Document Management

Installation Guide

Version 1.0

MODERN
Requirements

Document Revision History

Rev. #	Date	Details	Revised By	Approved By
Version 1.0	03rd April, 2024	• Document created	Syed Hammad	Hammad Masood

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SYSTEM REQUIREMENTS

GENERAL SOFTWARE REQUIREMENTS

1. Operating System: Windows Server 2012 R2 or higher / Windows 10 or higher
2. Browser: Microsoft Edge, Internet Explorer 10 or higher, Chrome, Mozilla Firefox
3. Screen resolution: 1280 x 960 or higher
4. IIS 7 or higher
5. Microsoft .Net Framework 4.7.2 or higher
6. ASP.NET 4.5
7. Multilingual Support – Language Pack for IE & Save as word.

*Note: Both the 32-bit and 64-bit versions of the operating systems are supported.

The credentials required for installing Document Management should include administrator rights on the machine. In other words, users installing Modern Requirements4DevOps on their machine should use admin credentials (or credentials that have admin rights) for proper installation.

For using Document Management on HTTPS, the application should be bound with a Trusted CA Signed SSL Certificate and not with a Self-Signed Certificate. Document Management is not compatible with the Self-Signed certificate and the user would be unable to proceed with it.

TEAM FOUNDATION SERVER REQUIREMENTS

ON PREMISES BUILD VERSIONS

Azure DevOps Server 2019 (Update 1 or above)

CLOUD BUILD VERSIONS

Azure DevOps Services

DOCUMENT MANAGEMENT INSTALLATION

DOCUMENT MANAGEMENT EXTENSION DEPLOYMENT (AZURE SERVICES)

In the case of Azure DevOps Services, Document Management extension would be shared to your Azure DevOps (ADO) account. Users can view shared extension(s) on their accounts from the Shared extensions area.

- To do so, the user has to log in to his/her ADO account with administrative privileges and navigate to the Extensions section. Once there, the user has to select the **Shared** tab and click on Document Management (Server Name).
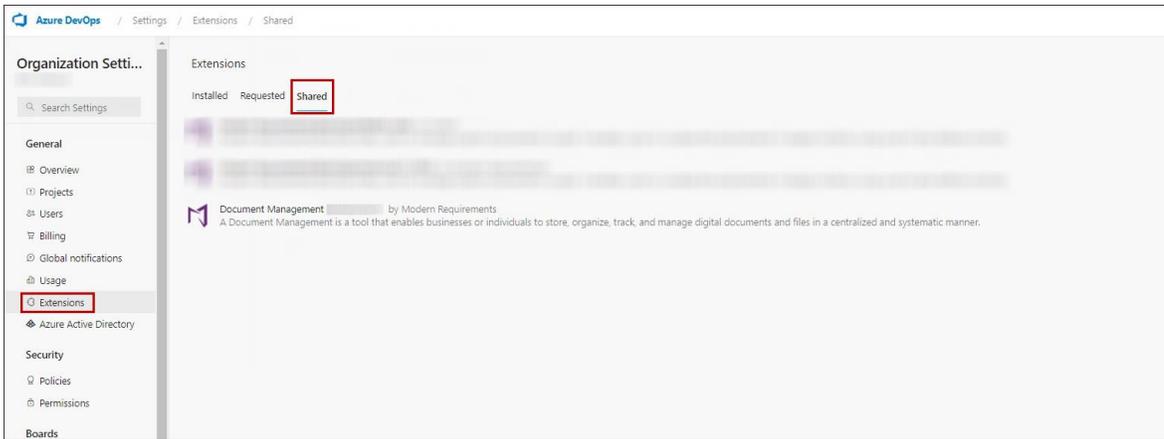
- An installation window will appear. Kindly click on the "**Install**" button.
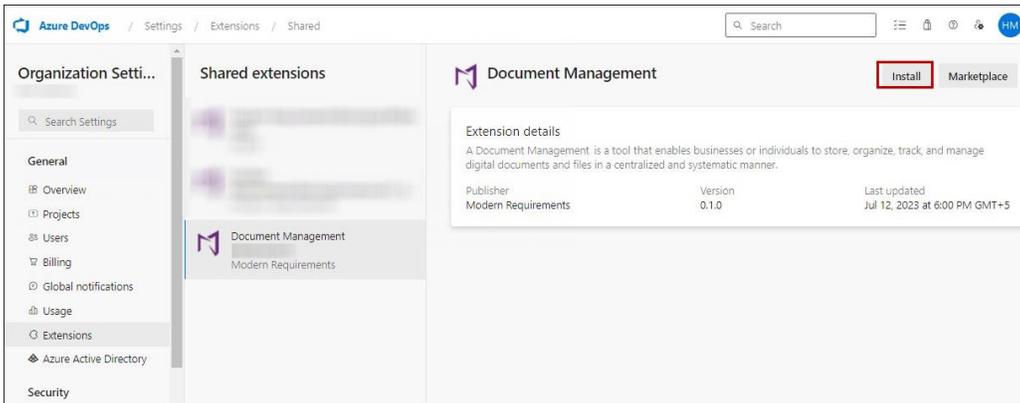
- The user will now be navigated to a new window that asks to "Select an Azure DevOps Organization". From the drop-down menu, kindly **select the desired organization** on which Document Management is required to be installed, then press the "**Install**" button.
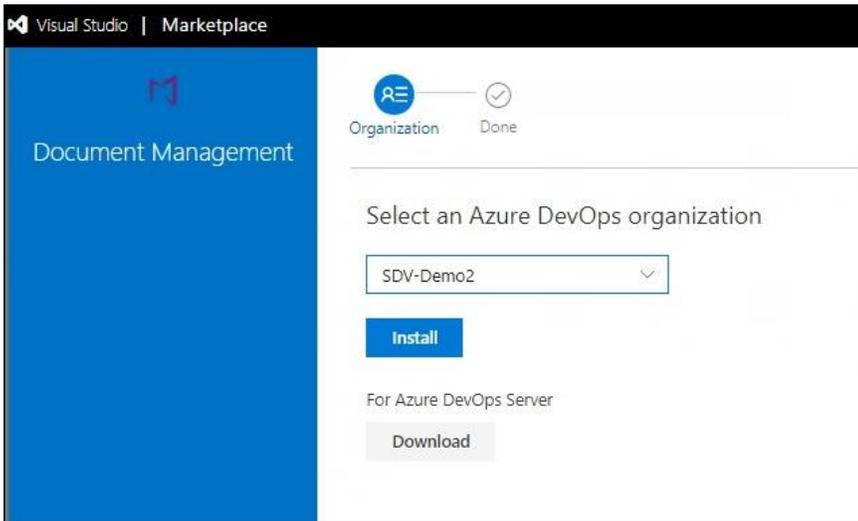
- The Document Management extension will be installed on the selected Organization and a confirmation message will be displayed along with the option to "**Proceed to organization**".
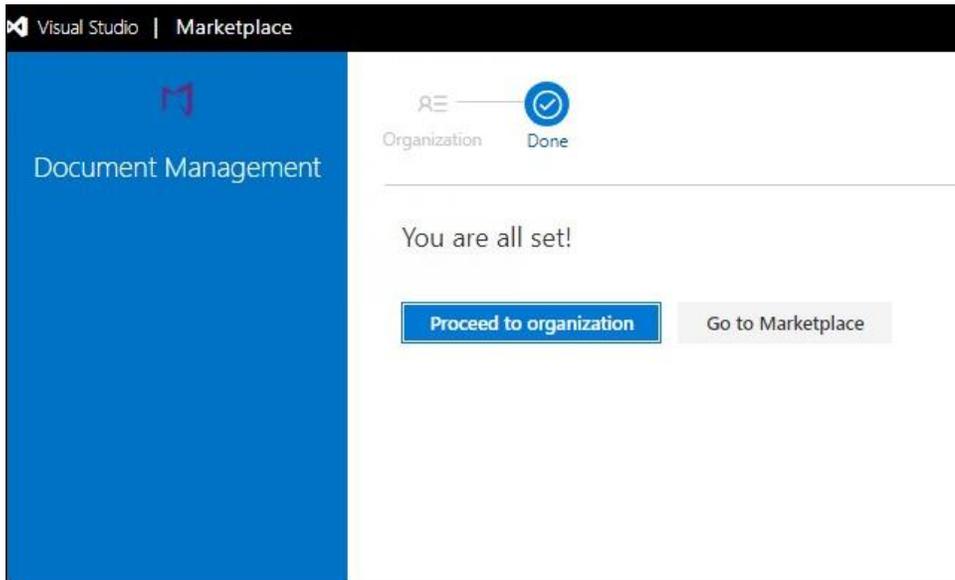
DOCUMENT MANAGEMENT INSTALLATION (AZURE SERVER)

The process for installing Document Management is quite simple. Follow the step-by-step guide below.

- Right click on the **Document Management .exe** file to start the installation process.

Name	Date modified	Type	Size
Document Management	9/4/2023 7:14 PM	Application	143,031 KB

- Select **Run as Administrator.**

Name	Date modified	Type	Size
Document Management	9/4/2023 7:14 PM	Application	143,031 KB
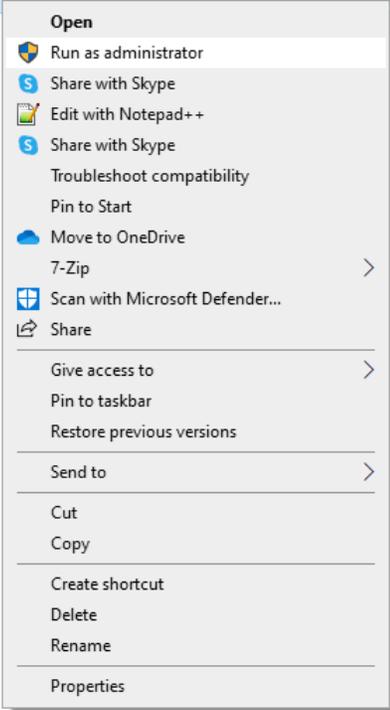
Open
Run as administrator
Share with Skype
Edit with Notepad++
Share with Skype
Troubleshoot compatibility
Pin to Start
Move to OneDrive
7-Zip   >
Scan with Microsoft Defender...
Share

Give access to   >
Pin to taskbar
Restore previous versions

Send to   >

Cut
Copy

Create shortcut
Delete
Rename

Properties

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- The initial installation screen appears, asking the user to accept the **terms and conditions** for using Document Management. Agree to the T&Cs by selecting the **checkbox** and then click on the **Install** button**.**
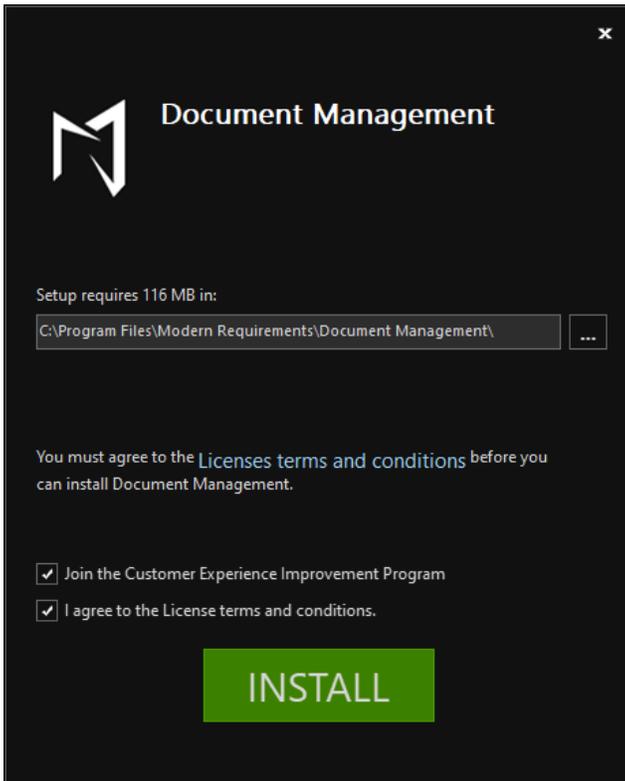
- The Setup Wizard is installing **Document Management.**

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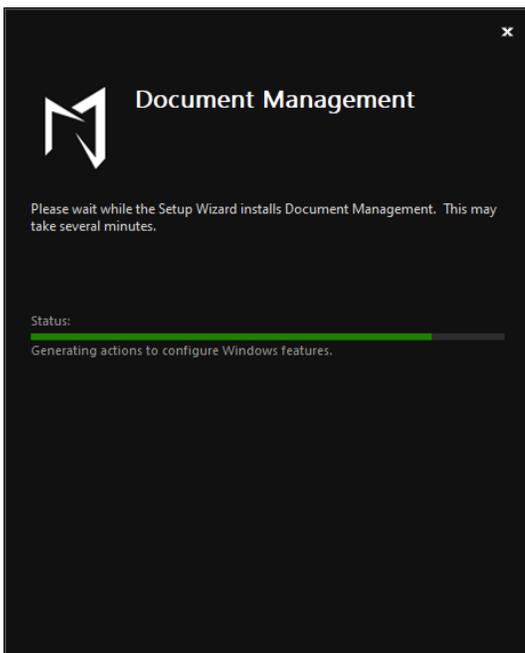
- You will see the following screen telling Document Management has been successfully installed. The user can click on the **Finish** button to close the installer.
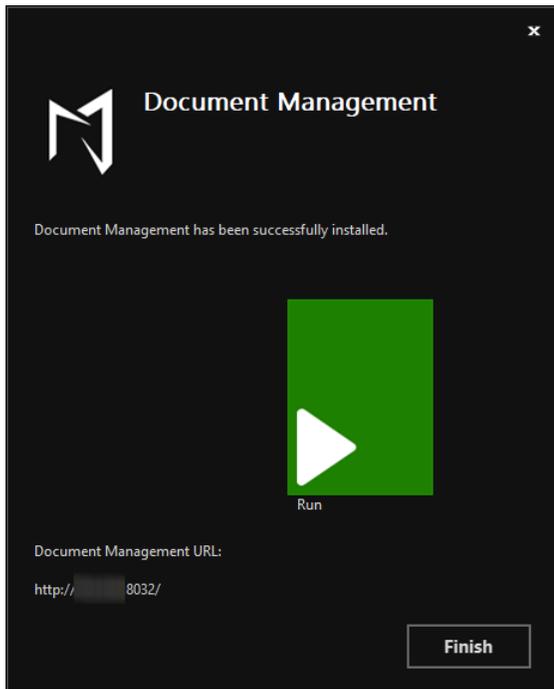
Note: The default port for Document Management will be 8032.

User has to apply Binding for https and use this same port with valid SSL certificate.

BINDING INFORMATION

1. Go to IIS and select **"Document Management"** site.
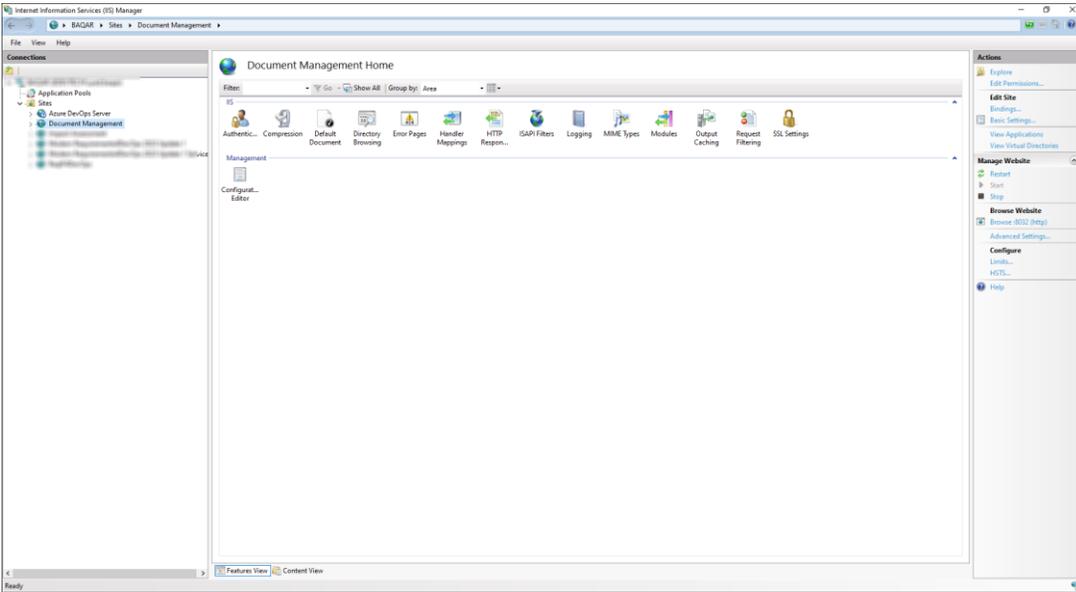
2. Click on **Bindings**.
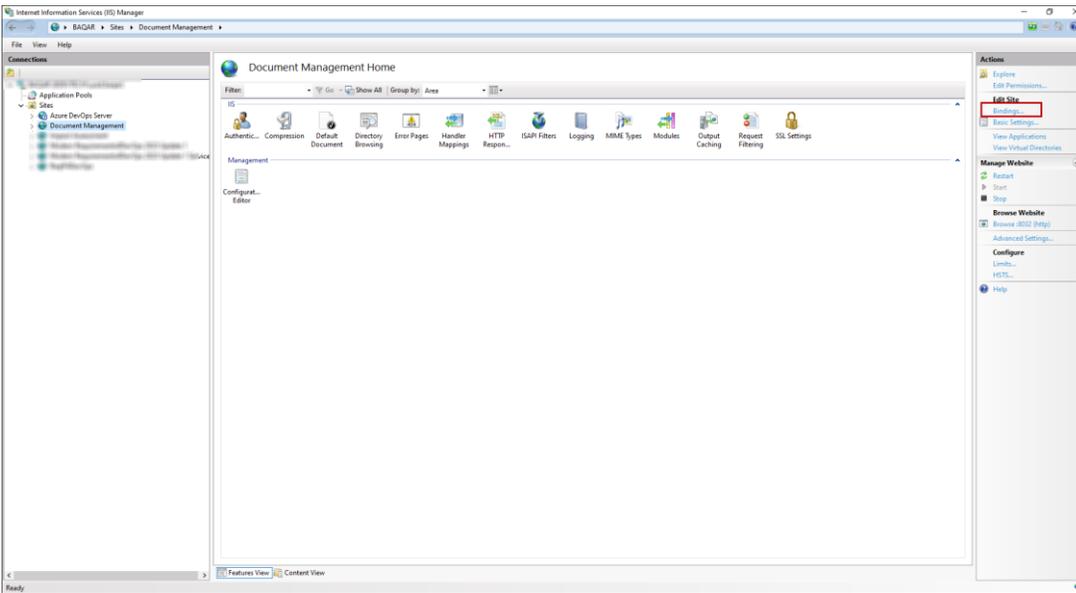
3. A window for **"Site Bindings"** would be displayed now. Click on the "**Add**…" button to create a new Binding information with SSL.

    Note: The default port for Document Management will be 8032.
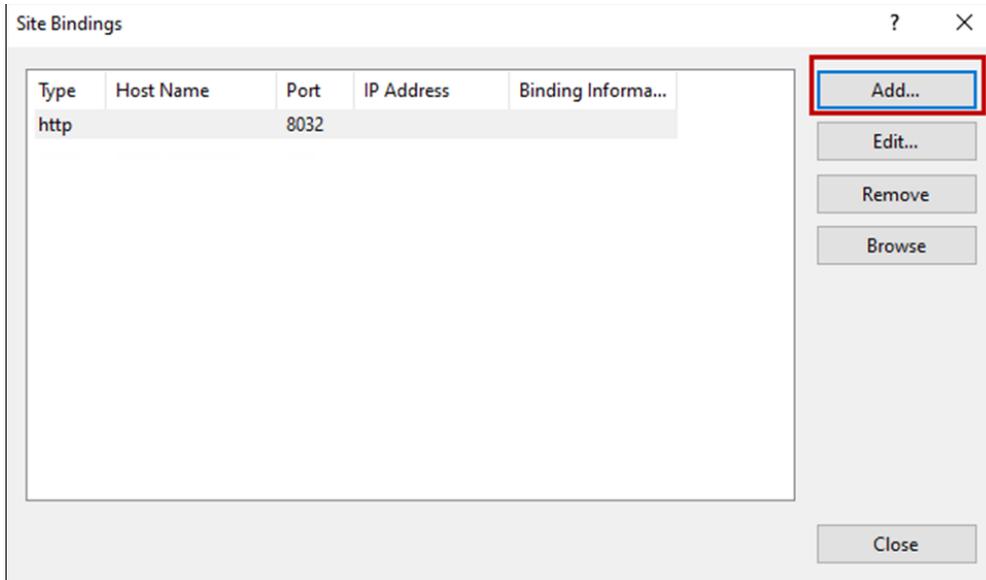
4. Enter the relevant window in the 'Add Site Binding' window. In order to use the default port with https, the user has to edit the default Binding (http) and change it to https OR the user can add a custom port as per their requirement, add a valid SSL certificate and click on the **"OK"** button.
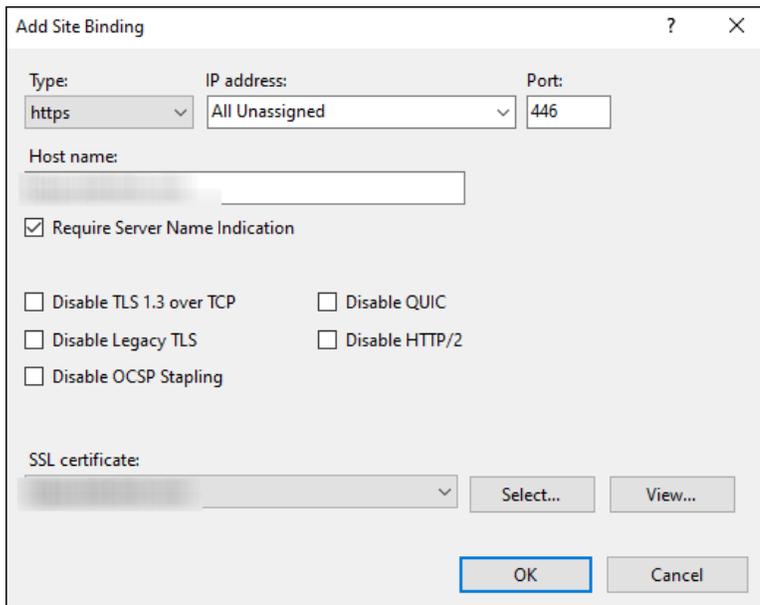
5. Once the Binding information has been added in Document Management IIS site, the user is required to open this port from their Server (where the build is being installed).

Now browse and verify if Document Management has been configured correctly. If it has been configured rightly, the following page would be displayed.

Document Management App service is running …(Build version: 1.4.0)

Please run and view this app on DevOps Extension.

About Document Management:

Document Management module brings a comprehensive document management feature designed to cater to the needs of our customers in the DevOps environment.

Empowering users with seamless document and folder upload and organization capabilities, the Document Management module streamlines workflows within ADO and MR4DO.

Collaborative work becomes effortless with the check-out and check-in functionality, ensuring smooth version control.

The intuitive user interface enables easy viewing, renaming, and removal of documents and folders, providing a streamlined and efficient document management experience for all Azure DevOps users.

Copy the above URL and create/enable extension from this URL.

CREATING/ENABLING EXTENSION MAKER

- Navigate to the folder containing the file "**DocumentManagementExtensionMaker**".
  <Installation Drive>:\Program Files\Modern Requirements\Document Management\Extension Maker

Name	Date modified	Type	Size
Setup	9/27/2023 4:36 PM	Windows Installer ...	14,596 KB

- Click on the "**Next**" button on the installer.

Document Management ExtensionMaker

Welcome to the Document Management ExtensionMaker Setup Wizard

The installer will guide you through the steps required to install Document Management ExtensionMaker on your computer.

WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.

< Back   Next >   Cancel

- Select your **desired folder** to install the extension.
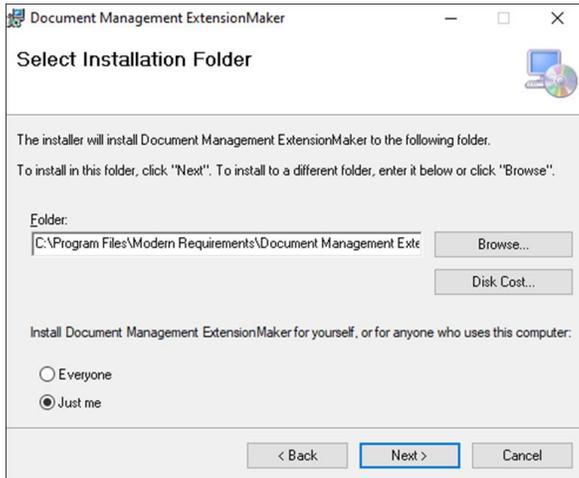
- Click on the "**Next**" button to start the installation.

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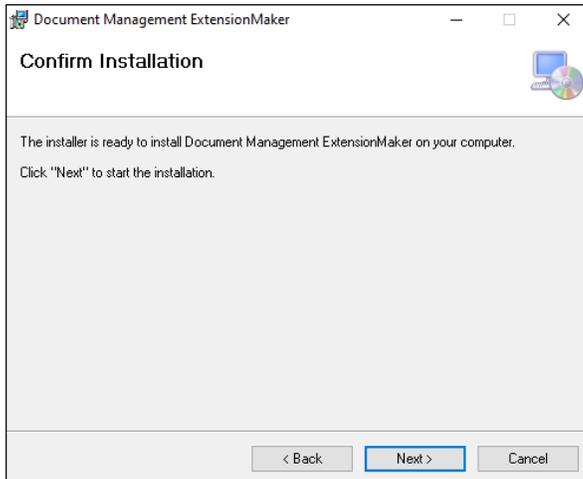
- The **Document Management ExtensionMaker** has been successfully installed.
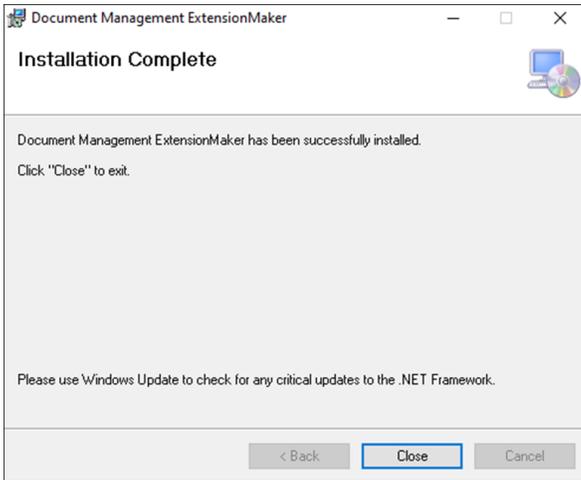
- Go to the start menu and click on "**Document Management ExtensionMaker**".
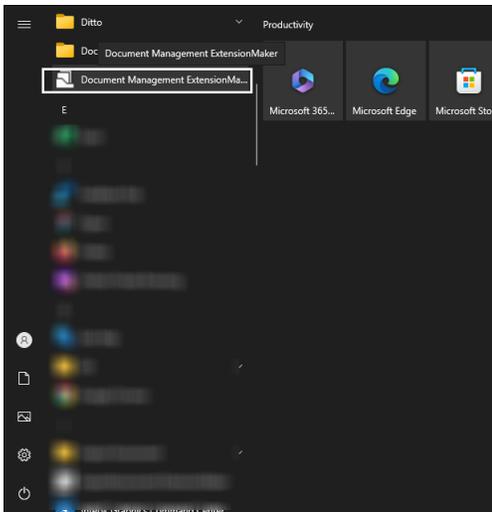
- A **Document Management Extension Maker** window will now open, as shown in the image below.
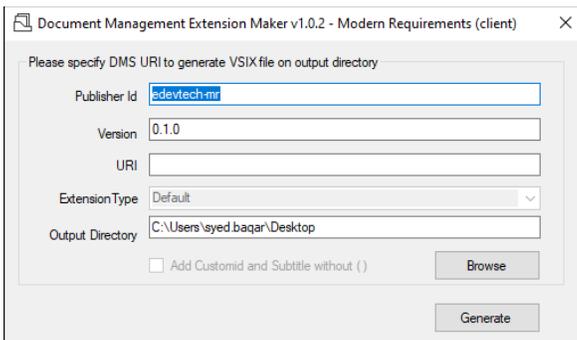
- Provide the required information (i.e., URI and the Output Folder) and click on the **Generate** button. By Default, the Document Management installer installs the build on your machine's local path utilizing port 8032. If the user not using a secure connection, they can copy this link and create the extension from this URL. However, the majority of the organizations now prefer using **Secure Socket Layer (SSL).** The extension then, therefore, is required to be created using a secure URL (https) along with the binding info.
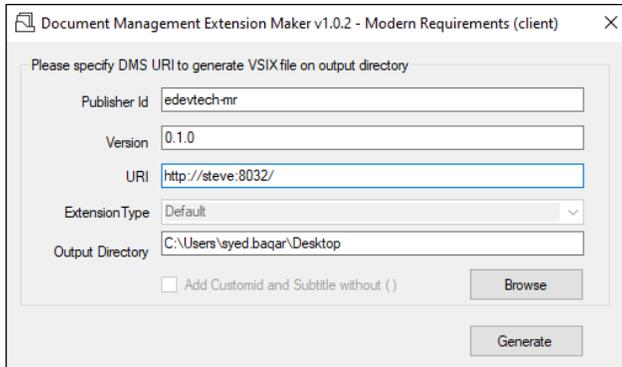
- Click the "**OK**" button to close the confirmation dialogue box.
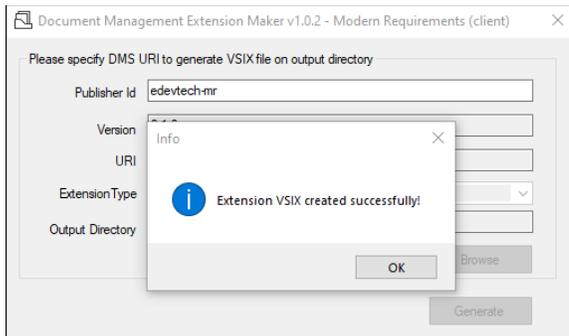
- **VSIX File** will now be generated at the desired location.

Modern Requirements**4**DevOps

1. Go to Azure DevOps Server Extensions and scroll down to **"Manage Extensions"**.
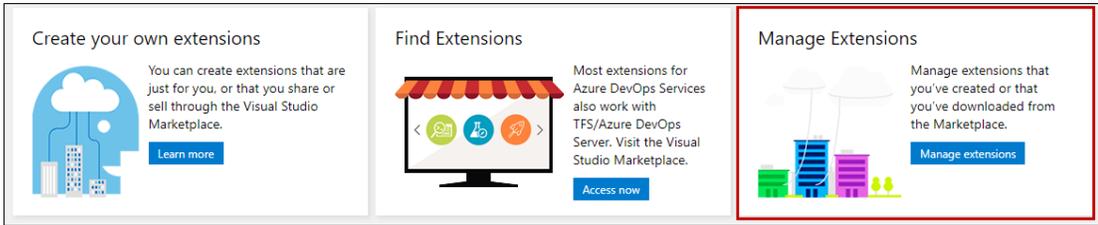
2. Click on the "**Upload Extension**" button on the top right corner.
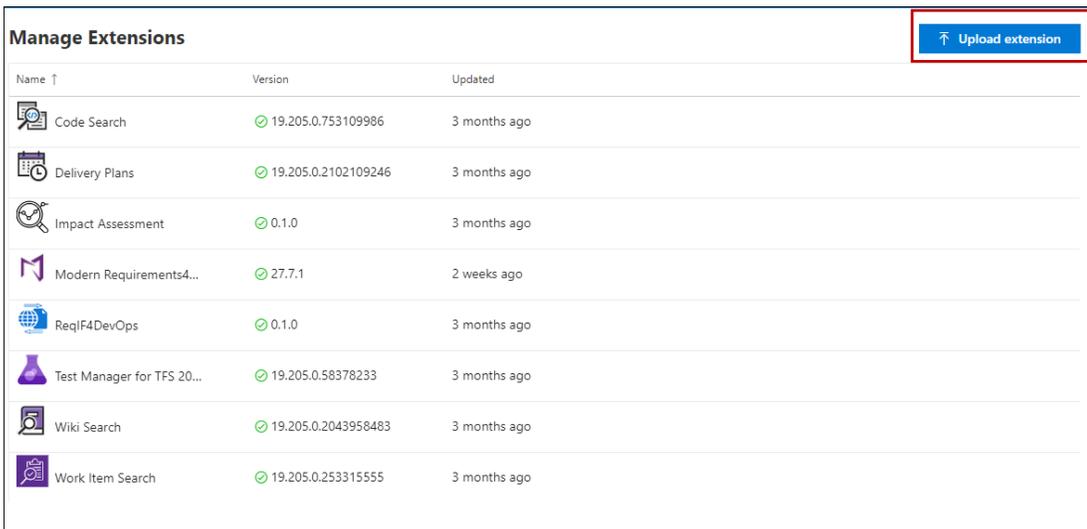
3. Once you click on the "**Upload Extension**" button, the following pop-up window appears for upload.
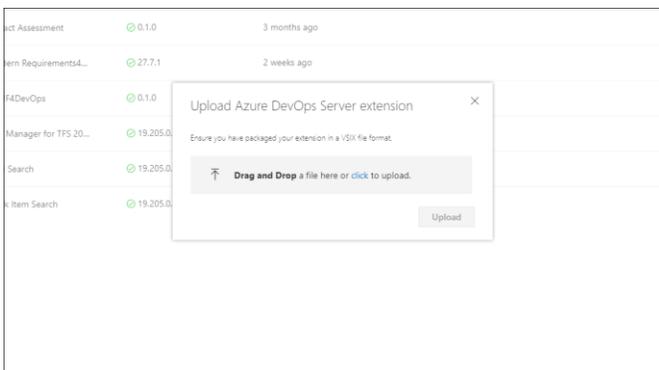
4. Now either **Drag and Drop** or **click** to upload the VSIX file generated using the extension maker. Now click on the "**Upload**" button.

Upload Azure DevOps Server extension   ✕

Ensure you have packaged your extension in a VSIX file format.

edevtech-mr.document-management-0.1.0.vsix   ✏
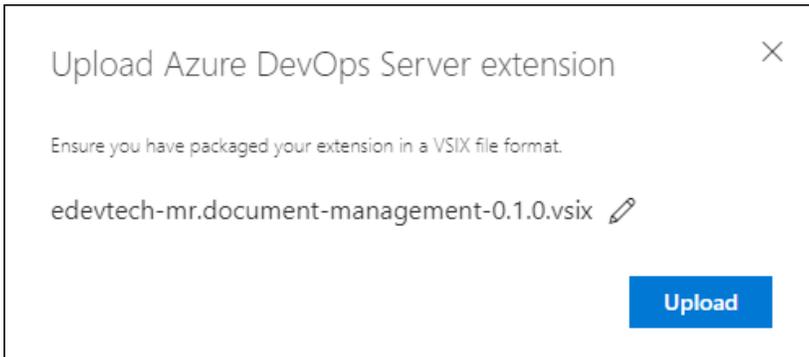
Upload

5. **Document Management** will now be displayed in the Manage Extensions list. Click on it to navigate to the View Extension page.

Manage Extensions   ↑ Upload extension

Name ↑		Version	Updated
Code Search	⋯	⊘ 19.205.0.753109986	3 months ago
Delivery Plans		⊘ 19.205.0.2102109246	3 months ago
Document Management		⊘ 0.1.0	just now
Impact Assessment		⊘ 0.1.0	3 months ago
Modern Requirements4...		⊘ 27.7.1	2 weeks ago
ReqIF4DevOps		⊘ 0.1.0	3 months ago
Test Manager for TFS 20...		⊘ 19.205.0.58378233	3 months ago
Wiki Search		⊘ 19.205.0.2043958483	3 months ago
Work Item Search		⊘ 19.205.0.253315555	3 months ago

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6. Click on "**Get it Free**" button.
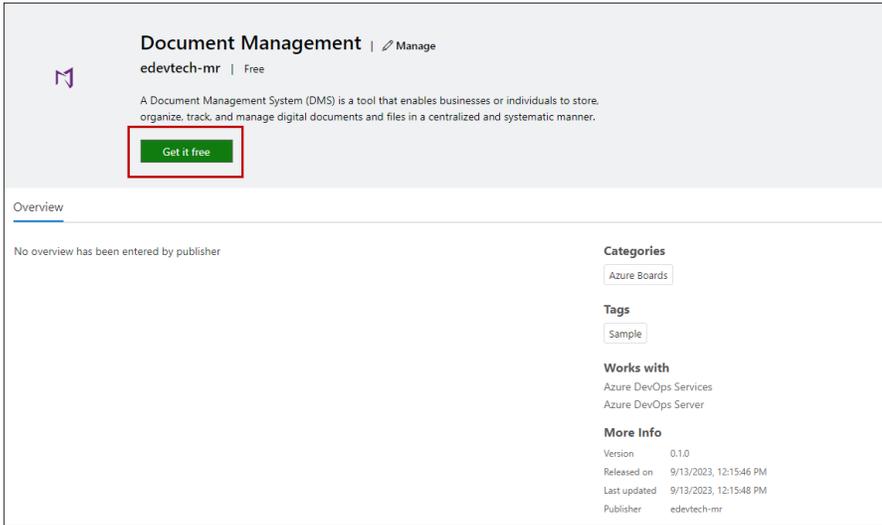
7. Now select the **collection** on which you want the Document Management extension to be installed and click on the **Install** button.
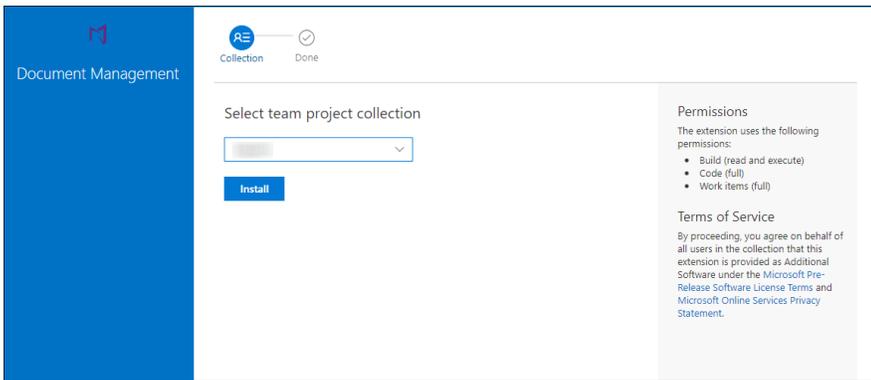
8. Document Management extension has been **successfully installed** to your desired collection.