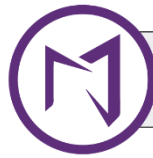# MODERN Requirements

Modern Requirements4DevOps

Document Properties

Version 2.0

Document Revision History

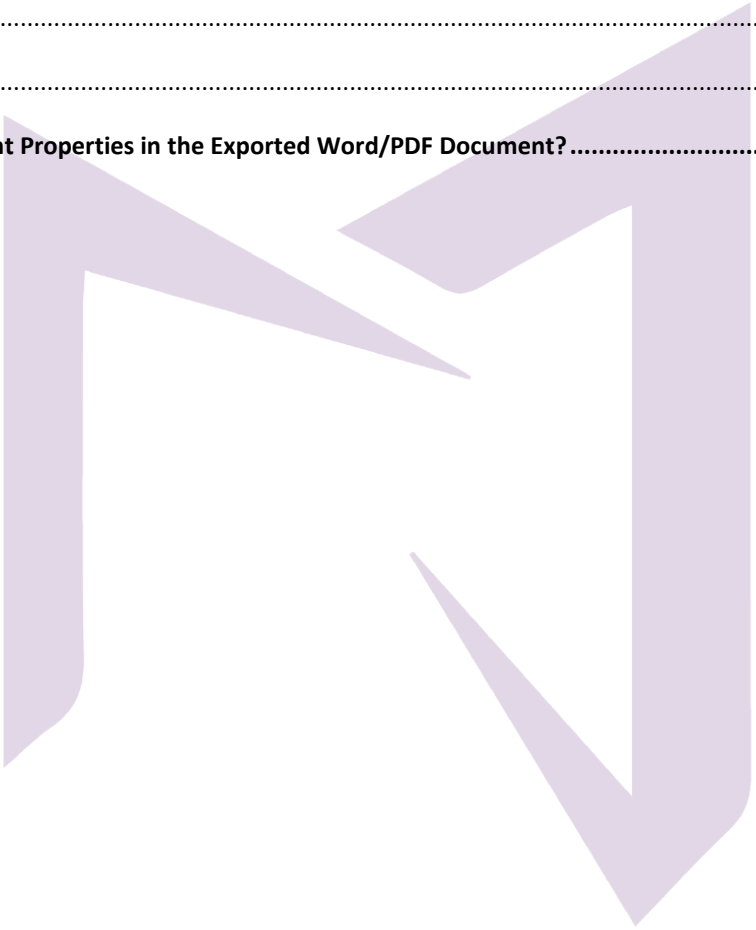| Revision #	Date	Details	Revised By	Approved By
Version 2.0	3rd July, 2023	• Screenshots have been updated as per the new UI enhancements. • Added a new section "Process Template" for the enhancement of root work item type "Document"	Syed Hammad	Hira Sharif
Version 1.0	2nd January, 2023	• Document created	Syed Hammad	Hira Sharif

TABLE OF CONTENTS

DOCUMENT PROPERTIES

Document properties are incorporated in MR to provide the user with an ease of exporting all desired document properties. We can apply these properties from two places (i) System defined from the admin Panel (ii) User defined from the Smart Docs toolbar.

- o **System defined:** Properties that can be invoked from the admin panel, user can add property name and its value will be passed by the system directly to the template containing a quick part of the same name as defined in the admin panel while exporting the report.

- o **User defined:** Properties that can be invoked from the Smart Docs toolbar user can add a property name and also its value and these user defined properties are exported to the template containing a quick part of the same name as defined in user defined pop-up while exporting the report.
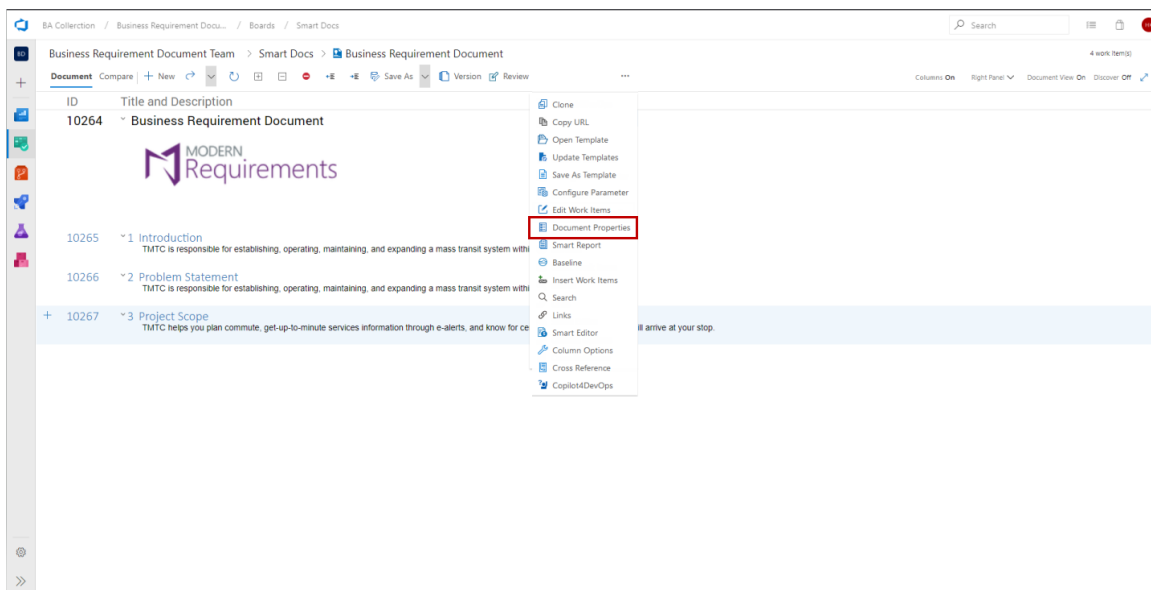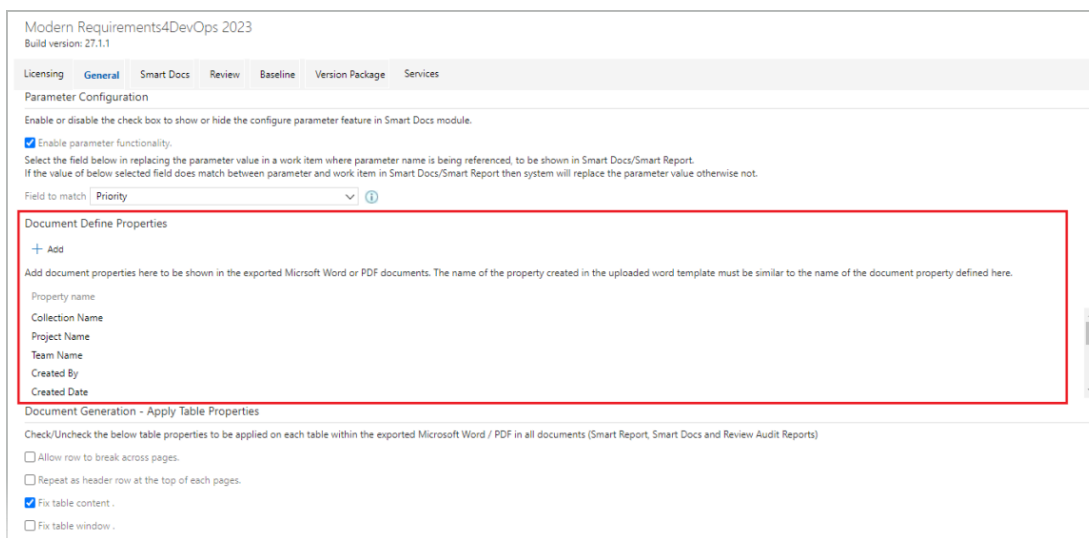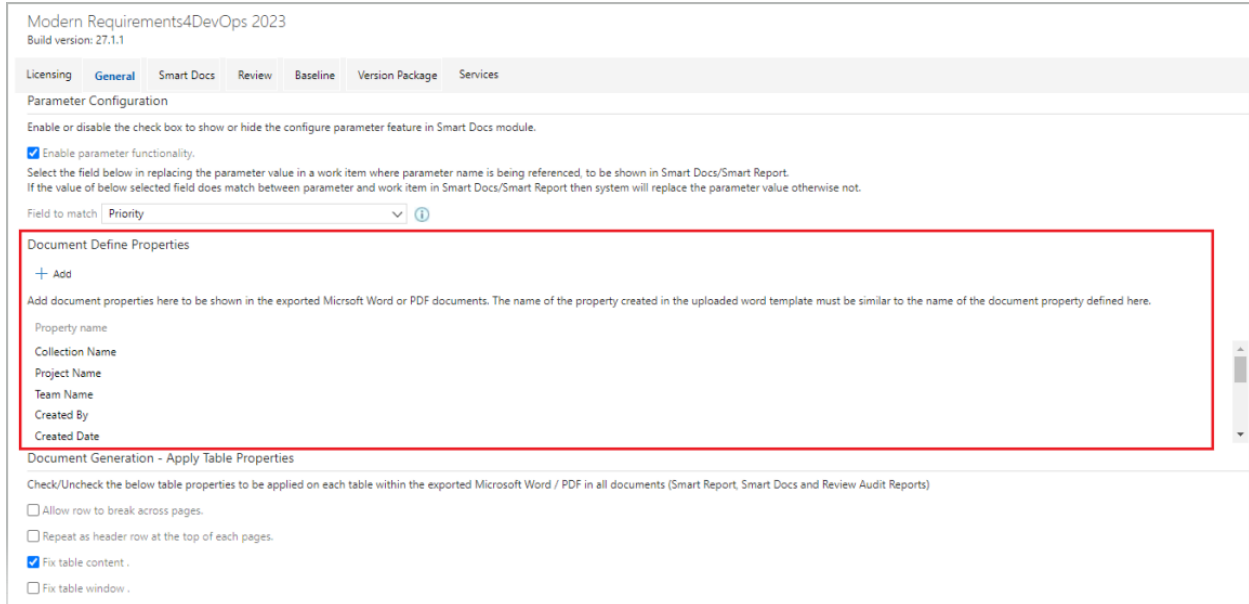
SETTING UP DOCUMENT PROPERTIES

There are different methods to add document properties into the Smart Doc this can be done from Admin panel, from Smart Doc toolbar and from Process template.
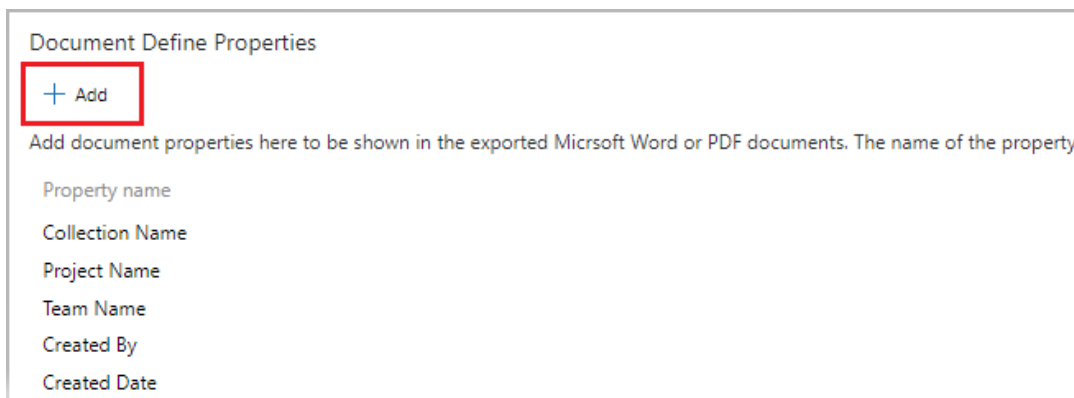
ADMIN PANEL

- The user can add document defined properties from the admin panel as shown in the below image.

- Click on the "+ **Add**" button to add document properties from the list of document properties and they will reflect in the Microsoft Word and PDF documents.

  Note: *The name of the property created in the uploaded world template must be similar to the name of the document property defined here.*

- **Check the box/boxes** whose value you want to be invoked in the exported document.

Add Document Properties ✕

Select Document Properties from below section
- ☑ [Any]

Project Details

- ☑ Collection Name
- ☑ Project Name
- ☑ Team Name

Smart Docs Details

- ☑ Created By
- ☑ Created Date
- ☑ Document Title
- ☑ Smart Docs Version
- ☑ URL

OK   Cancel

Add Document Properties ✕

Smart Docs Details

- ☑ Created By
- ☑ Created Date
- ☑ Document Title
- ☑ Smart Docs Version
- ☑ URL

Smart Docs Version Details

- ☑ Approver Details ⓘ
- ☑ Version Label
- ☑ Version
- ☑ Created Date
- ☑ Versioned By
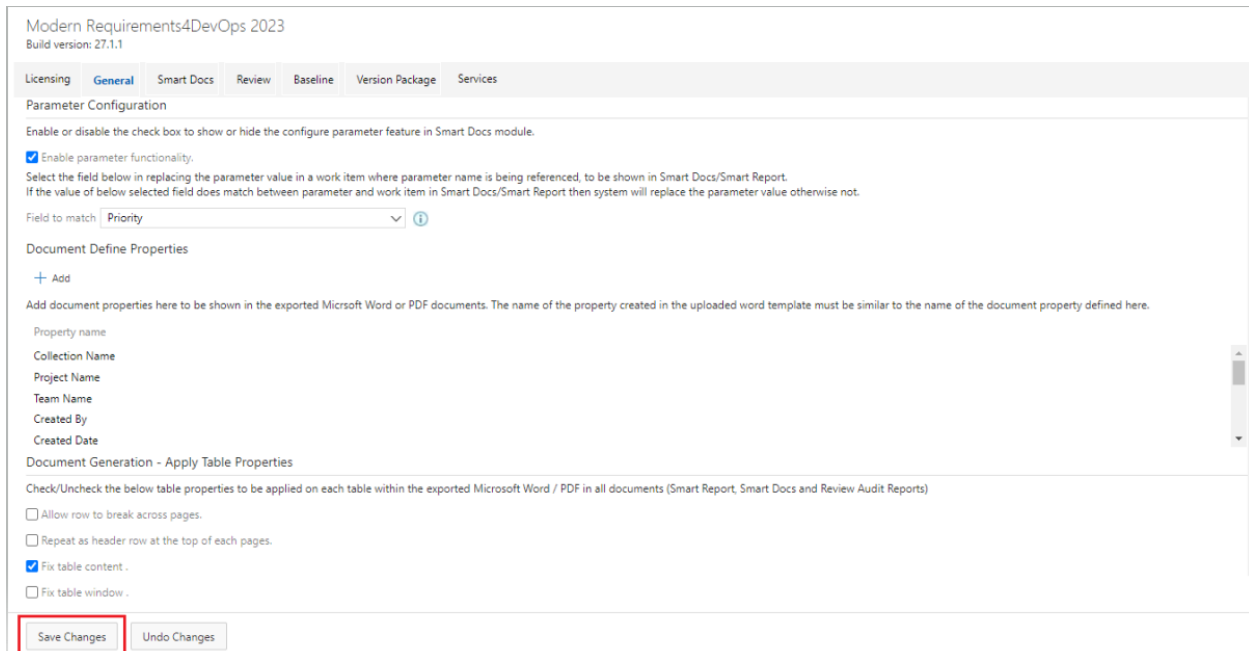- ☑ Version Comments

OK   Cancel

Note:

- *If you want to add all properties from the admin panel you have to checked [Any] checkbox available on top of the "Add Document Properties" pop-up.*
- *"Approver Details" field includes data from two fields "Approved By" and "Approver Role".*
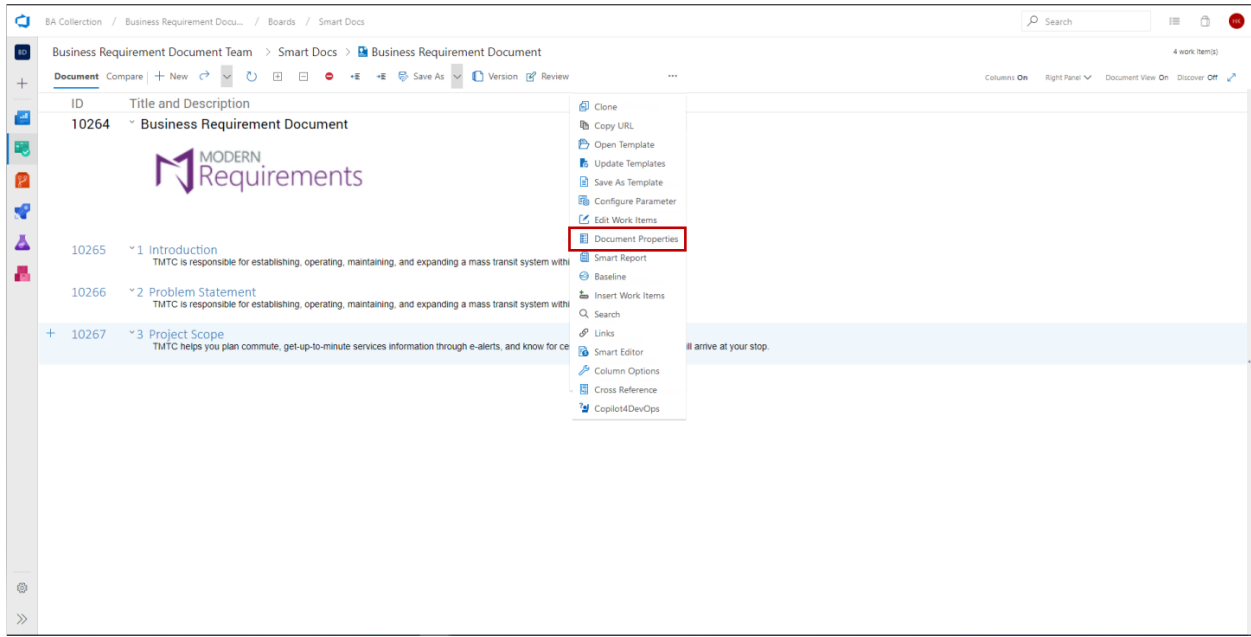
- Click on the "**OK**" button.
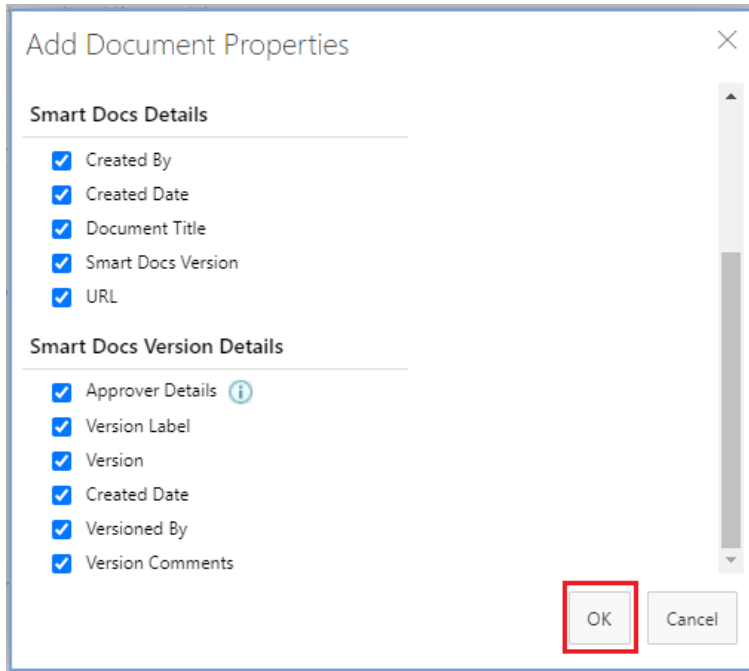
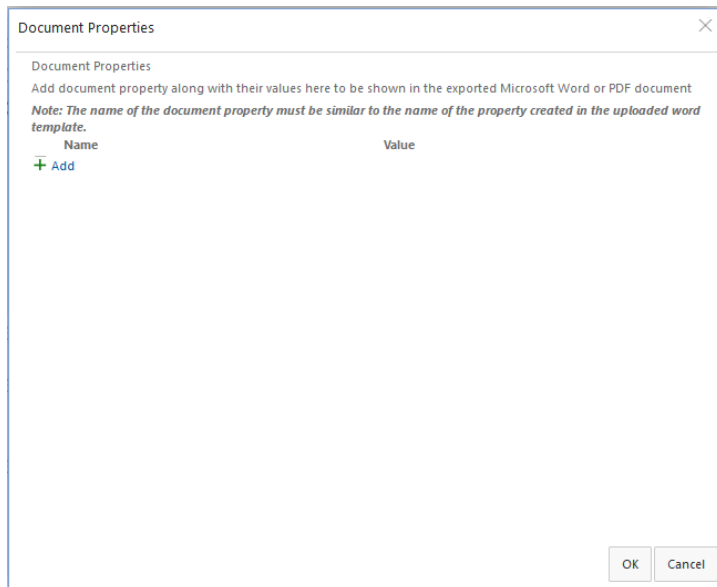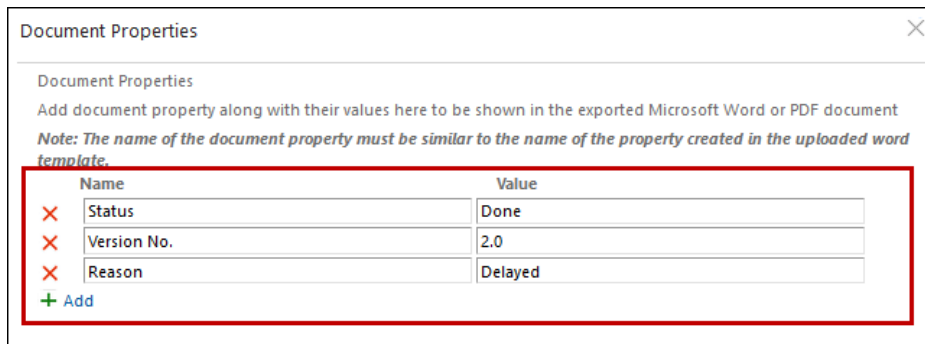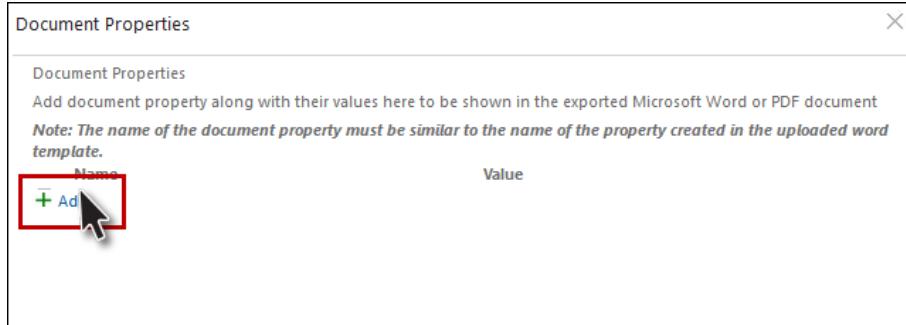- Click on the "**Save Changes**" button to apply the changes.

SMART DOCS

- Click on the " Document Properties" option present in the dropdown of extension point '…' from the Smart Docs toolbar.
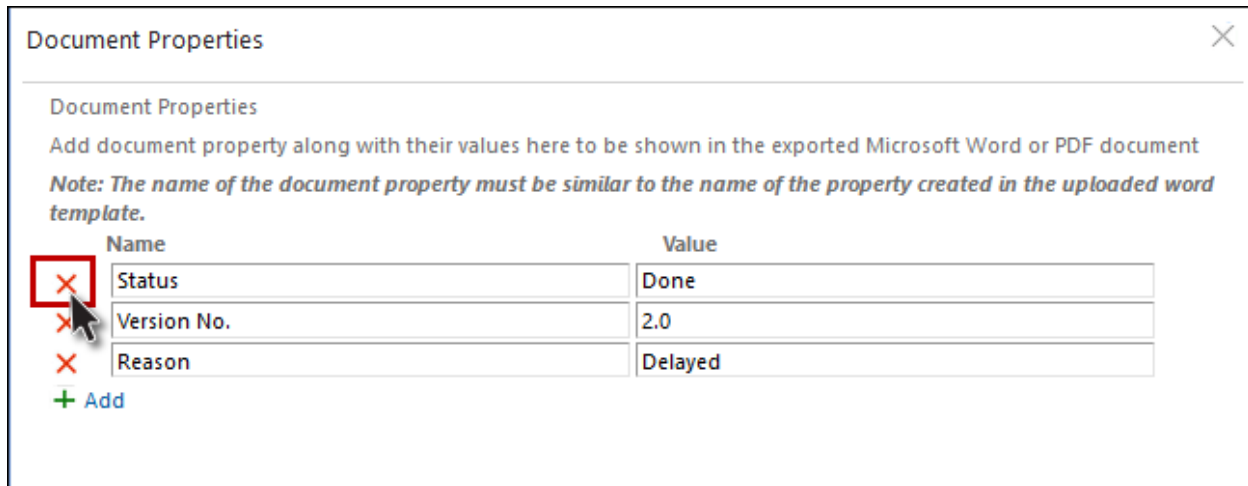

- The Document Properties pop-up will now open.

- Click on the "**+ Add**" button to add a Document Property Name/Value row and provide the desired "**Name**" and "**Value**".

Document Properties   ✕

Document Properties

Add document property along with their values here to be shown in the exported Microsoft Word or PDF document

Note: The name of the document property must be similar to the name of the property created in the uploaded word template.

Name	Value
+ Add	

Document Properties   ✕

Document Properties

Add document property along with their values here to be shown in the exported Microsoft Word or PDF document

Note: The name of the document property must be similar to the name of the property created in the uploaded word template.

	Name	Value
✕	Status	Done
✕	Version No.	2.0
✕	Reason	Delayed
+ Add		

- Click on the "**X**" button if you want to remove a particular property name and value row.

Document Properties   ✕

Document Properties

Add document property along with their values here to be shown in the exported Microsoft Word or PDF document

Note: The name of the document property must be similar to the name of the property created in the uploaded word template.

	Name	Value
✕	Status	Done
✕	Version No.	2.0
✕	Reason	Delayed
+ Add		

- Click on the "**OK**" button.

  Note: _The user may add any field with value and save it with the "**OK**" button. The values will be retained when the user opens the same document._

Document Properties   ✕

Document Properties

Add document property along with their values here to be shown in the exported Microsoft Word or PDF document

Note: The name of the document property must be similar to the name of the property created in the uploaded word template.

	Name	Value
✕	Status	Done
✕	Version No.	2.0
✕	Reason	Delayed

＋ Add

OK   Cancel

- **Note:** _Given properties will be reflected in the exported document. If there is no value defined by the user, nothing will be mapped in the exported document._

Process Template

- Process template support has also been provided for document properties. The fields added in the Document type work item in process template will be shown as below. While in Smart Doc, it will be shown in ADO of the root work item of type Document.
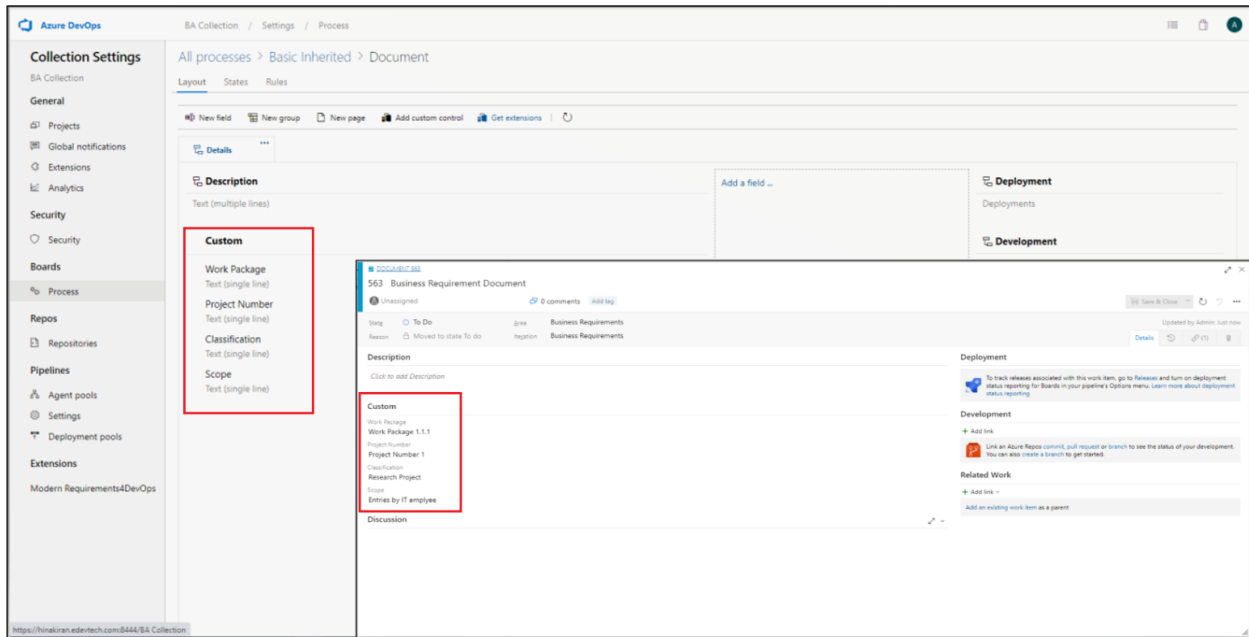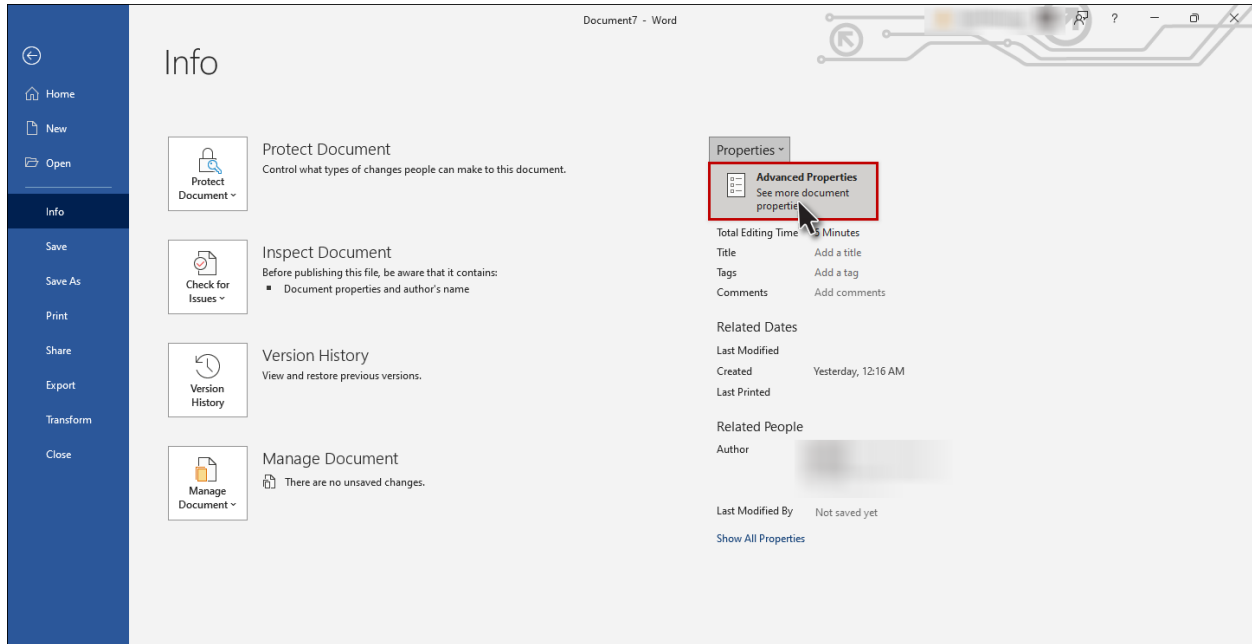

Note:

- *The system will fetch the values of configured fields (except HTML) from the root work item whose work item type is **'Document'** in the process template if the fields are defined through the quick parts in their uploaded template.*

- *Value(s) that is defined from the Smart Docs toolbar option will have precedence over the value of the document work item in the exported word document.*

HOW TO MAP DOCUMENT PROPERTIES IN THE EXPORTED WORD/PDF DOCUMENT?

The user is required to define the custom fields via quick parts in their uploaded word template.

- Click on the "**File**" option in the Word Document toolbar and navigate to **Info>Properties>Advance Properties**.

- A Document Properties Pop-up is opened. Click on the "**Custom**" tab.
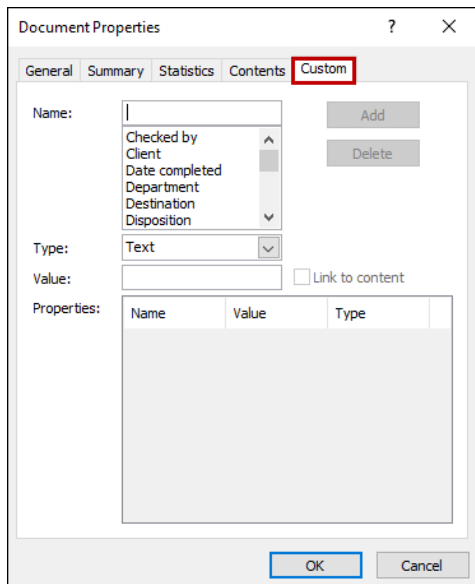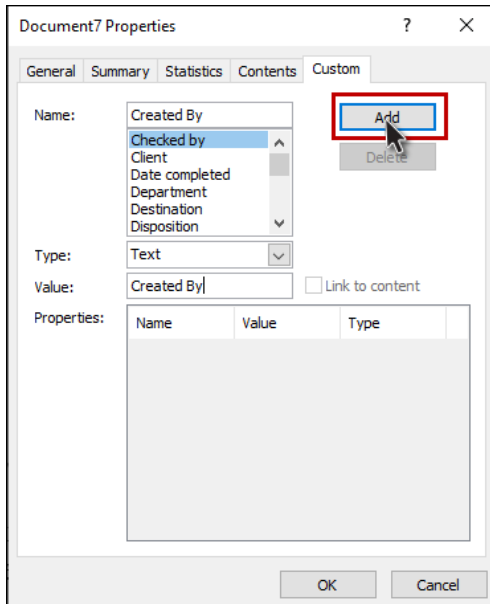
- Enter the property name in the textbox against 'Name' label and its value in the textbox against 'Value' label.
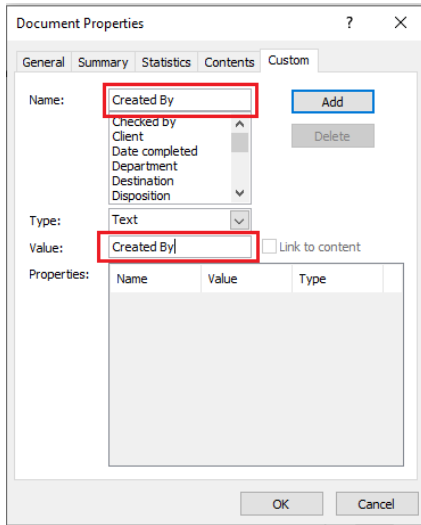
_Note__: "Type" should always be selected as text._

- After selecting/entering the desired name and value, click on the "Add" button. Repeat the process if you want to add more properties.

_Note__: The Property Name must be the same as defined in Smart Docs or in the Admin Panel, otherwise the values will not be mapped in the exported Word/PDF document._

- To add Quick Parts in the template, click on the "**Insert**" tab.
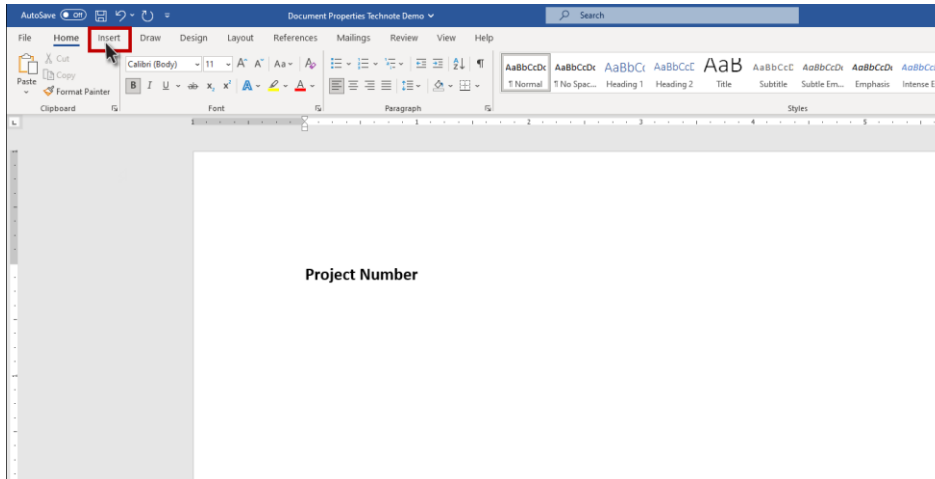
- Now, click on **"Quick Parts"** and a dropdown appears. Click on the "**Field**" option.
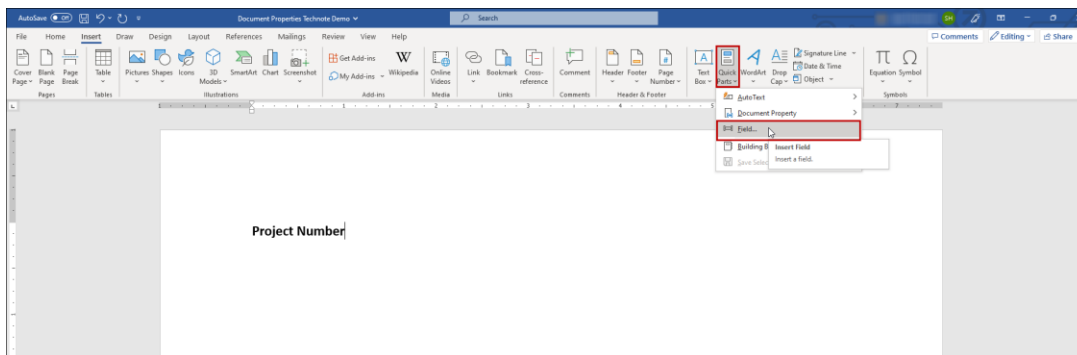
- Click on the "Field" option a "Field" pop-up appears. From the "**Field names**" option on the left, scroll down and click on "**DocProperty**". Once the "DocProperty" option is clicked, Field properties will be visible at the center of the Field pop-up in the **"Property"** column. Now, select the property name which you had created previously and click on the "**OK**" button.
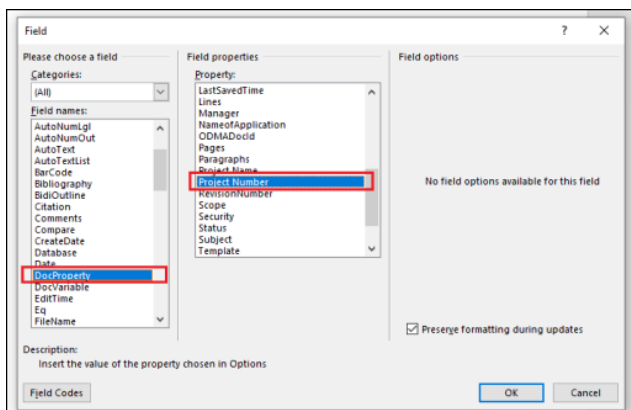
- The desired customized Quick Part(s) is now inserted in the document. The user can repeat the process to add all the required Quick Parts.
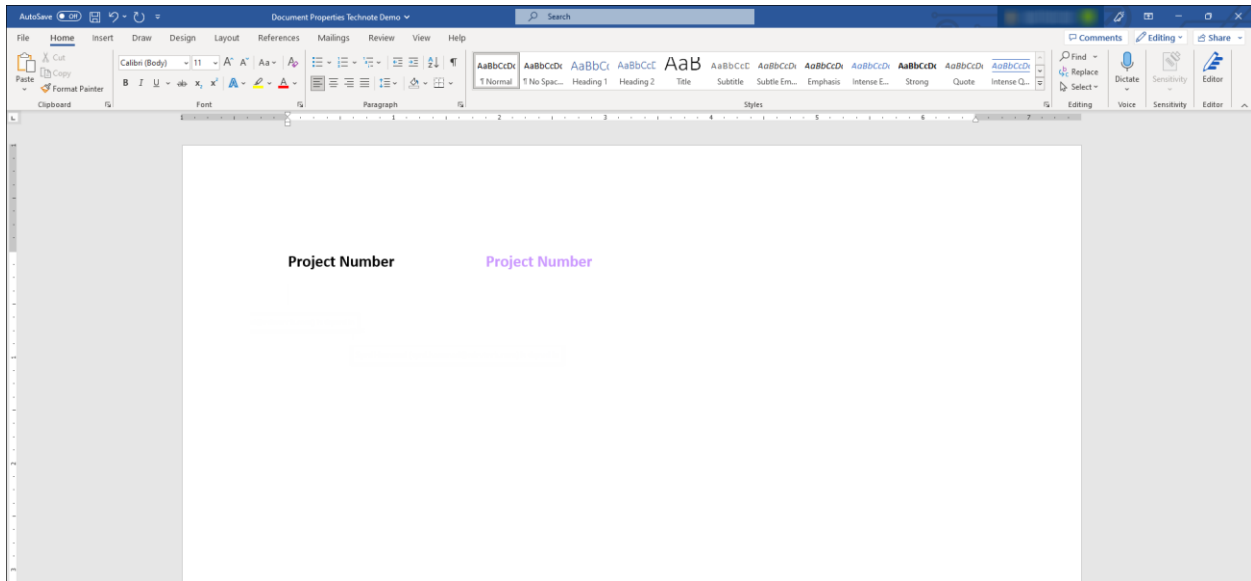
- **Template** designed for document properties.
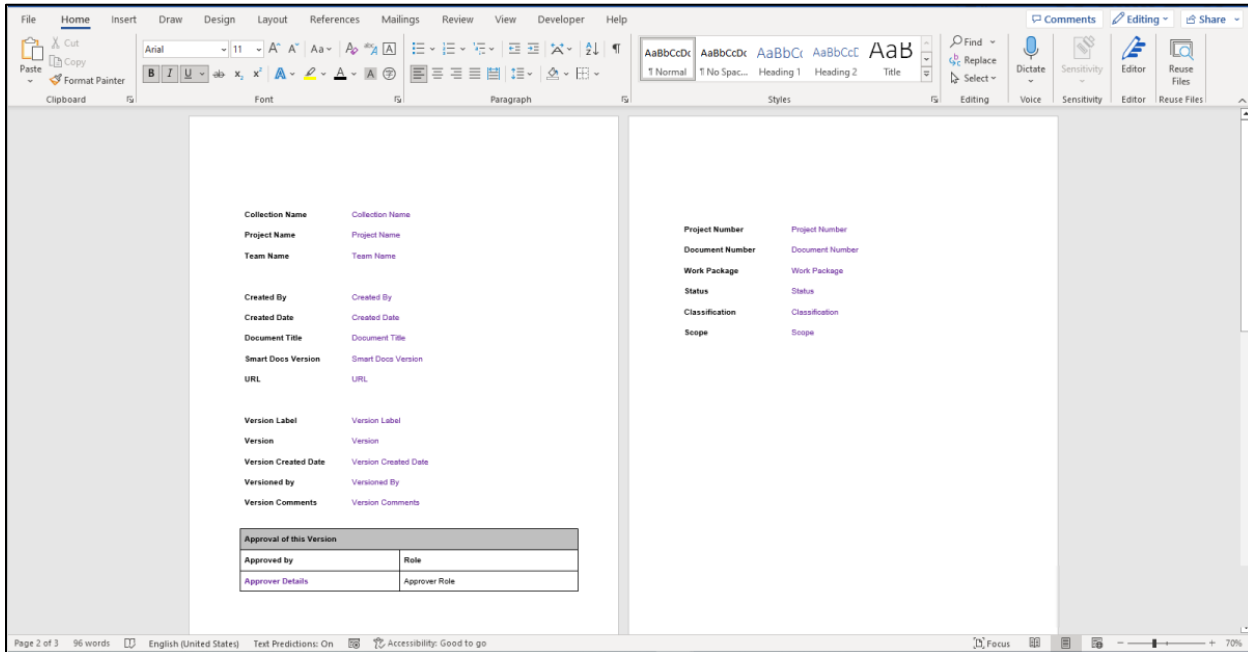
**Note:** When the review version is opened and a report is generated from the toolbar "Save As" option and from the "Smart Report" window, on generating a report to map the 'Approved by' and their 'Roles' a table should have to be defined in the template containing 3 rows and the quick part of 'Approver Details' shall be added in the 3rd row and 1st column of that table.

Generated Report: