



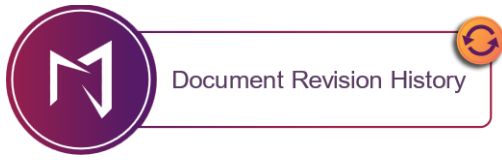
Document Management

User Guide

Version 1.0

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 MODERN
Requirements



Rev. #	Date	Details	Revised By	Approved By
Version 1.0	03 rd April, 2024	<ul style="list-style-type: none">Document created	Syed Hammad	Hammad Masood

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DOCUMENT MANAGEMENT

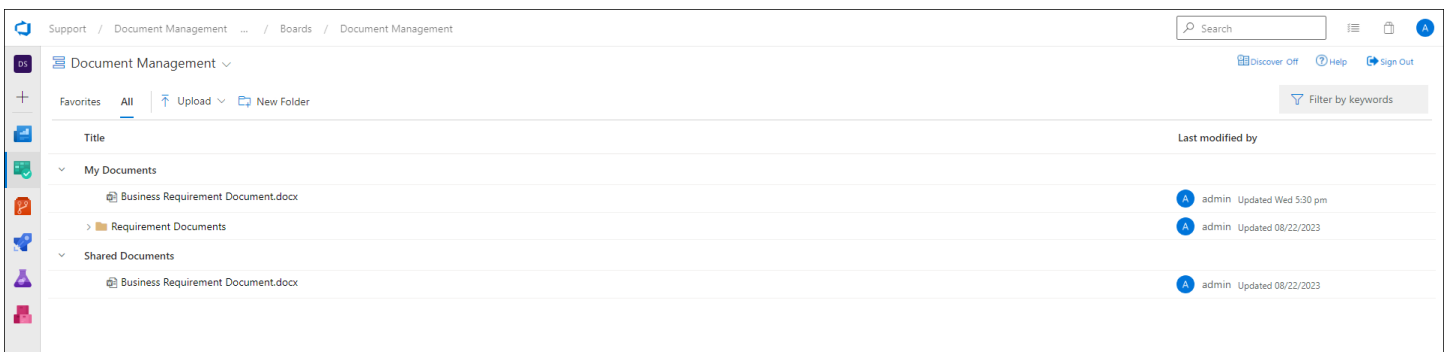
WHAT IS DOCUMENT MANAGEMENT?

The **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(s)/folder uploading, organizing, and managing 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. In a distributed environment where multiple stakeholders or teams are working on different documents, versioning of the document not only provides efficient baselining but also allows users to select any previous version and, if required, rollback to any previous version.

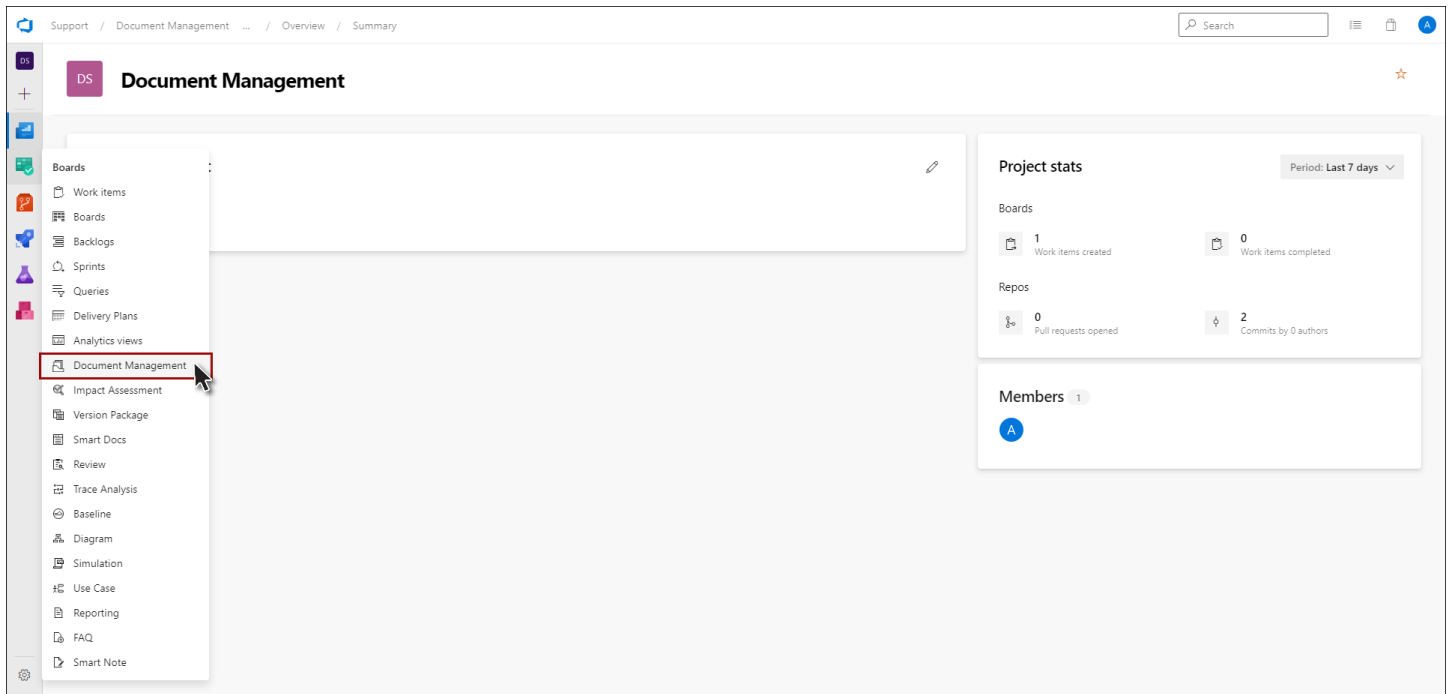
Document Management also provides an additional capability to MS-Word documents where users can compare all different versions of a document while viewing it at the same time.

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



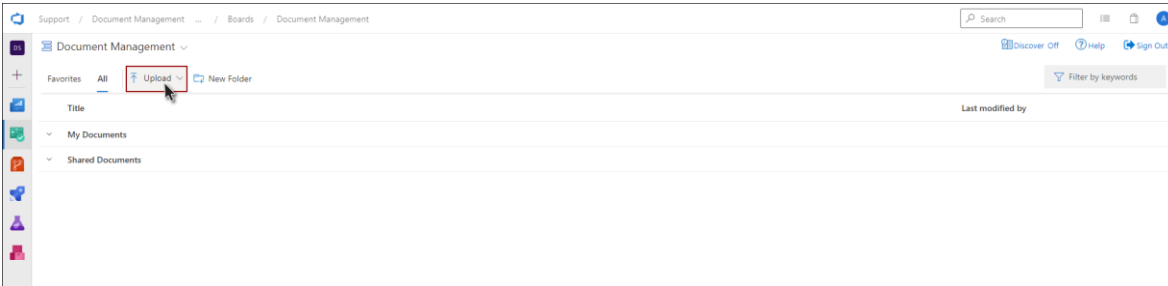
INVOKING DOCUMENT MANAGEMENT IN MR4DEVOPS

Navigate to the boards option in your desired project and click on **“Document Management.”**

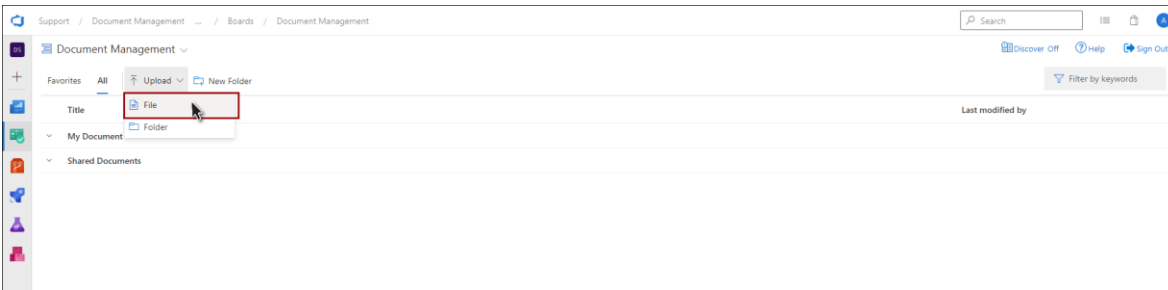


UPLOADING A FILE

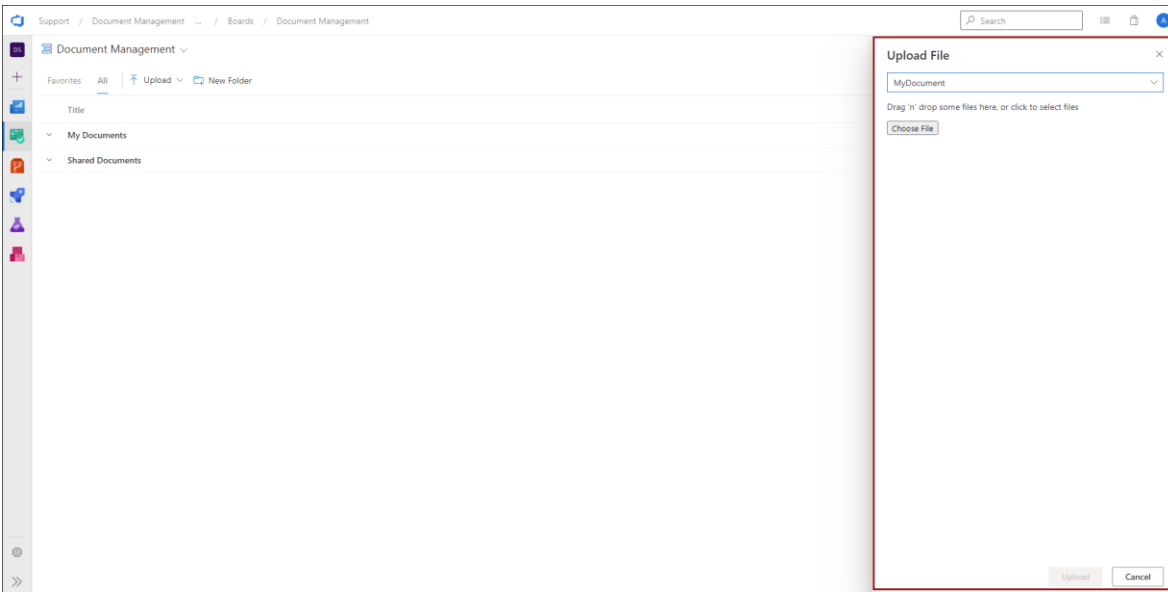
1. Click **Upload** on landing page of Document Management.



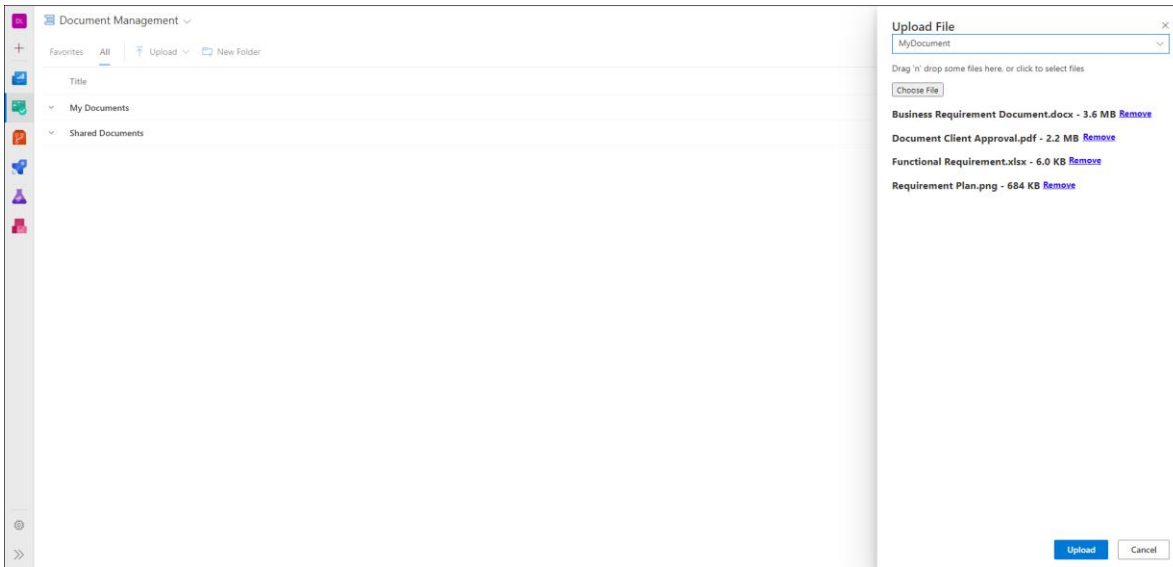
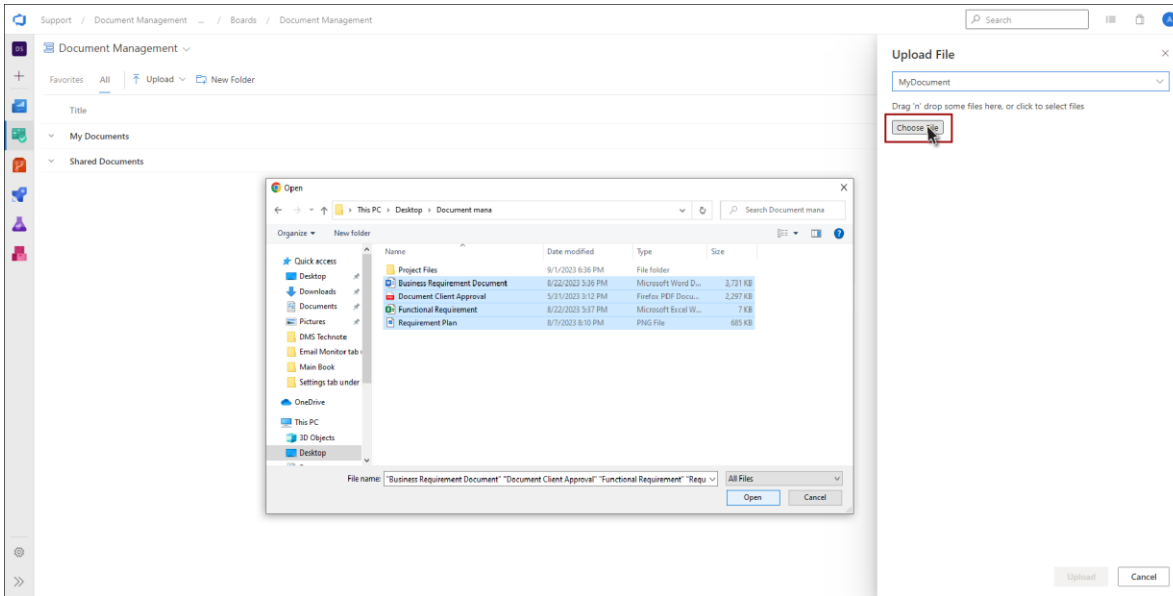
2. Click on **File** from the dropdown.



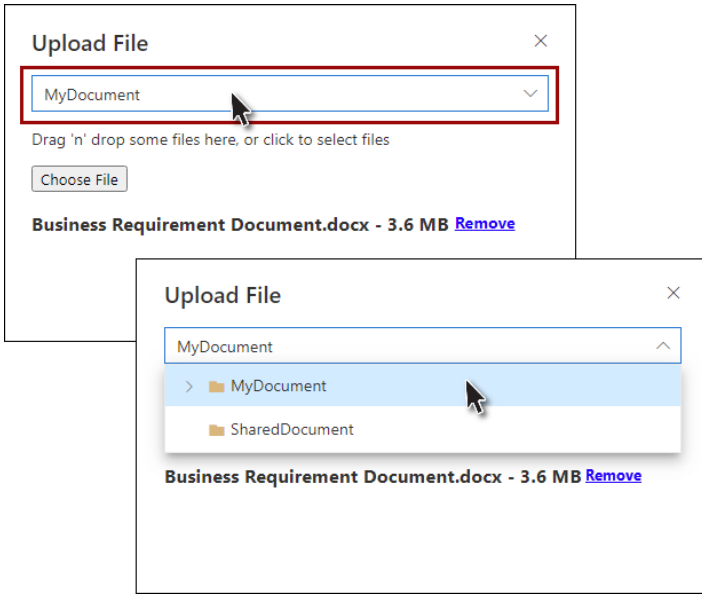
3. The **Upload File** window appears.



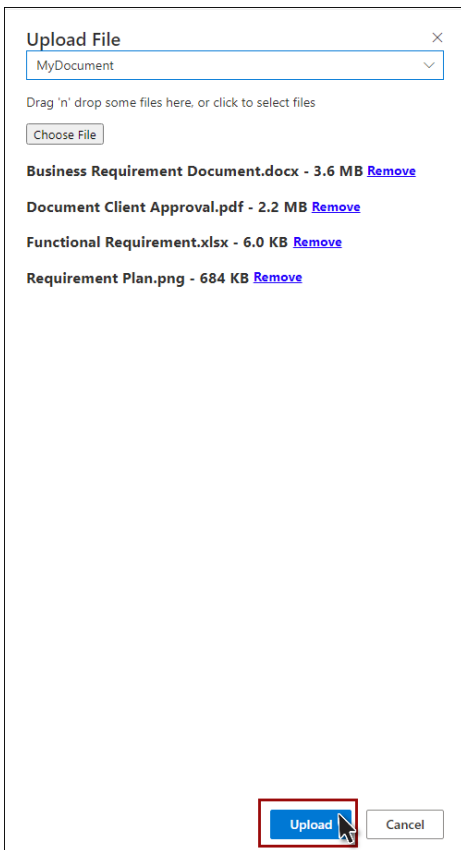
4. Click on the **“Choose File”** button and select your desired file(s) **OR** drag and drop the file(s).



5. Select the desired location i.e. **My Documents** and **Shared Documents**.



6. Click on the **Upload** button.

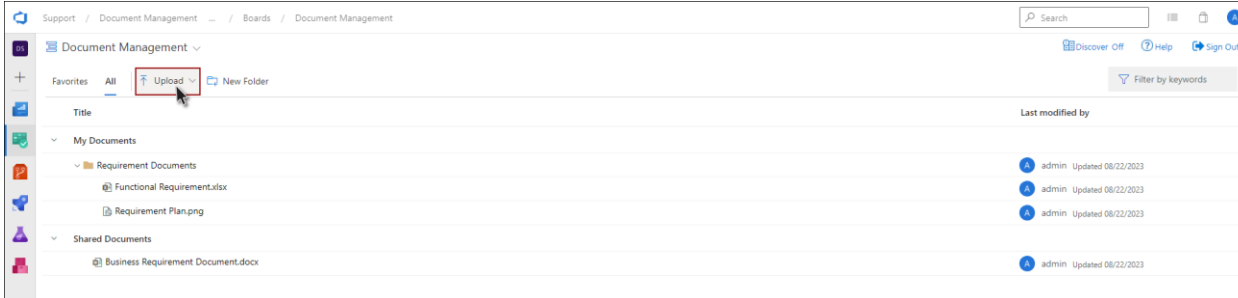


7. The Files have been uploaded.



UPLOADING A FOLDER

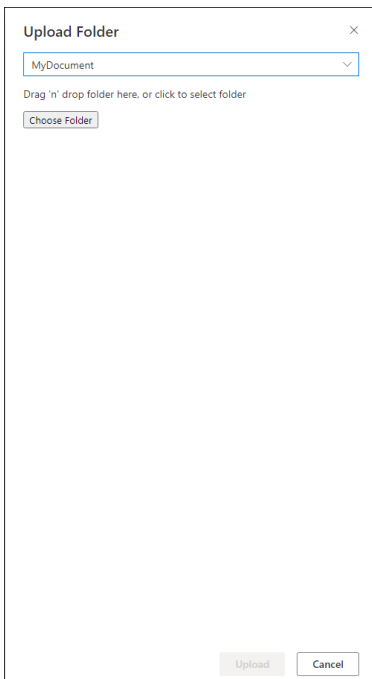
1. Click **Upload** on landing page of Document Management.



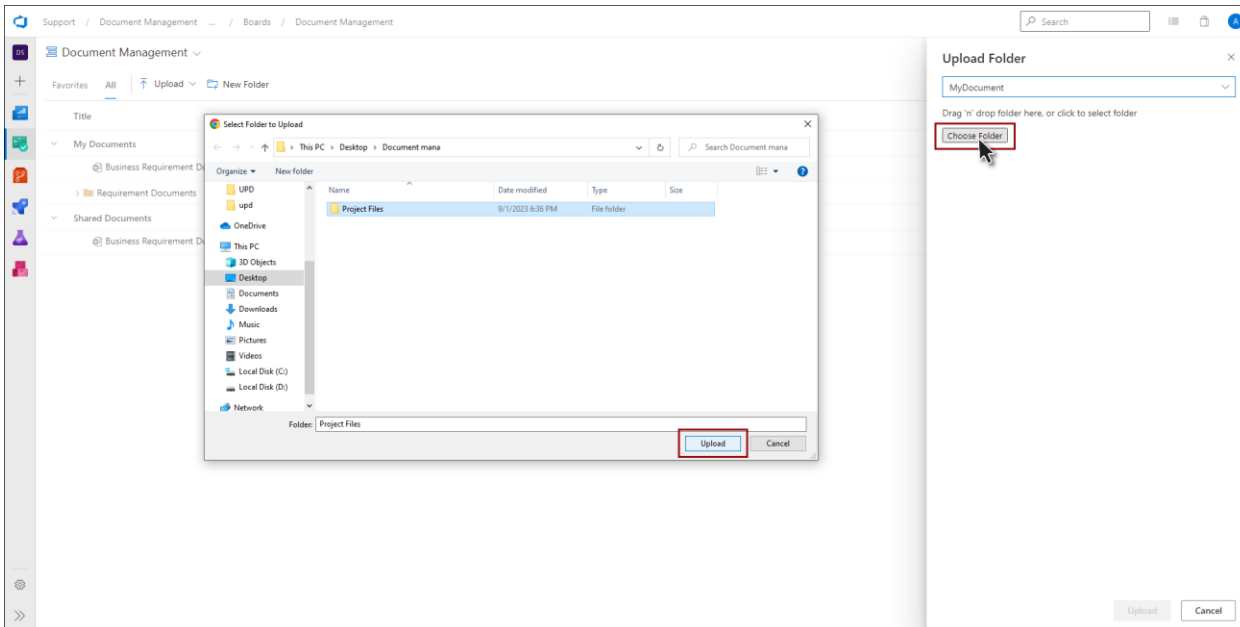
2. Click on the **Folder** Option from the dropdown.



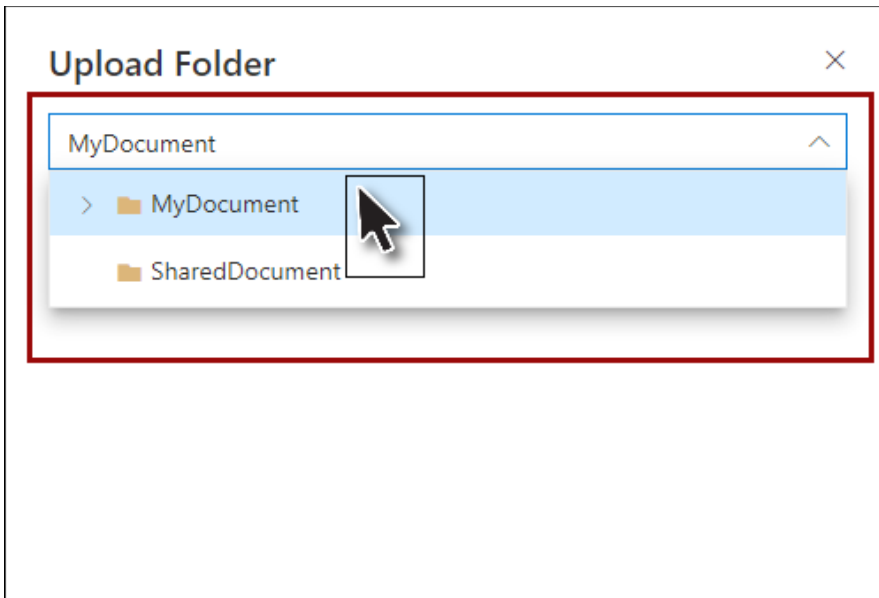
3. The **Upload Folder** window appears.



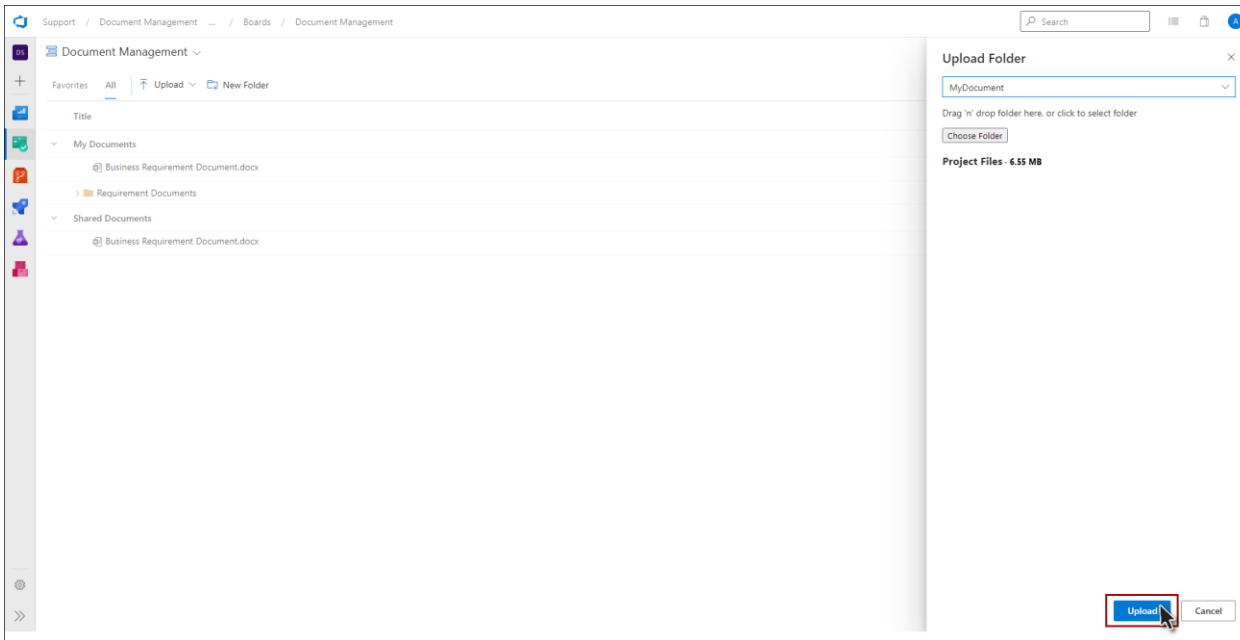
4. Click on the **“Choose Folder”** option and select the desired folder **OR** drag and drop the folder.



5. Select the desired location i.e. **My Document** or **Shared Documents**.



6. Click on the **Upload** button.



7. The Folder has been **uploaded**.



CHECKOUT A FILE

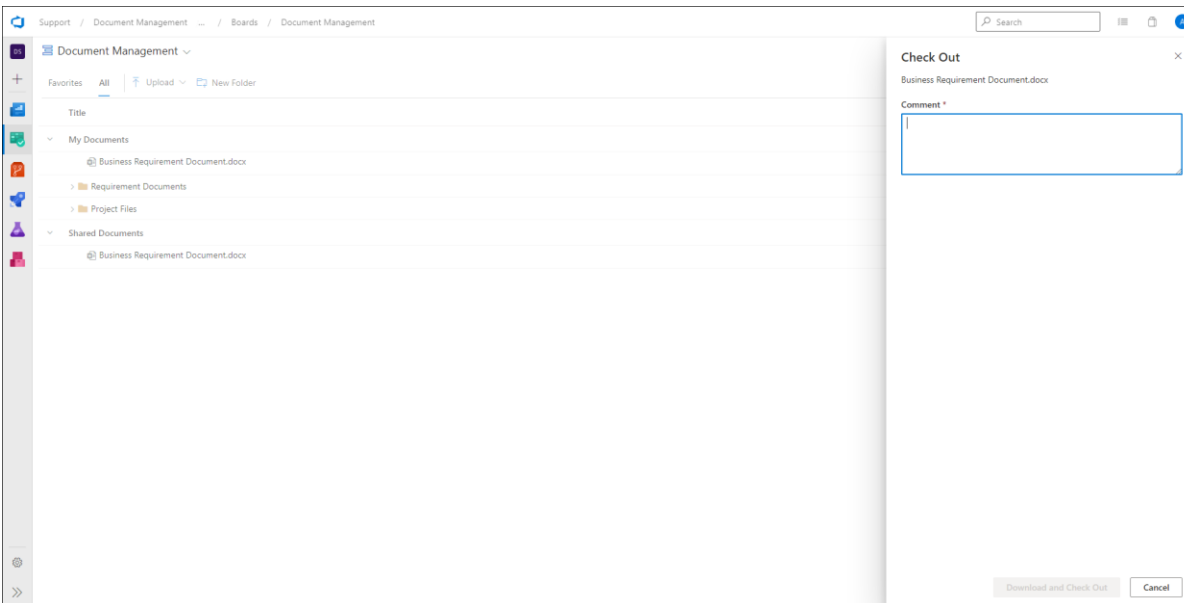
1. Click on “...” on the desired file.



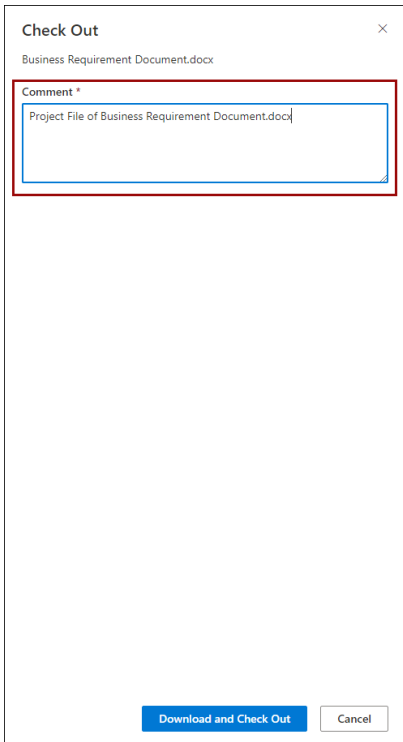
2. Click on  **Check Out** in the context menu.



3. A floating window of **Check Out** appears.

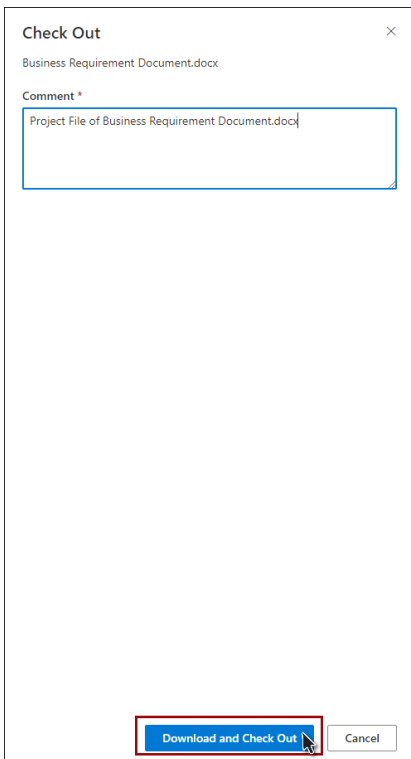


4. Enter the **Comments**.



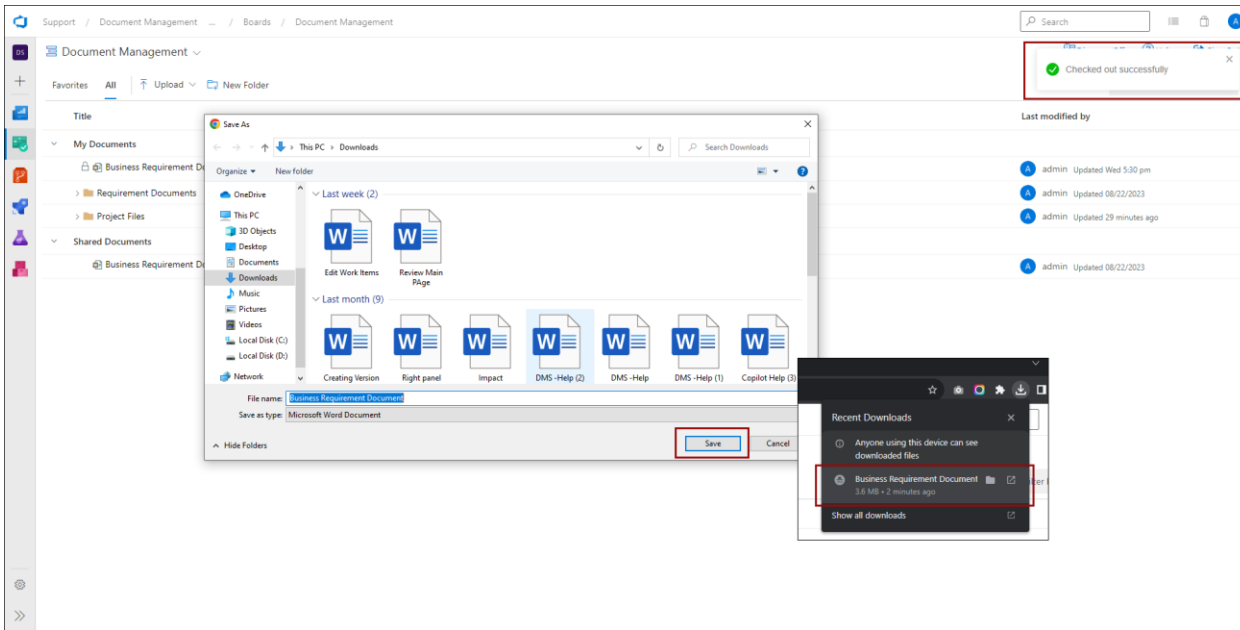
The screenshot shows a 'Check Out' dialog box for the file 'Business Requirement Document.docx'. It features a 'Comment *' field containing the text 'Project File of Business Requirement Document.docx'. The 'Comment *' field and its text are highlighted with a red rectangular border. At the bottom of the dialog, there are two buttons: 'Download and Check Out' (highlighted in blue) and 'Cancel'.

5. Click on the **“Download and Check Out”** button.



This screenshot is identical to the previous one, showing the 'Check Out' dialog box with the comment field highlighted. In this step, the 'Download and Check Out' button at the bottom left is highlighted with a red rectangular border, and a mouse cursor is shown clicking on it.

6. The selected file has been **checked out** and **downloaded** on the local system.

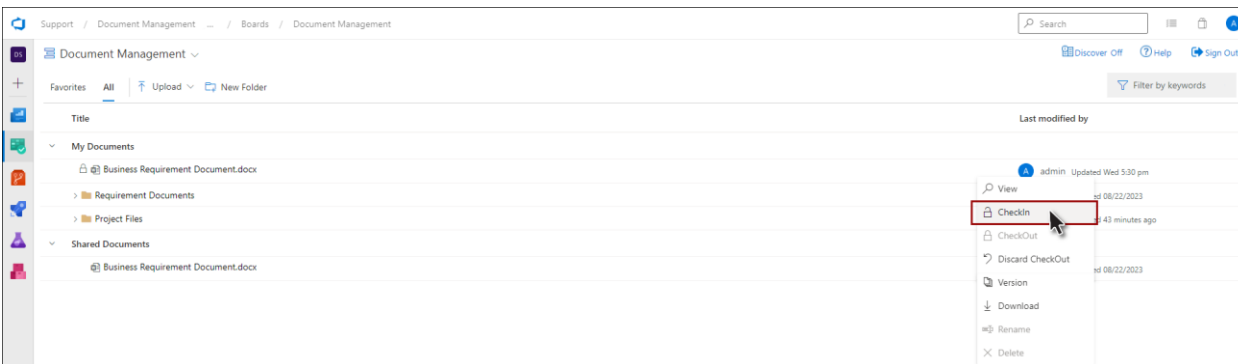


CHECKIN A FILE

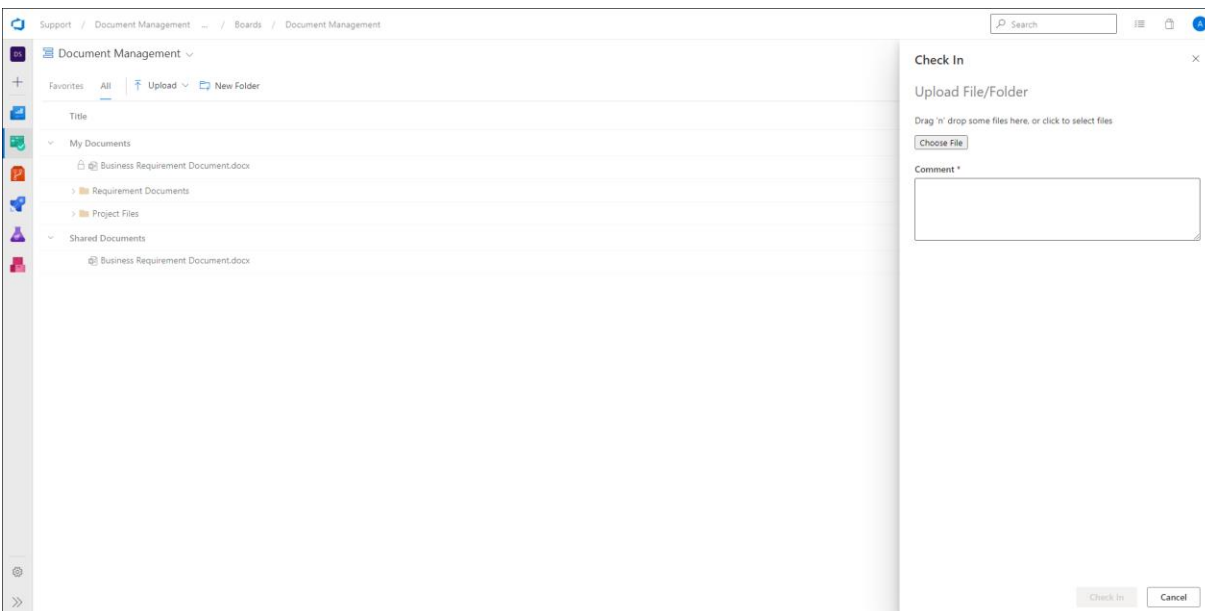
1. Click on “...” on the desired check out file.



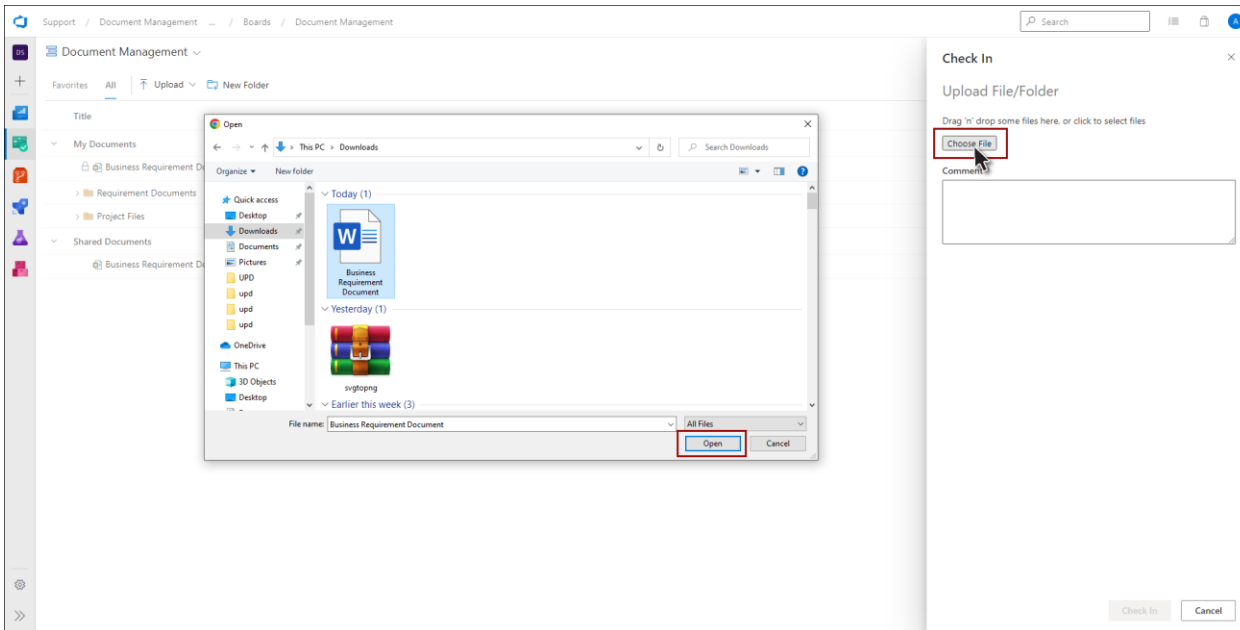
2. Click on  **Check In** in the context menu.



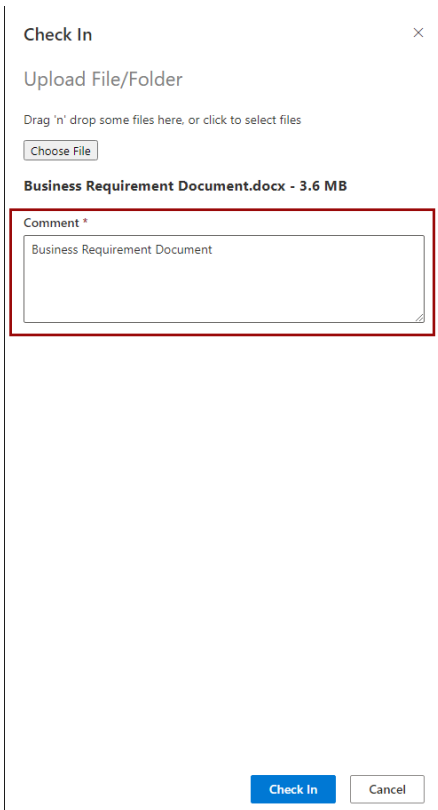
3. A floating window of **Check In** appears.



4. Click on the **Choose File** button and upload your desired file.



5. Enter the **Comments**.



6. Click on the **Check In** button.

Check In
✕

Upload File/Folder

Drag 'n' drop some files here, or click to select files

Business Requirement Document.docx - 3.6 MB

Comment *

Business Requirement Document

7. The file has been successfully **checked in**.

Support / Document Management / Boards / Document Management

Document Management

Favorites All Upload New Folder

Title	Last modified by
My Documents	
Business Requirement Document.docx	admin Updated a few seconds ago
Requirement Documents	admin Updated 08/22/2023
Project Files	admin Updated an hour ago
Shared Documents	
Business Requirement Document.docx	admin Updated 08/22/2023

✔
Checked in successfully
✕

DISCARD CHECKOUT

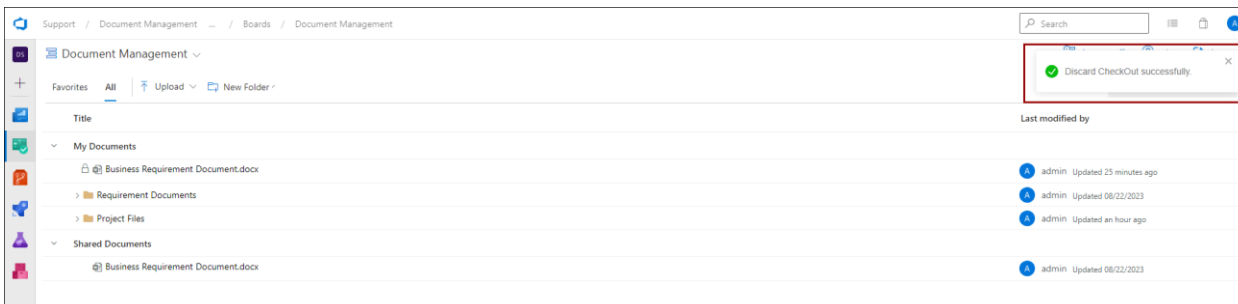
1. Click on “...” on the desired check out file in **My Documents**.



2. Click on  **Discard CheckOut** in the context menu.



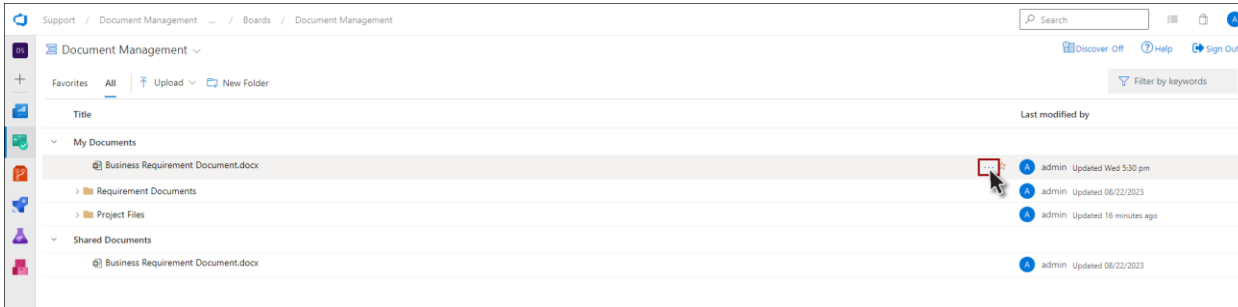
3. The Check Out has been successfully **discarded**.



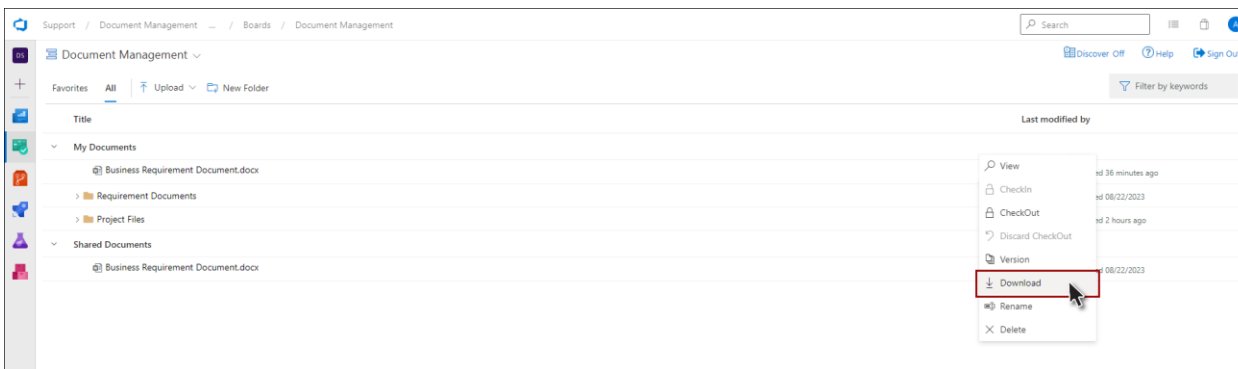
DOWNLOAD A FILE/FOLDER

DOWNLOADING A FILE

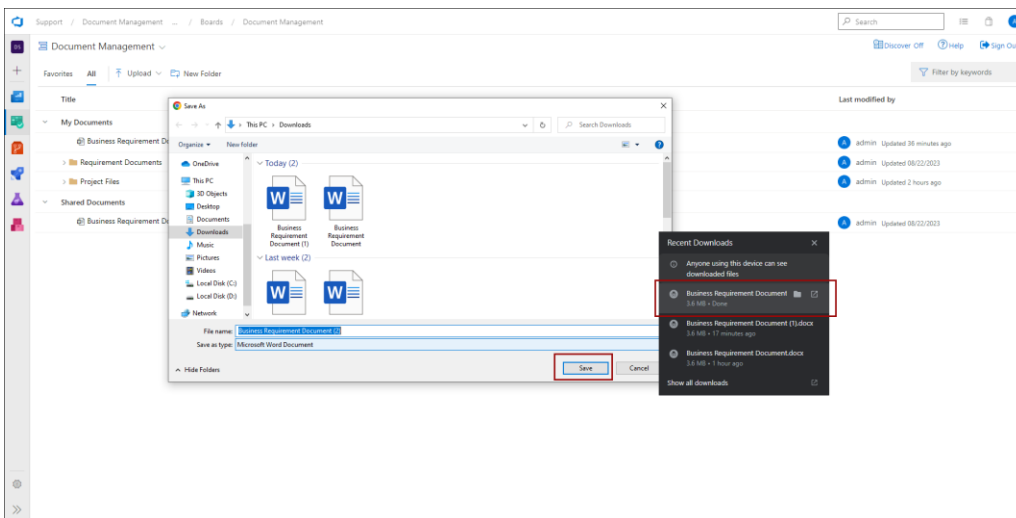
1. Click on “...” on the desired File.



2. Click on **Download** in the context menu.

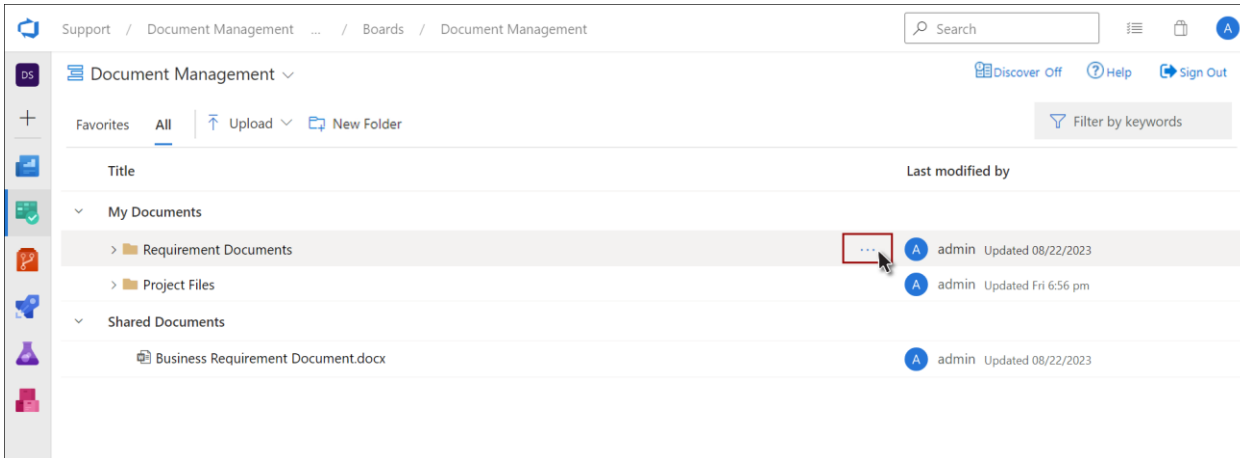


3. The file has been **downloaded** successfully.

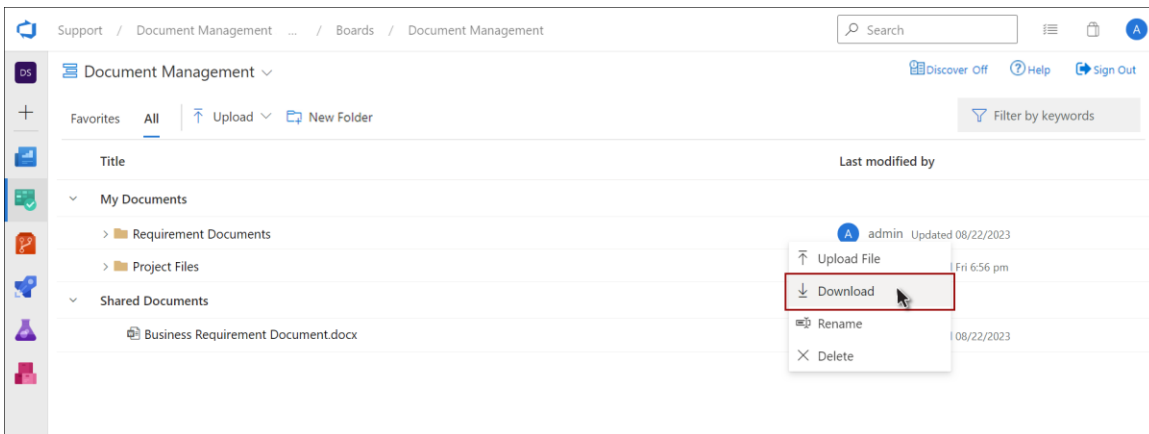


DOWNLOADING A FOLDER

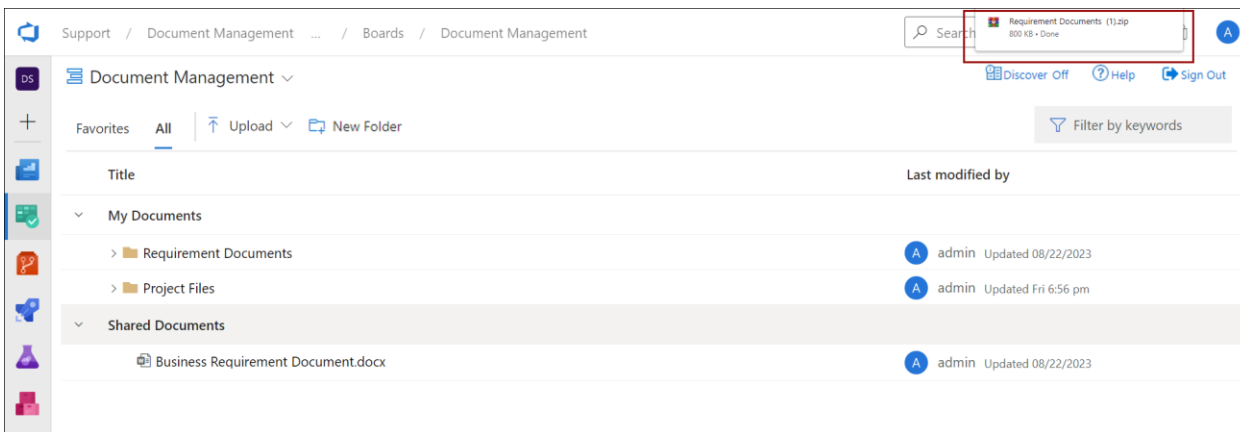
1. Click on “...” on the desired Folder.




2. Click on **Download** in the context menu.



3. The folder has been **downloaded** successfully.

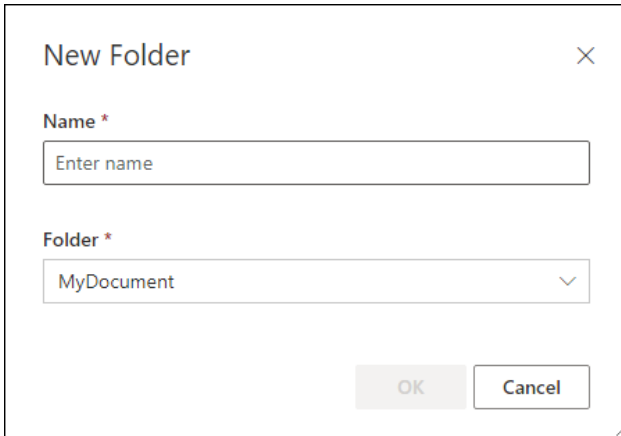


CREATE A NEW FOLDER

1. Click  **New Folder** on the landing page of Document Management module.

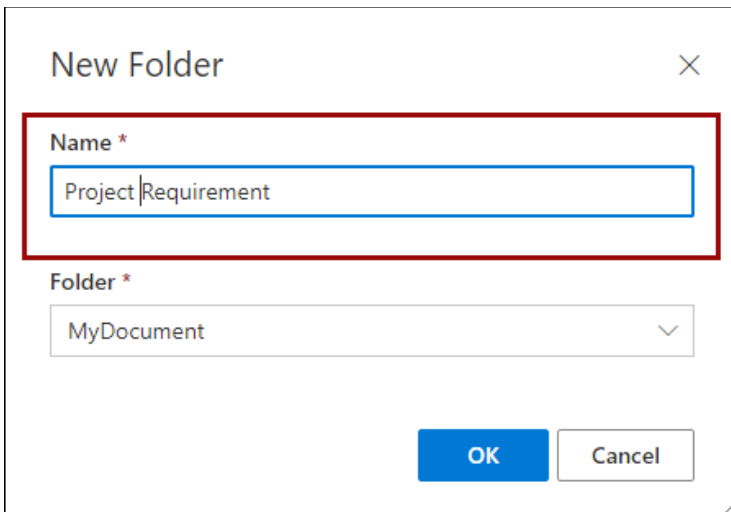


2. The following **New Folder** window appears.



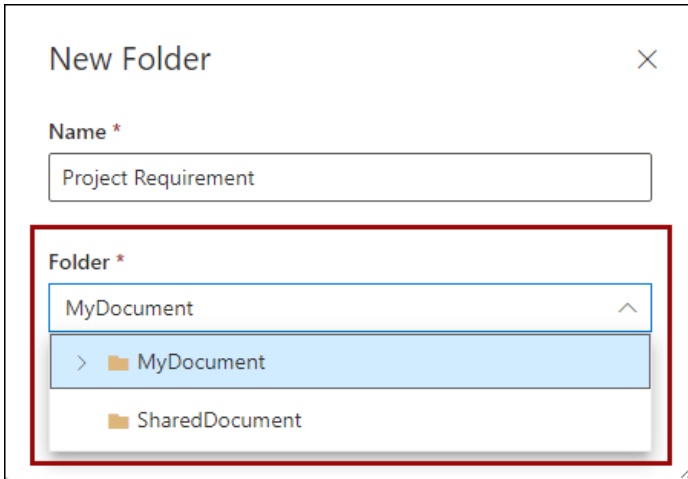
The 'New Folder' dialog box is shown. It has a title bar with a close button (X). The 'Name *' field contains 'Enter name'. The 'Folder *' dropdown menu is set to 'MyDocument'. There are 'OK' and 'Cancel' buttons at the bottom.

3. Enter a suitable **name** for the folder you want to create.

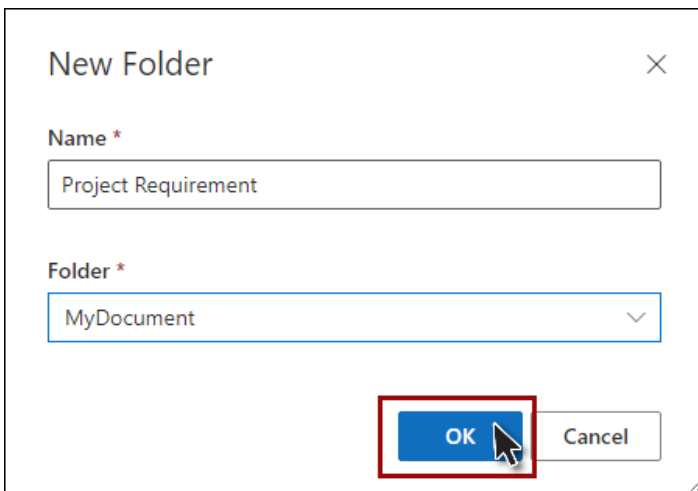


The 'New Folder' dialog box is shown. The 'Name *' field is highlighted with a red box and contains the text 'Project Requirement'. The 'Folder *' dropdown menu is set to 'MyDocument'. There are 'OK' and 'Cancel' buttons at the bottom.

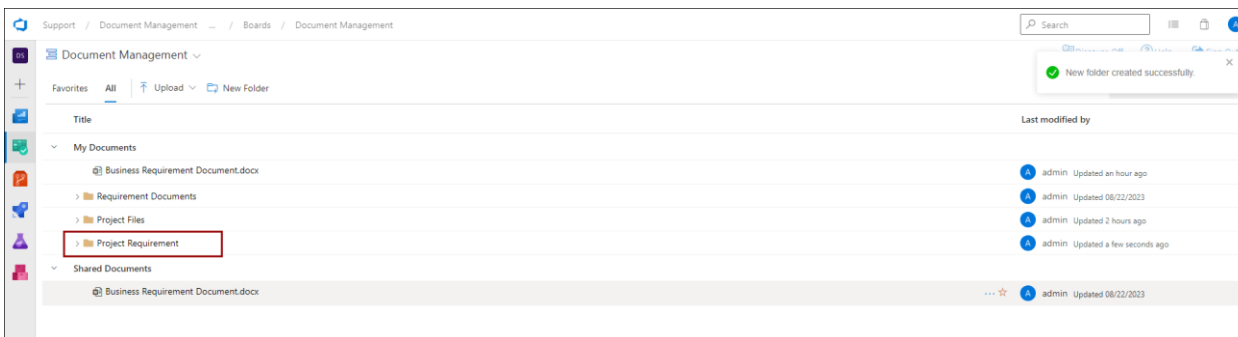
4. Select the **location** where you want to place the folder.



5. Click on the **OK** button.

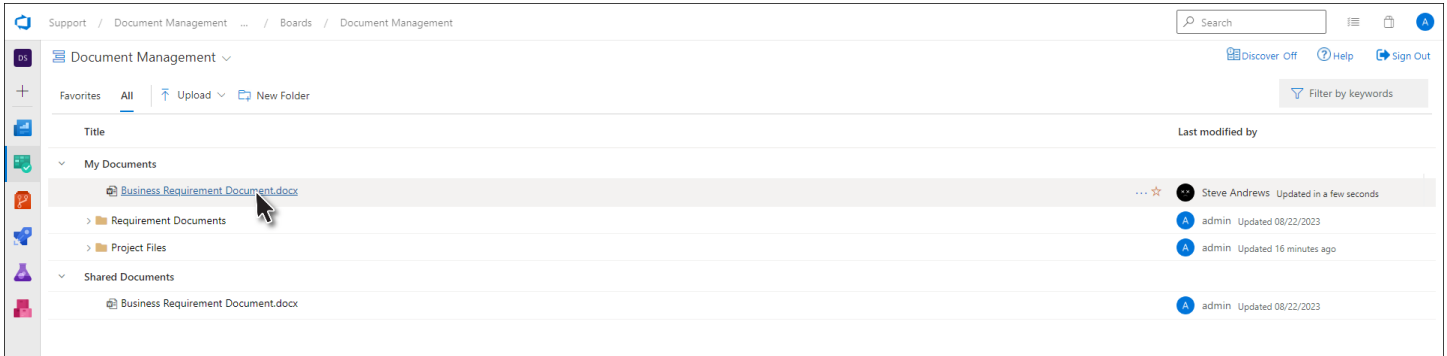


6. The new folder has been **created**.

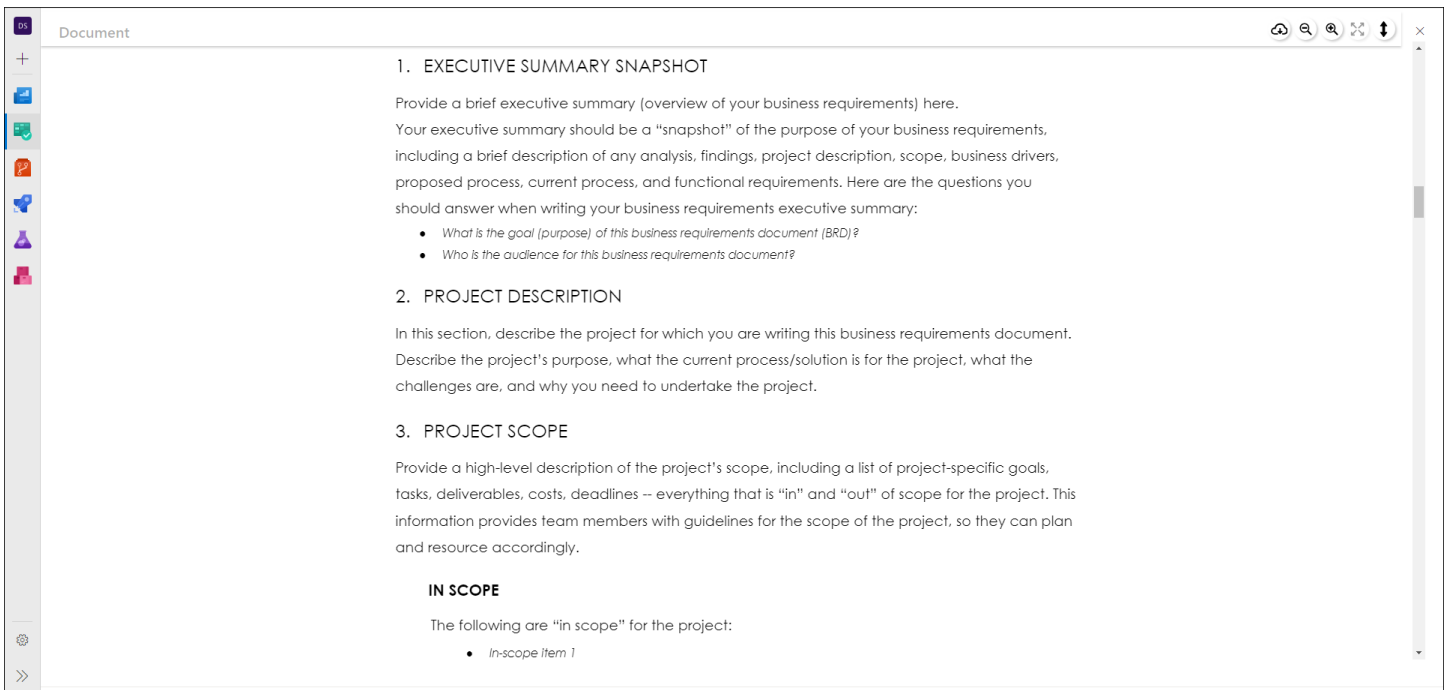


VIEW A FILE

1. Click on the name of the file you want to view.



2. A window appears where the user can view the content of the file.

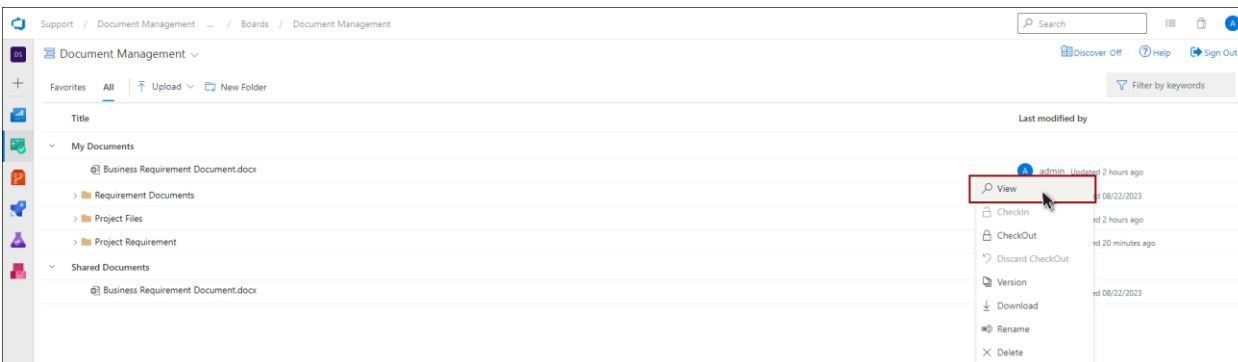


OR

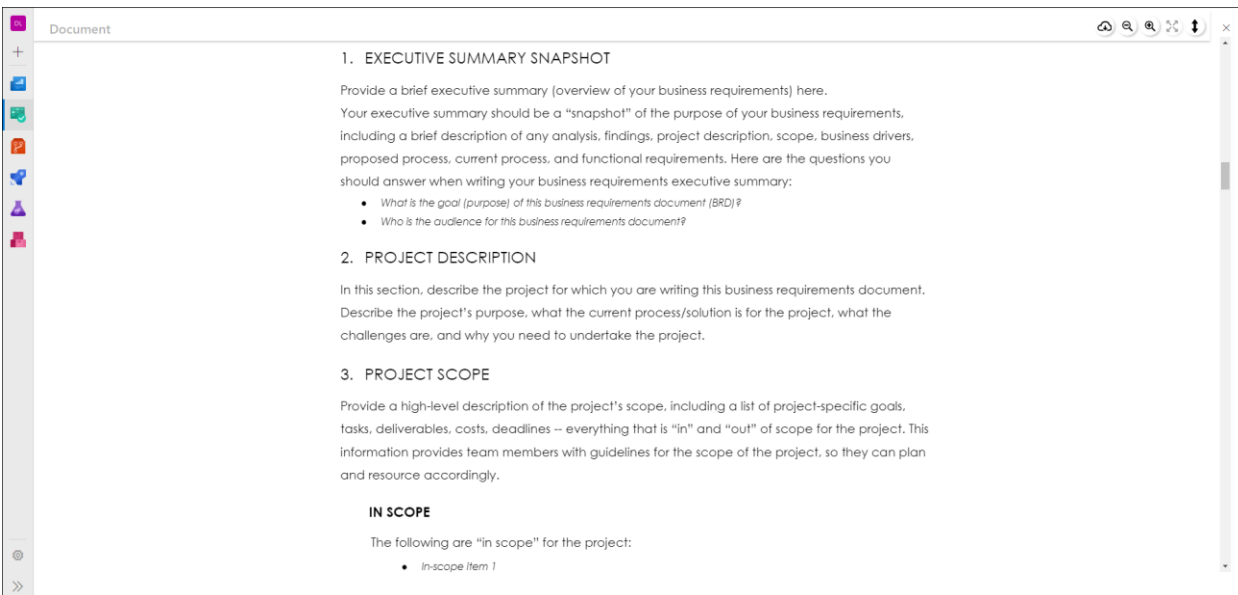
1. Click on the “...” of the desired file.



2. Click on the **View** option in the context menu.



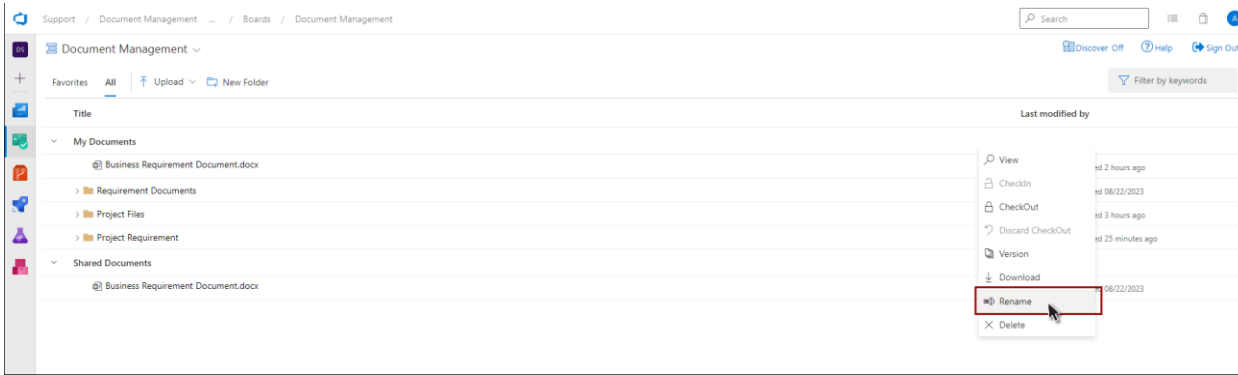
3. A window appears where the user can view the content of the file.



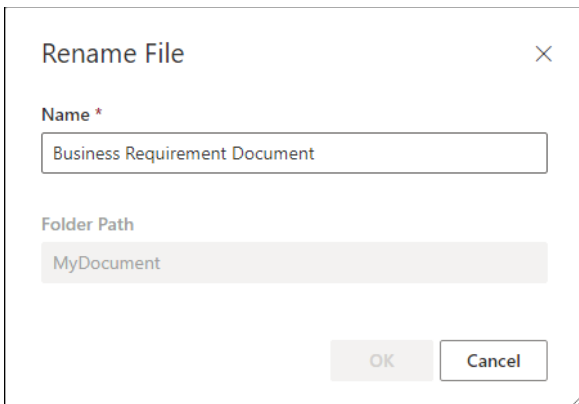
RENAME A FILE/FOLDER

RENAME A FILE

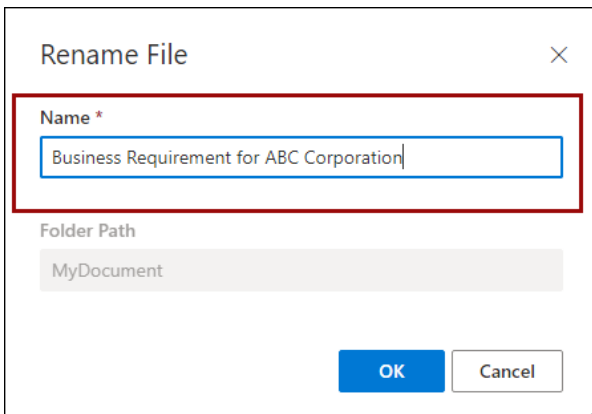
1. Click on the  **Rename** option in the context menu of the file you want to rename.



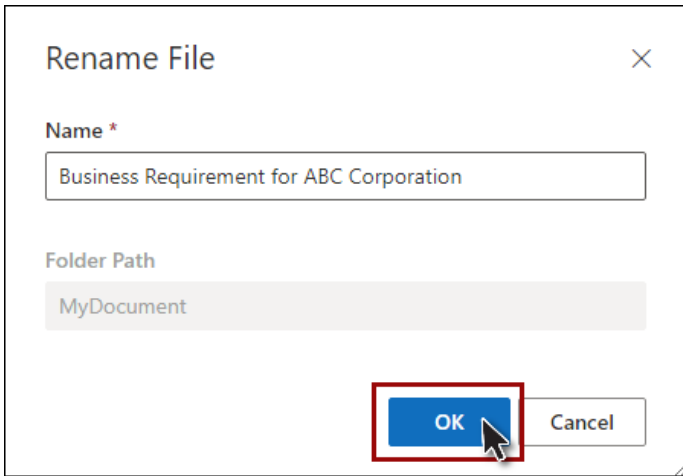
2. The **Rename File** window appears.



3. Add a new suitable **name** for the file.



4. Click on the **OK** button.

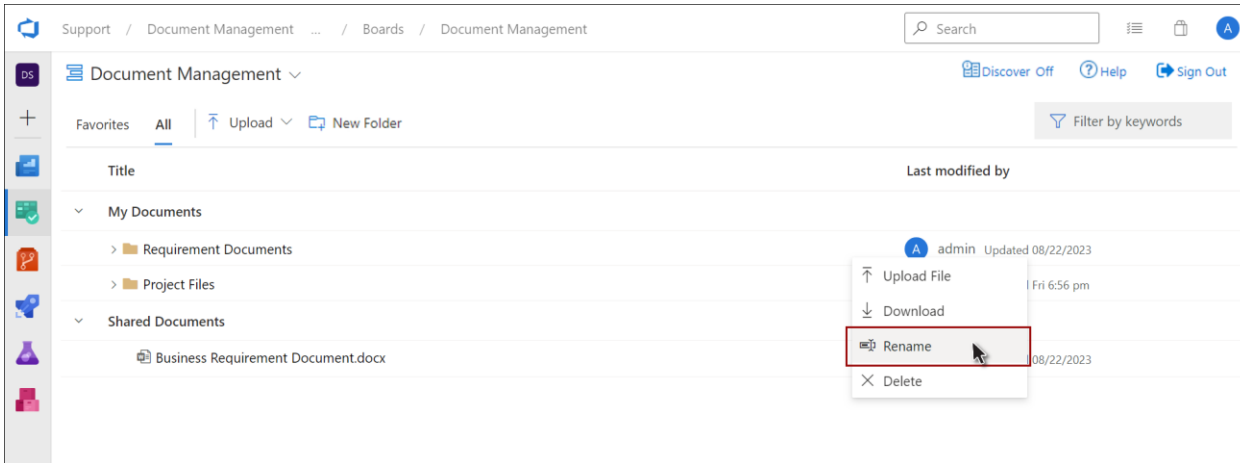


5. The File has been **renamed**.

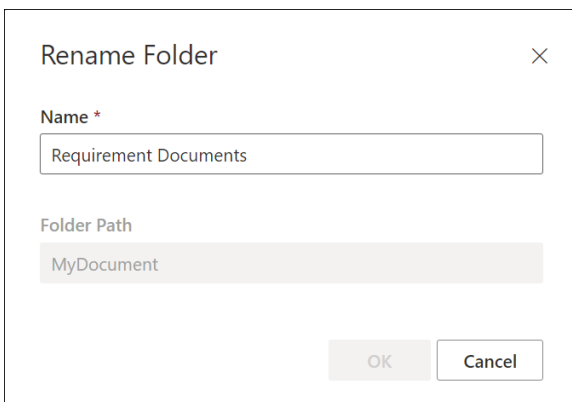


RENAME A FOLDER

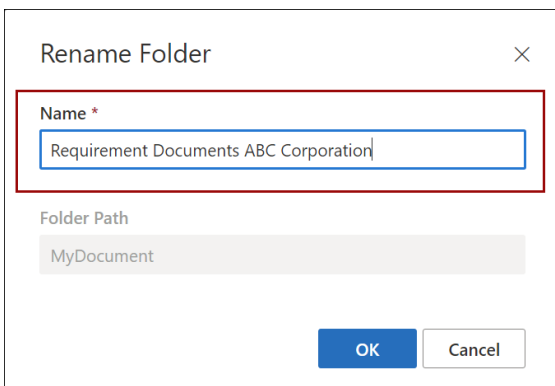
1. Click on the  **Rename** option in the context menu of the folder you want to rename.



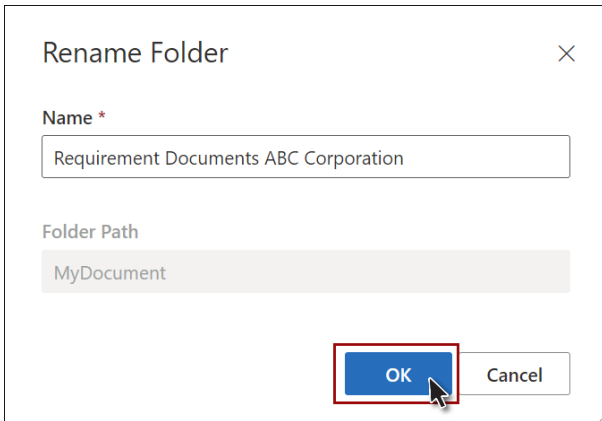
2. The **Rename Folder** window appears.



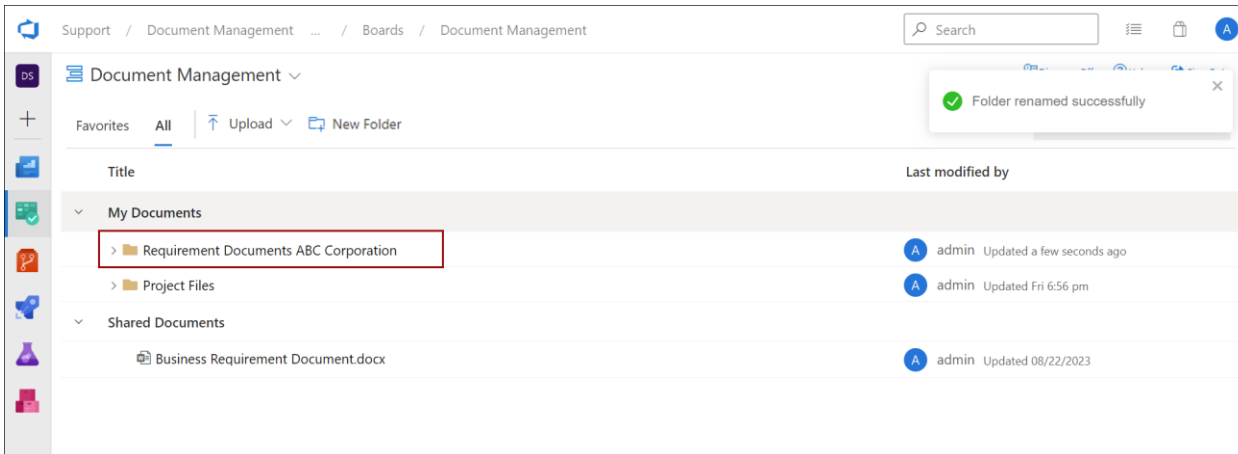
3. Add a new suitable **name** for the folder.



4. Click on the **OK** button.



5. The Folder has been renamed.



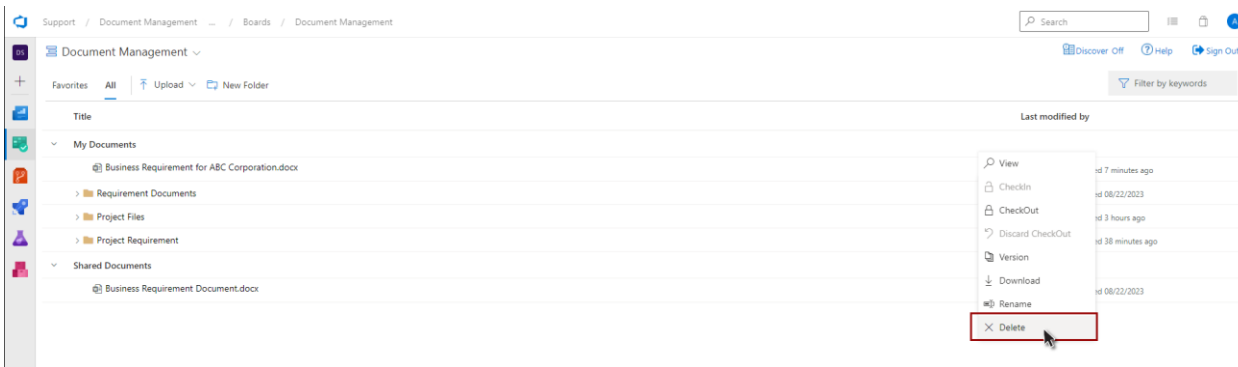
DELETE A FILE/FOLDER

DELETE A FILE

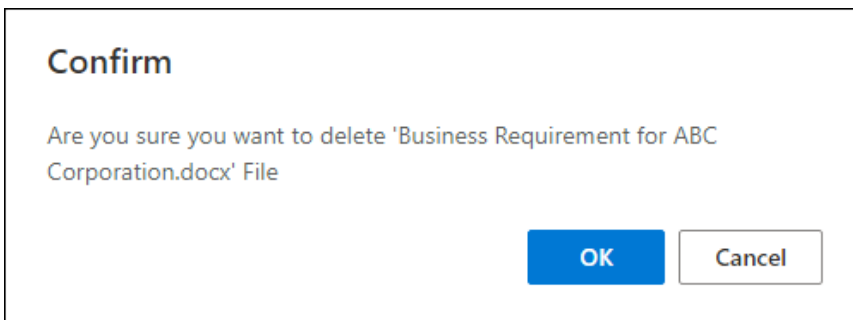
1. Click on the “...” of the desired file.



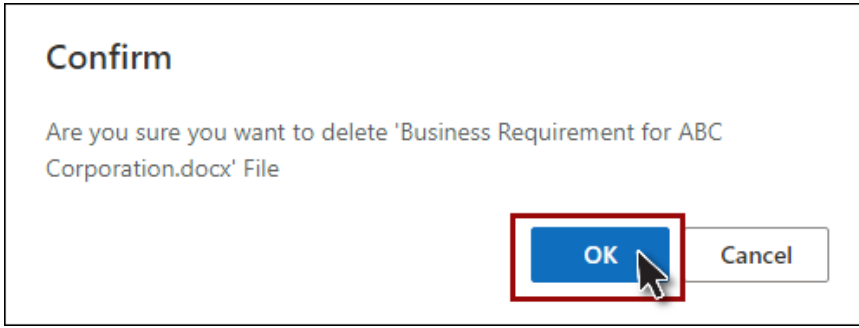
2. Click on the **Delete** option in the context menu.



3. A Confirmation window appears.



4. Click on the **OK** button.

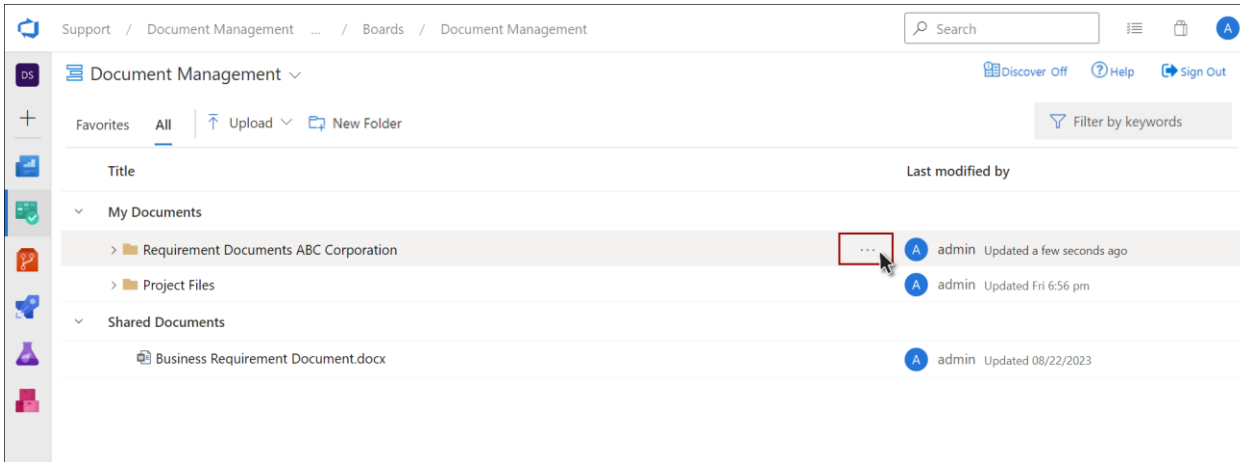


5. The File has been **deleted**.

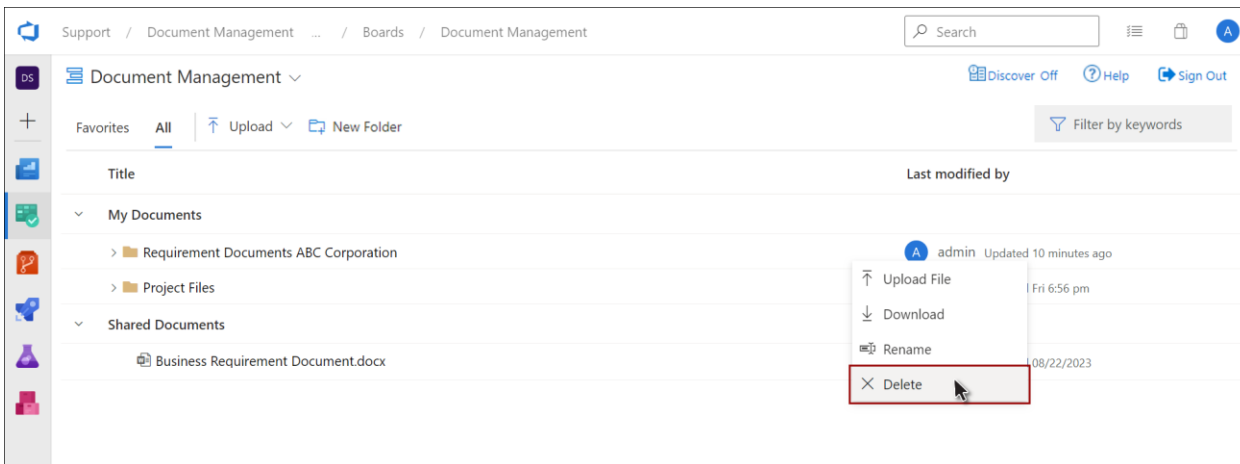


DELETE A FOLDER

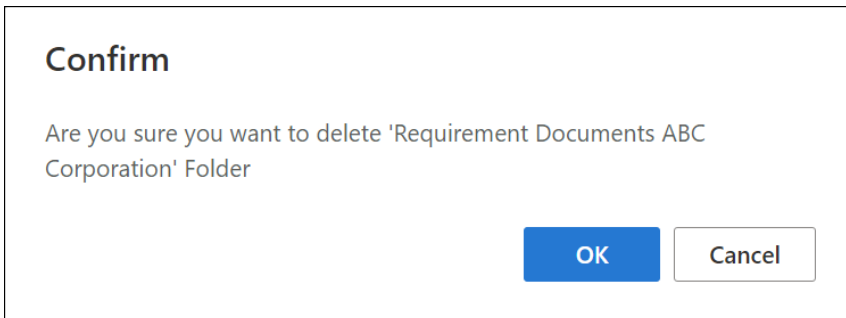
1. Click on the “...” of the desired folder.



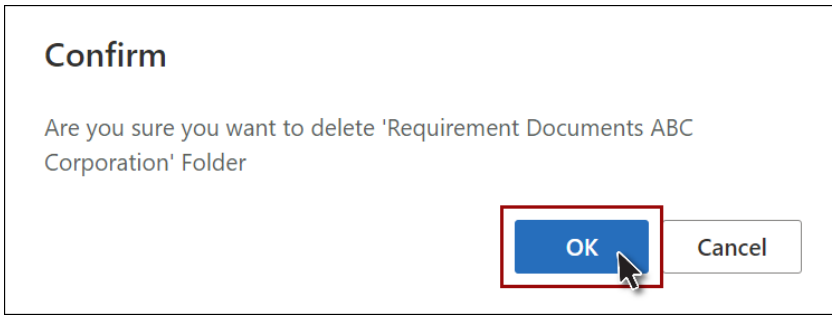
2. Click on the **Delete** option in the context menu.



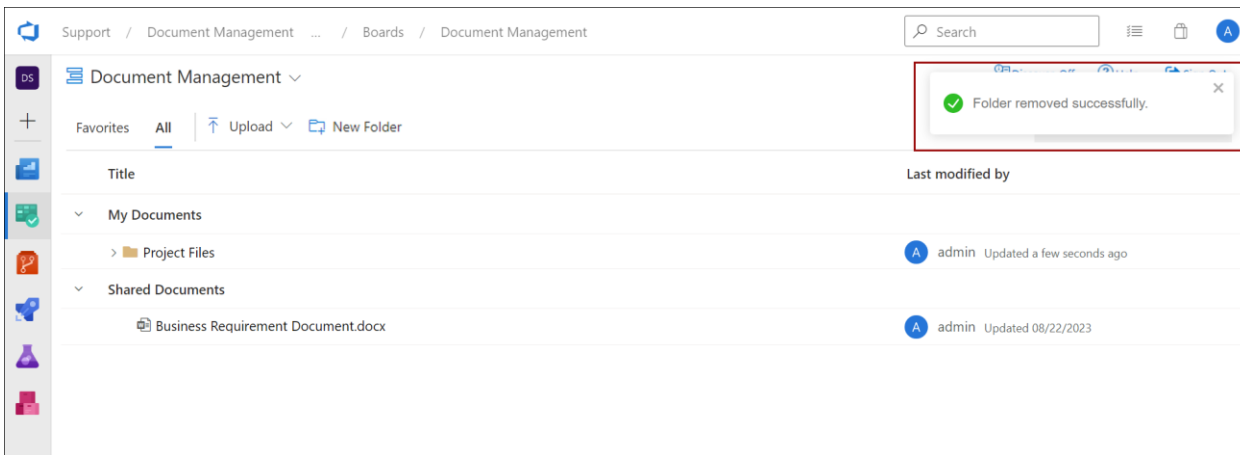
3. A Confirmation window appears.



4. Click on the **OK** button.

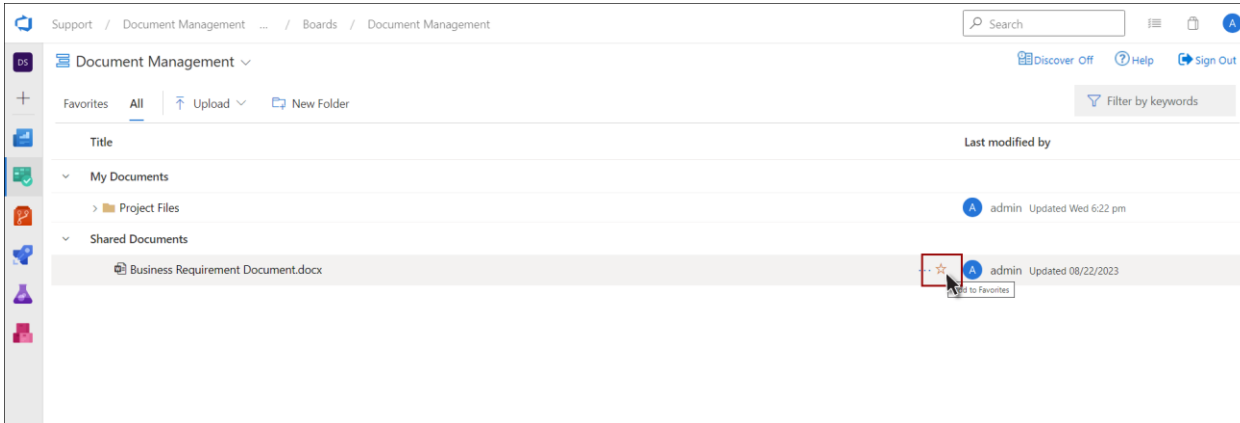


5. The Folder has been **deleted**.



ADD FILES TO FAVORITES

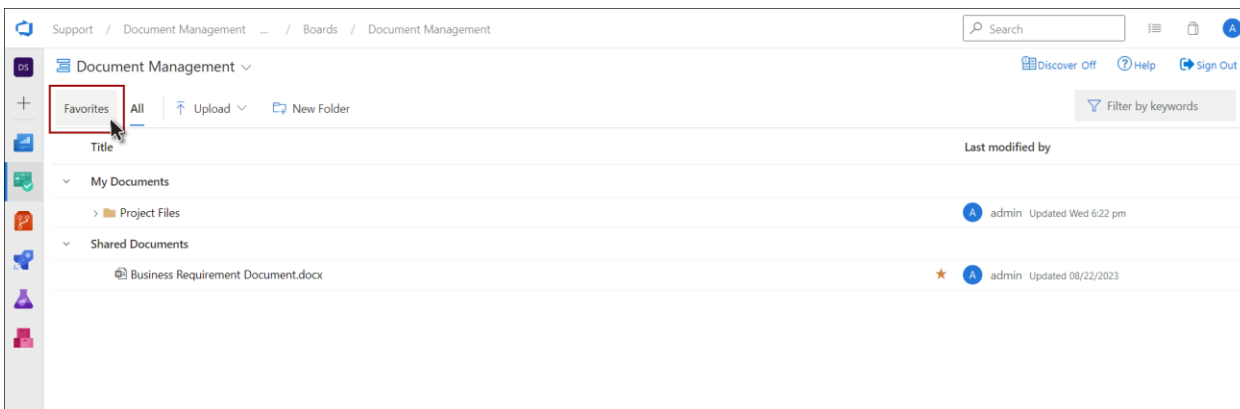
1. To add a file to **favorites**, hover on the desired file and click on the "★" icon.



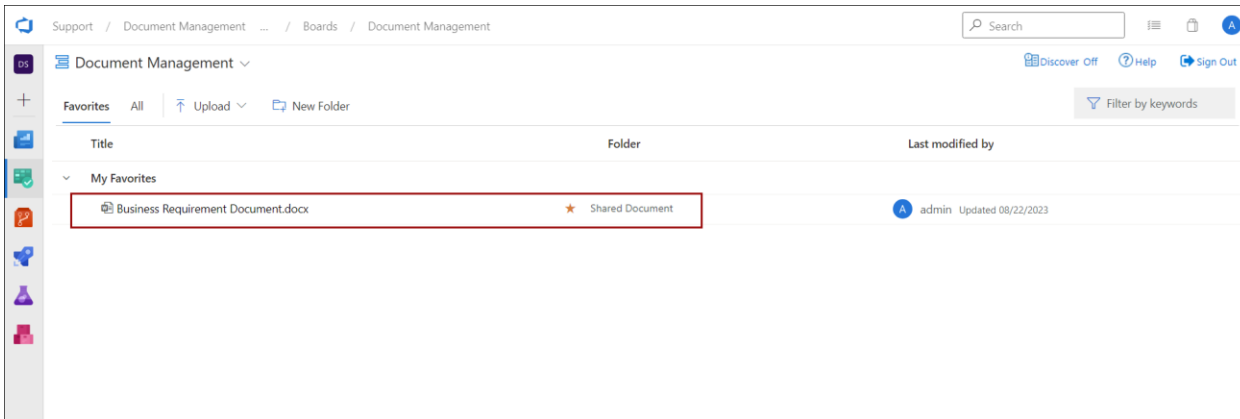
2. The file has been **added** to favorites.



3. The file added to favorites can now also be accessed by clicking on the **"Favorites"** tab.



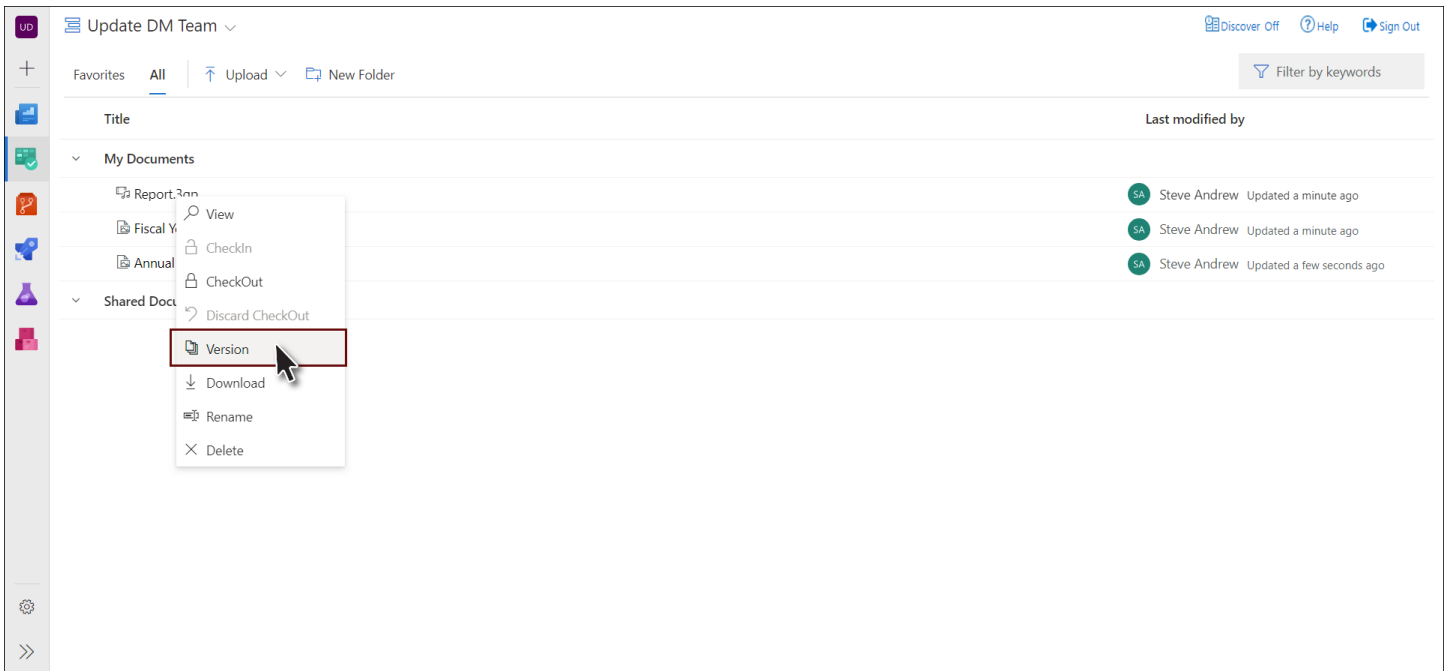
4. Files added to favorites will appear in the favorites tab.



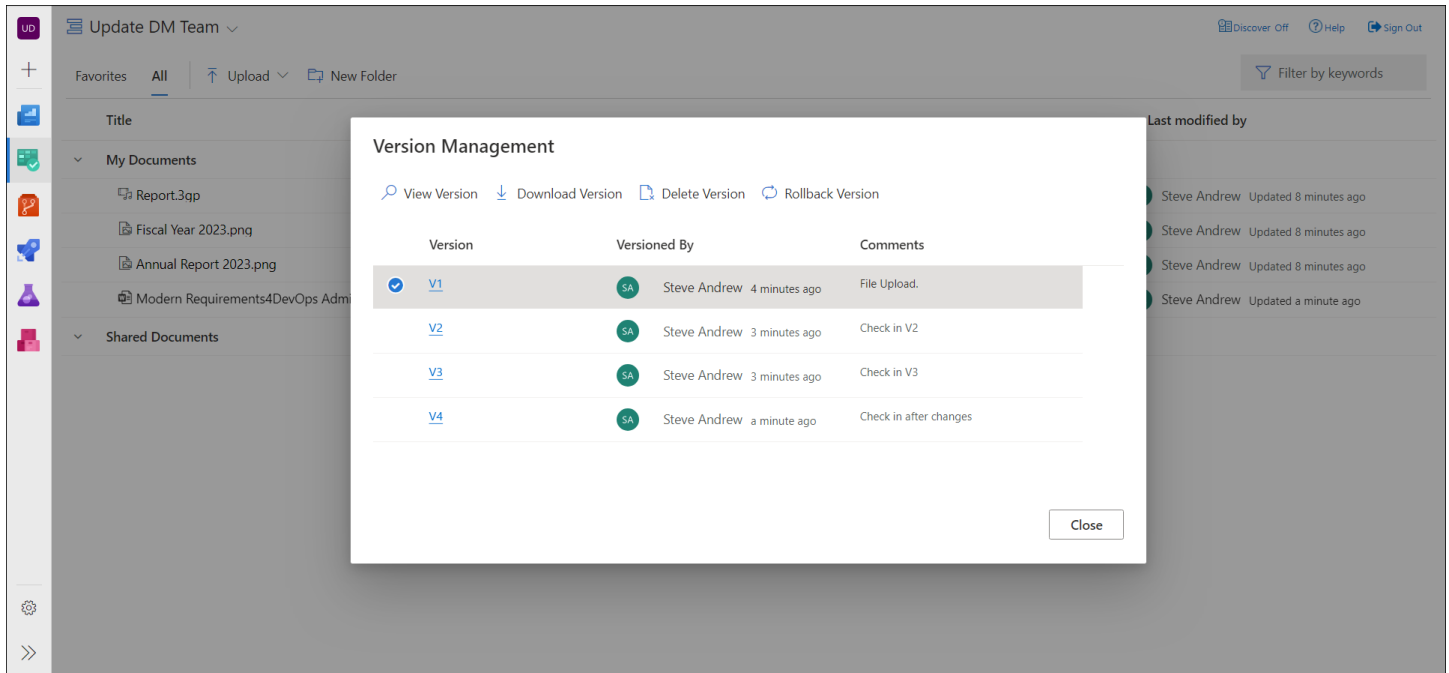
VERSION MANAGEMENT

The **Version Management** feature in Document Management module enables users to:

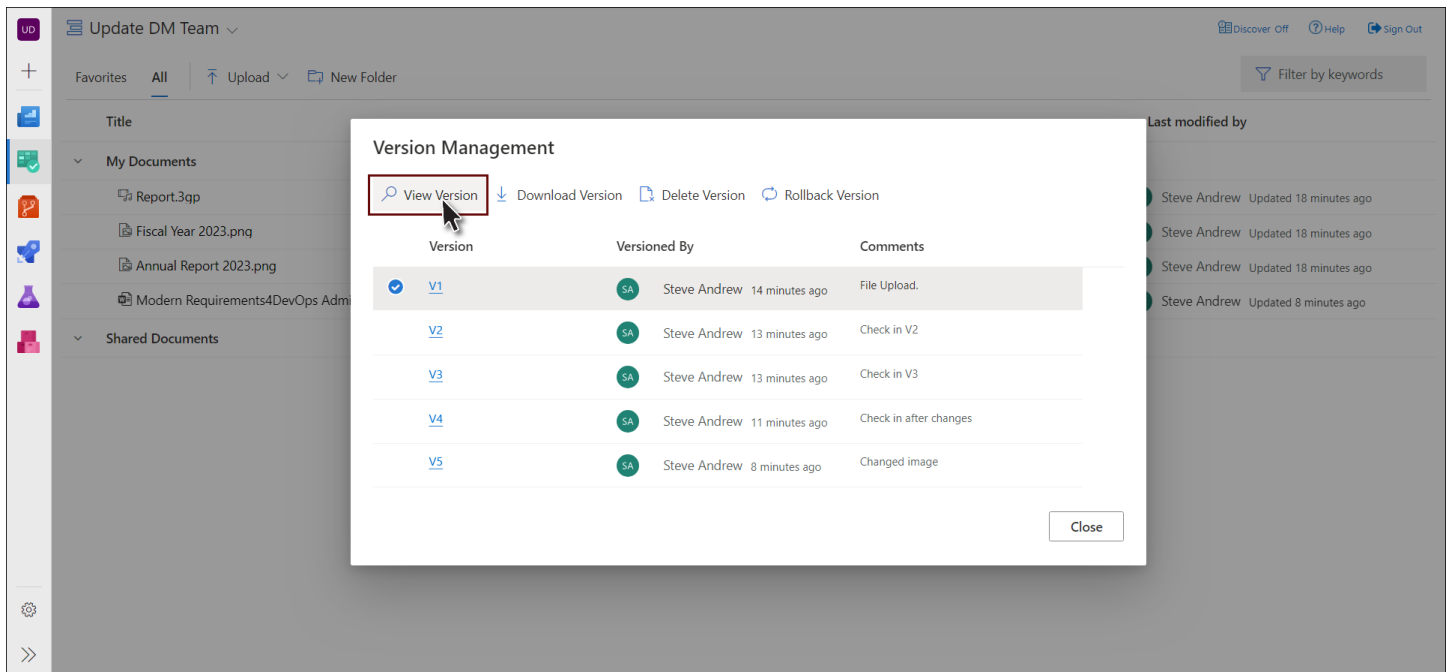
- **View** different versions of a document
 - **Download** the desired version of a document
 - **Delete** undesired versions
 - **Rollback** the current version with any of the saved versions of that document
- Users can invoke Version Management feature by clicking on the respective option in the context menu.

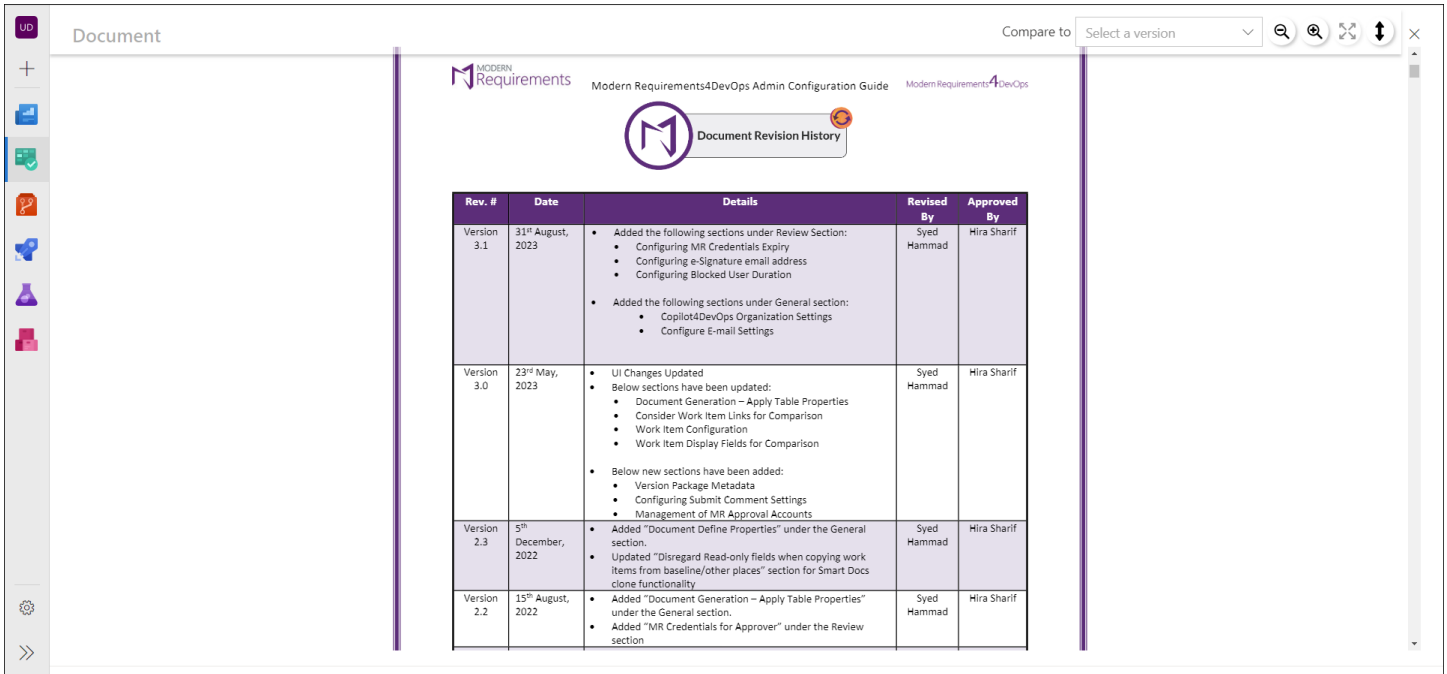


- Version Management options are accessible through the toolbar that appear in the **Version Management** window.

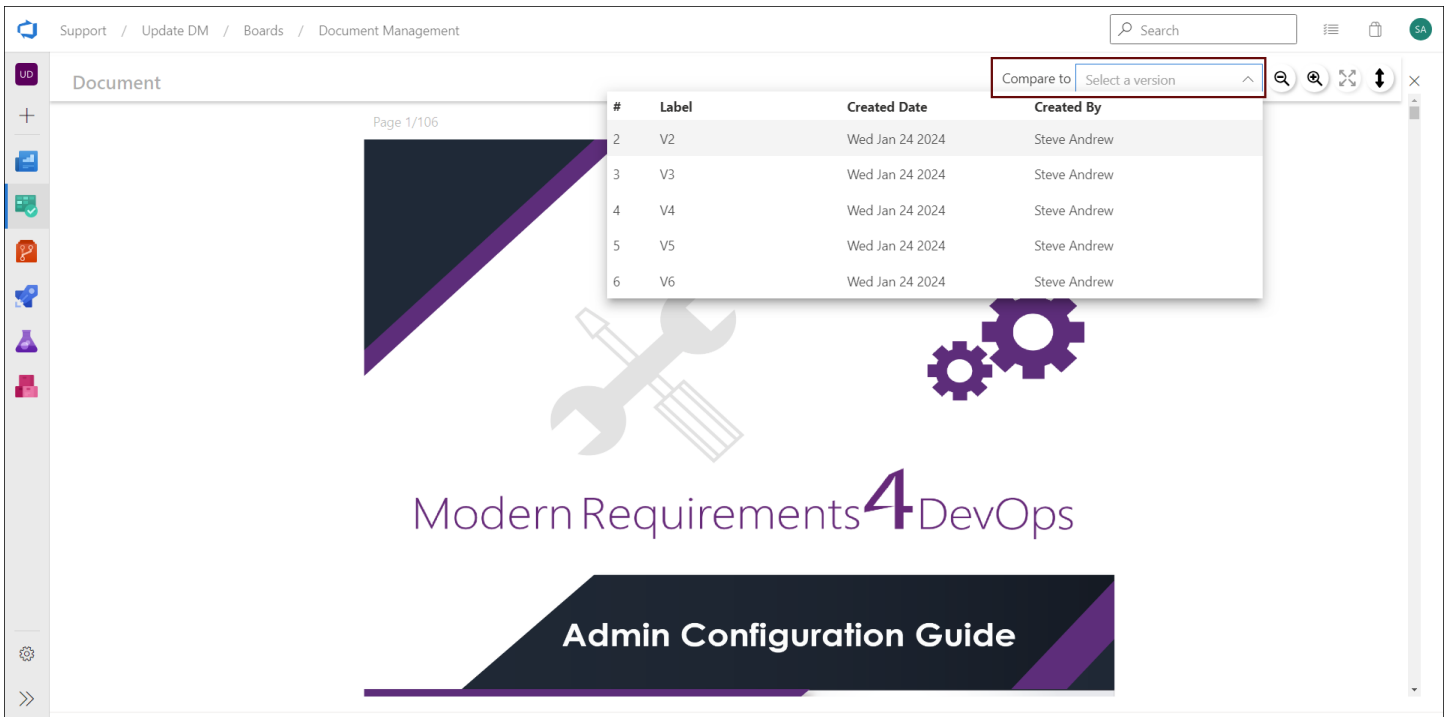


- With the "View Version" option, the user can view any desired version of the document.

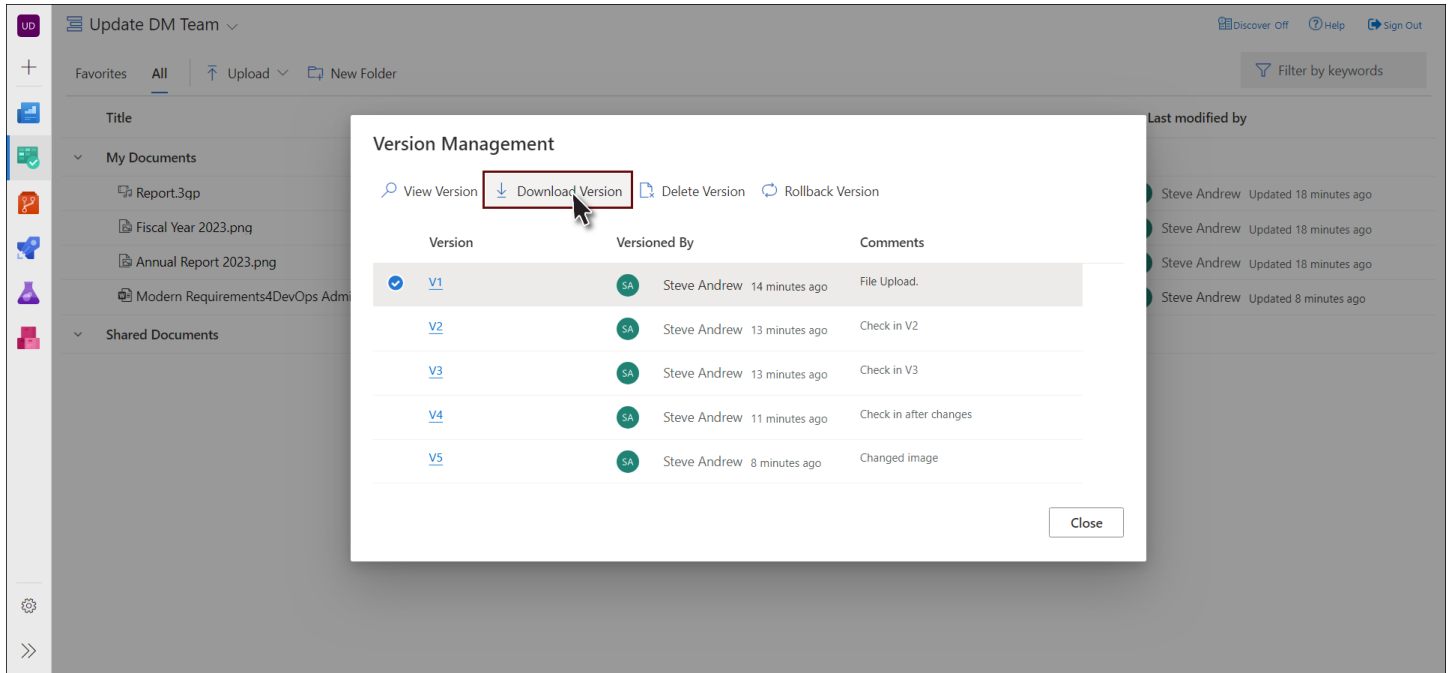




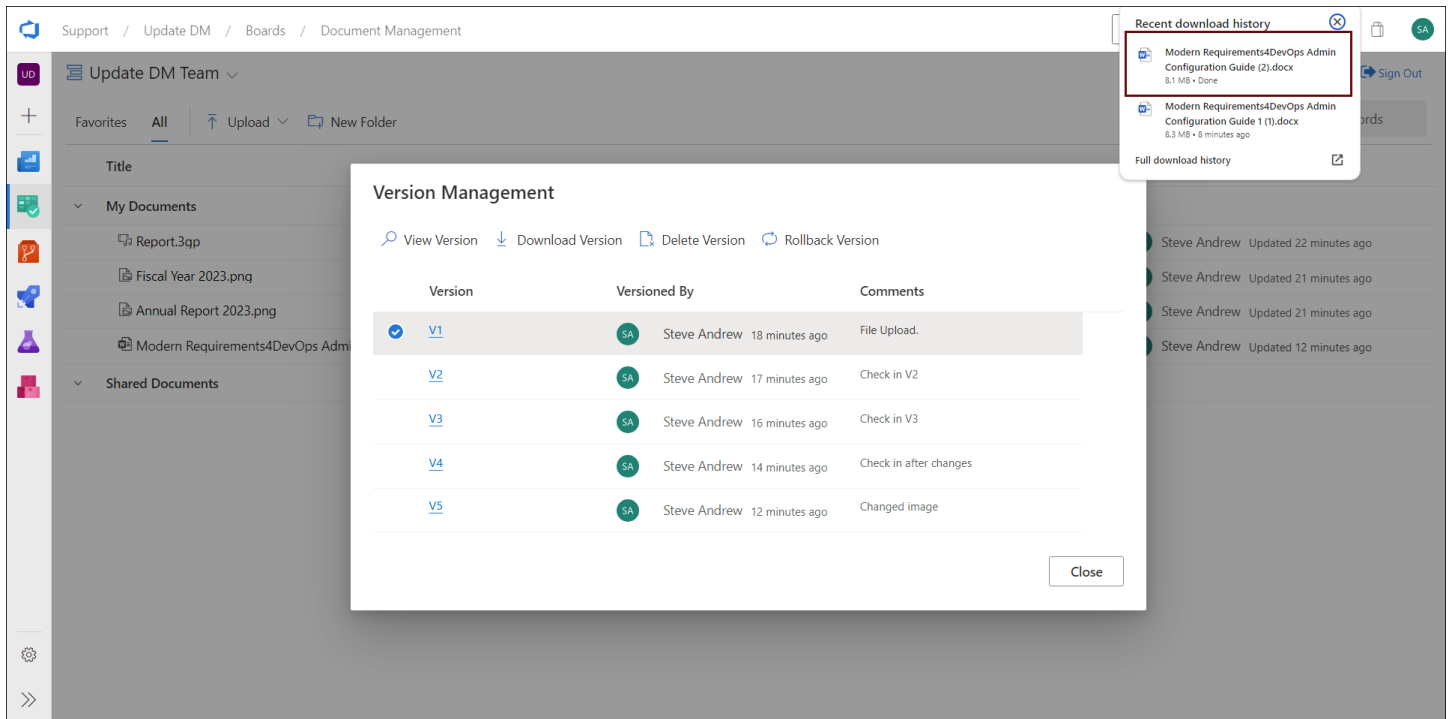
- Users can perform comparison between the selected viewed version and any of the other versions using the **"Compare to"** option as shown in the below image.



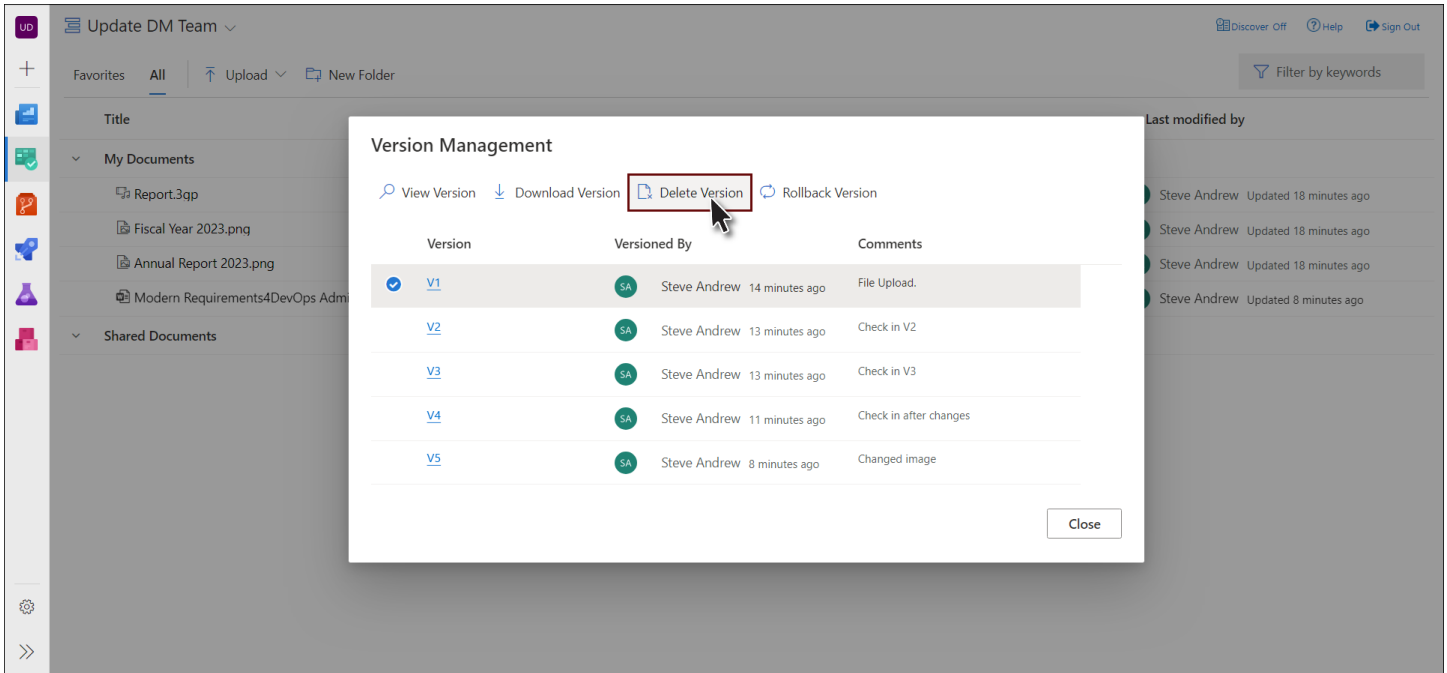
- Click on the "**Download Version**" option to download the selected document version.



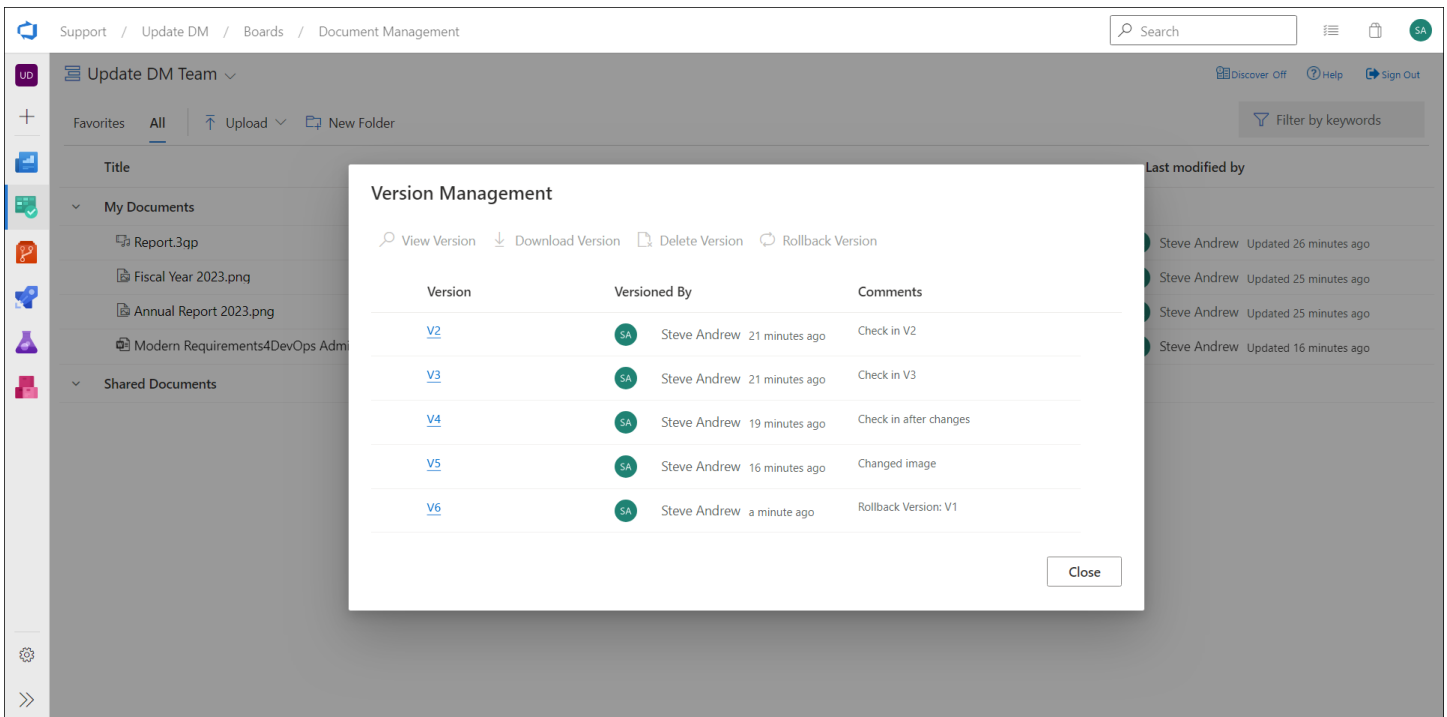
- The file has been **downloaded** successfully.



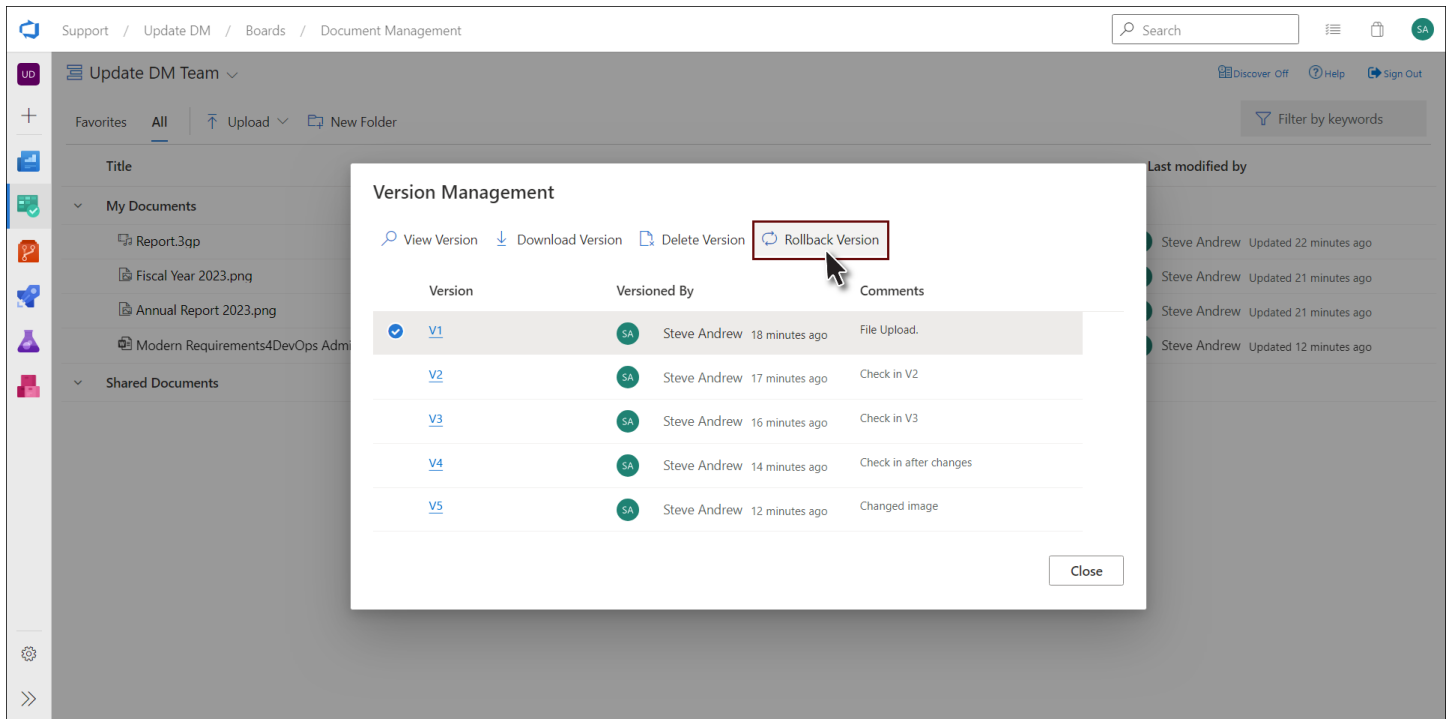
- To delete a particular document version, select the version and click on the "Delete Version" option.



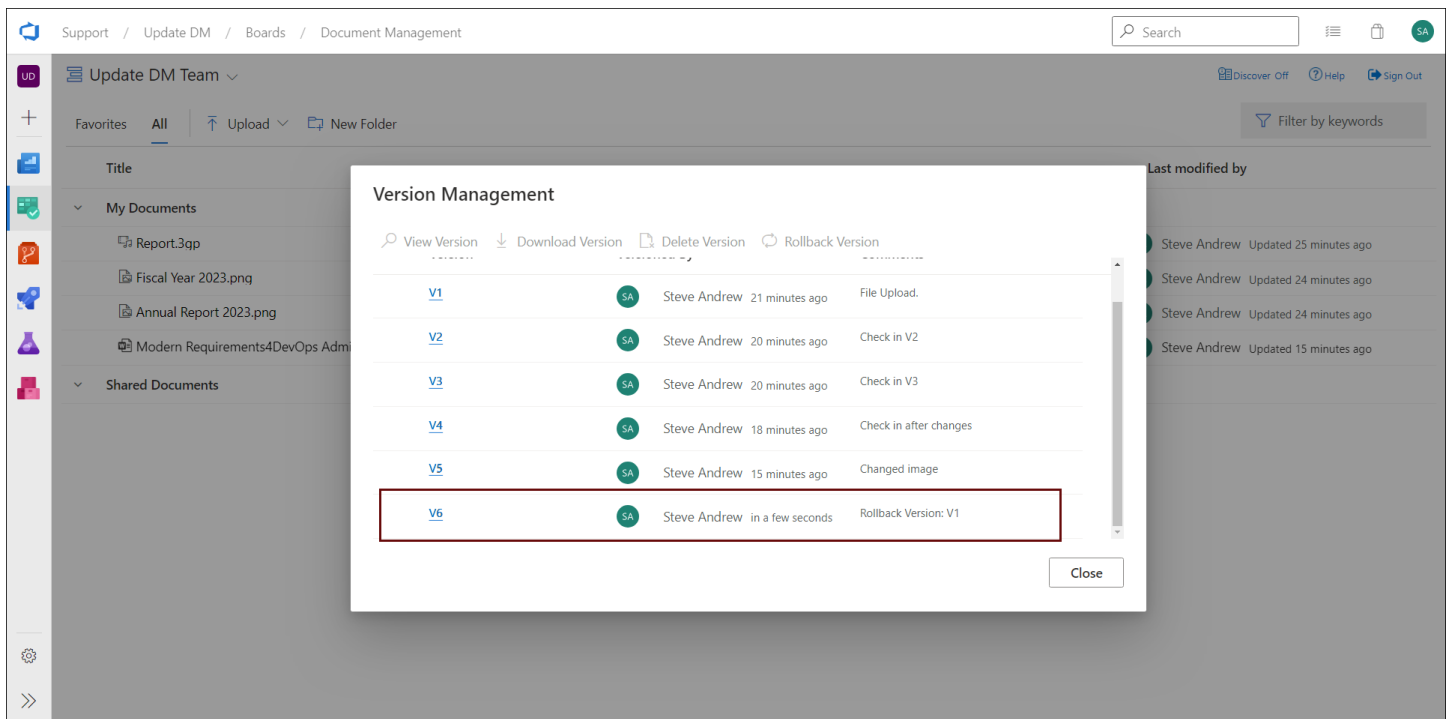
- The version has been **deleted** successfully.



- To rollback a document version to its initial state, click on the "Rollback Version" option from the toolbar.

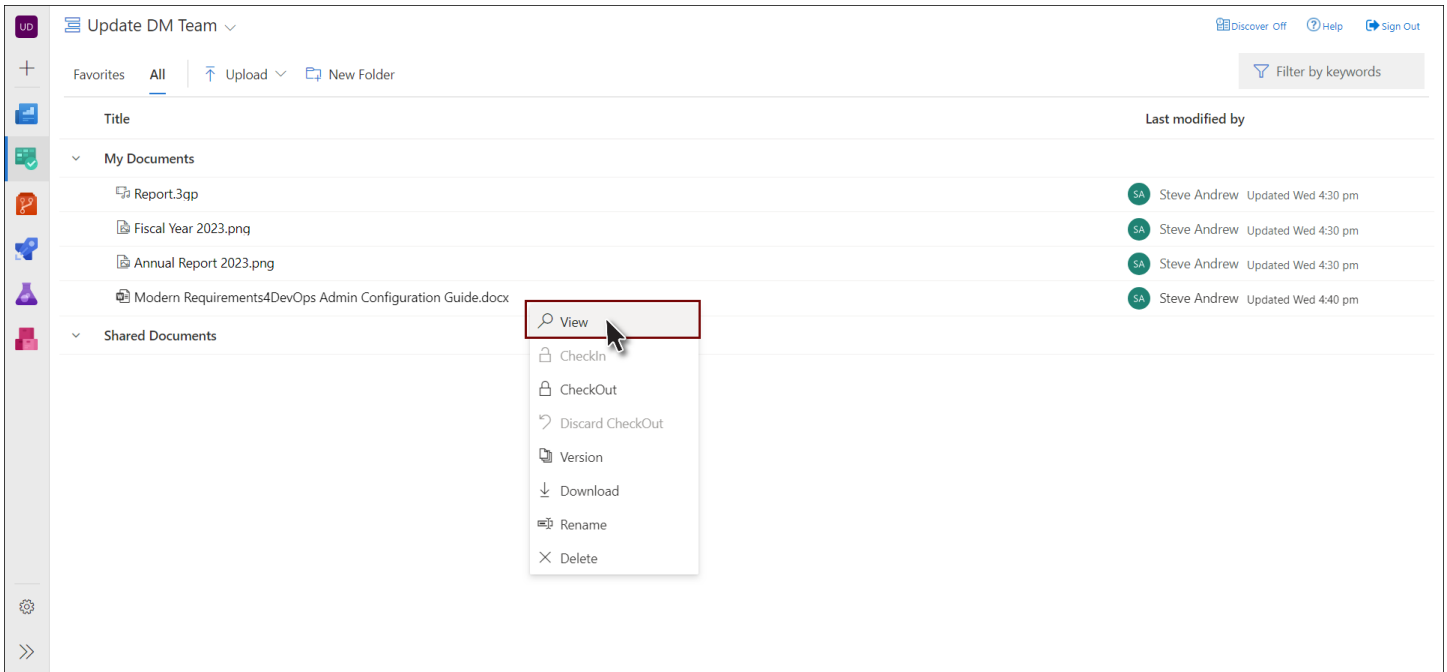


- Selected version has been rolled back.

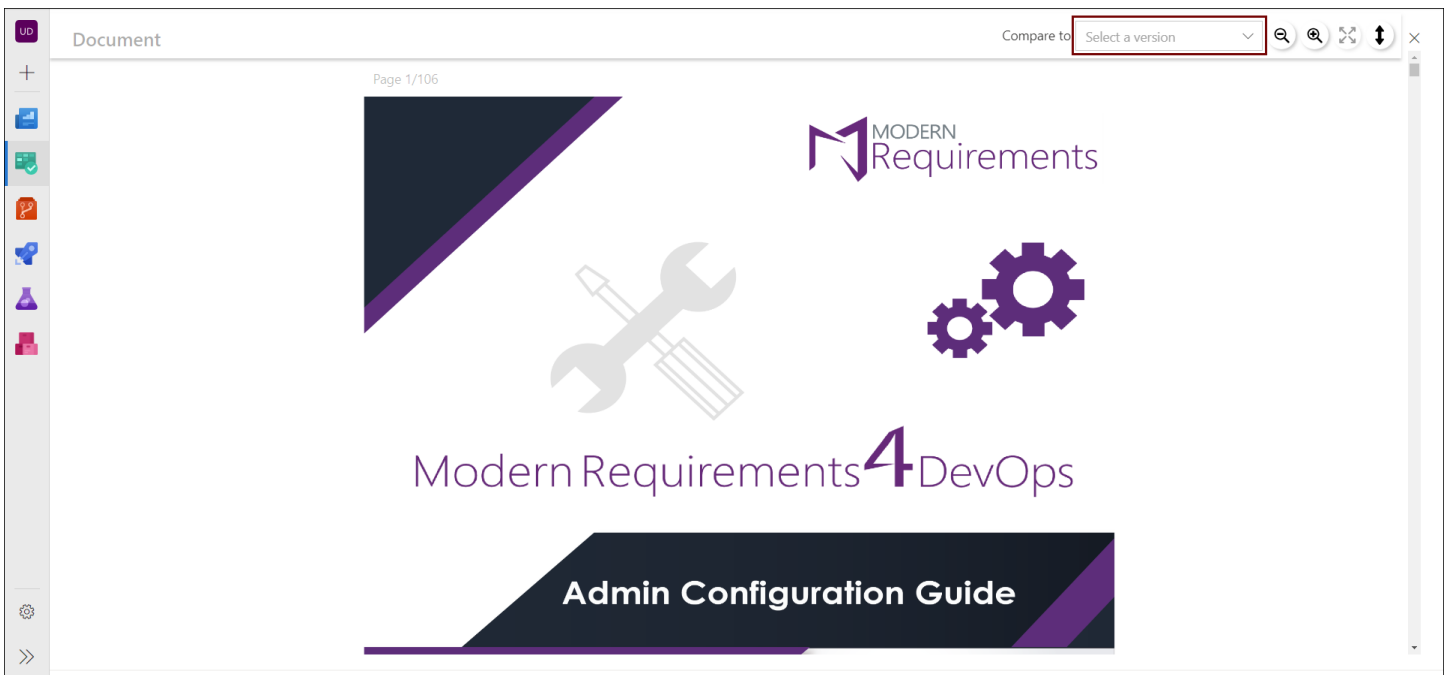


COMPARING DOCUMENT VERSIONS

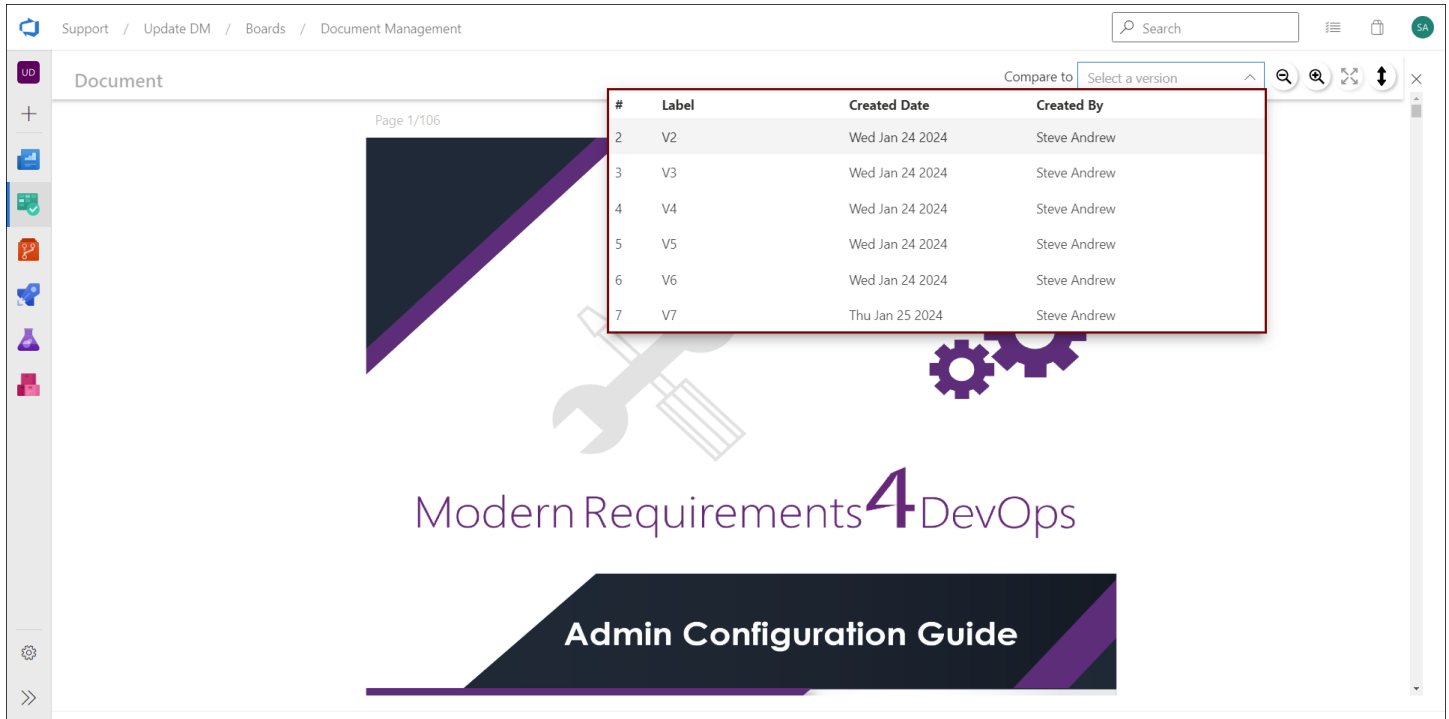
- Click on the **view option** from the context menu.



- The "**Compare to**" option appears as visible in the image below.



- From the "Compare to" option select the version with which you want to compare the viewed document.



- The comparison between the two versions is displayed and the changes will be marked in red.

