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1 Introduction

1.1 Purpose

This document provides system requirements and installation instructions for VERA on Micro Focus ALM.

1.2 Definitions

The following terms are used throughout this document:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALM</td>
<td>See ‘Application Lifecycle Management’</td>
</tr>
<tr>
<td>approval policy</td>
<td>A collection of business rules establishing approval routes for electronic records.</td>
</tr>
<tr>
<td>Micro Focus</td>
<td>Formerly Hewlett Packard Enterprise Software, the manufacturer of the Application Lifecycle Management software.</td>
</tr>
<tr>
<td>ALM</td>
<td>See Application Lifecycle Management’</td>
</tr>
<tr>
<td>Application Lifecycle Management</td>
<td>An enterprise application manufactured by Micro Focus that provides test management, requirements management, and defect management capabilities for information technology and software development organizations.</td>
</tr>
<tr>
<td>notification policy</td>
<td>A collection of business rules establishing email notification for approval tasks and approval routes.</td>
</tr>
<tr>
<td>records management policy</td>
<td>A collection of business rules establishing workflows for electronic records.</td>
</tr>
<tr>
<td>staging project</td>
<td>Project used to create VERA projects in ALM Quality Center Edition</td>
</tr>
<tr>
<td>template project</td>
<td>A software component of ALM that is used to apply a common set of project customizations to other projects as a part of cross project customization.</td>
</tr>
<tr>
<td>template project</td>
<td>See ‘template project’</td>
</tr>
<tr>
<td>Tx3 VERA</td>
<td>An enterprise application manufactured by Tx3 Services, LLC that specializes in enforcing shared business policies pertaining to the control of electronic records across multiple systems.</td>
</tr>
<tr>
<td>VERA</td>
<td>See ‘Tx3 VERA’</td>
</tr>
<tr>
<td>VERA application</td>
<td>See ‘Tx3 VERA’</td>
</tr>
<tr>
<td>VERA Records Management Policy</td>
<td>See ‘records management policy’</td>
</tr>
<tr>
<td>VERA Server</td>
<td>A central application where users can define business policies and configure those policies to be enforced across multiple information systems</td>
</tr>
<tr>
<td>VERA system adapter</td>
<td>See ‘system adapter’</td>
</tr>
<tr>
<td>VERA Windows Client</td>
<td>To-do</td>
</tr>
</tbody>
</table>
1.3 Overview

VERA is deployed as a Project Template extending ALM core functionality to enable test management in a controlled, validated environment. VERA implements electronic signatures, customer-defined procedures, and business rules via ALM’s scripting and programming capabilities.

VERA for Micro Focus ALM has three components:
- VERA Client - The VERA windows is a locally installed application comprised of a collection of Microsoft .NET library files (.dll).
- VERA ALM Template – ALM Template Project export (QCP File)
- VERA Policy files – JSON files containing configurable business rules. The JSON files are attached to the Requirements folder (root requirement) in the Requirements module
  a. Approval Policy
  b. Notification Policy
  c. Records Management Policy

2 VERA Installation

2.1 System Requirements

2.1.1 Supported Micro Focus ALM Versions

- QC/ALM 12.53 Patch 1
- QC/ALM 12.53 Patch 2
- QC/ALM 12.55 Patch 1
- QC/ALM 12.55 Patch 2
- QC/ALM 12.55 Patch 3

2.1.2 Hardware Minimum Requirements

<table>
<thead>
<tr>
<th>CPU</th>
<th>Core duo 1.6 Ghz (or higher) or equivalent compatible processor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memory (RAM)</td>
<td>4 GB minimum</td>
</tr>
<tr>
<td>Diskspace</td>
<td>8 MB minimum</td>
</tr>
</tbody>
</table>

2.1.3 Supported Operating Systems

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Micro Focus ALM Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Windows 7 SP1</td>
<td>ALM 12.53 and up</td>
</tr>
<tr>
<td>Microsoft Windows 8.1</td>
<td>ALM 12.53 and up</td>
</tr>
<tr>
<td>Microsoft Windows 10</td>
<td>ALM 12.53 and up</td>
</tr>
<tr>
<td>Microsoft Windows Server 2008 R2</td>
<td>ALM 12.53 and up</td>
</tr>
</tbody>
</table>
### Operating System

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Micro Focus ALM Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Windows Server 2012</td>
<td>ALM 12.53</td>
</tr>
<tr>
<td>Microsoft Windows Server 2012 R2</td>
<td>ALM 12.53</td>
</tr>
<tr>
<td>Microsoft Windows Server 2016</td>
<td>ALM 12.55</td>
</tr>
</tbody>
</table>

### 2.1.4 Supported Browsers

- Microsoft Internet Explorer 10 32 Bit
- Microsoft Internet Explorer 11 32 Bit

### 2.1.5 Supported Microsoft Office

<table>
<thead>
<tr>
<th>Microsoft Suite</th>
<th>Micro Focus ALM Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Office 2010 32 Bit</td>
<td>ALM 12.53 and up</td>
</tr>
<tr>
<td>Microsoft Office 2013 32 Bit</td>
<td>ALM 12.53</td>
</tr>
<tr>
<td>Microsoft Office 2016 32 Bit</td>
<td>ALM 12.53</td>
</tr>
<tr>
<td>Microsoft Office 365</td>
<td>ALM 12.53</td>
</tr>
</tbody>
</table>

### 2.1.6 Display Settings

<table>
<thead>
<tr>
<th>Screen Resolution Minimum</th>
<th>1024x768</th>
</tr>
</thead>
<tbody>
<tr>
<td>DPI Setting</td>
<td>100%</td>
</tr>
</tbody>
</table>

### 2.1.7 Prerequisites

- Microsoft .NET Framework 4.5.2 (or newer)
- Micro Focus ALM Connectivity Tool / Micro Focus ALM Client Registration

### 2.1.8 Recommended Site Configuration Parameters

The following ALM Site Parameters are recommended.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADD_NEW_USERS_FROM_PROJECT</td>
<td>If this parameter is set to &quot;N&quot;, you can add new ALM users from the Site Administrator (Site Users tab) only. If this parameter is set to &quot;Y&quot; (the default), new ALM users can also be added from Project Customization.</td>
<td>N</td>
</tr>
<tr>
<td>AUDIT_ATTACHMENTS</td>
<td><strong>For ALM 12.55:</strong> This parameter must be set to Y for attachment changes to be recorded in the ALM audit log. VERA requires this feature to be enabled for the test run &quot;Attachment History&quot; field to function correctly.</td>
<td>Y</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
<td>Value</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>AUTO_LOGOUT_ON_SERVER_DISCONNECT</td>
<td>The ALM server can disconnect an ALM client session. This occurs if: * The site administrator disconnects the session. * The session is automatically disconnected, according to the inactivity time interval setting. For more information on setting a timeout, see WAIT_BEFORE_DISCONNECT. The ALM client machine displays a message, informing the user that the session has been disconnected. If this parameter is set to Y, the client machine also automatically performs logout actions and returns the user to the ALM Login window. This ensures that the user does not continue to work in a session which is no longer connected to the server. If this parameter is set to N, no logout action is performed on disconnect.</td>
<td>Y</td>
</tr>
<tr>
<td>CUSTOM_HELP_MENU_LINK</td>
<td>This parameter enables you to add a custom entry to the Help menu that links to a URL address. For example, if you want to allow users local access to ALM product movies, you can save the movies on the server, and create a link to a movies index page. Use the following syntax to enter a parameter value: <code>&lt;link alias&gt;</code>;<code>&lt;URL&gt;</code>, where the values of both <code>&lt;link alias&gt;</code> and <code>&lt;URL&gt;</code> are surrounded by quotation marks, and separated by a semicolon. For example, set the value of the parameter to &quot;MyBusiness - Online Help Page&quot;;&quot;<a href="http://mybusiness/ALMHelp">http://mybusiness/ALMHelp</a>&quot;. The above example adds the MyBusiness - Online Help Page entry to the Help menu. Clicking the entry opens a custom Web page located at <a href="http://mybusiness/ALMHelp">http://mybusiness/ALMHelp</a>.</td>
<td>Tx3 Support; <a href="https://support.tx3services.com/portal/home">https://support.tx3services.com/portal/home</a></td>
</tr>
<tr>
<td>DISABLE_COMMAND_INTERFACE**</td>
<td>If this parameter is set to Y (default), only users belonging to the TDAdmin group can use the OTA Command object. If it is set to N, any user can use it. If it is set to ALL, no users can use it. For more information, refer to the ALM Open Test Architecture API Reference.</td>
<td>N</td>
</tr>
<tr>
<td>ENABLE_AUDIT</td>
<td>Enabling or disabling audit ALM events</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>If this parameter is set to &quot;Y&quot;, the logs are stored in the \log\Audit folder. The logs include the following information: Logins to Site Administration and ALM Logouts from Site Administration and ALM User operations: • Create • Delete • Disable • Enable • Update • Change password User group operations: • Create • Delete</td>
<td></td>
</tr>
<tr>
<td>ENABLE_COLUMN_VISIBILITY_TRACKING</td>
<td>If this parameter is set to &quot;Y&quot; then column visibility changes made via workflow will affect trees/grids and column selection (will cause the relevant fields to be hidden).</td>
<td>Y</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
<td>Value</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>ENABLE_STEPS_HISTORY</td>
<td>When set to Y, this command allows project administrators (TDAdmins) to select the History checkbox on system-level step fields. (NOTE: Does not support enabling history on user-defined step fields.)</td>
<td>Y</td>
</tr>
<tr>
<td>ENABLE_CREATE_LEGACY_EXCEL_REPORT</td>
<td>Determines whether legacy Excel Reports should be included in the 'New Analysis Item' menu.</td>
<td>Y</td>
</tr>
<tr>
<td>EXCEL_ADDIN_GROUP</td>
<td>This parameter specifies a user group name, only the users who is in this group have permission to access the Excel add-in.</td>
<td>Requirement Author, Test Designer</td>
</tr>
<tr>
<td>EXTENDED_MEMO_FIELDS</td>
<td>This parameter extends the maximum number of memo-type user-defined fields per entity to 15 instead of five. The default value is N. To extend the number of memo-type fields, set the parameter to Y.</td>
<td>Y</td>
</tr>
<tr>
<td>FTP_PORT</td>
<td>The port number of the FTP service that enables you to browse ALM project repositories. For more information, see Browsing the Project Repository. Recommended values are 21 or 2121. Note: Defining the parameter starts the FTP service on the specified port. Reconfiguring the parameter restarts the FTP service. Deleting the parameter stops the FTP service.</td>
<td>21</td>
</tr>
<tr>
<td>GRAPH_RESULT_LIFESPAN</td>
<td>The number of minutes a cached graph result is valid.</td>
<td>1</td>
</tr>
<tr>
<td>LIBRARY_FUSE</td>
<td>This parameter indicates max library size to handle it without performance hit on the customer.</td>
<td>2500</td>
</tr>
<tr>
<td>LOCK_TIMEOUT</td>
<td>The maximum number of hours that ALM objects can remain locked. After this time the lock is removed. By default, the value is set to 10 hours.</td>
<td>2</td>
</tr>
<tr>
<td>MAX_QUERY_LENGTH</td>
<td>This parameter enables you to change the maximum query length (number of letters). It includes the parameters and is valid for Oracle and for SQL. The default value is 10000000. Some reports are too large for the default limit query size to handle. In such cases, this parameter should be set to 100000000.</td>
<td>5000000</td>
</tr>
<tr>
<td>REPORT_RESULT_LIFESPAN</td>
<td>The number of minutes a cached project report result is valid.</td>
<td>1</td>
</tr>
<tr>
<td>REQUIREMENTS_LIBRARY_FUSE</td>
<td>This parameter indicates max requirements amount in library to handle it without performance hit on the customer.</td>
<td>6000</td>
</tr>
<tr>
<td>REQUIREMENT_REVIEWED_FIELD_AUTOMATIC_UPDATE</td>
<td>If this parameter is set to Y (default), then any change to a requirement field automatically sets the Reviewed (RQ_REQ_REVIEWED) field to Not Reviewed. If it is set to N, then a change to a requirement field does not affect the value of the Reviewed field.</td>
<td>N</td>
</tr>
<tr>
<td>TRACEABILITY_MATRIX_CORE_</td>
<td>Requirement Module Traceability Matrix Upper Limit</td>
<td>6000</td>
</tr>
<tr>
<td>REQUIREMENTS_FUSE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
<td>Value</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>USER_PROPERTIES_ACCESS_LEVEL</td>
<td>By default, the parameter is hidden and is with value &quot;ADMINS_MINIMAL&quot;. Possible values for &quot;USER_PROPERTIES_ACCESS_LEVEL&quot; parameter: &quot;ALL&quot; - All the fields in users table will be available if requested. &quot;MINIMAL&quot; - All the fields in users table except user password will be available if requested. &quot;ADMINS_ALL&quot; - All the fields in users table will be available if requested but only when the login user is Site Admin/Project Admin, otherwise error message will be responded. &quot;ADMINS_MINIMAL&quot; - All the fields in users table except user password will be available if requested but only when the login user is Site Admin/Project Admin, otherwise error message will be responded.</td>
<td>MINIMAL</td>
</tr>
<tr>
<td>WAIT_BEFORE_DISCONNECT</td>
<td>The time interval in minutes that the ALM client can be inactive before it is disconnected from the server. Disconnecting the client enables the license to be used by another ALM user. By default, the value is set to 600 minutes. For performance reasons, it is recommended to set a value of at least 60 minutes. If you set the value to -1, ALM will not disconnect, regardless of how long the client is inactive.</td>
<td>90</td>
</tr>
<tr>
<td>WORD_ADDIN_GROUP</td>
<td>This parameter specifies a user group name, only the users who is in this group have permission to access the Word add-in.</td>
<td>&lt;blank&gt;</td>
</tr>
</tbody>
</table>
msiexec /i "drive:\path\to\VERA Windows Client Installer.msi" /quiet

4. Exit the command prompt.

3 VERA Deployment

The VERA Project Template is imported in Site Administration as a QCP file. ALM Edition customers will import a Template Project and will create VERA projects from the Template project. ALM Quality Center Edition customers will import a project and will create VERA projects from the Staging project.

3.1 ALM Edition

3.1.1 Import VERA template

1. In Site Administration, click the Site Projects tab.
2. Click the Create Domain button. The Create Domain dialog box opens.
3. Enter TX3_VERA as Domain Name and click OK.
4. Select the TX3_VERA domain.
5. Click the Create Template button.
6. Select Create a template by importing data from exported template file. The Create Template: Select File for Import dialog box opens.
7. Click the browse button to the right of the Import template from box to locate the template project that you want to import. The Open dialog box opens.
8. Locate the directory and select the <ALM Project Export file> that you want to import. Click Open. The selected file is displayed in the Import template from box.
9. Click Next.
10. Under Database Type, select Oracle or MS-SQL. The default values defined for the domain are displayed for Server Name, DB Admin User, and DB Admin Password. If additional database servers are defined, you can select another name from the Server Name list.
11. Click Next. If your selected database server does not have the text search feature enabled, a message box opens. The message indicates that after this process completes, you can enable the text search feature.
12. If you are creating an Oracle template, a dialog box opens with Oracle TableSpace options. In the Create in TableSpace box, select a storage location that has sufficient space to store the new template. You should not use UNDO as the storage location. In the Temporary TableSpace box, select a temporary storage location that has sufficient space to store the new template.
13. Click Next.
14. The Add Template Administrators dialog box opens. Select the users you want to assign as template administrators, and click the Add Selected Users button.
15. Click Next.
16. Select Activate template to activate the template.
17. Select Enable Versioning to enable version control for the template.
18. Click Create. The new VERA template is added to the Projects list under Template Projects in the TX3_VERA domain.

3.1.2 Create VERA project:

1. In Site Administration, click the Site Projects tab.
2. Select the domain in which you want to create the project.
3. Click the Create Project button. The Create Project dialog box opens.
4. Select Create a project from a template. Creates a new project by copying the customization of an existing template project, but not the project data.
5. Click Next.
6. The Use Template Customization dialog box opens.
7. Select the TX3_VERA domain and VERA template you want to use to create the project.
8. Select Link the project to the selected template to link the new project to the template.
9. In the Project Name box, type a name for your project. The project name cannot be longer than 30 characters and can include only letters, digits, and underscores.
10. Click Next.
11. Under Database Type, select Oracle or MS-SQL.
12. By default, the default values defined for the domain are displayed for Server Name, DB Admin User, and DB Admin Password. If additional database servers are defined, you can select another name from the Server Name list.
13. Click Next.
14. If you are creating an Oracle Project, a dialog box opens with Oracle TableSpace options. In the Create in TableSpace box, select a storage location that has sufficient space to store the new template. You should not use UNDO as the storage location. In the Temporary TableSpace box, select a temporary storage location that has sufficient space to store the new template.
15. Click Next.
17. Select the users you want to assign as project administrators, and click the Add button.
18. Click Next.
19. Do not Enable any extensions.
20. Click Next.
21. Select Activate project to activate the project.
22. Select Enable Versioning to enable version control for the project.
23. Click Create. The new project is added to the Projects list.

3.2 ALM Quality Center Edition

3.2.1 Import VERA staging project
1. In Site Administration, click the Site Projects tab.
2. Click the Create Domain button. The Create Domain dialog box opens.
3. Enter TX3_VERA as Domain Name and click OK.
4. Select the TX3_VERA domain.
5. Click the Create Project button.
6. Select Create a project by importing data from exported project file. The Create Project: Select File for Import dialog box opens.
7. Click the browse button to the right of the Import project from box to locate the project that you want to import. The Open dialog box opens.
8. Locate the directory and select the <ALM Project Export file> that you want to import. Click Open. The selected file is displayed in the Import project from box.
9. Click Next.
10. Under Database Type, select Oracle or MS-SQL. The default values defined for the domain are displayed for Server Name, DB Admin User, and DB Admin Password. If additional database servers are defined, you can select another name from the Server Name list.
11. Click Next. If your selected database server does not have the text search feature enabled, a message box opens. The message indicates that after this process completes, you can enable the text search feature.
12. If you are creating an Oracle project, a dialog box opens with Oracle TableSpace options. In the Create in TableSpace box, select a storage location that has sufficient space to store the new template. You should not use UNDO as the storage location. In the Temporary TableSpace box, select a temporary storage location that has sufficient space to store the new template.

13. Click Next.

14. The Add Project Administrators dialog box opens. Select the users you want to assign as project administrators, and click the Add Selected Users button.

15. Click Next.

16. Select Activate project to activate the project.

17. Select Enable Versioning to enable version control for the project.

18. Click Create. The new VERA Staging project is added to the Projects list under Projects in the TX3_VERA domain.

3.2.2 Create VERA project

1. In Site Administration, click the Site Projects tab.
2. Select the domain in which you want to create the project.
3. Click the Create Project button. The Create Project dialog box opens.
4. Choose the Create a project by copying data from an existing project option.
5. Click Next.
6. Under Select Project To Copy From, select the TX3_VERA domain and Vera staging project you want to copy and click Next.
7. Select Customization, Requirements Users, and Groups.
8. Click Next.
9. In the Project Name box, type a name for your project. The project name cannot be longer than 30 characters and can include only letters, digits, and underscores.
10. In the In Domain box, select a domain.
11. Click Next.
12. Under Database Type, select Oracle or MS-SQL.
13. By default, the default values defined for the domain are displayed for Server Name, DB Admin User, and DB Admin Password. If additional database servers are defined, you can select another name from the Server Name list.
14. Click Next.
15. If you are creating an Oracle Project, a dialog box opens with Oracle TableSpace options. In the Create in TableSpace box, select a storage location that has sufficient space to store the new template. You should not use UNDO as the storage location. In the Temporary TableSpace box, select a temporary storage location that has sufficient space to store the new template.
16. Click Next.
17. The Add Project Administrators dialog box opens.
18. Select the users you want to assign as project administrators, and click the Add button.
19. Click Next.
20. Do not Enable any extensions.
21. Click Next.
22. Select Activate project to activate the project.
23. Click Create. The new project is added to the Projects list.
3.3 Update Sprinter Settings

1. Login to Project as TDAdmin.
2. Enter the Project Customization area.
3. Open the Sprinter settings.
4. Set the following settings:
   
   • Enable manual test to run with: Manual Runner
   • Screen Captures: Enable storing of all images for a failed test
   • Allow Macros: Checked
   • Allow Data Injection: Checked
   • Allow Mirroring: Checked
   • Allow editing steps in Sprinter Run mode: Unchecked
   • Allow attaching movies to defects: Unchecked
   • Add snapshot link to the step’s actual/expected result fields: Unchecked
   • Capture the actual step image automatically when the step status changes: Unchecked

3.4 Upload Policy Files

1. Login to Project as TDAdmin or Policy Administrator.
2. If this project was created from a template, a message box opens stating "This project is not configured with a VERA Records Management policy. Editing functionality has been disabled. Please contact your system administrator."
3. Click Ok to continue.
4. Select and Check Out the Requirements folder (root Requirement in the Requirements Module).
5. Select the Attachments tab and click the File button.
6. The Open dialog box opens, enabling you to add a file attachment to the Requirements folder.
7. Select the Approval Policy.json file and click Open to attach the json file to the requirement.
8. Click the File button.
9. Select Notification Policy.json file and click Open to attach the json file to the requirement.
10. Click the File button.
11. Select Records Management Policy.json file and click Open to attach the json file to the requirement.
12. Check in the Requirements folder.
13. Click the Go toolbar button.
14. The VERA Action Menu opens, click the Version Information link at the bottom of the dialog to see the VERA Policy and component versions.