

Document Management

Installation Guide

Version 1.0







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

CONTENTS

System Requirements1	
General Software Requirements	1
Team Foundation Server Requirements	1
Document Management Installation2	
Document Management Extension Deployment (Azure Services)	2
Document Management Installation (Azure Server)	5
Binding Information	8
Creating/Enabling Extension Maker	11
Document Management Extension Deployment	15

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).

Azure DevOps / Settings	/ Extensions / Shared
Organization Setti	Extensions
Q Search Settings	Installed Requested Shared
General	A second seco
B Overview	A THE REPORT OF
③ Projects	
88 Users	Document Management by Modern Requirements A Document Management is a tokinasses or individuals to store, organize track and manage divided documents and files in a centralized and systematic manage
₩ Billing	 А ресельств техноденных за воет пак своисе реализаст от полнового селот, единас, чток полноде одна оселности и полнового селоте и полнового селоте, единас, чток полноде одна оселности и полнового селоте полнового селоте и полнового селоте по селоте полнового селоте полнового селоте селоте селоте селоте селоте селоте полнового селоте полнового селоте селоте полнового селоте полнового селоте селоте полнового селоте селоте Селоте селоте село Селоте селоте селот Селоте селоте сел
Global notifications	
dì Usage	
G Extensions	
Azure Active Directory	
Security	
♀ Policies	
Permissions	
Boards	

• An installation window will appear. Kindly click on the "Install" button.

Azure DevOps / Setting	is / Extensions / Shared		Q. Search	i= 0 % HM
Organization Setti	Shared extensions	Document Managem	ent	Install Marketplace
Q Search Settings		Extension details		
General		A Document Management is a tool digital documents and files in a cent	that enables businesses or individua ralized and systematic manner.	ils to store, organize, track, and manage
B Overview		Publisher	Version	Last updated
Projects		Modern Requirements	0.1.0	Jul 12, 2023 at 6:00 PM GMT+5
88 Users	Document Management			
₩ Billing	Modern Requirements			
Global notifications Global notifi				
db Usage				
G Extensions				
Azure Active Directory				
Security				

• 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.

Visual Studio Marketplace	
M Document Management	Organization Done
	Select an Azure DevOps organization SDV-Demo2 ✓ Install
	For Azure DevOps Server Download

• 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**".

🛿 Visual Studio Marketplace		
M Document Management	RΞ Organization Done	
	You are all set!	
	Proceed to organization	Go to Marketplace

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	Туре	Size
🛃 Document Management	9/4/2023 7:14 PM	Application	143,031 KB

• Select Run as Administrator.

Name		Date modified	Туре	Size
🔀 Document Management		Q///2023 7-1/ DM	Application	143,031 KB
	Open			
	V Run as ad	ministrator		
	S Share with	h Skype		
	📔 Edit with I	Notepad++		
	Share with	h Skype		
	Troublesh	oot compatibility		
	Pin to Sta	rt		
	love to 🤇	DneDrive		
	7-Zip		>	
	🕀 Scan with	Microsoft Defender		
	🖻 Share			
	Give acce	ss to	>	
	Pin to tasl	kbar		
	Restore p	revious versions		
	Send to		>	
	Cut			
	Сору			
	Create sh	ortcut		
	Delete			
	Rename			
	Properties	5		

• 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.



- b

< Þ

< b

 \checkmark

4 b

< b

• 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.

Site Bindings ? X

Type
Host Name

Port
IP Address

http
8032

Edit...

Remove

Browse

Close

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.

Add Site Binding		?	\times
Type: https ~	IP address: Pc All Unassigned V 44	ort: 46	
Host name:			
Require Server Nar	e Indication		
 Disable TLS 1.3 ove Disable Legacy TLS Disable OCSP Stap 	TCP Disable QUIC		
SSL certificate:	∽ Select	t View	
	OK	Cance	2l

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	Туре	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 Ma ExtensionMaker Setup Wizard	anagem 1	ent			
The installer will guide you through the steps requir ExtensionMaker on your computer.	red to install I	Document Mar	nagemer	nt	
WARNING: This computer program is protected by Unauthorized duplication or distribution of this prog or criminal penalties, and will be prosecuted to the	y copyright la ram, or any p maximum exi	w and internat portion of it, ma tent possible u	ional tre y result nder the	aties. in sever law.	e civil
< E	}ack	Next >		Cano	el

• Select your **desired folder** to install the extension.



• Click on the "**Next**" button to start the installation.

Document Management Extension	nMaker	_	· 🗆	×			
Confirm Installation				5			
The installer is ready to install Document Management ExtensionMaker on your computer.							
Click "Next" to start the installation.							
	< Back	Next >	Ca	ncel			

< b

4 b

Þ

• The Document Management ExtensionMaker has been successfully installed.

🔀 Document Management ExtensionMaker	-	-		×
Installation Complete				
Document Management ExtensionMaker has been successfully insta	alled.			
Click "Close" to exit.				
Please use Windows Update to check for any critical updates to the	.NET Fra	nework	ς.	
< Back	Close		Car	ncel

• 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.

Document Manag	jement Extension Maker v1.0.2 - Modern Requirements (client)	×
Please specify DMS (JRI to generate VSIX file on output directory	
Publisher Id	edevtech-mr	
Version	0.1.0	
URI		
ExtensionType	Default 🗸	
Output Directory	C:\Users\syed.baqar\Desktop	
	Add Customid and Subtitle without () Browse	
	Generate	

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.

🗟 Document Manag	ement Extension Maker v1.0.2 - Modern Requirements (client)	Х
Please specify DMS U	JRI to generate VSIX file on output directory	
Publisher Id	edevtech-mr	
Version	0.1.0	
URI	http://steve:8032/	
Extension Type	Default ~	
Output Directory	C:\Users\syed.baqar\Desktop	
	Add Customid and Subtitle without () Browse	
	Generate	

• Click the "OK" button to close the confirmation dialogue box.



• VSIX File will now be generated at the desired location.

Name	Date	Туре	Size	Tags	
edevtech-mr.document-management-0.1.0.vsix	9/28/2023 5:27 PM	VSIX File	3 KB		
eductoring 36/50-0n/man-27.7. Unix					

DOCUMENT MANAGEMENT EXTENSION DEPLOYMENT

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.

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	
Impact Assessment	⊘ 0.1.0	3 months ago	
Modern Requirements4	Ø 27.7.1	2 weeks ago	
ReqlF4DevOps	⊘ 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	

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 $ imes$	
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 extensi
Name 1	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	
RegIF4DevOps	⊘ 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	

6. Click on "Get it Free" button.

Ŋ	Document Management & Manage edevtech-mr Free A Document Management System (DMS) is a tool that enables businesses or individuals to store organize. track. and manage digital documents and files in a centralized and systematic manner.	e,	
Overview			
No overview has be	een entered by publisher	Categorie Azure Board	s ds
		Tags Sample	
		Works wit Azure DevO Azure DevO	th yps Services yps Server
		More Info	
		Version Released on Last updated Publisher	0.1.0 9/13/2023, 12:15:46 PM 9/13/2023, 12:15:48 PM

7. Now select the **collection** on which you want the Document Management extension to be installed and click on the **Install** button.

M Document Management	RE 🕖	
	Select team project collection	Permissions The extension uses the following permissions: • Build (read and execute) • Code (full) • Work items (full) Torms of Service Torms of Service By proceeding, you agree on behalf of subsets in the collection that this real association of the services of the services provided as Additional Software under the Microsoft Pre- Release Software Ucense Terms and Microsoft Online Services Privacy statement.

8. Document Management extension has been **successfully installed** to your desired collection.

Futural and	6		
Extensions	security	browse marketplace	Browse local extensions
The provide the second	tic manner.		
Impact Assessment by edivitech-mr Impact Assessment helps users to assess and analyze impacts on requirements before making any updates.			
Modern Requirements4DexOps by isdivitedh-mir Modern Requirements4DexOps helps users to manage project requirements visually. It enables users to visualize the requirements in design mode by using a set of pre-defined contr	ols.		
RegIF4DevOps by edevletch-mr RegIF Bridge is utility to import/export RegIF data into Azure DevOps.			