Modern Requirements 4 DevOps

Admin Configuration Guide

Version 2.3

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<table>
<thead>
<tr>
<th>Rev. #</th>
<th>Date</th>
<th>Details</th>
<th>Revised By</th>
<th>Approved By</th>
</tr>
</thead>
</table>
| Version 2.3 | 5th December, 2022 | - Added “Document Define Properties” under the General section  
- Updated “Disregard Read-only fields when copying work items from baseline/other places” section for Smart Docs clone functionality | Syed Hammad      | Hira Sharif  |
| Version 2.2 | 15th August, 2022 | - Added “Document Generation – Apply Table Properties” under the General section  
- Added “MR Credentials for Approver” under the Review section | Syed Hammad      | Hira Sharif  |
| Version 2.1.0 | 15th January, 2022 | - Added “Date, Time Pattern and Time Zone Settings” section in General Tab  
- Added “Configure ‘Area’ field in Smart Docs ‘New File’ window” section | Syed Hammad      | Hira Sharif  |
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- Added a new section of “Smart Docs”  
- Modification in Baseline and Services sections  
- Design/Formatting of the document changed | Syed Hammad      | Hira Sharif  |
| Version 1.0.0 | 13th April, 2020 | - First release of MR4DevOps Admin Configuration Guide | Ubaid Ullah      | Hira Sharif  |
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RIGHTS MANAGEMENT

Rights Management in Modern Requirements4DevOps is managed using Permissions. It is used to provide particular rights to relevant stakeholders of the current project. Rights management is done project wise and is not applicable on Azure DevOps’ Organization (TFS Collection).

The Permission Tab (for rights management) is visible to the Collection Administrator. From this tab, the collection administrator can grant relevant rights. Due to the inherent nature of his work; the Permission Tab is visible to the Collection Administrator, even if he is not a member of the current project. However a Project Administrator can only view the Permission Tab of his own projects.

This feature is currently implemented for 3 modules: Smart Docs, Baseline & Reporting.
### ADDING A NEW USER TO A GROUP

- For admins to grant or deny permissions to users of an organization to access Modern Requirements’ modules, the users shall be added as members in Azure DevOps groups within the project.
- If user is a collection admin and is not added in any Azure DevOps group of a project then the collection admin will not be able to access the Modern Requirements’ modules.
- For collection admin to access Modern Requirements’ modules, the user should be added as a member in one of the respective project’s Azure DevOps group.
- Before rights can be assigned to a user, the user must be added to the particular group. The following steps describe the process:
  1. Navigate to the home page of the relevant project and click the **Project Settings** option.
2. Click the **Permission** option in the Left side panel.

3. Under the **Groups** tab in **Permissions** page, click on the desired group.
4. Click on Members tab.

5. Click the Add button.
6. Start typing the name of desired user, and then select from the list that appears.

7. Click the **Save** button.
The selected user is added to the group.

To delete; select the desired user from the group member’s list and click the **Remove** button.
The following steps demonstrate how to access the Permissions (Rights Management) section in Azure DevOps environment.

1. Navigate to the home page of the relevant project and click the **Project Settings** option.
2. Scroll down and click the Modern Requirements4DevOps option at the bottom of the side panel.

The Permissions page is displayed showing all the relevant options.
PERMISSION RULES

- Permissions are always granted to groups and never to a particular group member. However, there may be groups that contain only a single member.
- The relevant group members can be given one of the following three rights:
  1. **Allow**: Explicitly grants users the permission to access a group feature in Modern Requirements4DevOps' module(s).
  2. **Deny**: Explicitly restricts users from accessing a group feature in Modern Requirements4DevOps' module(s).
  3. **Not Set**: Implicitly denies user the ability to access a group feature in Modern Requirements4DevOps' module(s).

- The permissions set for a particular group/team is applicable for all the users that exist in the respective group/team.
- By default, “Project Valid users” and “Project Administrators” group permissions are set to ‘Allow’ for all groups features in each Modern Requirements module.
- The ‘Project Administrator’ is able to access all Modern Requirements4DevOps’ modules because of its non-editable default rights which are set to ‘Allow’.
  - However, if ‘Project Administrator’ is also a member in other ‘Azure DevOps Groups’ within a project and if ‘Deny’ is set as a permission on any of the group feature in other Azure DevOps group then this ‘Deny’ will precede the settings of ‘Project Administrators’ group.
Note: The default permissions settings of “Project Administrators” group are non-editable and are independent of inheritance from its parent group.

- Admins can assign rights to the users of the Azure DevOps groups for Modern Requirements4DevOps’ modules section as per the values defined above.
PERMISSION UI

- Permissions Page is divided into two panels*:

*The left-most panel deals with general Azure devOps options and is not directly involved in the working of Permissions.

AZURE DEVOPS GROUPS/TEAMS PANEL

- This panel consists of all the “Teams” and “Groups” directly fetched from active project of Azure DevOps.
- Addition of new groups/teams or changes in the existing respective teams/groups is reflected by refreshing the browser.

PERMISSIONS SETTINGS PANEL

- This panel is used to provide permissions settings for using Modern Requirements’ modules & features.
- It is further Subdivided into Common Settings section, and an individual section for each of the Modern Requirements4DevOps modules.
Under each section, there are Group features for which user can set permissions to "Allow", "Deny" or "Not set".
GROUP FEATURES

- These are a set of features which are grouped together and represented in the form of a collective ‘Group feature’ such as ‘Create/Edit folder’, ‘Delete folder’ and so on.
- The common group features are shown under both Common Settings section as well as under each module section.
- The module specific features appear only under the relevant module section.

- The specific group features vary depending on the features of individual modules.
COMMON SETTINGS SECTION

- The group features in this section are common in almost each module section.
- Values set in this section are automatically set in each module section for the respective group feature.
- By default, “Hyphen (-)” is set for all group features in “Common Settings” section (as shown in the above image).
- If a user explicitly set a value under Common Settings section for a common group feature, then the same value is automatically set for all module sections.
- If a user explicitly changes the value of a common group feature under any module section AND different values exists for the same group feature in different module sections, then hyphen “-” will appear automatically in “Common Settings” section for that particular group feature.
- Similarly, if “Allow & Allow (inherited)” or “Deny & Deny (inherited)” is set for the same group feature in different module sections, in this case also hyphen “-” appears in “Common Settings” section.
- The “Common Settings” section works independently for each Azure DevOps group and team and does not inherit permissions settings from any parent group.
There is a separate section for each Modern Requirements’ module on the right panel.
• A toggle button is provided under each module section which allows/prevents users to access the respective module in the application. By default, it is set to “On” in the parent Azure DevOps group (Project Valid Users) and the same settings are inherited in child group(s).
INHERITANCE IN PERMISSION

- Inheritance is carried out between the Azure DevOps parent and child groups for permissions on Modern Requirements’ module sections’ group features.
- The permissions set in the parent group are inherited in all of its child groups (except the “Project Administrators” group). Any settings changes made in the parent group are reflected in its child group as well.
- By default, permissions settings are inherited from Project Valid Users group (parent group) into each child group in the following way:
  - **Allow (inherited):** When “Allow” is set for a group feature in parent group, “Allow (inherited)” is set in its child group automatically.
  - **Deny (inherited):** When “Deny” is set for a group feature in a parent group, “Deny (inherited)” is set in its child group automatically.
- By default, ‘Allow’ is set for all group features in each module section in the parent group (Project Valid Users group) which is inherited in all its child groups/teams and will be shown as ‘Allow (inherited)’.
- “Allow” and “Allow (inherited)” values can be overridden to “Deny” (if explicitly changed in the child group by the admin).
- “Deny (inherited)” value cannot be overridden to “Allow”.

INHERITANCE SCENARIOS

1. The following is the impact of the combination of values when the same user exists in more than one Azure DevOps groups.
   a) If “Allow” is set for a group feature in one of the Azure DevOps groups and “Not set” is set for the same group feature in other Azure DevOps group(s), then “Allow” will have preference and user will be able to use the respective feature(s).
   b) If “Allow” is set for a group feature in one of the Azure DevOps groups and “Deny” is set for the same group feature in other Azure DevOps group(s), then “Deny” will have preference and user will be denied the access to use the respective feature.
   c) If “Deny” is set for a group feature in one of the Azure DevOps groups and “Not set” is set for the same group feature in other Azure DevOps group(s), then “Deny” will have preference and user will be denied the access to use the respective feature.
   d) If “Not set” is set for a group feature in one of the Azure DevOps groups and the same value “Not set” is set for the same group feature in another Azure DevOps group(s), then user will be implicitly denied the access to use the respective feature.

2. The following is the impact of the combination of values when the same user exists in more than one team:
   a) If “Allow” is set for a group feature in one of the teams and “Not set” is set for the same group feature in other team(s), then “Allow” will have preference and the same settings (“Allow”) will be applied in every team(s) including default team and user will be able to use the respective feature in all teams.
   b) If “Allow” is set for a group feature in one of the teams and “Deny” is set for the same group feature in other team(s), then “Deny” will have preference and the same settings (“Deny”) will be applied in
every team(s) including the default team and user will be denied the access to use the respective features in all teams.

c) If “Deny” is set for a group feature in one of the teams and “Not set” is set for the same group feature in other team(s), then “Deny” will have preference and same settings (“Deny”) will be applied in every team(s) including the default team and user will be denied the access to use the respective features in all teams.

d) If “Not set” is set for a group feature in one of the teams and same value “Not set” is set for the same group feature in other team(s), then user will be implicitly denied the access to use the respective feature in all teams including the default team.

Note:

Refer to the Rights Management Guide for further details on permissions features. This guide can be directly accessed from Smart Docs, Baseline and Reporting modules: <Smart Docs/Baseline/Reporting>/Discover/Rights Management.
ADMIN PANEL

The Admin Panel is a feature of Modern Requirements4DevOps used for licensing options, plus configuration and tweaking of many options (present in various modules of the application).

- To access the Admin panel, launch the embedded version of the application and select the Modern Requirements4DevOps option under the Settings tab.
The Admin panel is displayed.

- The Admin panel has five sections as shown in the image below. Each of these sections has relevant commands to configure or tweak corresponding modules (except the General section whose commands apply to the whole app).

- The Licensing section is used to check the license status, or activate the product using a valid key (in case the product hasn’t been activated yet).
- The General section is used to configure the repository name for GIT projects.
- The Review and Baseline sections are used for tweaking options in relevant modules.
- The Services section is used to configure options related to Services (formerly MR Agent)
- The licensing section has already been discussed in the Activation part of this document. Options in other sections are explained below.
- Many of the options discussed below are also discussed under the Appendix section. They illustrate how to carry out the same process for the standalone version of the application.
- The Synchronization tab has options, to synchronize the data in the application, with the database. This option is used, while migrating the data. It is activated to appear in Admin Panel, on user’s request. Hence majority of the users, won’t be seeing this option.
PERMISSION SETTINGS

The user can enable or disable the permission settings that are to be applied into the features and modules as provided at the project level. The checkbox is enabled by default and the users will be able to access the application based on the permission settings provided at project level.
USER CREDENTIAL

In the embedded version, admin/collection user credentials are to be provided here in order to sync your MR data to the source control of Azure DevOps Server. However, in the case of Azure DevOps Services, provide secondary/alternate user credentials which you provided in Azure DevOps settings.
PROJECT REPOSITORY NAME

Note: This option is not available for Embedded Single Sign-On version of ModernRequirements4DevOps.

The repository is named after the project’s name by default in any project.

However, for GIT projects only, users can now configure the repository name of their choice by following these steps:

1. Access the Admin panel and select the General option.
2. Click the +Add option.

3. Select the desired Git project from the list.
4. Enter a suitable repository name and click OK.

5. Click Save Changes.
The new repository name becomes visible in the list.
AUTO SAVE LAYOUT SETTINGS

The **Auto Save** option in the admin panel works for three modules:

- Diagram
- Simulation
- Use Case

**Diagram:**

1. As user click on publish button (User stories, Use Case or Test case tab) it shall auto save.
2. As user create existing or new link to page/shape, it shall auto save.
3. As user delete any link it shall auto save the diagram.
4. As user perform **drill down** on any shape, it shall auto save the diagram.

**Simulation:**

1. As user create existing or new link to page/shape, it shall auto save.
2. As user delete any link it shall auto save the diagram.

**Use Case:**

1. As user create existing or new link to page/shape, it shall auto save.
2. As user delete any link it shall auto save the diagram.
SECTIONS CONFIGURATION

When a review is opened, users can check and compare different revisions of the selected work item using the compare popup. In this popup there are different sections such as Attachments and Links (highlighted below).

Users can configure which sections will be displayed during the comparison, using the following steps:

1. Access the Admin Panel and click **General**.
2. Select the desired checkboxes in the Sections Configuration heading.
3. Scroll down and click **Save Changes** at the bottom.
CONSIDER WORK ITEM LINKS FOR COMPARISON

- During any comparison, field values are actually being compared at the basic level.
- Users can now configure whether they want link type updates to be considered as a CHANGE or not.
- This is done by using the Link Type drop down control under the General section in Admin Panel.
- Previously this option was managed through the Baseline section, however now it has been moved to the General section.
1. Choose **All Link Types** option, if any link type change should be considered as an update.

   - **Multiple link types can be selected by users.**
2. After selecting all the desired link types, click the **Save Changes** button.
In the Baseline Compare tab, the work item link comparison can be viewed in two ways:

- Global comparison
- Context comparison

In **Global Comparison**, a work item will be considered as **changed** if it encounters a change in the link (created/updated/deleted) with any work item irrespective of whether the work item exists in baseline compare context or outside the context.

Whereas, with **Context Comparison**, a work item will only be considered as **changed** if it encounters a change in the link (created/updated/deleted) with a work item that exists in the *baseline compare context*. The 'Baseline Compare Context' means that all the work items which are showing up under baseline compare tab during the comparison.

The link comparison is supported in all of the three comparison types:

1) Comparing a baseline with current version
2) Comparing with another baseline
3) Comparing with a query
Configuring the toggle button

In the Baseline compare tab, a toggle button is provided having "Context Comparison for Links" option in it so that users can see the context-based comparison, if required. The toggle button will be shown on UI if configured from the admin panel.

Here's how you can configure the toggle button:

1. Go to General tab in organization settings. By default, Global link comparison option is selected. To enable Context Comparison, deselect this option.
2. Select "Show 'Context Comparison' toggle button in baseline compare tab" and click on Save Changes.

<table>
<thead>
<tr>
<th>Licensing</th>
<th>General</th>
<th>Review</th>
<th>Baseline</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Consider work item links for comparison</strong>&lt;br&gt;Choose link type(s) here to show work item comparison between revisions on 'Compare' popup. Also, it will be considered to show the status as 'CHANGED' while comparing baselines.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Link type:</strong> Related</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Compare Baseline - Consider link comparison as Global vs Context</strong>&lt;br&gt;Global comparison shall consider baseline item as changed if its configured link is altered/uninherited. Regardless of the other type work item is a part of the collection of baseline in Jira, Contextual comparison shall consider baseline item as changed only when configured link is added/removed with a work item. Must be a part of baseline item collection</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Show 'Context Comparison' toggle button in baseline compare tab by default:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Work Item Configuration**
Click the work item title to view details in the compare popup or in Azure DevOps standard editor when using baseline or review module.

**Open the compare popup on clicking the work item title**

**Work item display fields**

+ Add

Add work item field(s) here to be shown in compare popup, which invoke from anywhere.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Reference name</th>
<th>Work item type</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Automated Test Id</strong></td>
<td>MicrosoftVSTS.COMAutomatedTestId</td>
<td>Any</td>
</tr>
<tr>
<td><strong>Parameters</strong></td>
<td>MicrosoftVSTS.COMParameters</td>
<td>Any</td>
</tr>
<tr>
<td><strong>Tags</strong></td>
<td>SystemTags</td>
<td>Any</td>
</tr>
<tr>
<td><strong>Steps</strong></td>
<td>MicrosoftVSTS.COMSteps</td>
<td>Any</td>
</tr>
</tbody>
</table>

**Work item display fields for Comparison**

+ Add

Add work item field(s) here to be shown in compare popup for comparing the work item revision(s), when invoke from any Compare tab.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Reference name</th>
<th>Work item type</th>
</tr>
</thead>
</table>

[Save Changes] [Undo Changes]
3. The **toggle button** is hidden by default. Once it is configured from the admin panel, the toggle button for link comparison appears at the baseline compare tab.

When the toggle button is set to **ON**, it enables **Context Comparison** and, when it is set to **OFF**, the default **Global Comparison** functionality is applied. If the user has set context comparison for links to "**ON**", it will retain the selection throughout the session. Once the session expires, the functionality will automatically be set as per the configured admin panel settings.
WORK ITEM CONFIGURATION

Users can click on Work Item titles to view their details.

Upon clicking the title, either of the following pop-ups will appear:

1. TFS pop-up showing latest revision details
2. Compare pop-up showing details of the selected revision ID

<table>
<thead>
<tr>
<th>W. ID</th>
<th>Work Item Type</th>
<th>Title</th>
<th>Link Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>75637</td>
<td>Test Case</td>
<td>User Registration module is working without a critical issue</td>
<td>Tested By</td>
</tr>
<tr>
<td>80256</td>
<td>Feature</td>
<td>Desired features of the system</td>
<td>Parent</td>
</tr>
<tr>
<td>75725</td>
<td>Test Case</td>
<td>User registration is working well for the Continental US and Hawaii addresses</td>
<td>Tested By</td>
</tr>
</tbody>
</table>
- User can select which of the popup to appear (TFS or Compare) upon clicking a Work Item's title. This is done by selecting or unchecking the option (highlighted in the following image).

<table>
<thead>
<tr>
<th>Field name</th>
<th>Reference name</th>
<th>Work item type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Spec, Description</td>
<td>Any</td>
</tr>
<tr>
<td>Steps</td>
<td>Microsoft/VS:TCM:Steps</td>
<td>Any</td>
</tr>
<tr>
<td>Severity</td>
<td>Microsoft/VS:Common:Severity</td>
<td>Any</td>
</tr>
<tr>
<td>Priority</td>
<td>Microsoft/VS:Common:Priority</td>
<td>Any</td>
</tr>
</tbody>
</table>

- If the checkbox is selected, then the Compare pop-up would show up
- If unchecked, then the TFS Work Item details pop-up would show up
User can select to open ADO/Smart Editor on clicking a Work Item’s title in Smart Docs module & Smart Docs View tab in Review module, using the option highlighted in the following image.

- Double click on work item.
• Check the respective settings check box from Admin Panel to open ADO Editor and uncheck to open Smart Editor.
WORK ITEM DISPLAY FIELDS

Wherever Work Item details are shown, not every field is displayed. Those which are displayed are configured using General section in Admin Panel.
Users can configure the desired Work Item fields (that will be displayed), using the following steps:

1. Access the Admin Panel and click **General**.

2. Click the + Add option (under the Work Items display fields section).
3. Move the desired fields from the **Available** list to the **Selected** list using the arrow button.

4. Click **OK** after selecting all the desired fields.
5. Scroll down and click **Save Changes** at the bottom.

![Screenshot of configuration settings]

<table>
<thead>
<tr>
<th>Field name</th>
<th>Reference name</th>
<th>Work item type</th>
</tr>
</thead>
<tbody>
<tr>
<td>abcd</td>
<td>Customizable</td>
<td>Any</td>
</tr>
</tbody>
</table>
WORK ITEM DISPLAY FIELDS FOR COMPARISON

Wherever Work Items are compared, certain fields of the selected work item are shown in the Compare pop-up. The fields shown in the compare pop-up are configured using the Admin Panel.
Users can configure the desired Work Item fields (that will be displayed), using the following steps:

1. Access the Admin Panel and click **General**.
2. Click the **Add** option (under the Work Items display fields section).
3. Move the desired fields from the **Available** list to the **Selected** list using the arrow button.
4. Click **OK** after selecting all the desired fields.

5. Click **Save Changes** at the bottom.
LINK TYPE FOR COPY AND CLONE

When a baseline is being copied, users can link the original work items with the work items being created at the target location.

When a smart document is being cloned, users can link the work item(s) in clone document with the work item(s) in source document.
Users can configure which type of relationship should exist between the source and target / cloned work items using the following steps:

1. Access the Admin panel and select the **General** tab.
2. At the bottom of the page, click the link type drop down control. By default 'Related' link type is shown selected here and links between work items will be created with the respective link type however, user can configure this setting and can select any other link type for the links to be created.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Reference name</th>
<th>Work item type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom</td>
<td>Custom, Custom</td>
<td>Any</td>
</tr>
<tr>
<td>Data</td>
<td>Custom, Data</td>
<td>Any</td>
</tr>
<tr>
<td>Roll no</td>
<td>Custom, Rolling</td>
<td>Any</td>
</tr>
<tr>
<td>Description</td>
<td>System, Description</td>
<td>Any</td>
</tr>
<tr>
<td>Effort</td>
<td>Microsoft, VSTS, Scheduling, Effort</td>
<td>Any</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field name</th>
<th>Reference name</th>
<th>Work item type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effort</td>
<td>Microsoft, VSTS, Scheduling, Effort</td>
<td>Any</td>
</tr>
<tr>
<td>Time Criticality</td>
<td>Microsoft, VSTS, Common, Time Criticality</td>
<td>Any</td>
</tr>
<tr>
<td>Custom</td>
<td>Custom, Custom</td>
<td>Any</td>
</tr>
<tr>
<td>Data</td>
<td>Custom, Data</td>
<td>Any</td>
</tr>
<tr>
<td>Roll no</td>
<td>Custom, Rolling</td>
<td>Any</td>
</tr>
</tbody>
</table>

Link type for Copy and Clone

Choose your link type to link with source work item when you copy work item from Baseline and also for clone in Smart Docs.

Link type: Related

Save Changes  Undo Changes
3. Click on **Save Changes**.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Reference name</th>
<th>Work Item type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom</td>
<td>Custom, Custom</td>
<td>Any</td>
</tr>
<tr>
<td>Data</td>
<td>Custom, Data</td>
<td>Any</td>
</tr>
<tr>
<td>Roll no</td>
<td>Custom, Rollno</td>
<td>Any</td>
</tr>
<tr>
<td>Description</td>
<td>System, Description</td>
<td>Any</td>
</tr>
<tr>
<td>Effort</td>
<td>Microsoft, VSTS, Scheduling, Effort</td>
<td>Any</td>
</tr>
</tbody>
</table>

**Work item display fields for Comparison**

<table>
<thead>
<tr>
<th>Field name</th>
<th>Reference name</th>
<th>Work Item type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effort</td>
<td>Microsoft, VSTS, Scheduling, Effort</td>
<td>Any</td>
</tr>
<tr>
<td>Time Criticality</td>
<td>Microsoft, VSTS, Common, TimeCriticality</td>
<td>Any</td>
</tr>
<tr>
<td>Custom</td>
<td>Custom, Custom</td>
<td>Any</td>
</tr>
<tr>
<td>Data</td>
<td>Custom, Data</td>
<td>Any</td>
</tr>
<tr>
<td>Roll no</td>
<td>Custom, Rollno</td>
<td>Any</td>
</tr>
</tbody>
</table>

**Link type for Copy and Clone**

Choose your link type to link with source work item when you copy work item from Baseline and also for clone in Smart Dock.

| Link types      | Related, Related       | Related |

[Save Changes] [Undo Changes]
When using copy/reuse in Baseline, Queries, Backlog, and clone in Smart Docs tabs, if a user wants to disregard any read-only field he can add the work item read-only field(s) by clicking on the Add button as shown in the image below.

Any disregarded work item read-only field that a user adds in the list won’t be considered.

By clicking on the Add button, the user can select the read-only fields that have to be disregarded.
PARAMETER CONFIGURATION

In Smart Docs module, a user can show or hide the configure parameter by enabling or disabling the parameter functionality from the Admin Panel’s General section.

- Select ‘General Tab’ from admin panel.

- Scroll down to the ‘Parameter Configuration’ section.
• By enabling this check box, the “Configure Parameter” option will be “shown” in “Smart Docs” module. By default, this check box will be shown disabled on which the “Configure Parameter” option will be hidden in Smart Docs module.

<table>
<thead>
<tr>
<th>Parameter Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable or disable the check box to show or hide the configure parameter feature in Smart Docs module.</td>
</tr>
</tbody>
</table>

| Enable parameter functionality |
| Select the field below in replacing the parameter value in a work item where parameter name is being referenced, to be shown in Smart Docs/Smart Report. If the value of below selected field does match between parameter and work item in Smart Docs/Smart Report then system will replace the parameter value otherwise not. |

<table>
<thead>
<tr>
<th>Field to match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area Path</td>
</tr>
</tbody>
</table>

[Save Changes] [Undo Changes]

• Select the desired field from this drop down to be used as a matching field in the work item in which the parameter(s) is referenced, to replace the value. By default, ‘Area Path’ will be shown selected here. However, user can select any other desired field as well.

<table>
<thead>
<tr>
<th>Parameter Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable the check box to use the parameter feature.</td>
</tr>
</tbody>
</table>

| Enable parameter functionality |
| Select the field below in replacing the parameter value in a work item where parameter name is being referenced, to be shown in Smart Docs/Smart Report. If the value of below selected field does match between parameter and work item in Smart Docs/Smart Report then system will replace the parameter value otherwise not. |

<table>
<thead>
<tr>
<th>Field to match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area Path</td>
</tr>
</tbody>
</table>

[Save Changes] [Undo Changes]
1. Add document properties for a smart document by clicking on the Add button as shown in below image to be shown in the generated “Word/PDF as word template” reports through “Smart Report” and save as “Word/PDF reports from the toolbar.

2. By Clicking on the Add button, the user can select the document properties that he/she wants to include in the generated reports for a smart document.
1. Go to the "General" tab in Admin Panel.

2. Scroll down to the "Document Generation - Apply Table Properties" section.
3. Check the box to apply the row break across pages of each table within the exported Microsoft Word / PDF in all documents (Smart Report, Smart Docs, and Review Audit Reports). By default, the check box will be "unchecked".

4. Check the box to repeat the header row at the top of each table within the exported Microsoft Word / PDF in all documents (Smart Report, Smart Docs and Review Audit Reports). By default, check box will be “unchecked”.

5. Click on "Save Changes" button to apply the settings.
6. Allow row to break across pages and repeat as header row at the top of each page functionalities will be applicable for section type “Table” and “Form as table”. However, we will use the “Table” option here.

7. Now go to the Report Tab from any module and generate the configured report. The table will now be generated. Click on the Save As button and download the Smart Report in MS Word.
DATE, TIME PATTERN AND TIME ZONE SETTINGS

Users can now set **Date/Time patterns** to show the date and time in the selected pattern. The selected pattern will then be followed everywhere in the application in UI and documentation.

- Go to the ‘**General**’ tab from the Admin Panel
- Scroll down to “Date, Time, Pattern and Time Zone Settings”

![Date, Time Pattern and Time Zone Settings](image)

- Check the box to show date & time in UTC time zone everywhere in MR application (UI & documentation). By default, the check box will be "checked" and date & time will be shown w.r.t UTC time zone. When the checkbox is unchecked, the Date and Time Value will be shown according to end user locale.

![Date, Time Pattern and Time Zone Settings](image)
• Check the box to show timestamp with date & time everywhere in MR application (UI & documentation). By default, the check box will be “Checked”.

Date, Time Pattern and Time Zone Settings

Check/UncHECK the option below in order to define the time zone settings for date/time value. By default, the check box is checked displaying the date & time value w.r.t to the UTC time zone, otherwise it would be displayed according to end-user locale. These settings will be applicable everywhere in the MR application (UI & documentation).

- Check the box to show date & time value with respect to UTC time zone.
- Check the box to show time zone stamp (e.g. UTC) with date & time value in MR application.

Choose Date/Time patterns below in order to show the date and time values in the selected pattern, which will be followed everywhere in the application: UI (e.g Smart Doc) and documentation (e.g Review Audit Report).

<table>
<thead>
<tr>
<th>Date Pattern</th>
<th>Time Pattern</th>
</tr>
</thead>
<tbody>
<tr>
<td>21-Feb-2022 (UTC) (dd-MMM-yyyy)</td>
<td>4:00:15 AM (UTC) (hh:mm:ss tt)</td>
</tr>
</tbody>
</table>

• Select your desired Date and Time Pattern and click on ‘Save Changes’. Please note that (dd-MMM-yyyy) is the default date format and (hh:mm:ss tt) is the default format for time.

Date, Time Pattern and Time Zone Settings

Check/UncHECK the option below in order to define the time zone settings for date/time value. By default, the check box is checked displaying the date & time value w.r.t to the UTC time zone, otherwise it would be displayed according to end-user locale. These settings will be applicable everywhere in the MR application (UI & documentation).

- Check the box to show date & time type fields in UTC time zone.
- Check the box to show time stamp (e.g UTC) in date & time type fields everywhere (UI & MR Documents).

Choose Date/Time patterns below in order to show the date and time values in the selected pattern, which will be followed everywhere in the application: UI (e.g Smart Doc) and documentation (e.g Review Audit Report).

<table>
<thead>
<tr>
<th>Date Pattern</th>
<th>Time Pattern</th>
</tr>
</thead>
<tbody>
<tr>
<td>02-Feb-2022 (UTC) (dd-MMM-yyyy)</td>
<td>09:48:04 PM (UTC) (hh:mm:ss tt)</td>
</tr>
</tbody>
</table>
• The selected **Date & Time** pattern and **Time Zone** Settings can now be seen everywhere in the MR application UI.

• The selected **Date & Time** pattern and **Time Zone** Settings can now be seen in MR application documents.
SMART DOCS SECTION

FONT SETTINGS IN SMART EDITOR

Through the Smart Docs section in the Admin Panel, user can now select the desired **font-family** and **font-size** to be shown by default in Smart Editor.

- Select ‘Smart Docs Tab’ from admin panel.

- Select any ‘Font-Family’ and ‘Font-Size’ from the below shown section.
• By default, ‘Calibri Light’ will be set as font family for the text to be shown in Smart Editor. However, the user can set it to any other desired font family as well.

• By default, ‘14’ will be set as font size for the text to be shown in Smart Editor. However, user can set it to any other desired font size as well.
- The selected settings of ‘Font Family’ and ‘Font Size’ will be applied on the entire text in Smart Editor.
CONFIGURE ‘AREA’ FIELD IN SMART DOCS ‘NEW FILE’ WINDOW

Users can now set the ‘Area’ field as mandatory or not for creating a Smart Docs file.

- Go to the ‘Smart Docs’ tab from the Admin Panel

- Scroll down to the “Configure ‘Area’ field in Smart Docs ‘New File’ window” section
• Check or uncheck the setting as per your requirement. By default the check box will be un-checked.

Configure ‘Area’ field in Smart Docs ‘New file’ window

Check/un-check the option below to make ‘Area’ field as mandatory or not for creating a Smart Docs file.

☑ Check the box to make ‘Area’ field as mandatory for creating a new Smart Docs file.

• As you check the box, the ‘Area’ field while creating a new smart docs file in the ‘New File Window’ will be made mandatory.

Configure ‘Area’ field in Smart Docs ‘New file’ window

Check/un-check the option below to make ‘Area’ field as mandatory or not for creating a Smart Docs file.

☑ Check the box to make ‘Area’ field as mandatory for creating a new Smart Docs file.
REVIEW SECTION

MR CREDENTIALS FOR APPROVER

1. Select ‘Review’ tab from the Admin panel.

![Review Tab in Admin Panel]

2. Go to “Providing approval using MR Credentials” section.

![Providing approval using MR Credentials]

- Disable the checkbox to restrict a user from using a PAT while providing an approval through the “MR Credential” option. In this case, only MR registered password will be acceptable by the system. By default, both options are allowed either enter PAT or MR registered password during approval.
- On providing an approval using the “MR Credential” option, allow both options either enter MR registered password or personal access token (PAT).

MR Credentials Settings
- Select time period.
- Expiration: Every 90 Days
3. Check the **check box** to be able to choose between MR Credentials and PAT (Personal Access Token) on providing approval. By default, it will be checked. On uncheck, only MR Credentials will be allowed on providing approval.
AUTO GENERATING REVIEW AUDIT REPORTS

The newly added section regarding legacy reviews, is in the upper portion of the Review page.
1. Select the relevant project.
2. Select the relevant dates (To and From).

In case the dates are not provided, then audit reports of all the reviews, present in the selected project(s) will be generated.
3. Click the **Generate Audit Report** button.
The audit report is generated.

The generated audit reports are available at the following location:

%public%\Documents\Review Management\Review Audit Reports\<project name>\n
In case the generation of audit reports is unsuccessful due to some reason, users are advised to repeat the above steps for failed project(s) only.
AUDIT REPORTS FORMAT

By default, the audit reports are generated in MS Word format, however users have the option to generate these in PDF format by selecting the corresponding option in the relevant section.

The report format selected here is applicable on both bulk generation as well as for single reports (generated from audit report option present at the Review Toolbar).
REVIEW RESPONSE ACTIONS

The actions for the review response can be configured so that the desired values can be added.

This can be done by:

1. Accessing the Admin panel and clicking the Review option.

The Review Response Actions section determines which actions are available for review response.
2. Select the **Add** option located in the **Review Response Actions** section.

3. Enter a suitable action name and click **OK**.
4. Scroll down and click **Save Changes** at the bottom.
DUE-DATE CONFIGURATIONS

Users can now configure many aspects of the due date of reviews. This is done using a new section added under Review settings.

Using the options in this section, users can configure:

- default Due Date (this appears in the Due Date drop box while creating a new Review Request)
- allowing initiators to edit default Due Date
- show/hide Due Date field in the Review Request pop-up
- allowing initiators to extend Due Date
- allowing initiators to clear Due Date
Once done, users are advised to click Save Changes, to save the configurations they made.
RULES CONFIGURATION REVIEW POP UP

While creating a Review Request, the Rules section is shown at the bottom of the dialogue box.

User can configure if this section is shown or not, and if shown which of the options (highlighted above) are actually shown in the section. This is done by:

1. Accessing the Admin panel and clicking the **Review** option.
2. Configure which of the options appear in the Rules Section of Review Request dialogue box (Disable the top control if the Rules section is not to be shown).
3. Scroll down and click **Save Changes**.
REVIEW NON-PARTICIPANT RIGHTS

Traditionally, Modern Requirements4DevOps Reviews were only accessible to concerned participants, namely:

- Approvers
- Reviewers
- Initiators (who requested the review in first place)

However, there may be situations when access to certain reviews is desired for non-participants (who don’t fall in any of the above-mentioned categories). This feature is now configurable through the relevant option in Admin Panel.

A new category "Other Review(s)" is created in Folder Explorer for accessing such reviews in read-only mode.
SEND E-MAILS

Modern Requirements4DevOps can automatically send out emails to stakeholders when certain events occur while responding to a review request. Users can configure which events, would trigger emails to be sent automatically, by enabling/disabling relevant check boxes.

Like other options, the **Save Changes** button should be clicked after updating this section.
SEND REMINDER

Modern Requirements4DevOps can automatically send out reminder emails to reviewers/approvers to make sure they respond to the review request within due time. This is done by using the corresponding part under the Review section of Admin Panel.

Follow these steps to configure the reminder email timing:

1. Access the Admin panel and click Review.
2. Scroll down to view the bottom portion of the page.
3. Select the desired time in days (before the deadline) from the list.
4. Click Save Changes.
When a review request is being created, a field called Post State (in the Rules section) tells Modern Requirements4DevOps to change the state field (to the selected state) when the approval process is completed.

If the selected post state can’t be automatically achieved for any reason, the review initiator will be notified automatically via email. That said, the review initiators may want to send out the automatic notification to additional stakeholders. This section deals with how to configure the emails for these additional stakeholders.

1. Access the Admin panel and click **Review**.
2. Scroll down to view the bottom portion of the page.
The **Review Post State Rule** section determines which actions are available for review response.

3. Click **+ Add** option located in the **Review Post State Rule** section.
4. Provide the desired email address and click **OK**.

5. Click **Save Changes**.
DATA MIGRATION

Users can migrate all legacy reviews of a project to new approach (which were created using previous approach) in bulk. The following steps are required to carry out this task:

1. Access the Admin Panel and click the Review option.
The newly added section regarding legacy reviews, is at the top of the page.
2. Select the desired project from the list (for which legacy reviews are to be updated).
3. Click the **Migrate Data** button.
The legacy reviews for the selected project are migrated successfully.

In case the migration is unsuccessful due to some reason, users are advised to repeat the above steps for failed project(s) only.
BASELINE SECTION

CONFIGURING WORK ITEM FIELDS TO BE COPIED WHILE COPYING BASELINE

1. Access the Admin panel and select the Baseline option.

![Admin panel screenshot showing Baseline option]

2. Click + Add option (located in the Fields Configuration for Copy baseline section).

![Fields Configuration for Copy baseline section screenshot]
Consider work item links for compare baseline

Choose your link type(s) to be considered as 'CHANGED' while comparing the baseline. \*This will have an impact on performance\*

**Link type:**

- [ ] Child

**Fields Configuration for Copy baseline**

Add the same fields and their values to be copied in work item.

<table>
<thead>
<tr>
<th>Work item type</th>
<th>Field name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bug</td>
<td>Priority</td>
<td>4</td>
</tr>
<tr>
<td>Feature</td>
<td>Priority</td>
<td>4</td>
</tr>
<tr>
<td>Task</td>
<td>Priority</td>
<td>4</td>
</tr>
</tbody>
</table>

**Link type for Copy baseline**

Choose your link type to link with source work item.

- [ ] Referenced By
3. Select the relevant Work Item type.

4. Select the desired Work Item field.
5. Select the default value of the field.
The work item field is added to the list.

6. Click the **Save Changes** Button.
### Consider work item links for compare baseline

Choose your link type(s) to be considered as 'CHANGED' while comparing the baseline. **⚠️ This will have an impact on performance**

**Link type:**
- [ ] Child

### Fields configuration for Copy baseline

Add work item fields and their values to be copied in work item.

<table>
<thead>
<tr>
<th>Work item type</th>
<th>Field name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bug</td>
<td>Priority</td>
<td>4</td>
</tr>
<tr>
<td>Feature</td>
<td>Priority</td>
<td>4</td>
</tr>
<tr>
<td>Task</td>
<td>Priority</td>
<td>4</td>
</tr>
<tr>
<td>Bug</td>
<td>Priority</td>
<td>1</td>
</tr>
</tbody>
</table>

**Link type for Copy baseline**

Choose your link type to link with source work item.

- **Link type:** [ ] Referenced by

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The ‘Services’ section is used to configure ModernRequirements4DevOps services options that were previously done using command prompt instructions.

For a detailed information on the services section, click here.