form is complete. If you need to stop working on a form, but you don't want to lose the information that you already entered, you must leave the application open.
- When you create a new form or open an existing form, the application "checks out" the form under your user profile and prevents other QIT users from opening and modifying that same form. The form will remain checked out until you save it and close it (and submit it for publication).
- If either the file name or local directory path of the PDF or that you want to attach to a QIT form contains an invalid character, the error message "Cannot save files" appears when you try to save the form. File and directory names are not permitted to contain any spaces or other special characters. File and directory names can consist only of lowercase letters (a-z), numbers (0-9), hyphen (-), underscore (_), and period (.). The maximum file length is 64 characters.
- When you submit a publication, you must select the products that the publication supports. If the product or products that the publication supports have not yet been announced, the products might not be available as selections on the QIT form.

Submitting a new document for publication

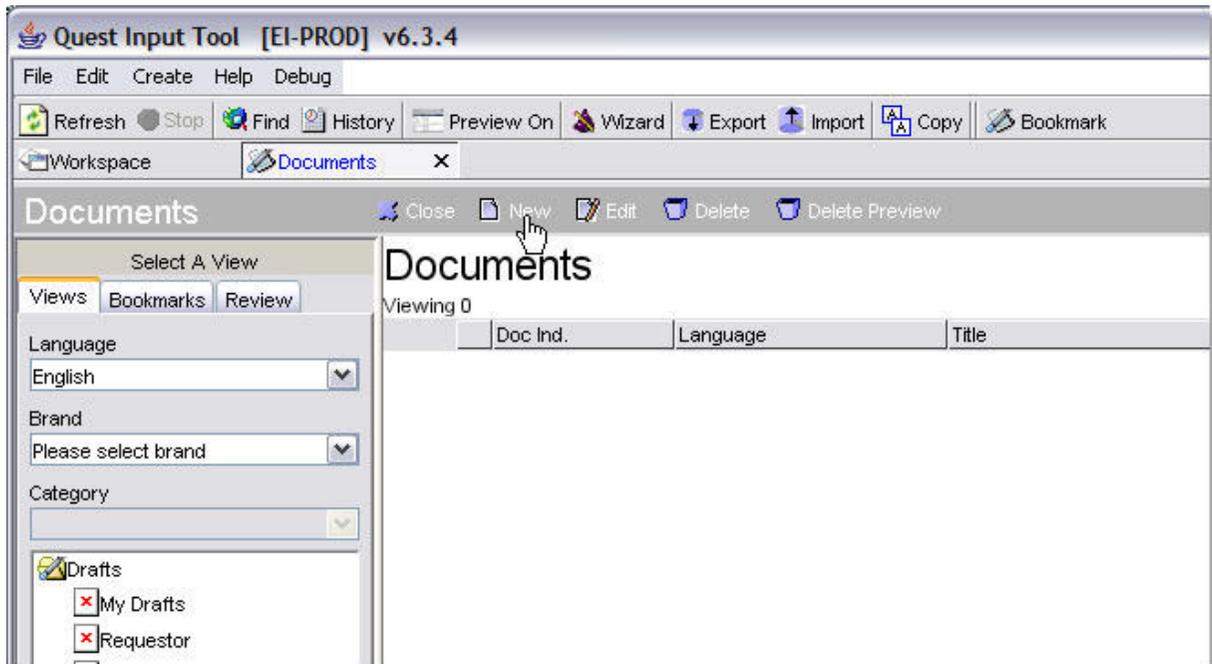
Important: This section describes the procedure for submitting a new document, or first edition of a publication. If you want to submit an update to document that already exists, or a replace an old edition of a publication with a new edition, you must find the existing QIT form using the MIGR number for that pub and then edit the form. See “Updating a document that has been submitted for publication” on page 12 for more information.

To submit a new document for publication with the QIT, complete the following steps:

1. Click the **Document** button. The Documents console is displayed.



2. Click **New**.



3. When the New Document window opens, click **New Blank Document**.
4. Select **Publications** and click **Ok**. The Edit console is displayed.
5. In the **Title** field, enter the type of publication, a hyphen, and then the product family, model, and machine types (in parentheses).

Note: If you want the document posted on a future date, type (HOLD until <publication date>): before the title.

For example, if you wanted the *IBM System x3850 X5 and x3950 X5 User's Guide* available on the IBM Support Portal on April 13, 2010, the title would be the same as the following example.



6. Under Document Type, click the applicable radio button. Typically, the document type is **Publications**.
7. Under Document Classification, click the applicable radio button. Typically, the document classification is **Unclassified**.
8. Under Draft Information, modify the **Content Owner** and **Source** fields:
 - a. Click the Person icon to the right of the **Content Owner** field. Search for, then select, Brian Moore from the database.
 - b. In the **Source** field, type your name.
9. Under Comment, type the release status (for example, initial release or second edition), title, and part number of the document. This information appears automatically in the **Comment History** box after the QIT form is saved.

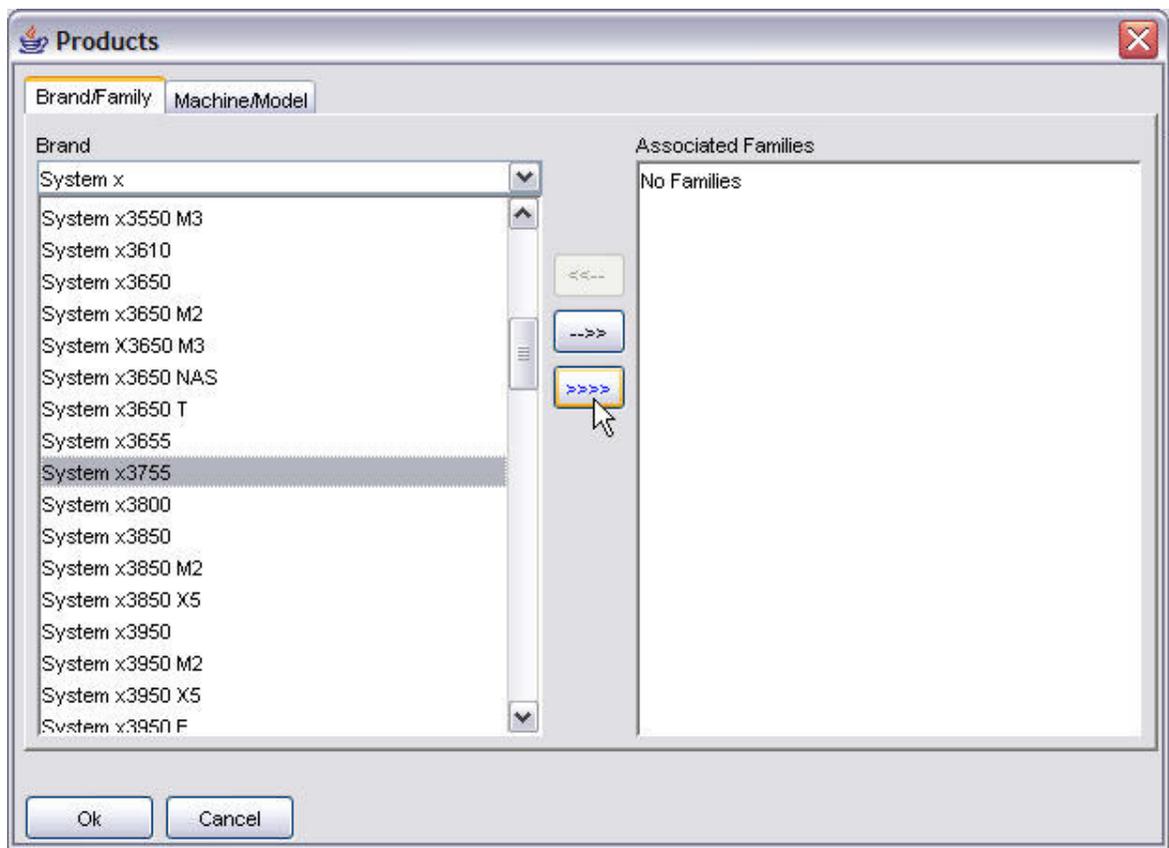
10. Under Publishing Options, check the **Webable** box if it is not already checked. Disregard the other publishing option fields.
11. Select the product families and product models relevant to your document:
 - a. Click the **Select** button to the right of the Products area. The Products window opens.

Important: The actions described in the next two steps determine where the publication is organized on the IBM Support Portal. If you make an error, your document might not be categorized correctly online.

- b. Select the product brand or family from the Brand list (for example, System x). The products (for example, System x3655, System x3755, and so on) for that brand appear underneath the Brand list.

Note: Depending on your document, you might want to select multiple brands from the drop-down list in the Products window. For example, a user's guide for a System x-compatible tape drive would require two brands: **System x** and **Hardware options and upgrades**. If you select multiple brands in the Products window, all of the brands will be available in the Categories window when you get to the Categories section of the QIT form. If you select only one brand, that brand will be the only one in the Categories window.

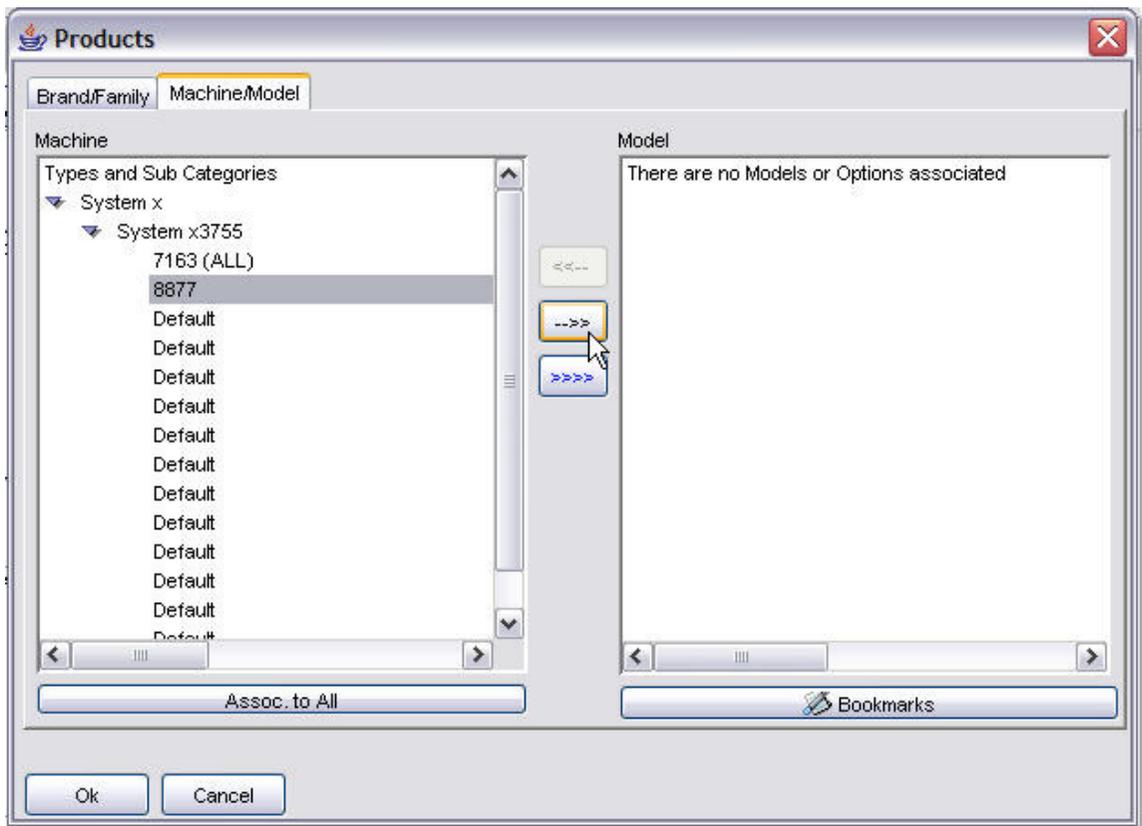
- c. Select the products for your document. Press Ctrl while you click to select multiple products.



- d. After you select the products that are relevant to your document, take one of the following actions:
 - If you want to select all machine types and models for a product, click the button with four arrow heads (>>>>) in the middle of the window. All of the machine types and models for that product move to the Associated Families box, and have the word (ALL) beside them.

- If you want to select certain machine types for a product, but not others, click the button with two hyphens and two arrow heads (- ->>) in the middle of the window. The product moves to the Associated Families box. Click the **Machine/Model** tab to select the specific machine type, and click the button with four arrow heads (>>>>).

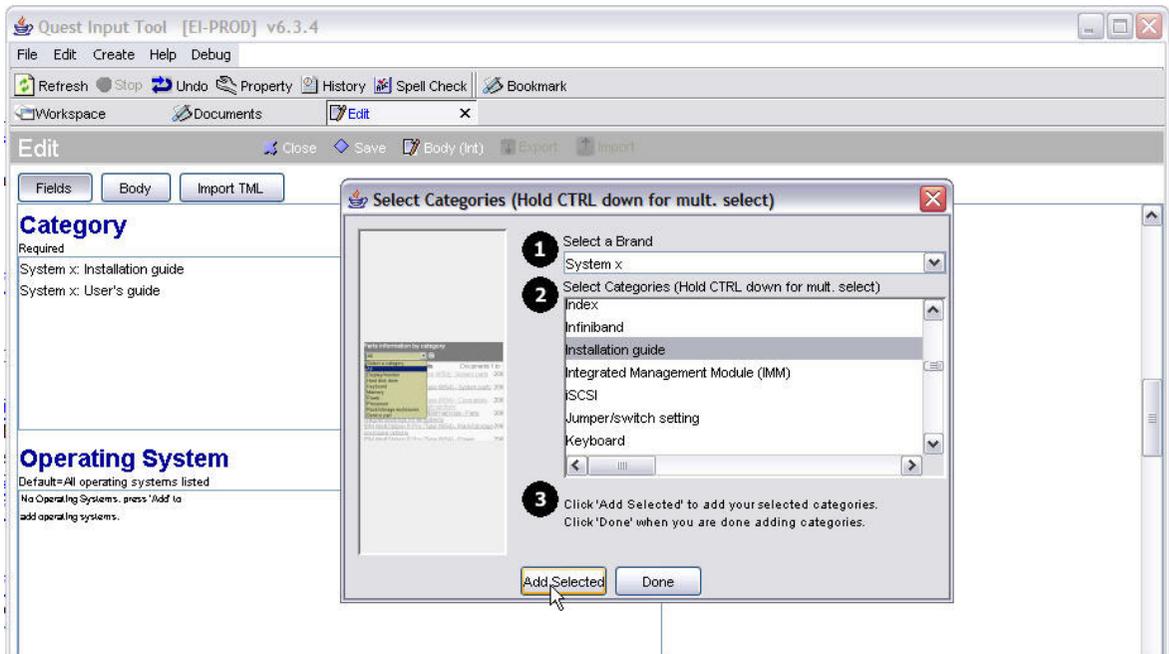
Note: If you use the button with two arrows to add a machine type (- ->>), you must then select the specific model number for the machine type configuration that you want to add. This granular level of specificity is not typically needed for most documents.



e. Click **Ok** to save the product information.

Important: Read the information in the sections “Selecting task/topic pairings and categories for a document” on page 13 and “Assigning task/topic pairings and categories to certain types of documents” on page 17 before you complete the next step.

12. To determine the IBM Support Portal categories under which your document will be published, complete the following steps:
 - a. Click the **Add** button to the right of the Category area. The Select Categories window opens.
 - b. In the box marked with the number 2, scroll and select the correct categories for your document (for example, User’s Guide, Installation Guide, Service Guide). Press Ctrl while you click to select multiple categories.
 - c. Click the **Add Selected** button to add the category. The added category appears in the Category area of the main QIT screen.



d. Click **Done** to close the window.

13. Click the **Add** button to the right of the Operating System area. The Select Operating Systems window opens, which works similar to the Select Categories window. Add the applicable operating systems for your document.

Note: If your document applies to all operating systems, either disregard the Operating System area, or select **Operating system independent / None** from the **Select Operating Systems** list. The default setting for operating-system compatibility in QIT is all operating systems.

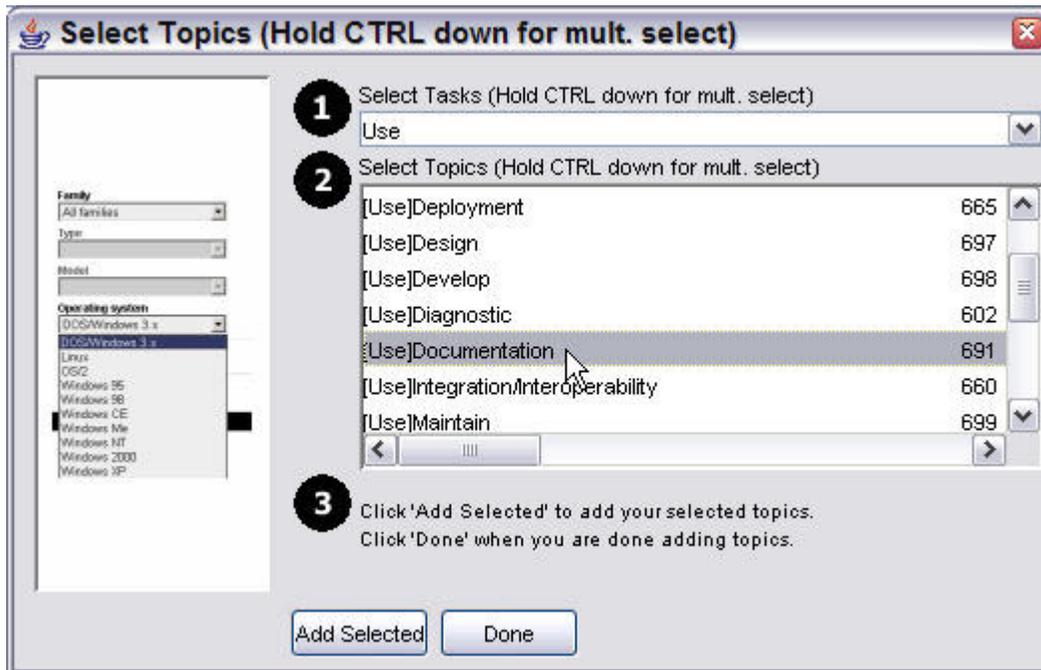
14. Disregard the Doc Inventory and Security Group areas.

Important: Read the information in the sections “Selecting task/topic pairings and categories for a document” on page 13 and “Assigning task/topic pairings and categories to certain types of documents” on page 17 before you complete the next step.

15. To determine the task and topic pairing on the IBM Support Portal under which your document will be published, complete the following steps:

Note: Be careful not to confuse the Task area in the QIT interface with the Task/Topic Pair area. The Task area is no longer an active field in QIT, but remains as a part of the interface for the time being.

- a. Click the **Add** button to the right of the Tasks/Topic Pair area. The Select Topics window opens.
- b. In the box marked with the number 1, scroll and select the applicable tasks for your document (for example, an Installation and User's Guide would warrant the tasks **Install**, and **Use**). Press Ctrl while you click to select multiple tasks.
- c. In the box marked with the number 2, scroll and select the applicable topics for the task you chose (for example, **[Install]Documentation** and **[Use]Documentation**).



- d. Click the **Add Selected** button to add the task and topic pairings. The added tasks and topics appear in the Task/Topic Pair area and the Task area of the main QIT screen.
- e. Click **Done** to close the window.

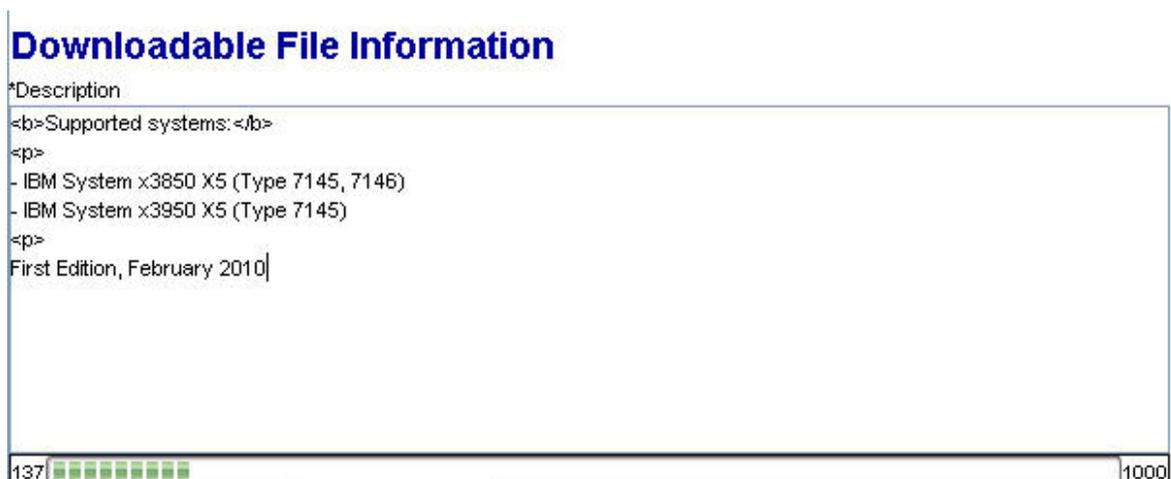
16. Click the **World wide** button next to the Documentation Location area.

17. Under Downloadable File Information, complete the following steps:

- a. In the **Description** field, enter text in the format of the following example (including the markup elements):

```
<b>Supported Systems:</b>
<p>
- IBM <product family A> (Type <machine type 1>, <machine type 2>)
- IBM <product family B> (Type <machine type>)
</p>
<p>
<Edition Number>, <Month> <Year>
```

For example, the following image shows the description for the System x3850 X5 and x3950 X5 documentation.



- b. In the ***Part Number** field, type the part number of the document.
- c. In the ***Version** field, type the document edition number.
- d. In the ***Release Date** field, type the date that you want the document published on the web.

Important: Make sure that the date you type in the ***Release Date** field is formatted as
<two-digit day> <Three-character month abbreviation> <four-digit year>.

For example, March 23, 2010, must be formatted like this:

23 Mar 2010

- e. From the **Publication** list, select the type of document that you are posting.
 - f. Disregard the **Quick Order URL** field.
18. Upload the document or link to the document in the File Attachment area. There are two methods for adding a document to the QIT form. You can either upload a document from a local or network directory, or you can link to the document if it already exists in an information center or somewhere else on the web.
- To upload the document from a local or network directory, complete the following steps:
 - a. Click the **Add Local** button next to the Documentation Location area. The File Attachment window opens.
 - b. Browse to the directory for the document, select the document file, and click **Open**. A new File Attachment window opens.
 - c. Type the full title of the document, in a single line, in the **Description** box.
 - d. Under **FTP Mode**, make sure that the **Binary** radio button is selected.
 - e. In the Severity list, select the severity level of the document (typically **Initial Release** or **Suggested**).
 - f. In the **Version** field, type the month and year (from the edition notice of the document).
 - g. Make sure that the value of the **Location** field is **system_x_pdf**.
 - h. Click **Ok**. The name of the document file and the description you entered appear in the File Attachment box.

File Attachment

59y7210.pdf
11,139,505 bytes

*Description
Installation and User's Guide for the IBM System x3850 X5 and x3950 X5

70 ██████████ 254

FTP Mode
 Ascii Binary Hidden Severity: Suggested ▼

*Version
June 2010

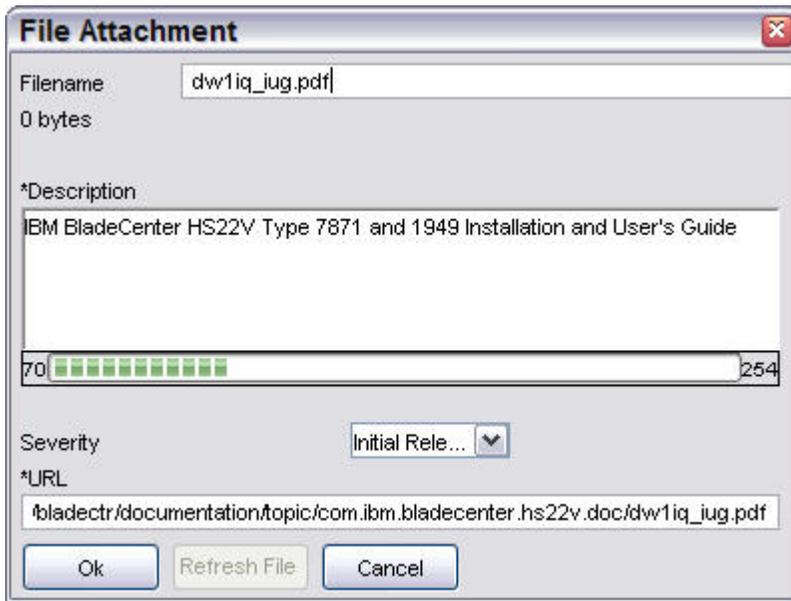
*Location
system_x_pdf ▼

*URL
ftp://ftp.software.ibm.com/systems/support/system_x_pdf/59y7210.pdf

Ok Refresh File Show Linked Docs Cancel

Notes:

- a. If you want to add a link to the support-site document page (for example, a link to the product PDSG document page), click the **Add URL** button to the right of the File Attachment area. Click **Yes** after the new message window is displayed. Then, complete the **Filename**, **Description**, and **URL** text fields, select the severity level, and click **Ok**.
- b. Click the **Edit** button to the right of the File Attachment area to change the file settings after the file has been uploaded.
- c. Click the **Up** and **Down** buttons to change the order of multiple uploaded files in the File Attachment area.
- To link to a document in an information center or somewhere else on the web, complete the following steps:
 - a. Click the **Add URL** button next to the Documentation Location area. The File Attachment window opens.
 - b. In the **Filename** field, type the name of the PDF file.
 - c. In the ***Description** field, type the title of the publication that you want to appear on the Support Portal.
 - d. In the ***URL** field, enter the complete address where the file is hosted.
 - e. Click **Ok**.



19. Disregard the Pro Mail, Links from this document, and Links to this document areas.
20. Under Meta Keywords, type the keywords that a user might use to search for the document. Use all lowercase text, and separate keyword terms with commas.
21. Under Abstract, type the text you want users to see when they mouse-over the document download link on the IBM Support Portal. For example, the abstract should have the following format:
Download the latest version of the <publication type> for the <product name><machine types>.

Note: The abstract function on the IBM Support Portal is not yet active.

22. Under Quest Document Information, find the MIGR number for the document and record it for future use.

Important: If you need to update this form in the future, you will need the MIGR number to locate the form.

23. Click **Save** in the gray edit bar at the top of the screen. The Save window opens.

Note: The text you entered in Comment field at the beginning of the QIT form automatically appears in the **Comment** field (e.g. New document 60Y0001.pdf on MIGR-5084846) on the Save window.

24. Click the **Save As Draft** button.
25. After you save the form successfully, click **Close** in the gray edit bar at the top of the screen. The document has been submitted for publication.

Important: You must click **Close** after you save the form. Otherwise, the form will not be available to other QIT users, and the document cannot be posted to the Support Portal. If the form has been saved and closed, the document you submitted appears in the list when you click **All Open Drafts** in the Drafts folder on the left frame of the QIT Documents console.

Updating a document that has been submitted for publication

Important: This section describes the procedure for updating a document that already exists, or replacing an old edition of a publication with a new edition. If you want to submit a new document, or the first edition of a publication, follow the steps in “Submitting a new document for publication” on page 3.

To update a document or change an uploaded file in QIT, complete the following steps:

1. Start QIT and log in.
2. Click the **Document** button. The Documents console is displayed.
3. To locate the document form that you want to edit, type the MIGR number of the document in the **Quick Edit** search box at the bottom right of the QIT window, and click **Go**. If the MIGR number you typed is valid, the form for that document opens.

Notes:

- a. If you do not know the MIGR number for the document, you can find it on the applicable support webpage on the IBM Support Portal.
 - b. If you submitted the original document form, and the document has not yet been published on the Support Portal, you can also click **My Drafts** link under the Drafts folder to locate the form.
 - c. The links under the Drafts and Active folders are not reliable options for locating a specific document form.
4. In the Comments box, describe the change that you are making, including the document title, edition number, and part number. For example, if you want to update a PDSG with a new edition, you might type the following:
Updating the Problem Determination and Service Guide - IBM BladeCenter HS22V (Type 7871, 1949).
New edition is Seventh Edition, new part number is 60Y1587, new file name is 60Y1587.pdf.
 5. Go to the Downloadable File Information area. Type the applicable information for the new document in the ***Version**, and ***Release Date** fields.

Note: The ***Part Number** and **Publication** fields are grayed-out and cannot be changed.

6. Go to the File Attachment area and take one of the following actions:

If the new file has the same name as the existing file on the form, complete the following steps:

- a. Select the PDF file you want to change and click the **Edit** button. The File Attachment window opens.
- b. Type the title of the new file in the ***Description** field. For example, you might type the title text in the following format:
IBM BladeCenter HS22V Problem Determination and Service Guide
- c. If necessary, select a different severity level from the **Severity** list.
- d. Type the document edition month and year in the ***Version** field.
- e. Click the **Refresh File** button. A new File Attachment window opens.
- f. Browse to the directory for the document, select the document file, and click **Open**.
- g. If a warning message appears, disregard it.

If the new file has a different name from the existing file on the form, complete the following steps:

- a. Select the PDF file you want to change and click the **Remove** button. A confirmation message appears.
- b. Click **Yes** to remove the file.
- c. Click **Add Local** to add the file from your local system.
- d. Browse to the directory for the document, select the document file, and click **Open**.

- e. Type the title of the new file in the ***Description** field. For example, you might type the title text in the following format:
IBM BladeCenter HS22V Problem Determination and Service Guide
 - f. If necessary, select a different severity level from the **Severity** list.
 - g. Type the document edition month and year in the ***Version** field.
 - h. Click the **Refresh File** button. A new File Attachment window opens.
 - i. Browse to the directory for the document, select the document file, and click **Open**.
 - j. If a warning message appears, disregard it.
7. Click **Save** in the gray edit bar at the top of the screen. The Save window opens.

Note: The text you entered in Comment field at the beginning of the QIT form automatically appears in the **Comment** field (e.g. New document 60Y0001.pdf on MIGR-5084846) on the Save window.

8. Click the **Save As Draft** button.
9. After you save the form successfully, click **Close** in the gray edit bar at the top of the screen. The document has been submitted for publication.

Important: You must click **Close** after you save the form. Otherwise, the form will not be available to other QIT users, and the document cannot be posted to the Support Portal. If the form has been saved and closed, the document you submitted appears in the list when you click **All Open Drafts** in the Drafts folder on the left frame of the QIT Documents console.

Selecting task/topic pairings and categories for a document

The **Task/Topic** and **Category** areas of the QIT enable you to determine how and where your document is available on the IBM Support Portal.

See the “Assigning task/topic pairings and categories to certain types of documents” on page 17 section for guidance about which standard task/topics pairings and categories must be assigned to specific document types.

Task/topic pairings

The task/topic pairings you assign to a document in QIT determines where that document will appear on the IBM Support Portal. By selecting the task/topic pairings in Table 1 on page 17, you can ensure that your document appears in the right portlets on the Support Portal.

Note: The term *documentation* is available only as a topic in QIT, and not as a task.

The following images show documentation portlets on the *Installation* and *Usage* pages in the Support Portal for the System x3950 M2.

Installation

Support for my selected products

[Hide graphic]

Have questions about installing your product?

These resources can help lead you through your product installation and setup.



More installation links

System x3950 M2

- [CRU service parts installation and removal movies](#)

Flashes & alerts (Installation)

Installation

Installation documentation

System x3950 M2

- [Redbooks - IBM System x](#)
- [Installation Guide - IBM System x3850 M2, x3950 M2](#)
- [1U 17-inch Flat Panel Console Kit Installation...](#)
- [1U 19-inch Flat-Panel Console Kit with...](#)
- [Brocade 4 GB / 8 GB FC Single-Port and...](#)

[More results]

Figure 1. Documentation portlet on the Installation page

In the preceding example, the task/topic pairing [Install]Documentation was assigned in QIT to the *Installation Guide*, so the link to that document appears in the Installation documentation portlet.

Usage

Support for my selected products

[Hide graphic]

Make your IBM product work for you!

Use the information here to learn how to use your IBM product to achieve your goals.



Flashes & alerts (Usage)

Usage documentation

System x3950 M2

- Redbooks - IBM System x
- User's Guide - IBM System x3850 M2, x3950 M2
- 1U 17-inch Flat Panel Console Kit Installation...
- 1U 19-inch Flat-Panel Console Kit with...
- Brocade 4 GB / 8 GB FC Single-Port and...

[More results]

Figure 2. Documentation portlet on the Usage page

In the preceding example, the task/topic pairing [Usage]Documentation was assigned in QIT to the *User's Guide*, so the link to that document appears in the Usage documentation portlet.

Categories

To access the list of relevant categories, the user clicks **More results** in a portlet on the IBM Support Portal. The list of available categories is displayed beside the Product documentation list.

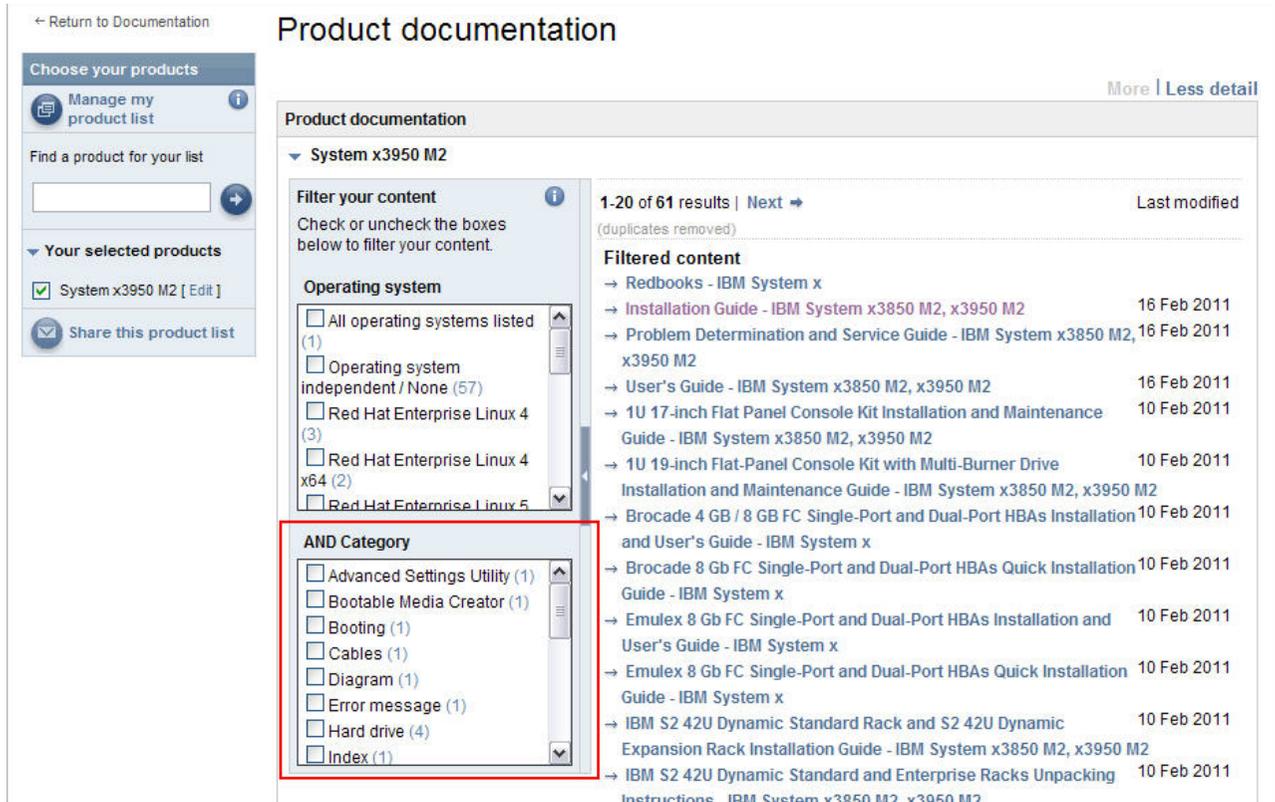


Figure 3. Filtering content with categories

Only the categories that have content associated to them appear in the list on the Support Portal. The complete list of available categories is shown in QIT. After a document form is assigned to a category and the document is published, the category will appear in the Support Portal navigation.

Assigning task/topic pairings and categories to certain types of documents

Use the following table determine the standard categories, tasks, and topics designations for each common hardware document type. To select multiple task/topic pairings or categories in QIT, hold Ctrl while you click.

Table 1. Best practices for assigning task/topic pairings and categories

Document type	Category ¹	[Task]Topic pairing
Installation and User's Guide	Installation guide	[Install]Documentation
	User's guide	[Use]Documentation
Installation, User's, and Maintenance Guide	Installation guide	[Install]Documentation
	User's guide	[Use]Documentation
Install Guide, Rack Installation Guide, or Quick Start Guide	Installation guide	[Install]Documentation
Problem Determination and Service Guide	Diagnostic	[Use]Documentation
	Service guide (HMM)	[Troubleshooting]Documentation
Cabling and Configuration Guide	Configuration	[Install]Documentation
		[Plan]Documentation
Planning Guide	Reference	[Plan]Documentation
Warranty	Warranty	[Install]Documentation
		[Use]Documentation
White Paper	White paper	[Use]Documentation

¹The Category selections available in the QIT form depend on the brands you selected in the Product window. If you selected multiple brands from the drop-down list in the Products window, you will have multiple sets of categories in the Categories window. Make sure that you select categories for each of the active brands in the Categories window.

Deleting an existing document

If you want to delete existing installation instructions and remove them from the IBM support site, complete the following steps:

1. Start QIT and log in.
2. Click the **Document** button. The Documents console is displayed.
3. To locate the document form that you want to edit, type the MIGR number of the document in the **Quick Edit** search box at the bottom right of the QIT window, and click **Go**. If the MIGR number you typed is valid, the form for that document opens.
4. Type the parenthetical note (DELETE) at the beginning of the title. For example:
(DELETE) User's Guide - IBM 2U Universal Tape Autoloader (3362)



5. In the Comments box, type a brief summary of your request. For example, This User's Guide should be deleted from QIT. The product is obsolete.
6. Click **Save** in the gray edit bar at the top of the screen. The Save window opens.

Note: The text you entered in Comment field at the beginning of the QIT form automatically appears in the **Comment** field (e.g. New document 60Y0001.pdf on MIGR-5084846) on the Save window.

7. Click the **Save As Draft** button.
8. After you save the form successfully, click **Close** in the gray edit bar at the top of the screen. The document has been submitted for publication.

Important: You must click **Close** after you save the form. Otherwise, the form will not be available to other QIT users, and the document cannot be posted to the Support Portal. If the form has been saved and closed, the document you submitted appears in the list when you click **All Open Drafts** in the Drafts folder on the left frame of the QIT Documents console.