GForge® AS Project Administrator Manual

Version 5.4

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Section 1 – Project Administration Tab

Use the GForge Project Admin screen to maintain Project members, edit User Roles, view miscellaneous Project information, edit the Trove Categorization for a Project, and access other administrative tools.

1.1 Project Administration Overview

When you first register your Project, and it is approved, there are a small number of steps you should take to customize your Project. GForge automates all the hard processes, such as creating mailing lists, CVS and SVN trees, and controlling access to these. However, you must define which mailing lists, Forums, Trackers, Roles, and users you want to have in your Project using the admin screens.

1.2 Project Administration Process

This section describes how to configure your Project.

1. Click the Admin tab and choose the **Forum**, **Tracker**, **Documents**, **News**, **Files**, **CVS**, **Cruise Control**, **Trove Categorization**, and **Mailman** links on the left navigation. These screens allow you to create additional information as required. Once these are all created, edit the roles for your Project.

2. Click the Admin tab. Select each **Role** and configure the access levels. Each item in the role can be edited to set access levels to your Project. Make the required adjustments and then save the changes. Repeat for each role.

3. Select **Edit Observer Permissions** to customize the settings for non-members of your Project. You can choose to make the entire Project private, or just pieces of it. If the entire Project is private, all of the pieces will be private as well.

4. Next, add users to your Project and assign the desired Role to each user.
5. Select **Browse Project Join Requests** to accept or reject users that desire to join your Project.
6. Select **Manage Project's Parent** to allow or delete associated Parent Projects.

   ❖ **Note:** Allow up to 30 minutes for role changes and mailing lists to be propagated to the server.

1.3 Maintaining Projects

To view the Project Admin screen:

1. Click the **Admin** tab in your Project.

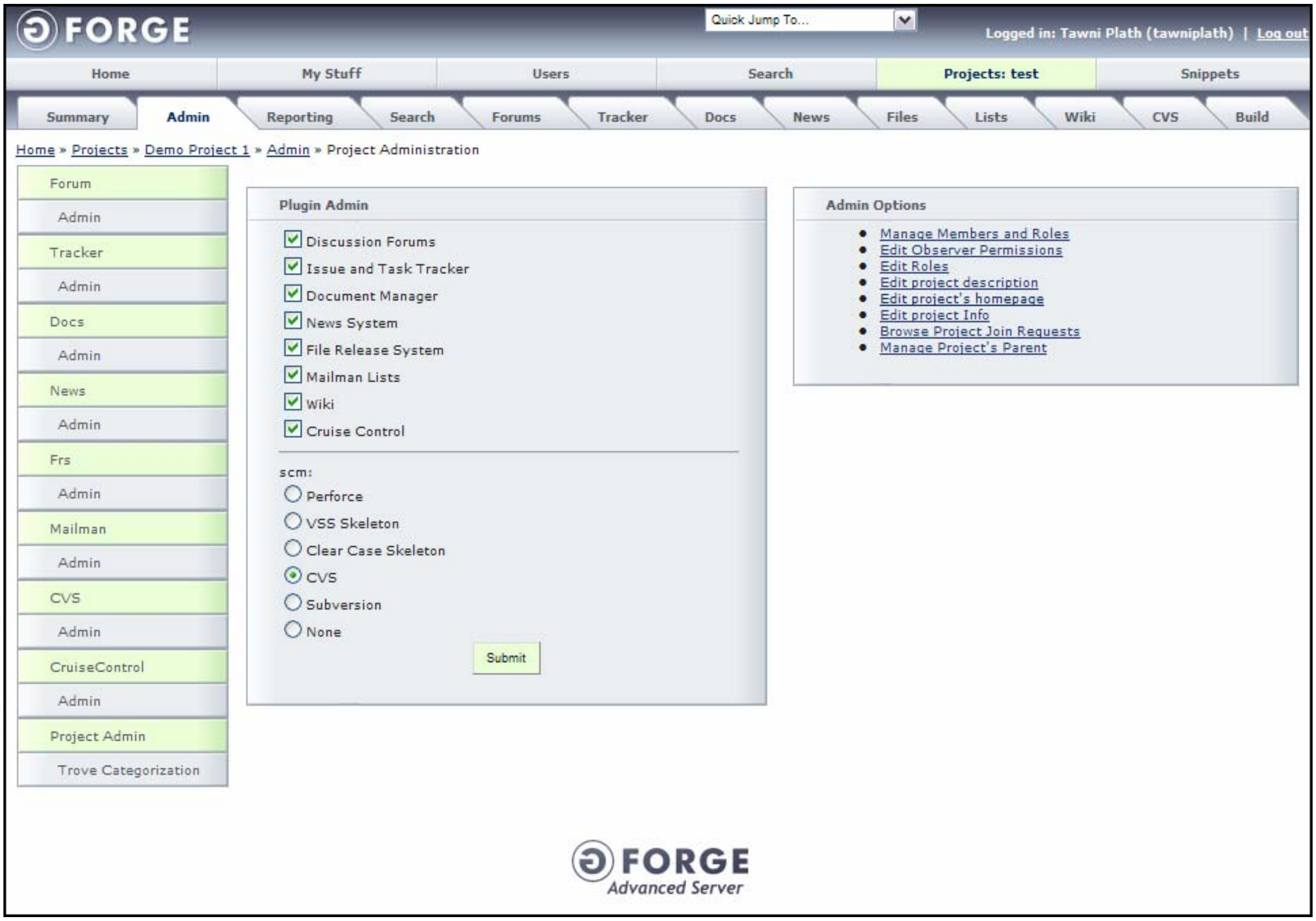

Figure 1-1. Project Admin

1.3.1 Displaying Tabs in a Project

To view a tab that is not currently displayed:

1. Click the **Admin** tab for your Project.
2. Select the **checkbox** for the tabs that you desire to display.
   - **Discussion Forums** – Displays the Forum tab for this Project.
   - **Issue and Task Tracker** – Displays the Tracker tab for this Project.
   - **Document Manager** – Displays the Docs tab for this Project.
   - **News System** – Displays the News tab for this Project.
   - **File Release System** – Displays the Files tab for this Project.
   - **Mailman Lists** – Displays the Lists tab for this Project.
   - **Wiki** – Displays the Wiki tab for this Project.
   - **Cruise Control** – Displays the Cruise Control tab for this Project.

3. Select the type of Source Code Management (**SCM**) tab to display:
   - **Perforce –** Perforce tab displays.
   - **VSS Skelton** – VSS (Visual SafeSource) tab displays.
   - **ClearCase Skelton** – ClearCase tab displays.
   - **CVS** – CVS (Concurrent Versioning System) tab displays.
   - **Subversioning** – SVN tab displays.
   - **None** – No Source Code Management tab displays for this Project.
4. Click the **Submit** button.

1.4 Maintaining Project Members

This section details how to add, assign roles, and remove Project members. Project Members displays the list of all members in the Project.

1.4.1 Manually Adding a User to a Project

To manually add a user to a Project:

1. Click the **Admin** tab for your Project.
2. Click the **Manage Members and Roles** link.
3. Type the user name in the **Full name** field at the bottom of the user list.
4. Select a **Role** for the new user in the list box. Refer to Figure 1-2.
5. Click the **Search Users** link.
6. Enter the **user's name**.
7. Click the **Search** button.
8. Navigate to the user and click the **user's name**.
9. Select a **Role**.
10. Click the **Add User** button.

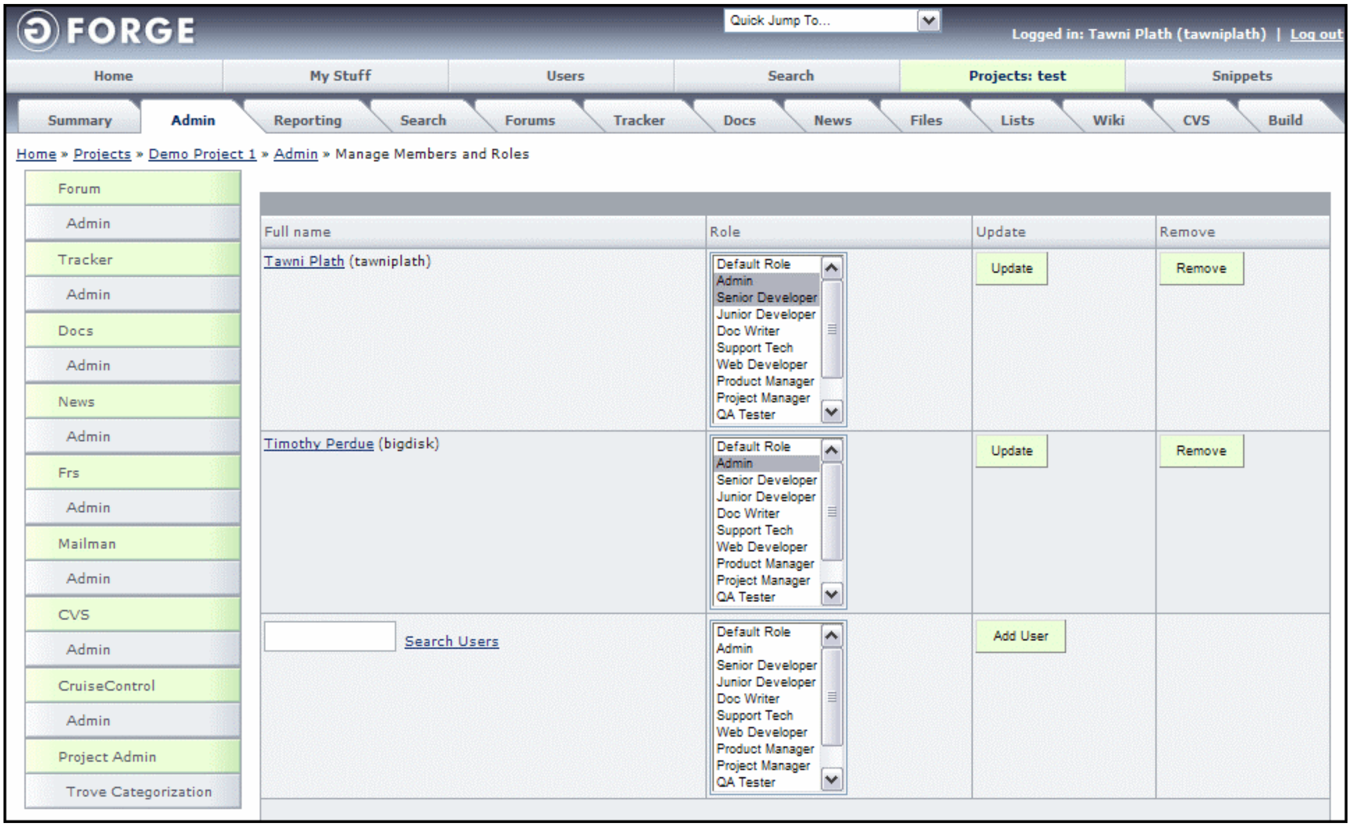

Figure 1-2. Project Members

Full Name – Unix User Name, User Name, and Login Name of the user. Click the User Name to view details.

Role – The role the user is assigned in this Project.

Update – Click to update a user's Role.

Remove – Removes the user from the Project.

Add User – Adds a new user associated with the selected Role.

1.4.2 Editing a User's Role

To edit existing user roles:

1. Click the **Admin** tab for your Project.
2. Click the **Manage Members and Roles** link.
3. Change the **Role** of the user. Refer to Figure 1-2.
4. Click **Update**.

1.4.3 Removing a User from a Project

To remove a user from a Project:

1. Click on the **Admin** tab for your Project.
2. Click the **Manage Members and Roles** link.
3. Click the **Remove** button next to the user to be removed. Refer to Figure 1-2.
   - ❖ **Note:** The user will be immediately removed without any further confirmation.

1.5 Maintaining Project Observers

This section details how to edit Project Observers. Users not validated as a Project member and users not currently logged into GForge have Observer privileges.

1.5.1 Editing Observers

To change the privileges of users that are NOT members in the Project:

1. Click on the **Admin** tab for your Project.
2. Click the **Edit Observer Permissions** link.

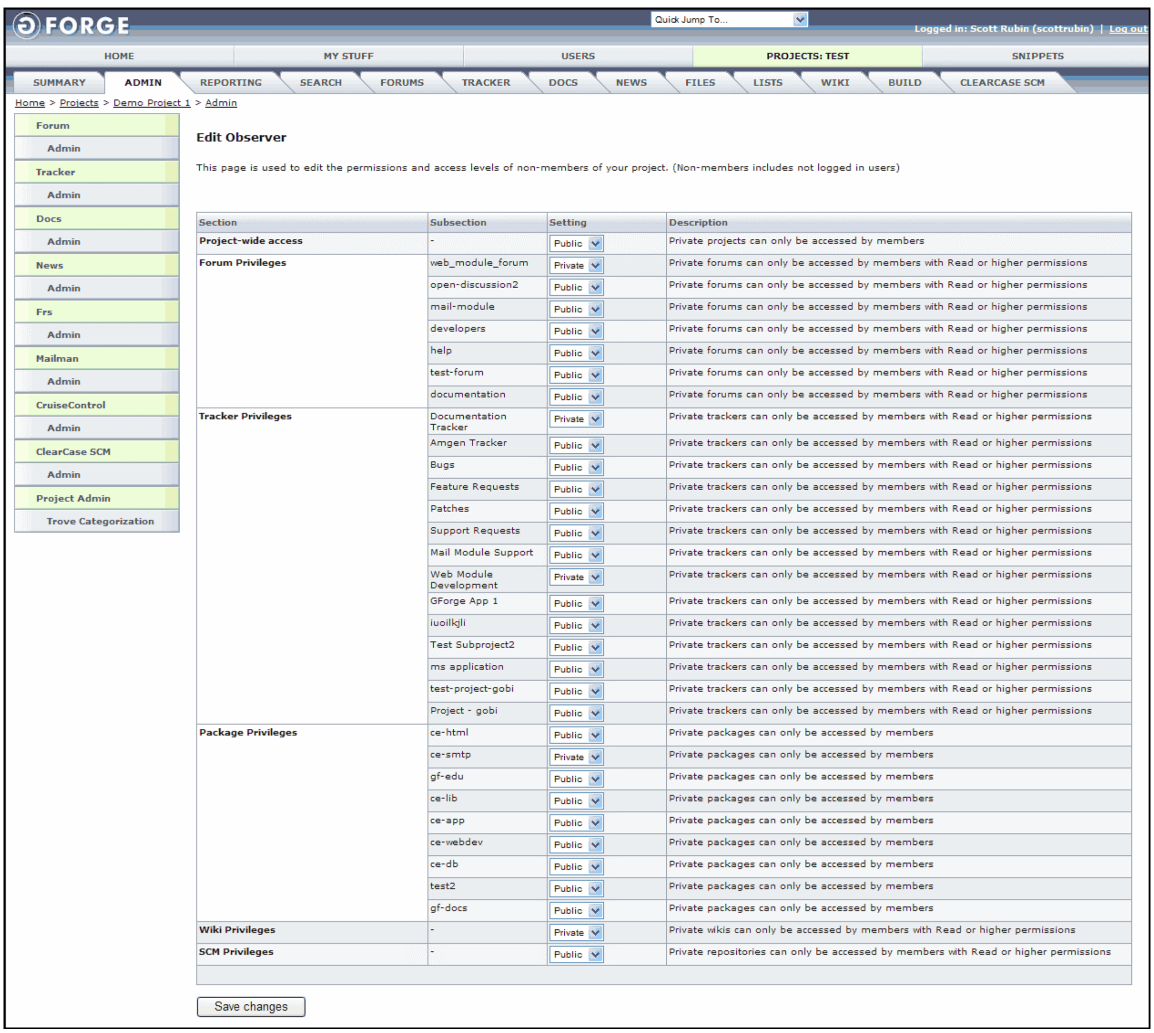

Figure 1-3. Edit Observer Permissions

3. Select the desired attribute for each **Section** from the **Settings** drop-down list boxes.
4. Click the **Save changes** button.

Section – The Edit Observer page contains a list of several Project sections. The specific items vary depending upon sections defined for the Project.

Subsection – Subsections related to the Project.

Setting – Each item can have either a Public or Private attribute. Forum and Tracker sections also have an Anonymous Posts allowed or NOT allowed attribute.

- ❖ **Note:** Sections with the Public attribute can be seen by users that are not members of the Project. Sections marked Private are hidden.

Description – Description of the Observers privileges.

Save changes – Click to edit the Observer.

1.6 Adding, Editing, and Deleting Roles

This section details how to edit existing user Roles and creating new Roles.

1.6.1 Adding a New Role

Add Role adds a custom role to the Role field.

1. Click on the **Admin** tab for your Project.
2. Click the **Edit Roles** link.

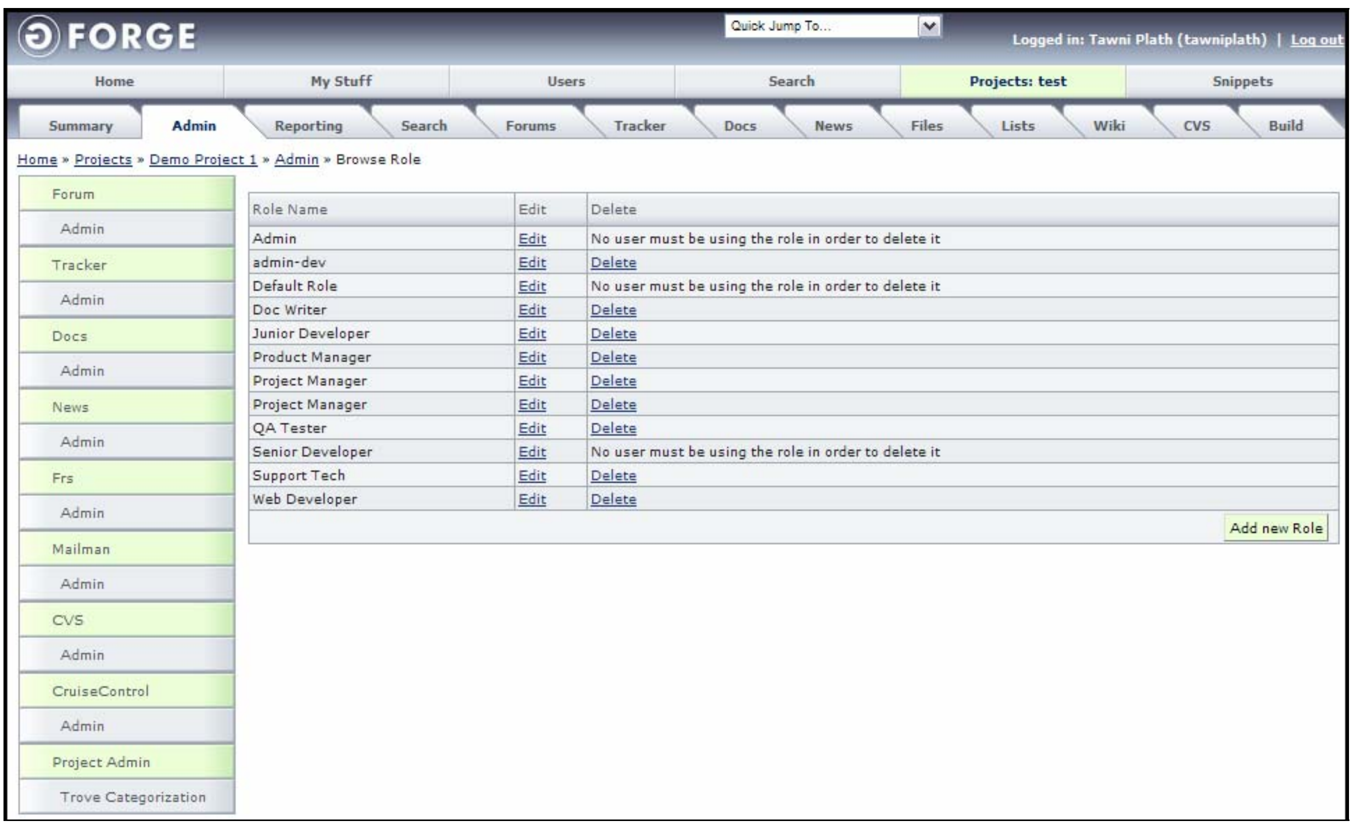

Figure 1-4. Edit Roles

3. Click the **Add new Role** button. Refer to Figure 1-5.
4. Enter a **Role Name**.
5. Select the **Settings** for this Role.
6. Click the **Save changes** button.

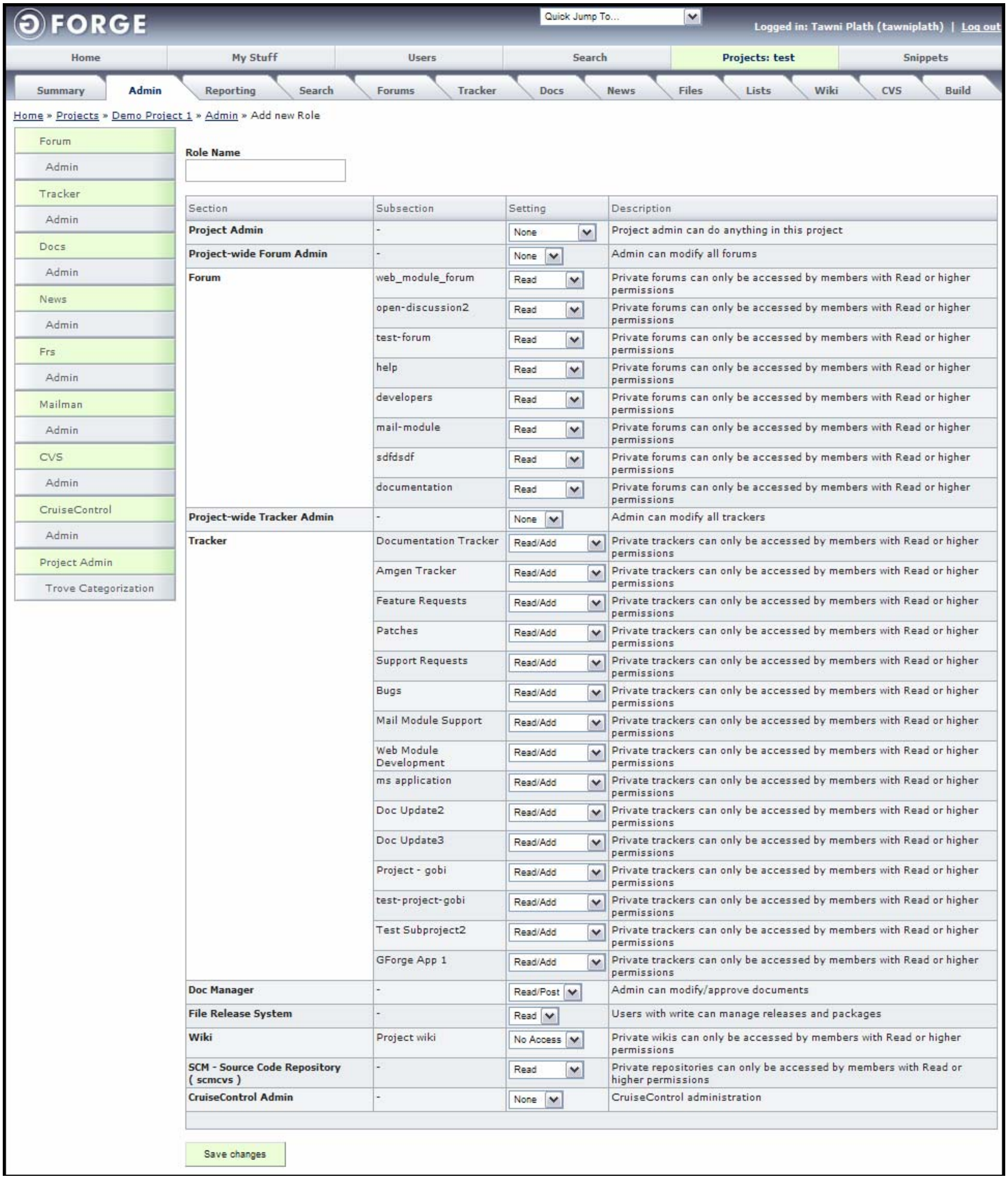

Figure 1-5. Add New Role

Section – Area of the Project the item is located.

Subsection – Specific section, such as a specific tracker or forum, in which to edit the permission.

Settings – Permissions you require for this area.

- **Project Admin** – Project Administrator access for the selected Role.
- **Admin** – Administrator access for the selected Role. They can add and edit items including editing Tracker settings.
- **None** – No access to the item is allowed for the entered Role. This is the lowest Role.
- **No Access** – No access to the item is allowed for the entered Role.
- **Read** – Read only access to the item is allowed for the entered Role.
- **Read/Add** – User with the entered role may read and add the item.
- **Write** – User with the entered role may read the item.
- **Edit** – User with the entered role may edit the item.
- **Post** – User with the entered role may post the item.
- **Assignee** – Displays in the list of assignees in a Tracker and they can add items to the tracker.
- **Assignee Admin** – All add, edit, and delete security rights. This is the highest level.

Description – Description of the role.

1.6.2 Editing a Role

When changing a user's Role for a Project, only the "default" Forums and Trackers update. When you add a Forum or Tracker, you must update each Role to set the Forum or Tracker. To edit an existing Role:

1. Click on the **Admin** tab for your Project.
2. Click the **Edit Role** link.

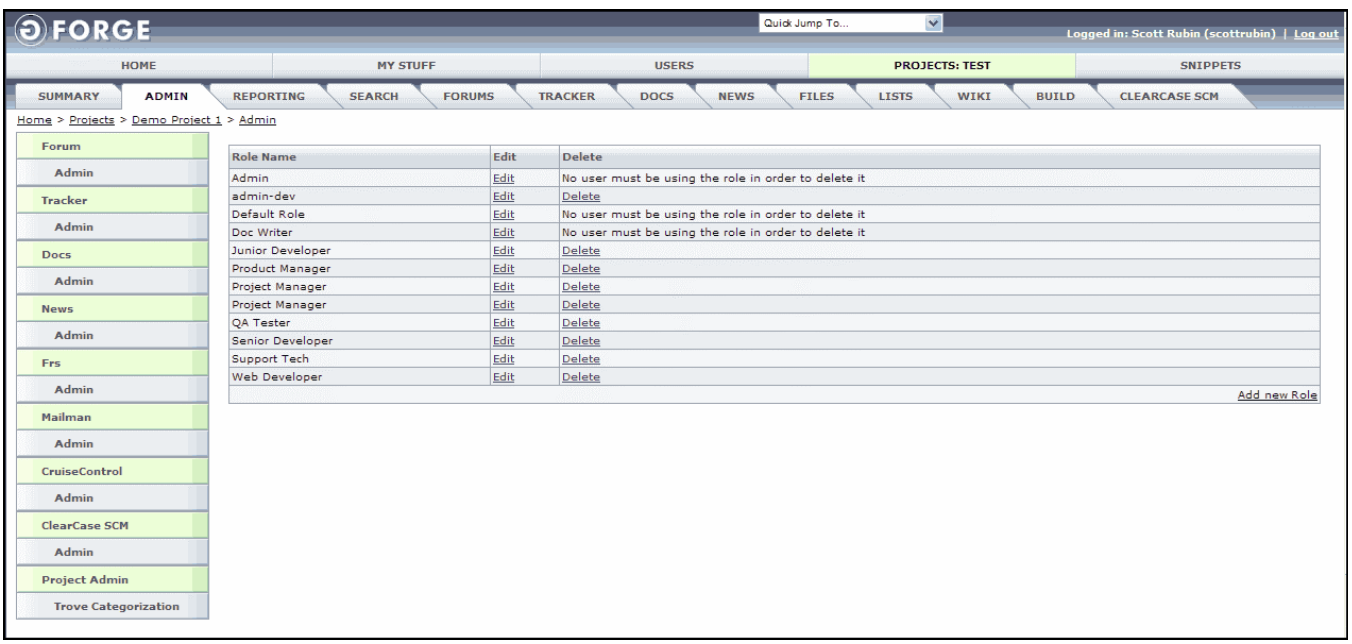

Figure 1-6. Edit Role

❖ **Note:** The Edit Role page contains a list of several Project sections. The specific items vary depending upon sections defined for the Project. Each item has a drop-down list box displaying the current Setting for the item. The permitted settings vary by item.

3. Click the **Edit** link next to the role you desire to edit.
4. Select the desired **value** for each section listed.
5. Click the **Save Changes** button.

1.6.3 Deleting a Role

To delete a Role in the Project:

1. Click on the **Admin** tab for your Project.
2. Click the **Edit Roles** link.
3. Click the **Delete** link next to the Role you desire to delete.

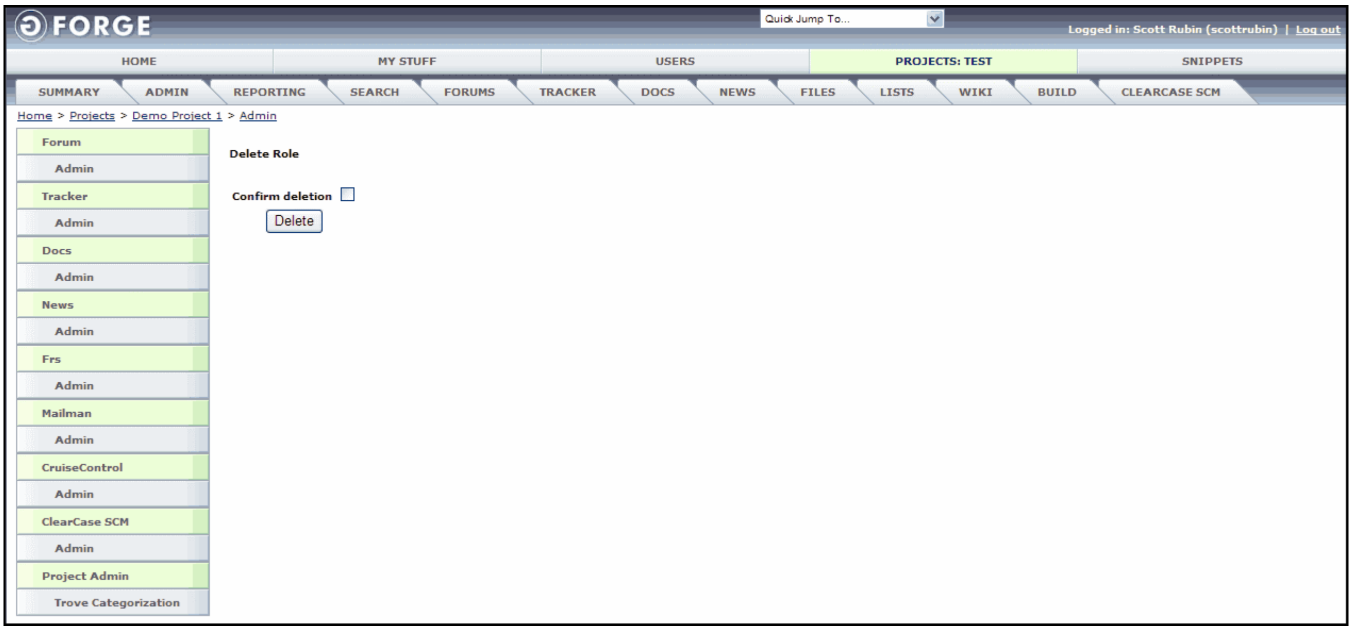

Figure 1-7. Delete Role

4. Select the **Confirm deletion** checkbox.
5. Click the **Delete** button.

1.7 Editing a Project Description

Edit Project Description allows you to edit the description of the current Project. To edit the Project description:

1. Click on the **Admin** tab for your Project.
2. Click **Edit Project description** on the Project summary page.

Figure 1-8. Edit Project Description

3. Change the **Description** of the Project.
4. Click the **Update** button to submit the changes to the GForge database.

1.8 Editing the Project Home Page

The Project Home Page appears at the bottom of the page. To edit the Project Description:

1. Click on the **Admin** tab for your Project.
2. Click the **Edit project's homepage** link.

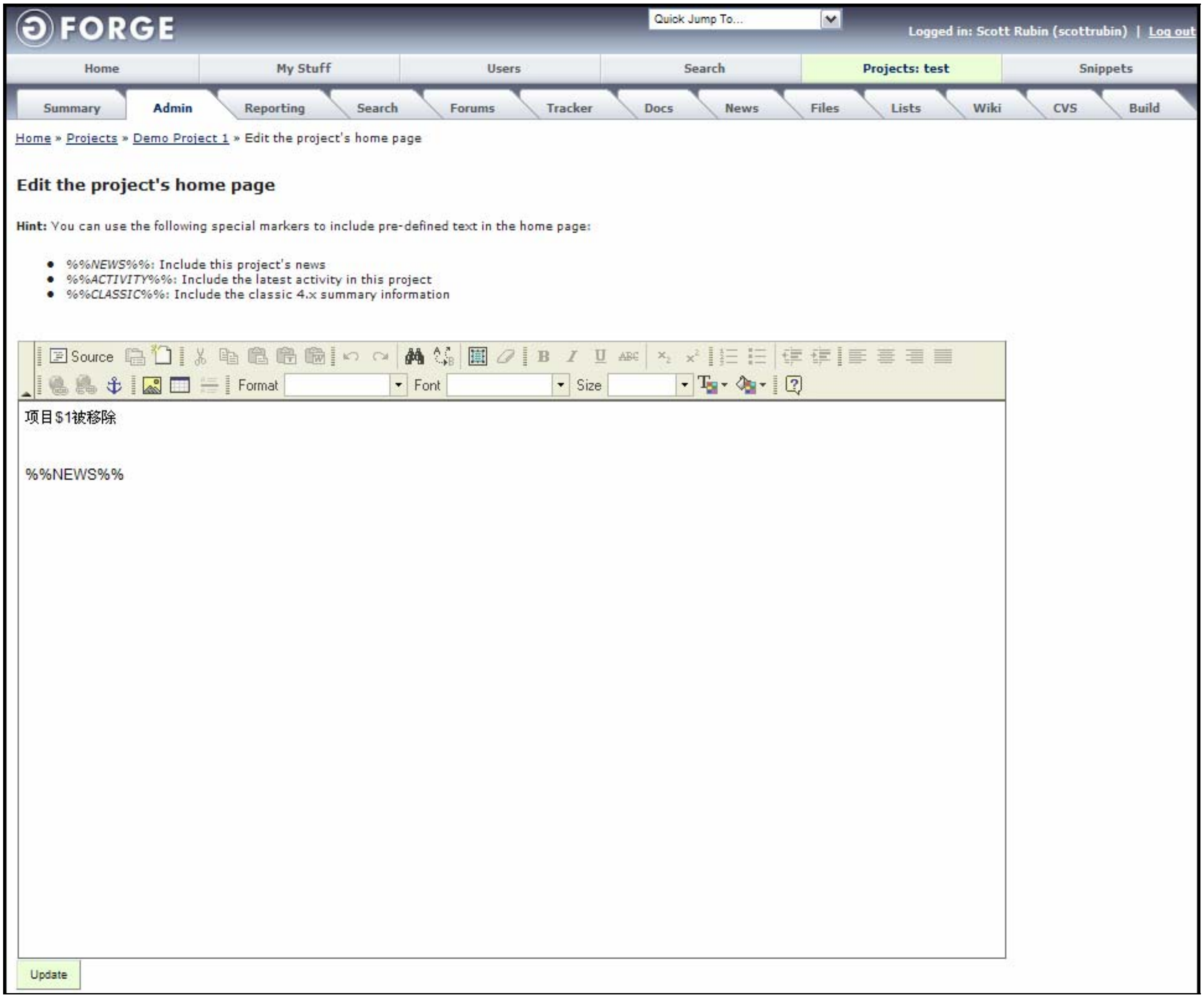

Figure 1-9. Edit Project Home Page

3. **Edit** the Homepage.
4. Click the **Update** button.

1.9 Editing Project Information

Edit Project Info allows you to edit the Project name and Homepage Uniform Resource Locator (URL). To edit the Project information:

1. Click the **Admin** tab for your Project.
2. Click the **Edit project Info** link.
3. Edit the **Full Name** the Project. Refer to Figure 1-10.
4. Edit the **Account name**, which is the UNIX Project name entered when the Project was created.
5. Edit the **Homepage URL**, which is the Uniform Resource Locator where the Homepage of this Project resides.
6. Click the **Save changes** button.

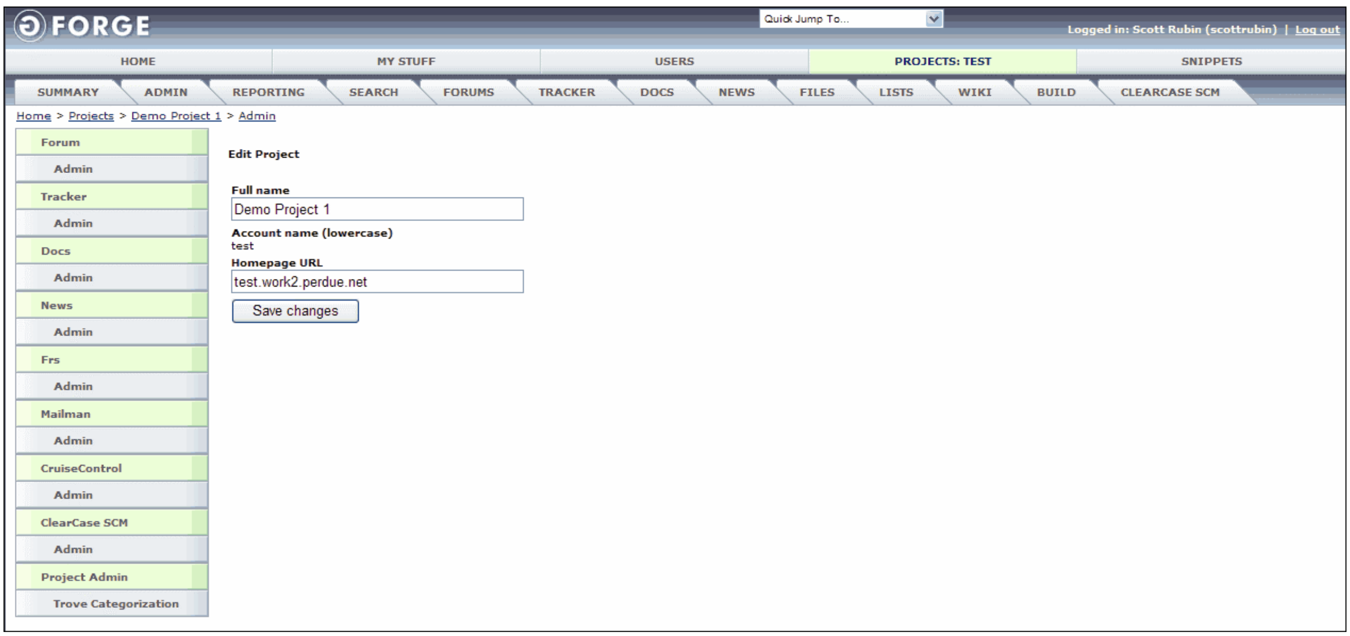

Figure 1-10. Edit Project Info

1.10 Browse Project Join Requests

To view the a users that desire to join a Project:

1. Click the **Admin** tab for your Project.
2. Click the **Browse Project Join Requests** link. Refer to Figure 1-11.

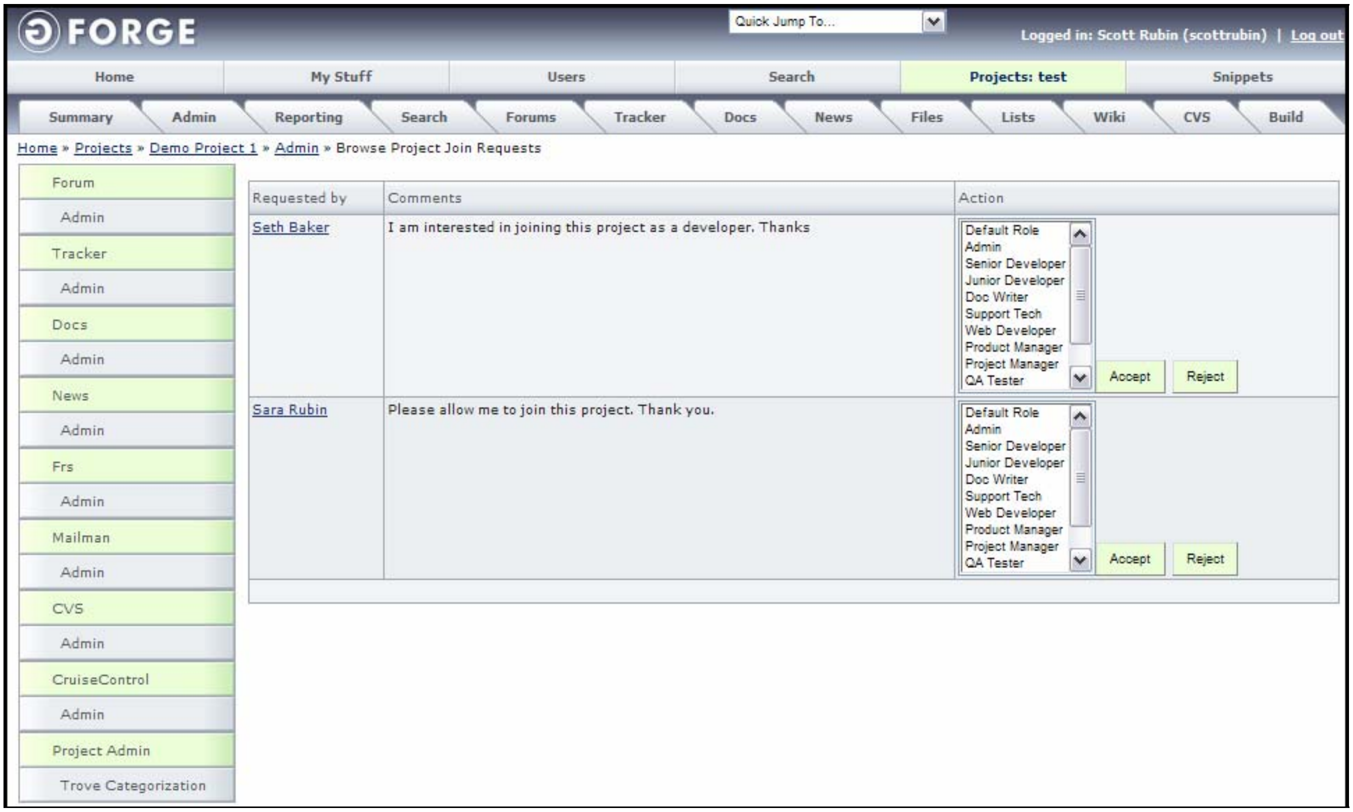

Figure 1-11. Browse Project Join Requests

1.10.1 Accepting a User to Join a Project

To view the a users that desire to join a Project:

1. Click the **Admin** tab for your Project.
2. Click the **Browse Project Join Requests** link. Refer to Figure 1-11.
3. Select the user's role in the **Action** field drop-down list box.
4. Click the **Accept** button next to the user's name to allow them to join the Project.

1.10.2 Rejecting a User to Not Join a Project

To view the a users that desire to join a Project:

1. Click the **Admin** tab for your Project.
2. Click the **Browse Project Join Requests** link. Refer to Figure 1-11.
3. Click the **Reject** button next to the user's name to allow them to join the Project.

1.11 Manage Project's Parent

You can associate each Project with a Parent Project to form a hierarchical association between Projects.

❖ **Note:** Child Projects inherit users and permissions from Parent Projects all the way up the hierarchy. Each user inherits the maximum permission from any Parent Project. For example, if a user does not have SCM commit privileges in a Child Project, but does have them in a Parent Project, the user will have commit privileges in all Child Projects.

To view or delete a Project's Parent:

1. Click the **Admin** tab for your Project.
2. Click the **Manage Project's Parent** link.
3. Click the **Remove** link to remove this Project from the parent Project.

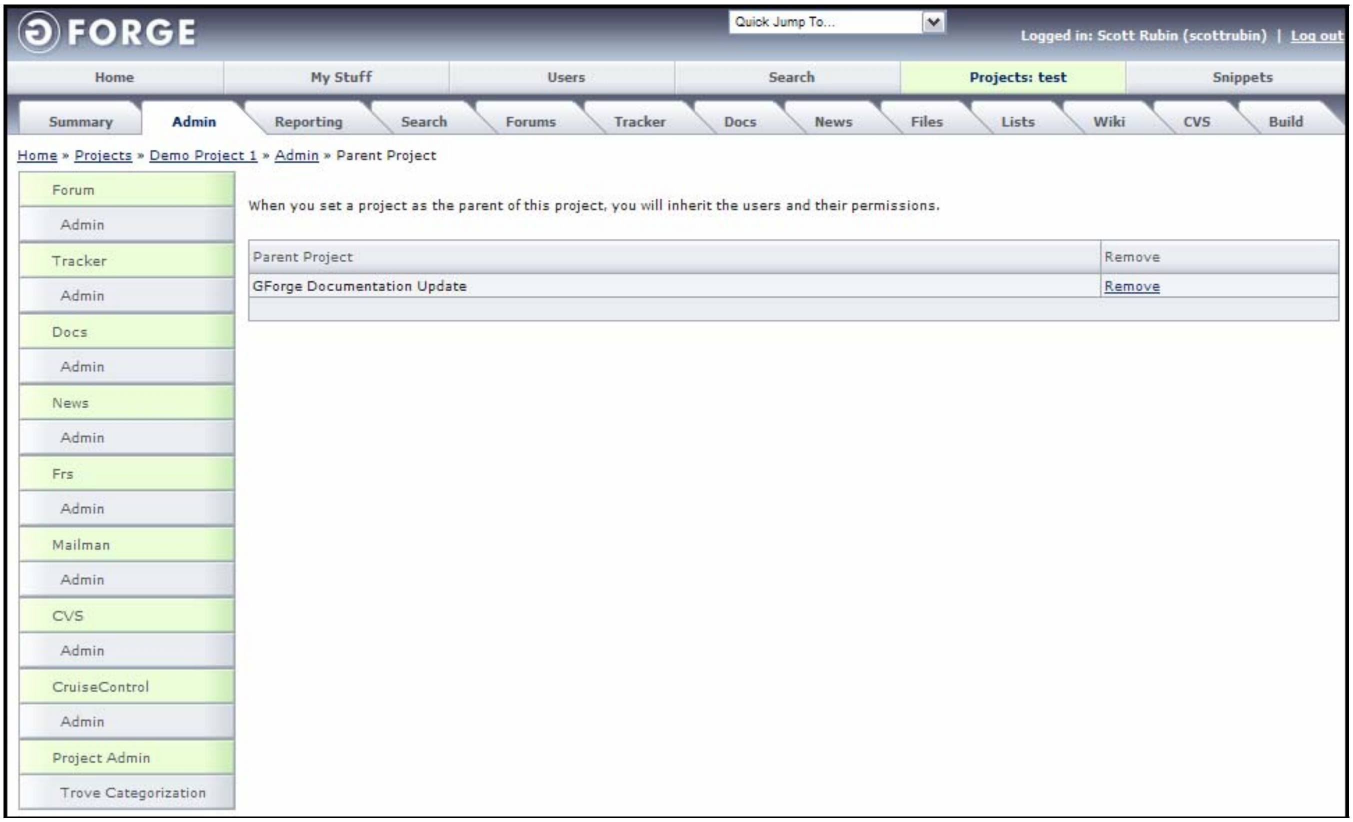

Figure 1-12. Manage Project's Parent

1.12 Trove Categorization

Click this command to view the Edit Trove Categorization page. The Project Tree (Trove Tree Map) is a Project classification type system so Projects can be easily located by different criteria. By default, this includes Development Status, Environment, Intended Audience, License, Natural Language, Operating System, Programming Language, and Topic. Other Project Types can be setup by the Site Administrator.

- ❖ **Note:** Projects should be categorized in the most specific locations available in the Trove map. Simultaneous categorization in a specific category AND a parent category results in only the more specific categorization being accepted.

- ❖ **Note:** Changes to Trove categorization may not be updated in the Project tree immediately. An intensive daily process runs which re-calculates numbers of Projects in the tree.

To categorize your Project using the Trove map:

1. Click the **Admin** tab for your Project.
2. Click the Project Admin **Trove Categorization** button in the left menu bar.
3. **Select** your options from the drop-down list boxes.
4. Click the **Submit** button.

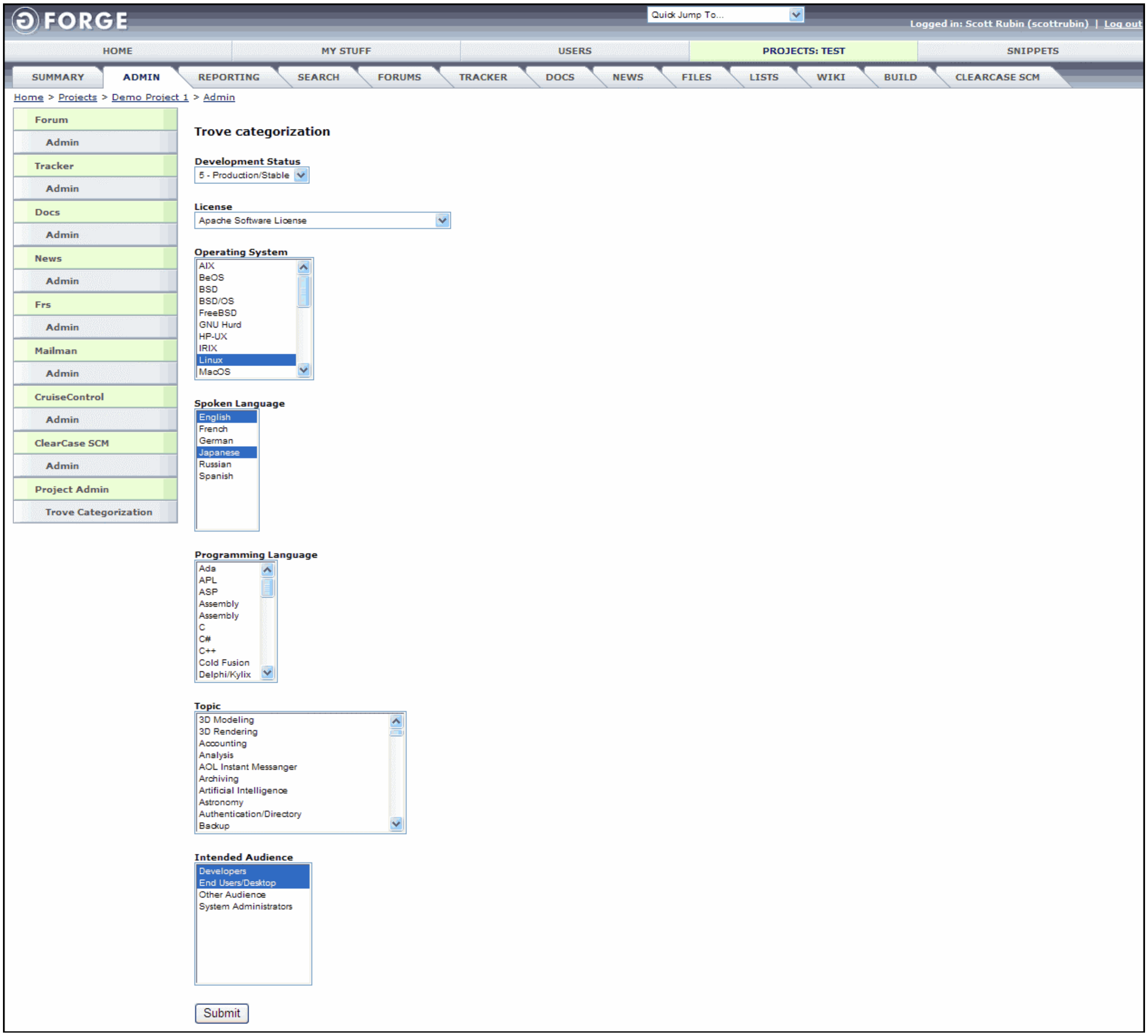

Figure 1-13. Trove Categorization

Development Status – Current status of your Project.

License – Select a **License** for your software. If you selected Other/Proprietary License, provide an explanation along with a description of your license.

❖ **Note:** Other licenses may not be approved and it may take additional time to make a decision for such Projects. All licenses must be compatible with the Open Source definition.

Operating System – Operating system for which your Project is created.

Spoken Language – Language for which your Project is created.

Programming Language – Programming language in which your Project is written.

Topic – Basic topic about your Project.

Intended Audience – Audience your Project is intended.

Submit – Submits your Project for approval.

1.13 Hierarchical Parent Projects

You can associate each Project with a Parent Project to form a hierarchical association between Projects.

- **Note:** Child Projects inherit users and permissions from Parent Projects all the way up the hierarchy. Each user inherits the maximum permission from any Parent Project. For example, if a user does not have SCM commit privileges in a Child Project, but does have them in a Parent Project, the user will have commit privileges in all Child Projects.

To associate a Project with a parent Project:

1. Select your **Project**.
2. Click the **Admin** link.
3. Click the **Manage Project's Parent** in the Admin Options frame.
4. Click the **Project** with which you desire to become the Parent Project.

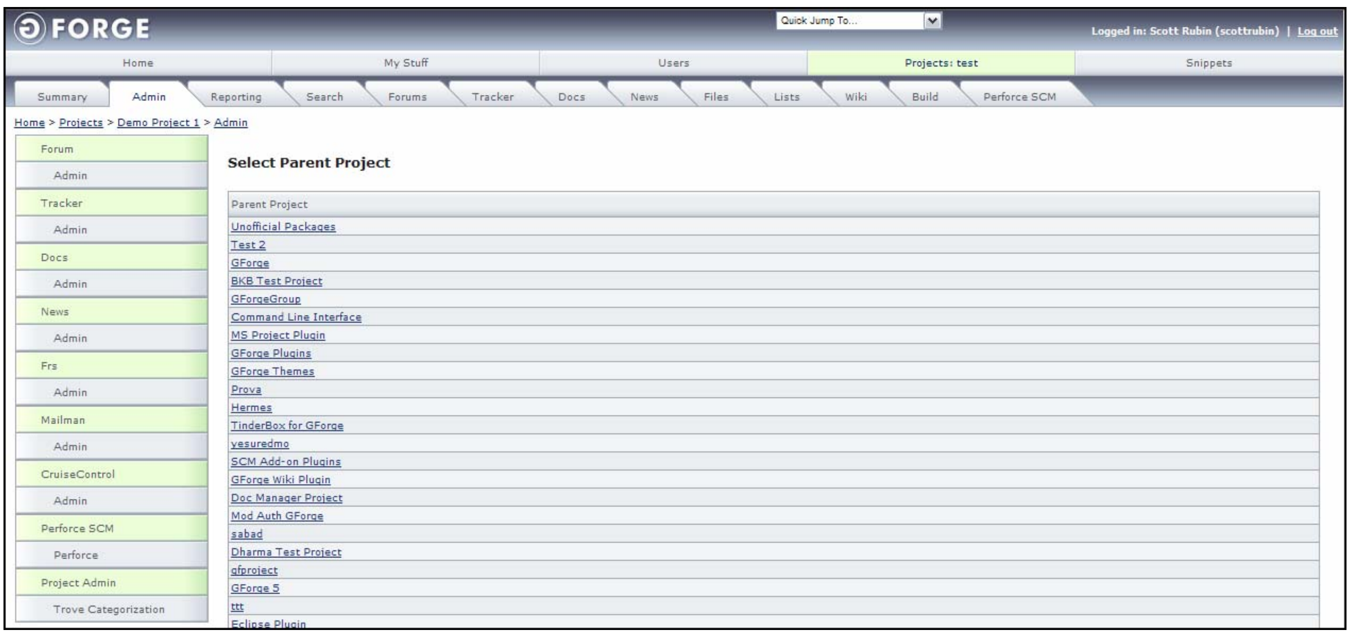

Figure 1-14. Parent Project

Section 2 – Forums

Forums can be accessed from the Project Summary page or the Project's Forums tab. Use Forums to facilitate discussions between users. When a Project is created, some Forums may be automatically created, depending on which template Project was chosen.

- **Open Discussion** – Forum where all types of discussions can take place.
- **Help** – Forum where the user can ask for help.
- **Developers** – Forum where developers can discuss development issues.

❖ **Note:** When changing a user's Role for a Project, only the "default" Forums and Trackers update. When you add a Forum or Tracker, you must update each Role to set the Forum or Tracker.

2.1 Adding a New Forum

To add a new Forum:

1. Click the **Forum** tab for your Project.

Figure 2-1. Forums Tab

2. Click the **Admin** link.
3. Click the **Add New Forum** button.

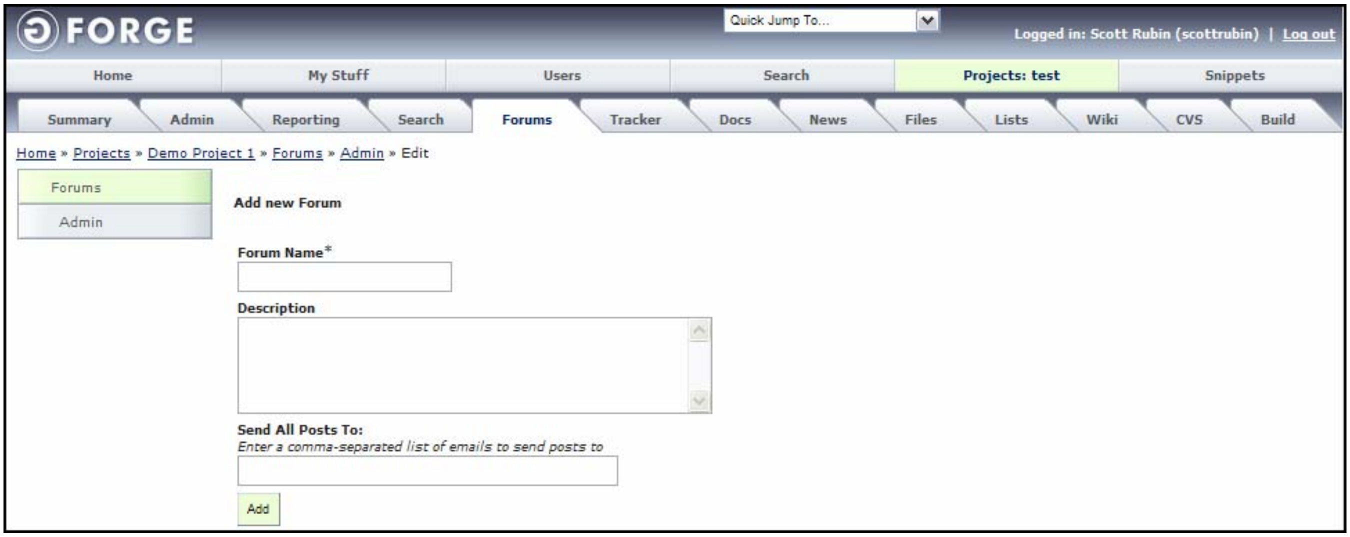

Figure 2-2. Add Forum

4. Enter a **Forum Name** using the following criteria:
   - ♦ Only characters allowed are letters and numbers.
   - ♦ Must be at least three characters long.
   - ♦ Cannot exceed 30 characters.
5. Enter a free-form **Description** of the Forum. Descriptions must be at least ten characters in length and cannot exceed 80 characters.
6. Enter an e-mail address in the **Send All Posts To** field to monitor the Forum when a post is added.
7. Click the **Add** button.

2.2 Editing a Forum

To edit a Forum:

1. Click the **Forum** tab for your Project.
2. Click the **Admin** link.
3. Click the **Edit Forum** link.
4. **Edit** the Forum.
5. Click the **Save Changes** button.

2.3 Deleting a Forum

To delete a Forum and all related messages:

1. Click the **Forum** tab for your Project.
2. Click the **Admin** link.
3. Click the **Delete Forum** link.
4. Select the **Confirm deletion** checkbox.
5. Click the **Delete** button.

Figure 2-3. Delete Entire Forum and All Content

Section 3 – Tracker

Use the Tracker to record Bugs, Support Requests, Patches, and Feature Requests or other types of information as required for your Project. Tracker can record virtually any kind of data, with each Tracker having separate user, group, category, and permission lists.

Trackers include individual pieces of data called Tracker Items, which are either Tracker Issues or Tracker Tasks. For example, Bugs is the name of a Tracker Issue, while an individual Bug Report is the actual Tracker Issue. The System Administrator can create custom Trackers and you can add Tracker Items (Issues or Tasks) to any Tracker.

When a Project is created, GForge automatically may create several default Trackers depending on which template was chosen at Project registration time:

Example Trackers that you can create include:

Issues

Bugs – Users and developers can enter bugs associated with a Project.

Support – Users can enter support requests and receive support responses.

Patches – Developers can upload software patches.

Feature Requests – Users can request feature enhancements to a Project.

Tasks

To Do – Task that need attention.

Next Release – Tasks that need attention before the next release.

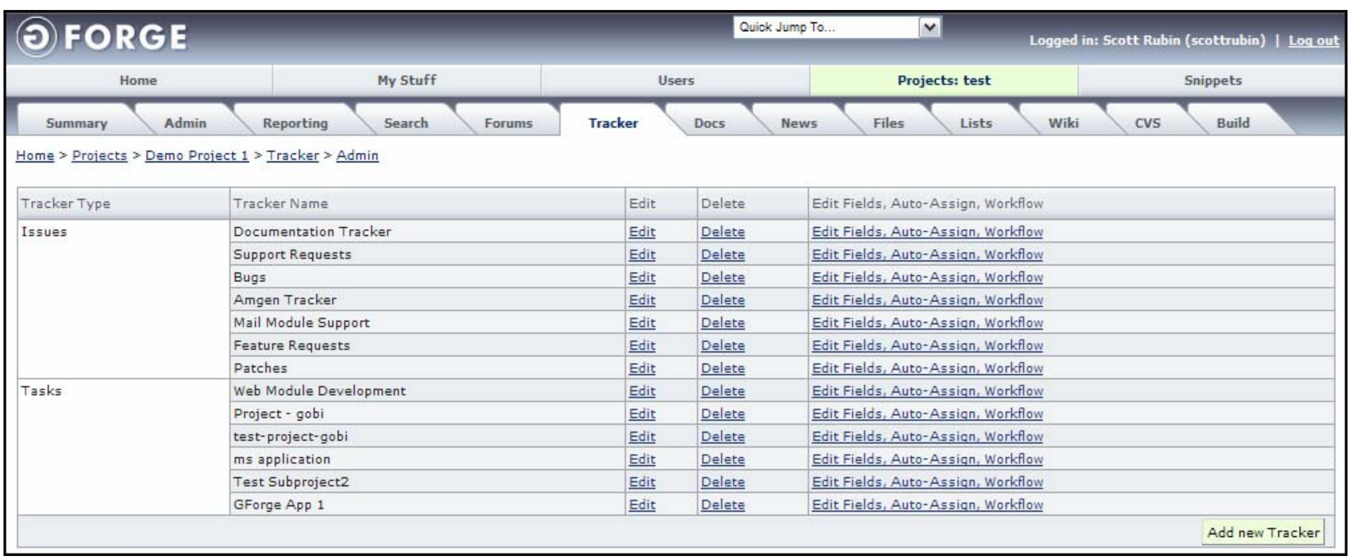

Figure 3-1. Tracker Admin

Tracker Type – The type of Tracker Item. By default, Issues and Tasks display.

Tracker Name – Name of the Tracker.

Edit – Edit the Issue or Task.

Delete – Delete the Issue or Task.

Edit Fields, Auto-Assign, Workflow – Edit fields in the Tracker, Auto-Assign users to a Tracker, or add the Tracker to the Workflow.

3.1 Managing Trackers

This section details how to add, edit, and delete Trackers in Issues and Tasks.

3.1.1 Adding a New Tracker

To add a new Tracker within the Issues and Tasks:

1. Click the **Tracker** tab in your Project.
2. Click the **Edit** link next to the Tracker Name.
3. Click the **Admin** button.
4. Click the **Add New Tracker** button.
5. Enter the Tracker **data elements**. Refer to Figure 3-2.
6. Click **Add**.

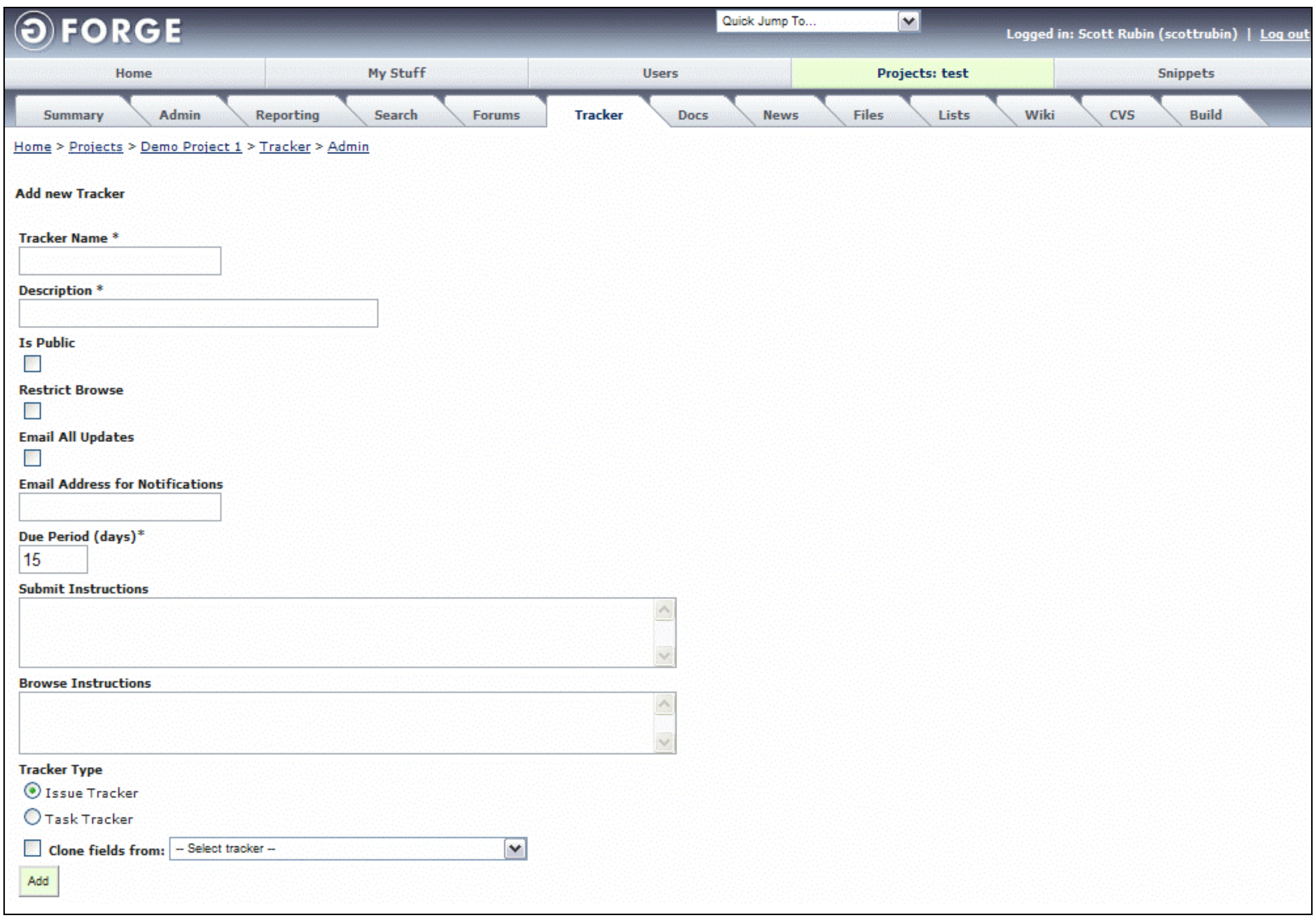

Figure 3-2. New Tracker

Tracker Name – Name of the new Tracker.

Description – Description of the new Tracker.

Is Public – If selected, anyone using GForge can see Tracker Items submitted in the Tracker; otherwise, Tracker Items are visible only to users in the Project.

Restrict Browse – If selected, and the tracker is set to private, users with read-only permissions will only be able to see the items they submitted. If the tracker is public or the user has Assignee or Admin privileges, they will not be affected by this preference.

Email All Updates – If selected, a message will be sent to the e-mail address for all Tracker Items changes; otherwise, messages are sent only for new submissions.

Email Address for Notifications – Whenever a new Tracker Item is submitted, a message is sent to this e-mail address. This field may be left blank, in which case, no messages will be sent.

Due Period (Days) – Number of days in which this Tracker must be completed before it is considered overdue.

Submit Instructions – Text appears at the top of the Submit New page when this Tracker is selected.

Browse Instructions – Text appears at the top of the Browse page when this Tracker is selected.

Tracker Type – The type of Tracker Item: Issue or Task.

Clone fields from – Select if you desire to clone this Issue or Task Tracker from a previously created Tracker. All the fields and elements in the selected tracker will be copied.

3.1.2 Editing a Tracker

To edit a Tracker:

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit** link next to the Tracker Name.
5. **Edit** the Tracker information.
6. Click the **Save Changes** button.

3.1.3 Deleting a Tracker

To delete a Tracker:

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click **Delete** next to the Tracker you desire to delete.
5. Select the **Confirm deletion** checkbox.
6. Click the **Delete** button.

3.2 Tracker Fields

By default, all Trackers have default values associated with them depending on the type of Tracker – whether Issue or Task. The default fields cannot be deleted and their options cannot be modified. You can create custom Tracker fields and manage user-defined data field elements related to the fields.

All Trackers include several default fields including:

- **Status –** Indicates the status of the Tracker, such as Open or Closed.
- **Estimated Effort (Hours) –** Approximate number of hours required to complete the Tracker Task or Item.
- **Percent Complete (0-100) –** Approximate percentage of the Tracker Task or Item that is completed.
- **Duration (Days) –** Approximate number of days required to complete the Tracker Task or Item.

3.2.1 Viewing Tracker Fields

To view fields associated with a Tracker:

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.

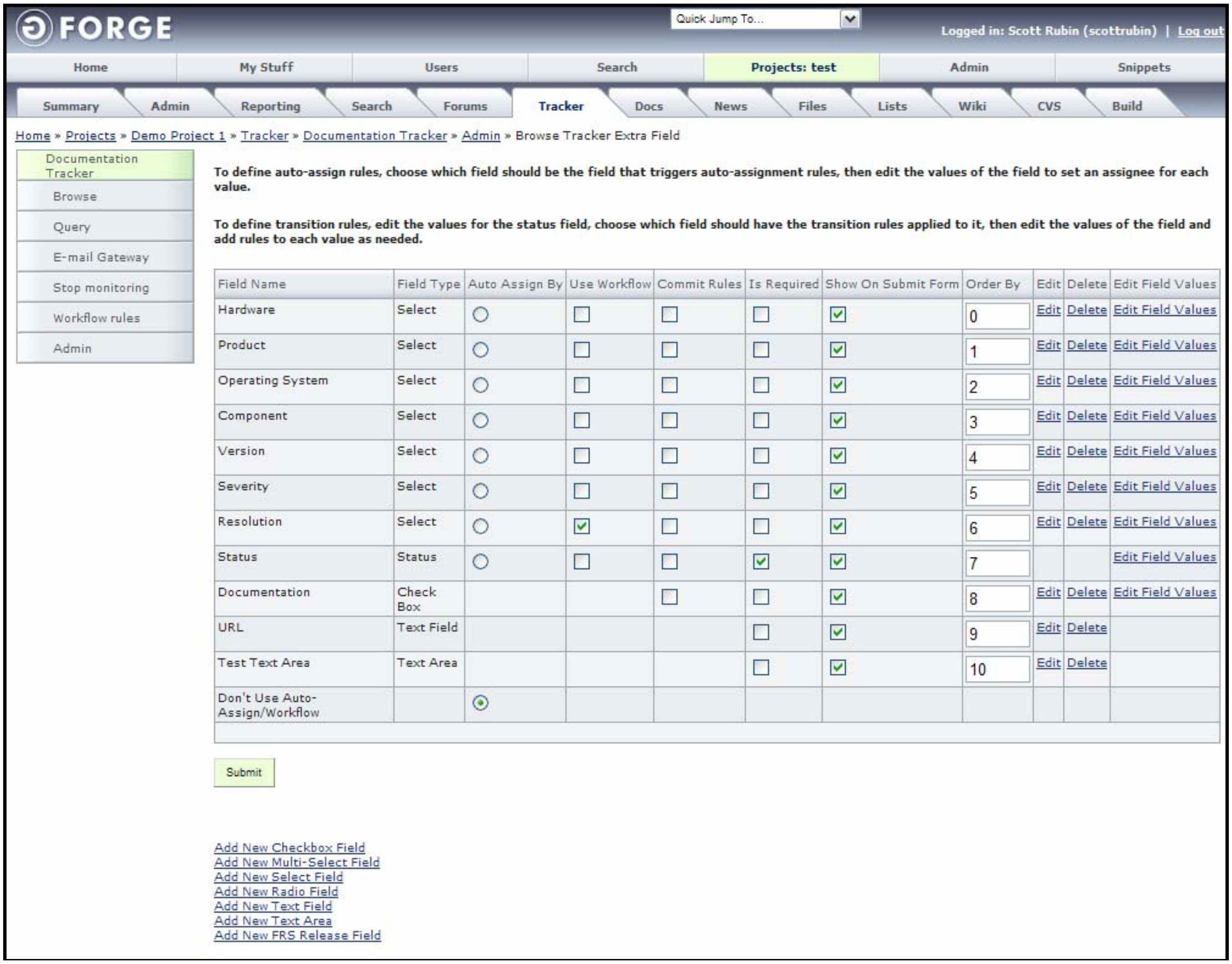

Figure 3-3. Tracker Field Elements

Field Name – Name of the field that displays within the Tracker.

Field Type – Field types are dependant on the type of field selected when the field was added.

Auto Assigned By – Select to have the field automatically assigned to the selected user. For example, if you choose the “Category” field to set auto-assignment on, when a ticket is submitted in a particular Category, it will be assigned to the user that is designated for that particular value.

Use Workflow – Select to include the fielding the automated workflow. Refer to 3.6, Managing Tracker Transition Rules, on page 3-11.

Commit Rules – Select to use this rule during the commit process. Refer to Section 3.5, Using Commit Rules, on page 3-11.

Is Required – Select if this is a required field.

Show on Submit Form – Select if this is to be displayed on the initial Tracker Item submit form.

Order By – Enter the numerical order in which you desire for the fields to display in the Tracker.

Edit – Edit the Tracker field.

Delete – Delete the Tracker field.

Edit Field Values – Edit the values associated with this field. For example, a radio button has multiple choices, which would be entered here.

3.2.2 Adding a Tracker Field

To create a field in a Tracker:

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.
5. Click the link at the bottom of the page to select a **Type of custom field to add**:
   - **Add New Checkbox Field** – List of check boxes, any or all of which can be selected.
   - **Add New Multi-Select Field** – List elements, any or all can be selected by using the <Shift> and <Ctrl> keys.
   - **Add New Select Field** – Drop-down list box, any one of the elements may be selected.
   - **Add New Radio Field** – List of buttons, one and only one from the list may be selected.
   - **Add New Text Field** – Single line free-form text field.
   - **Add New Text Area** – Multiple line free-form text field.
   - **Add New FRS Release Field** – Links the field with the File Release System (FRS).
6. Enter all required information and click the **Add** button. All custom information is defined below.

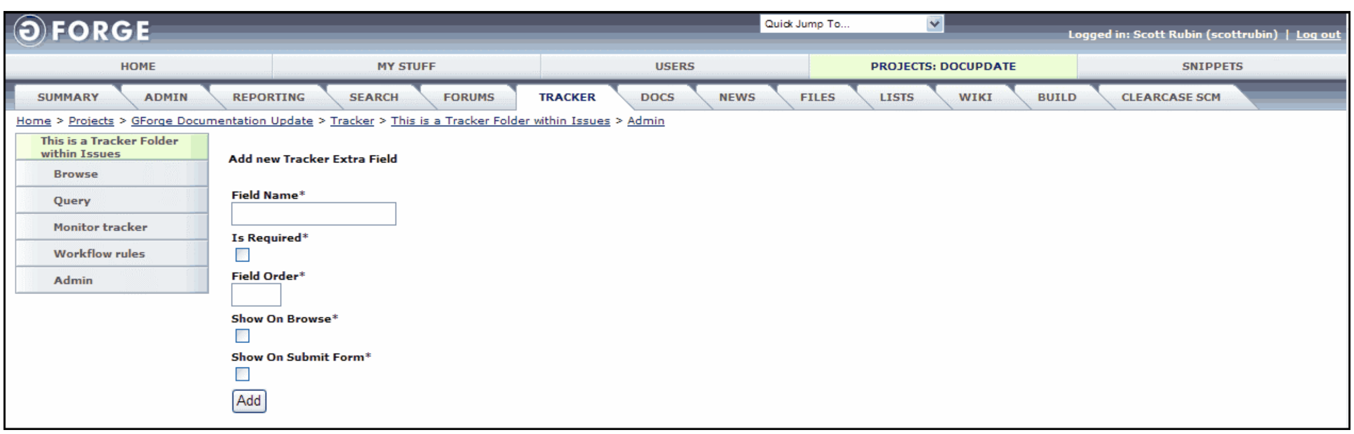

Figure 3-4. Adding a Tracker Field

❖ **Note:** Not all fields display for every field.

Field Name – Display name of the new checkbox.

Text Area Rows / Text Field Size – Number of rows or size of the field.

Text Area Columns / Text Field Max length – Number of columns of maximum length of field.

Is Required – If this checkbox is a required field.

Field Order – Order to place the checkbox on the form.

Show on Browse – Display the checkbox for users that browse the Trackers.

Show on Submit Forms – Displays on the Submit forms.

Add – Adds the information as entered.

3.2.3 Editing a Tracker Field

To edit a Tracker field:

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link.
5. Click the **Edit** link.
6. Edit the **field values** as necessary.
7. Select or de-select the **values** as required.
8. Click the **Save changes** button.

3.2.4 Deleting a Tracker Field

To delete a Tracker field:

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link.
5. Click the **Delete** link next to the field you desire to delete.
6. Select the **Confirm deletion** checkbox.
7. Click the **Delete** button.

3.2.5 Changing the Order of Tracker Fields

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.
5. Select the **Field Name**.
6. **Drag and drop** the Field Name to the desired sort order.
   - ❖ **Note:** This works at the field or element level.

3.3 Tracker Field Elements

Each Tracker has multiple fields used to define what it being tracked. Each field within a Tracker can have multiple field elements and allows the user to make selections that are associated with the field. Tracker Field Elements are the actual element associated with each Tracker Field. You can add, edit, and delete Tracker Field Elements.

After creating a Tracker field, certain types of fields must have their data elements defined. For example, a radio button has multiple choices, which you enter in the Field Element screen.

3.3.1 Adding an Element to a Tracker Field

To add a element to a Tracker field:

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.
5. Click the **Edit Field Values** link. Refer to Figure 3-3.
   - ❖ **Note:** Not all system-generated fields can be edited.
6. Click the **Add new Field Element** button. Refer to Figure 3-5.
7. Enter the **Element Name** for the field. Other fields display depending on the type of field being added. Refer to Figure 3-6.
8. Click the **Add** button. Refer to Figure 3-6.
9. Click the **Submit** button. Refer to Figure 3-5.

3.3.1.1 Tracker Field Elements Screen

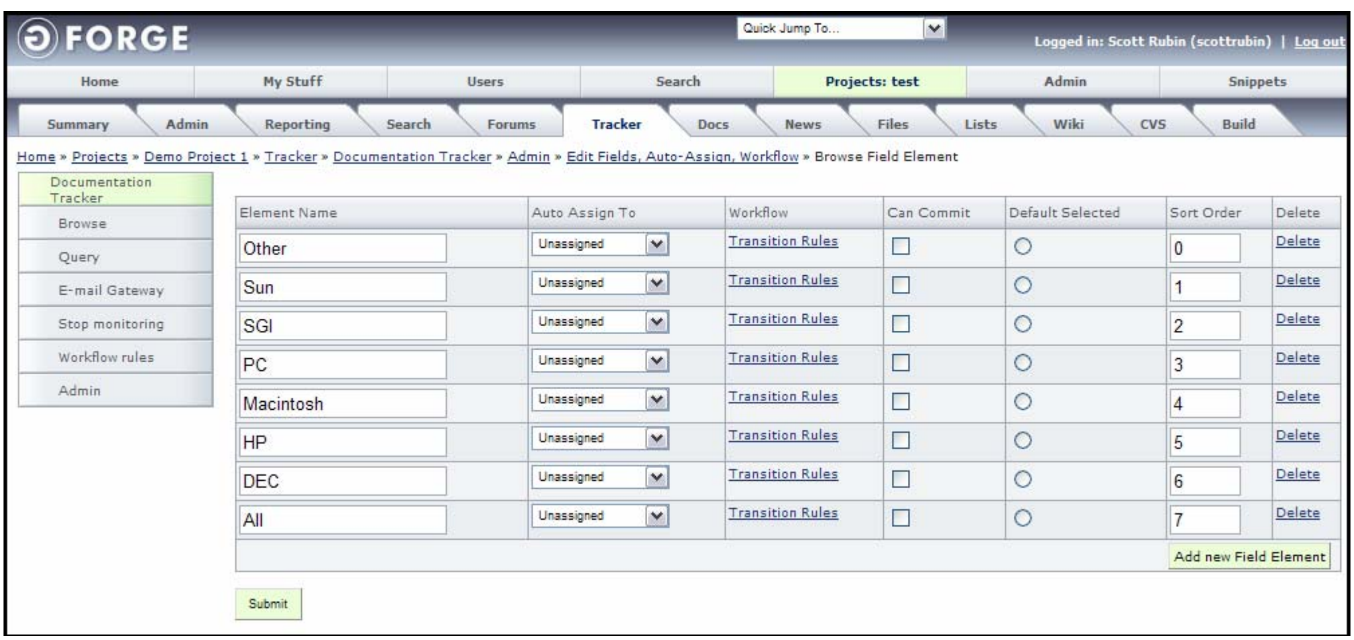

Figure 3-5. Tracker Field Elements

Element Name – Name of the field that displays within the Tracker

Auto Assign To – This column only shows if this field is set as the auto-assign field. When a new item is submitted and has a corresponding field setting selected by the submitter, the new item will be assigned to the selected user.

Workflow – This column only shows if this field is selected as a transition rule field. Click Transition Rules to add workflow rules to the field. Refer to Section 3.6, Managing Tracker Transition Rules, on page 3-11.

Can Commit – This column only shows if this field is selected to define commit rules. Select to allow this field element to be included during the commit process. Refer to Section 3.5, Using Commit Rules, on page 3-11.

Default Selected – If a field is to be selected when a user opens the Tracker, select the value.

Sort Order – Enter the numerical order in which you desire for the fields to display in the Tracker.

3.3.1.2 New Tracker Field Element Screen

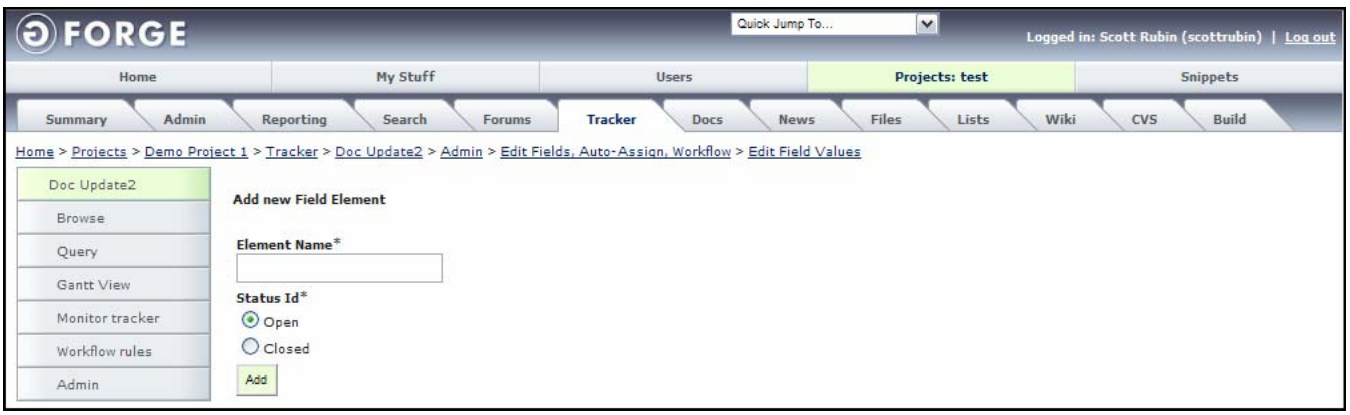

Figure 3-6. Adding a New Tracker Field Element

Element Name – Name of the Tracker field element.

Status Id – Select if the Tracker field element is Open or Closed by default.

3.3.1 Editing Field Elements in a Tracker

To edit field elements and values in a Tracker Item:

1. Click the **Tracker** tab.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.
5. Click the **Edit Field Values** link next to the field you desire to alter.
6. **Edit** the values.
7. Click the **Save Changes** button.
8. Click the **Submit** button.

3.3.2 Deleting Elements from a Tracker Field

To delete elements from a Tracker field:

1. Click the **Tracker** tab.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.
5. Click the **Edit Field Values** link next to the field you desire to alter.
6. Click the **Delete** link next to the field you desire to delete.

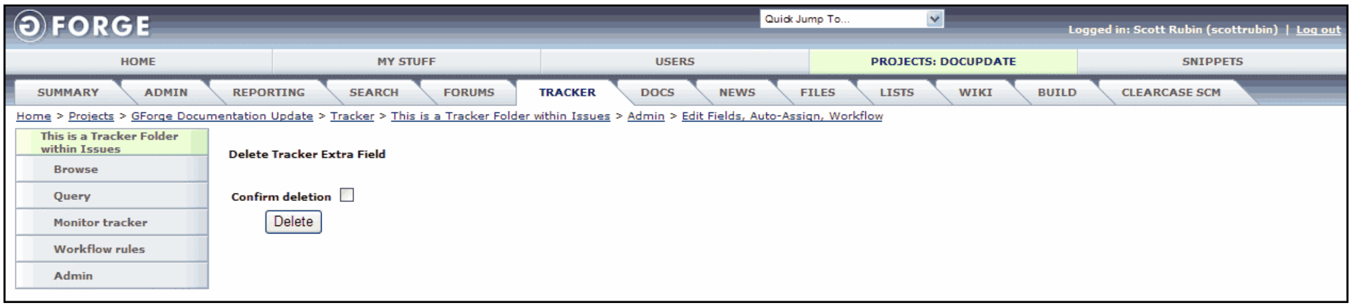

Figure 3-7. Delete Tracker Field

7. Select the **Confirmation deletion** checkbox.
8. Click the **Delete** button.

3.4 Defining Auto Assign Rules

Auto Assign Rules enable a Tracker Issue or Task to be automatically assigned to a specified user when that type of Tracker is entered. To define Auto Assign Rules:

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.
5. Click the **Auto Assign By** radio button to select which **field** should be the field that triggers auto-assignment rules. Refer to Figure 3-3.
6. Click the **Submit** button.
7. Click **Edit Field Values**.
8. Select the user in the **Auto Assign to** drop-down list box to set an **assignee** responsible for this Tracker. Refer to Figure 3-5.
9. Click the **Submit** button.

3.5 Using Commit Rules

The Tracker allows you to associate fields with Commit rules to determine when you can commit against the Tracker Item.

For example, you can create a rule on the "Status" field. Edit the field values and select the check box next to "Open". If a person commits an item against a Tracker Item in this Tracker, the commit can only proceed if the Status is set to Open.

- ❖ **Note:** Commit rules are only enforced if the "Require Tracker Item ID on commit" checkbox is selected in the CVS or SVN admin page.

To add a commit rule in a Tracker Item:

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.
5. Select the **Commit Rules** checkbox.
6. Click the **Submit** button.
7. Click the **Edit Field Values** link.
8. Select the **Can Commit** checkbox.
9. Click the **Submit** button.

3.6 Managing Tracker Transition Rules

Use Transition Rules to define which Roles have permission to make a change in a field from one value to the next. You may also require one or more fields to be entered before a change can be made.

3.6.1 Adding a New Transition Rule

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.
5. Select or edit the **values** for the fields.
6. Select the **Use Workflow** checkbox to choose which **fields** should have the transition rules applied to it. Refer to Figure 3-3.
7. Click the **Submit** button.
8. Click the **Edit Field Values** link.
9. Click the **Transition Rules** link.
10. Click the **Add New Transition Rule** button.

11. Select the **values**. Use <Shift> and <Ctrl> to select multiple value.
    - **From Value to Value** – Select the value that must change in order for the message to be sent.
    - **Roles that may make this change** – Select the users who may make the change.
    - **Required fields for this change** – Select the field or fields that may change to force the rule to be issued.
    - **Notify on Change** – Select the users to notify when the change occurs.
    - **Notification Message** – Enter a message to display to the "Notify on Change" users when the rule is carried out.
12. Click the **Add** button.

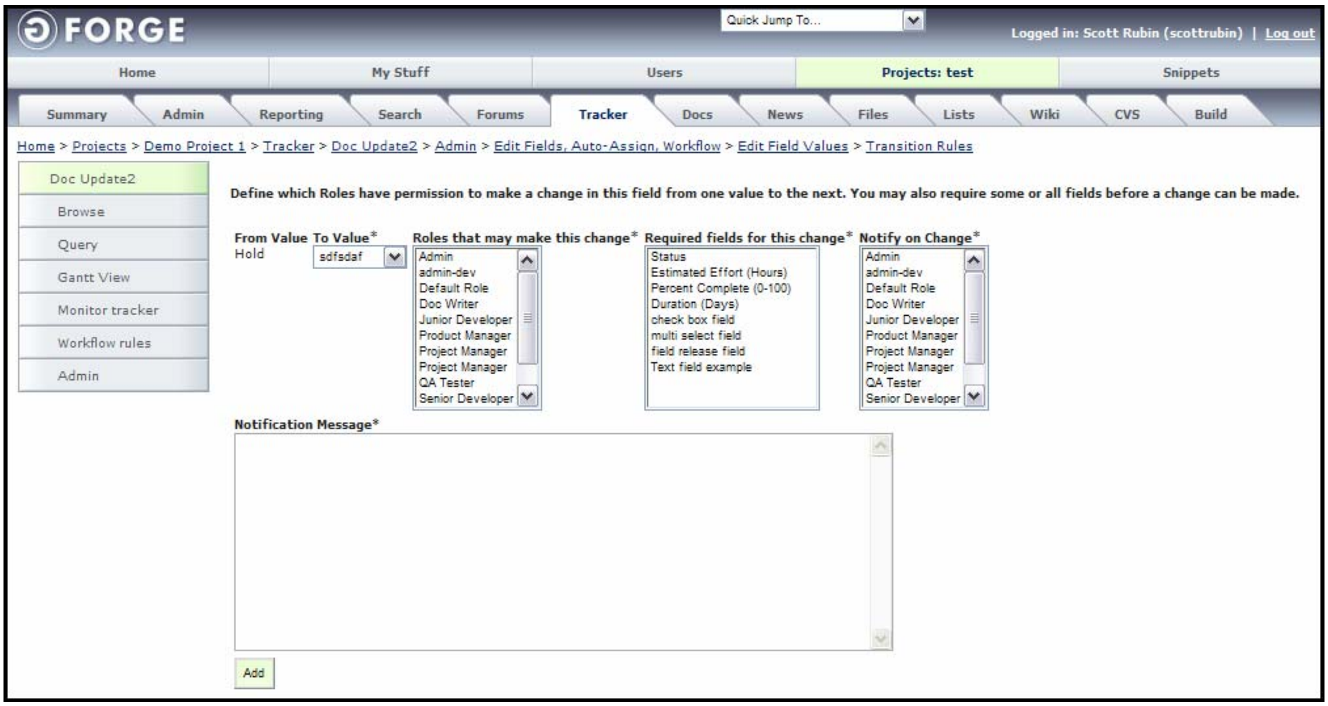

Figure 3-8. Add New Transition Rule

3.6.2 Editing a Transition Rule

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.
5. Click the **Edit Field Values** link.
6. Click the **Transition Rules** link.
7. Click the **Edit** link.
8. Alter the **values**.
9. Click the **Save changes** button.

3.6.3 Deleting a Transition Rule

1. Click the **Tracker** tab for your Project.
2. Click the **Tracker Name** link.
3. Click the **Admin** button.
4. Click the **Edit Fields, Auto-Assign, Workflow** link next to the Tracker Name.
5. Click the **Edit Field Values** link.
6. Click the **Transition Rules** link.
7. Click the **Delete** link.

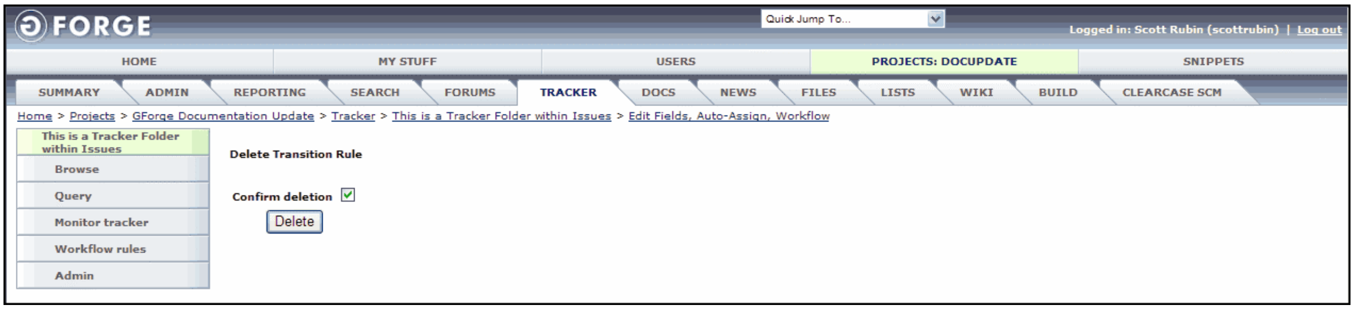

Figure 3-9. Confirm Transition Rule Deleting

8. Select the **Confirm** deletion checkbox.
9. Click the **Delete** button.

Section 4 – Document Manager

Use the Document Manager in a Project to maintain documents and folders, or to submit a new document for approval and publishing. The Project Administrator can determine if documents can be viewed publicly by all users or only users that are a member of the Project. Folders categorize documents submitted by regular users. The Project Administrator sets up the list of valid Folders.

4.1 Maintaining Document Folders

This section details how to add, edit, and delete folders.

4.1.1 Adding Document Folders

To add document Folder to a Project:

1. Click the **Docs** tab for your Project.
2. Click the **Admin** link.

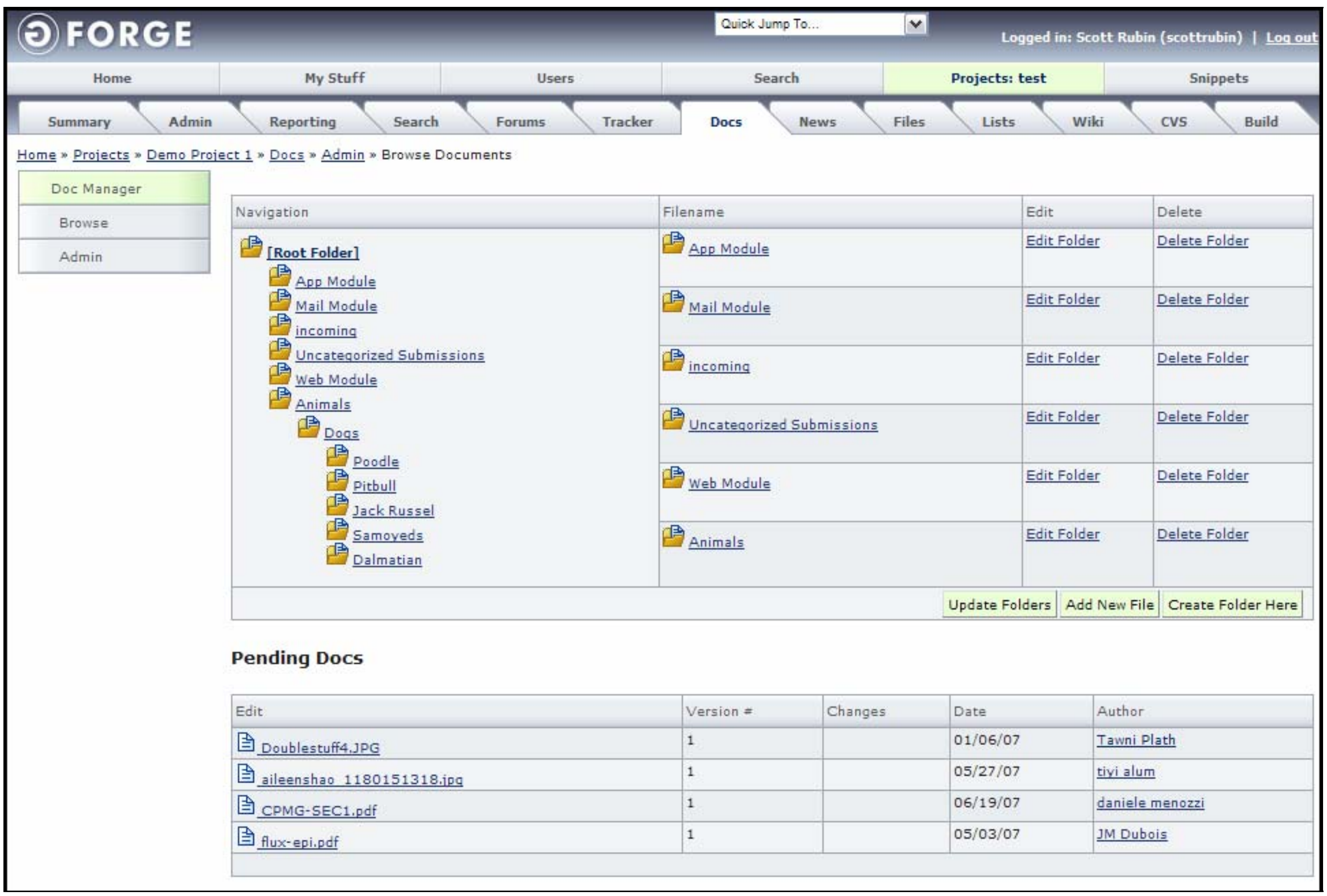

Figure 4-1. Document Manager Administration

3. Navigate to the **location** where you desire to add the Folder.
4. Click the **Create Folder Here** button.
5. Enter a **Folder Name**.

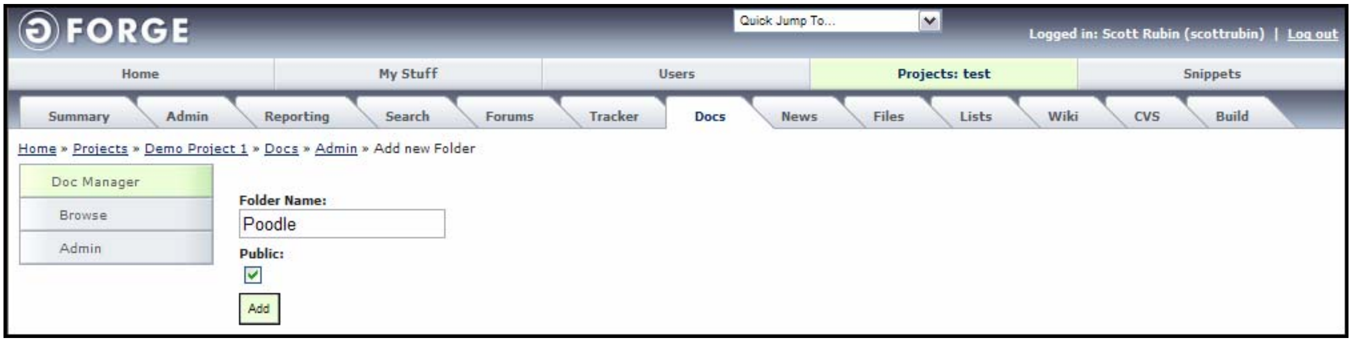

Figure 4-2. Add Folder

6. If the new folder should be viewable for users that are not logged in or users that are not part of this Project, select the **Public** checkbox.
7. Click the **Add** button.

4.1.2 Updating Document Folders

To update all document folders and synchronize with the database:

1. Click the **Docs** tab for your Project.
2. Click the **Admin** link.
3. Click the **Update Folder** button.

4.1.3 Editing Document Folders

To edit the name or public status of a document Folder:

1. Click the **Docs** tab for your Project.
2. Click the **Admin** link.
3. Navigate to the **location** where you desire to edit the Folder.
4. Click the **Edit Folder** link.

Figure 4-3. Edit a Folder

5. Edit the **Folder** name.
6. If the new folder should be viewable for users that are not logged in or users that are not part of this Project, select the **Public?** checkbox.
7. Click the **Save Changes** button.

4.1.4 Deleting a Folder

To delete a folder:

1. Click the **Docs** tab for your Project.
2. Click the **Admin** link.
3. Navigate to the **location** where you desire to delete the Folder.
4. Click the **Delete Folder** link next to the folder you are deleting.

Figure 4-4. Delete Folder Confirmation

5. Select the **Confirm deletion** checkbox.
6. Click the **Delete** button.

4.2 Maintaining Documents

This section details how to add, edit, upload a new version, and delete documents.

4.2.1 Viewing a Document

To view a document in a Project:

1. Click the **Docs** tab for your Project.
2. Click the **Admin** link.
3. Click the **Folder** in which the document resides.
4. Click the **File name** of the file you desire to view.

   ❖ **Note:** Any changes you make to the document will NOT be saved to GForge, but to a local drive.

4.2.2 Adding a Document

To add a document to a Project:

1. Click the **Docs** tab for your Project.
2. Click the **Admin** link.
3. Click the **Folder** in which the document is to reside.
4. Click the **Add New File** button.

Figure 4-5. Add New Document

5. Click **Browse** and locate the File.
6. Select the **file** and click the **Open** button.
7. Enter a **Description** for the file.
8. Click the **Upload** button.

4.2.3 Editing Document Attributes and Locking a Document

To manage individual documents in a Project:

1. Click the **Docs** tab for your Project.
2. Click the **Admin** link.
3. Click the **Folder** in which the document resides.

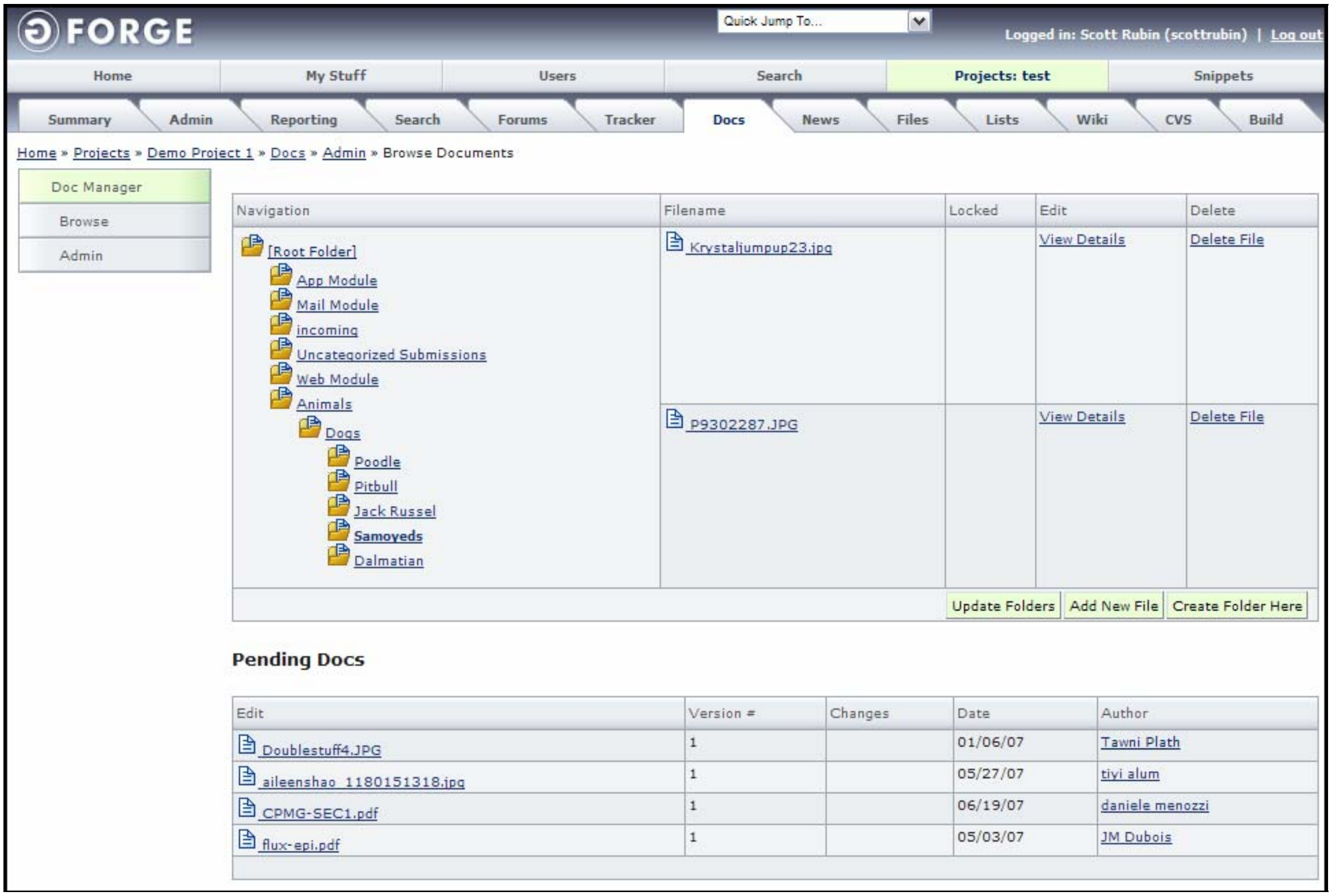

Figure 4-6. Expanded Document Group

4. Click the **View Details** link to edit that document's attributes or lock the document.

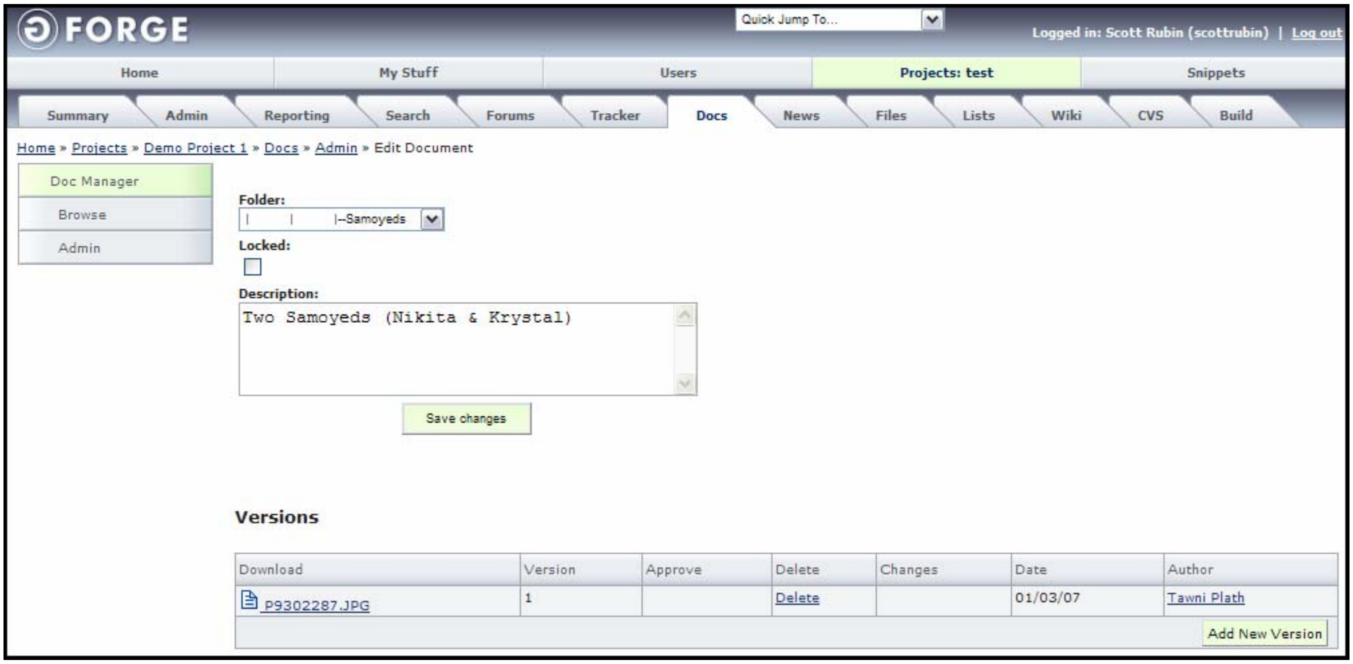

Figure 4-7. Document Attributes

5. Edit the **Folder** drop-down list box if you desire to relocate the document to a different folder.
6. Click the **Locked** checkbox to lock the file and prevent other users from uploading another version of the file.
7. Edit the **Description** if necessary.
8. Click the **Save changes** button.

Download – Name of the document.

Version – Version number of this document.

Approve – Indicates if the document has been approved or not.

Changes – Changes made to this document.

Date – Date the file was altered.

Author – Name of the person who altered the file.

4.2.4 Uploading a New Version of the Document

To manage individual documents in a Project:

1. Click the **Docs** tab for your Project.
2. Click the **Admin** link.
3. Click the **Folder** in which the document resides.
4. Click the **View Details** link.
5. Click the **Add New Version** link.

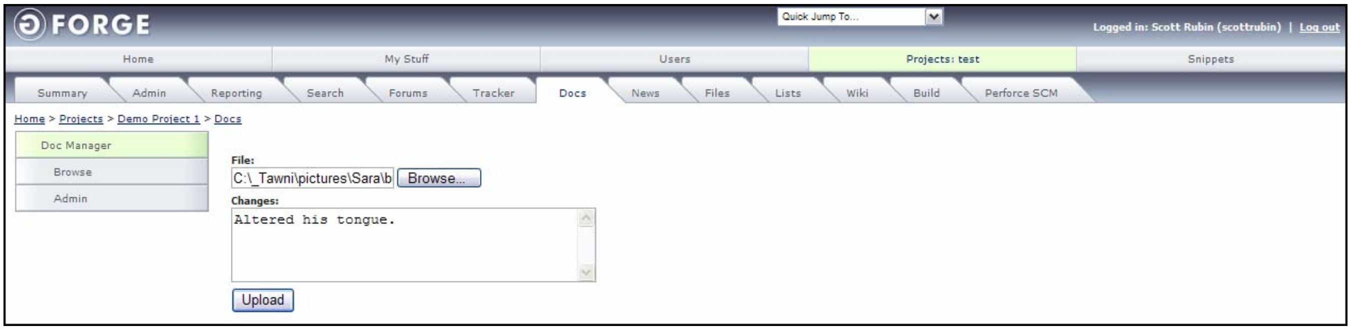

Figure 4-8. Upload New Version

6. Click the **Browse** button.
7. **Navigate** to and **select** the new file to upload.
8. Click the **Open** button in the navigation screen.
9. Enter a description of the **Changes**.
10. Click the **Upload** button.

4.2.5 Approving a Pending Document

To approve a document submitted by a user:

1. Click the **Docs** tab for your Project.
2. Click the **Admin** link. A list of pending documents (if any) appears at the bottom of the window.

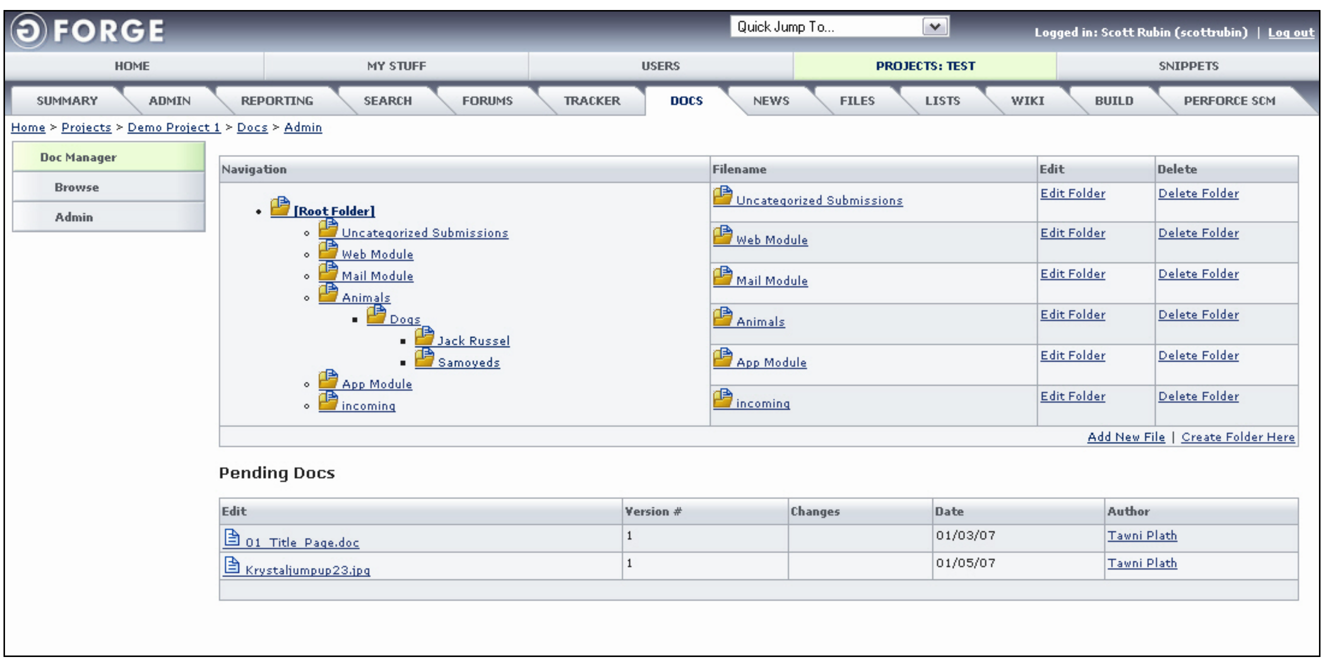

Figure 4-9. Pending Submitted Documents

3. Click the **document** to be approved.

Figure 4-10. Pending Document Details

4. Edit the **Folder** drop-down list box if you desire to relocate the document to a different folder.
5. Edit the documents **Description** if necessary.
6. Click the **Locked** checkbox to lock the file and prevent other users from uploading another version of the file.
7. Click the **Approve** link if the document is to be approved.
8. Click the **Save changes** button.

4.2.6 Viewing Historical Document Details

To view historical details about a document associated with a Project:

1. Navigate to the **Project**.
2. Click the **Docs** tab.
3. Click the **Admin** link.
4. Click the **Navigation folder** in which the document resides.
5. Click the **View Details** link next to the document. Refer to Figure 4-6.

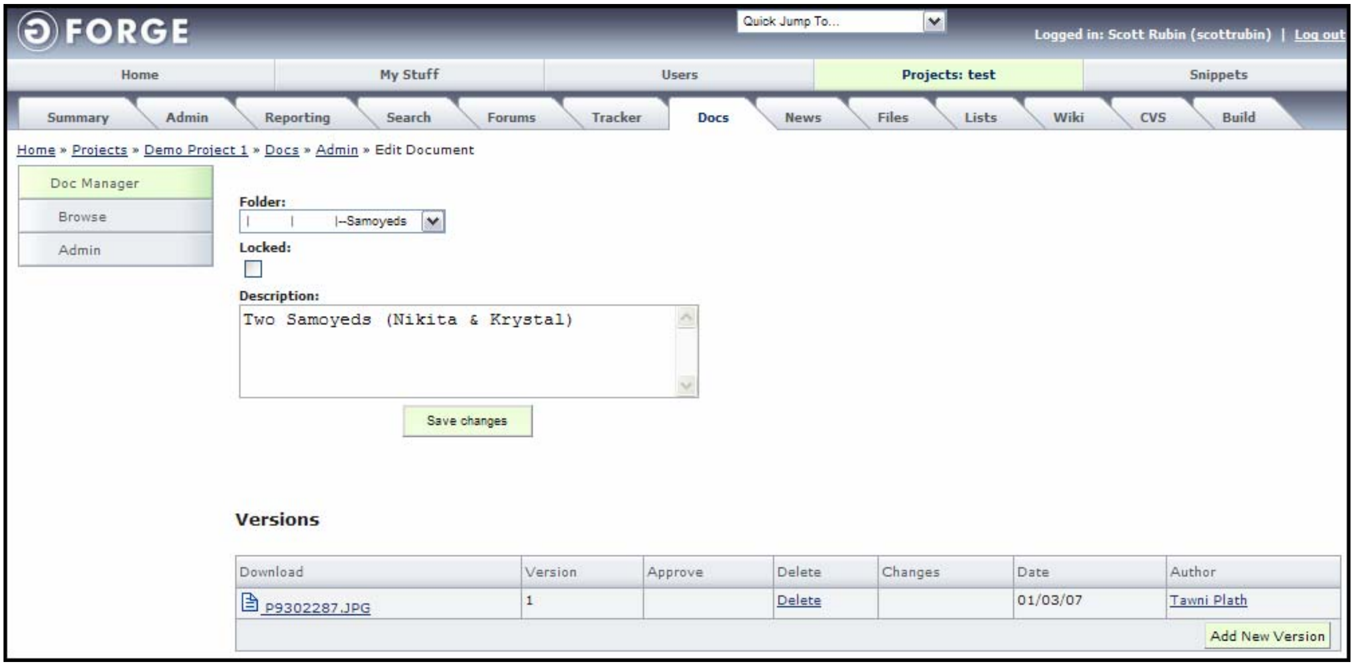

Figure 4-11. Historical Document Details

Download – Name of the file. Click to view the file.

Version – Version of the document.

Approve – Indicates if the document has been approved or not.

Delete – Deletes the document.

Changes – Describes what change was made.

Date – Date change occurred.

Author – User that uploaded the file.

4.2.7 Deleting a Document

To delete an individual document from a Project:

1. Click the **Docs** tab for your Project.
2. Click the **Admin** link.
3. Click the **Folder** in which the document resides.
4. Click the **Delete File** link. Refer to Figure 4-6.

Figure 4-12. Deleting a Document Confirmation

5. Click the **Confirm deletion** checkbox.
6. Click the **Delete** button.

Section 5 – News

The News tab displays all News articles about the selected Project, such as milestones, releases, or significant changes to the Project. All news items are submitted to the site administrator for approval as a front-page news item. You can add, edit, and delete News articles.

5.1 Adding a News Article

You can post News about your Project if you are the Project Administrator. All posts **for your Project** appear instantly on the Project Summary page. Posts that are of special interest to the community will have to be approved by a member of the GForge CDE News team before they will appear on the GForge Home page.

- ❖ **Note:** You may include URLs, but not HTML in your submissions. URLs that start with http:// are made clickable.

To add a News article:

1. Click the **News** tab in your Project.
2. Click the **Admin** link.
3. Click the **Add New News** link.

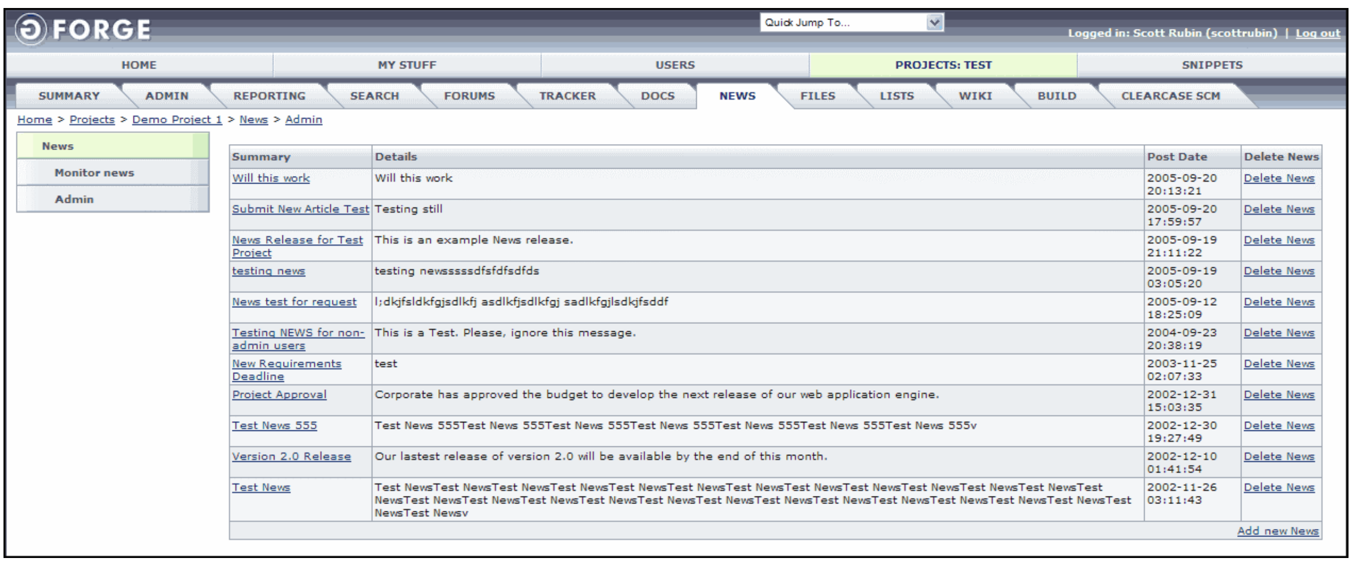

Figure 5-1. News

4. Enter the name of the News article in the **Summary** field.

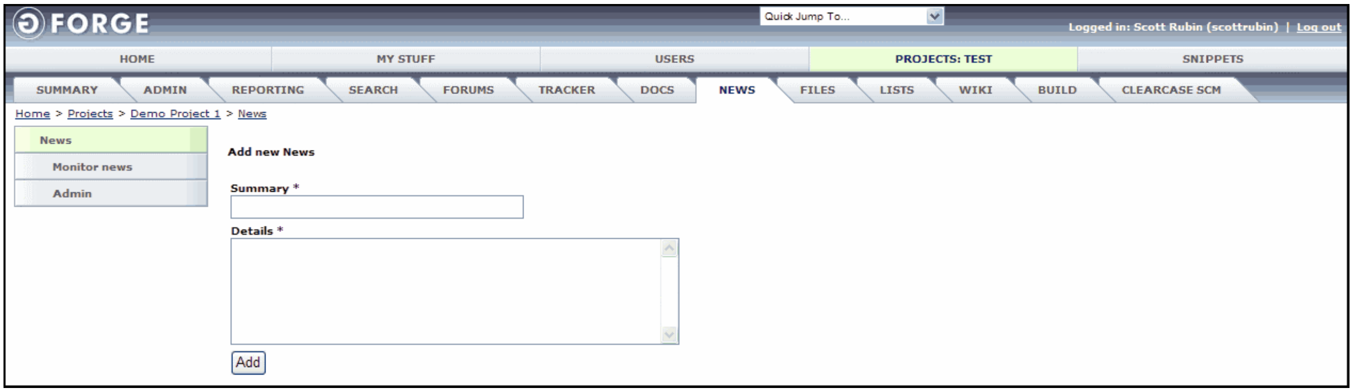

Figure 5-2. News Submit

5. Enter the text of the News item in the **Details** field.
6. Click the **Add** button.

5.2 Editing a New Article

To edit a news article:

1. Click the **News** tab for your Project.
2. Click the **Admin** link.
3. Click the **Summary** of the News article.
4. Edit the **Details**.
5. Click the **Save Changes** button.

5.3 Deleting a News Article

To delete a News article:

1. Click the **News** tab for your Project.
2. Click the **Admin** link.
3. Click the **Delete News** link. Refer to Figure 5-1 on page 5-1.

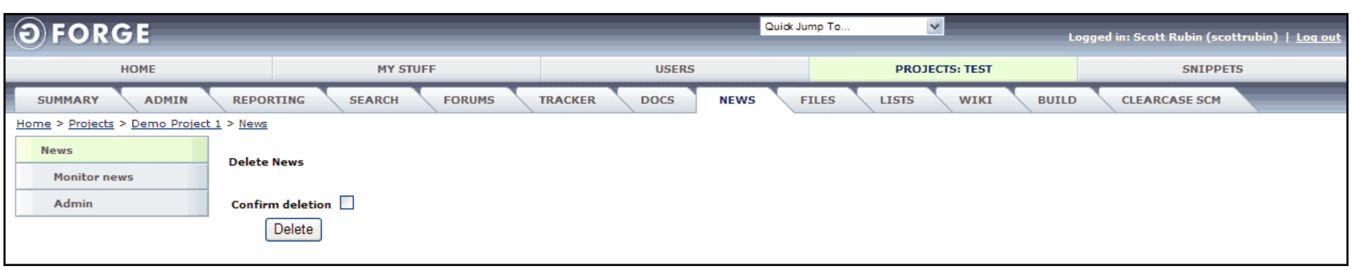

Figure 5-3. Delete News

4. Select the **Confirm deletion** checkbox.
5. Click the **Delete** button.

Section 6 – File Release System

Use the File Release System (FRS) to view file Releases associated with your Project that have been uploaded to GForge. Files are organized into Packages and Releases and each Release may contain multiple files.

Packages are distinct modules within your Project, for example a documentation module is a separate Package from the binary module.

Releases are distinct versions of Packages, such as 1.0, 1.1, or 1.2. Since each version may have multiple platforms, Windows, Linux, Solaris, and such, a Release may contain multiple files.

6.1 Maintaining Packages

This section details how to add, edit, and delete Packages.

6.1.1 Adding a New Package

To create a new Package:

1. Click the **Files** tab for your Project.

Figure 6-1. Files Tab

2. Click the **Admin** link.

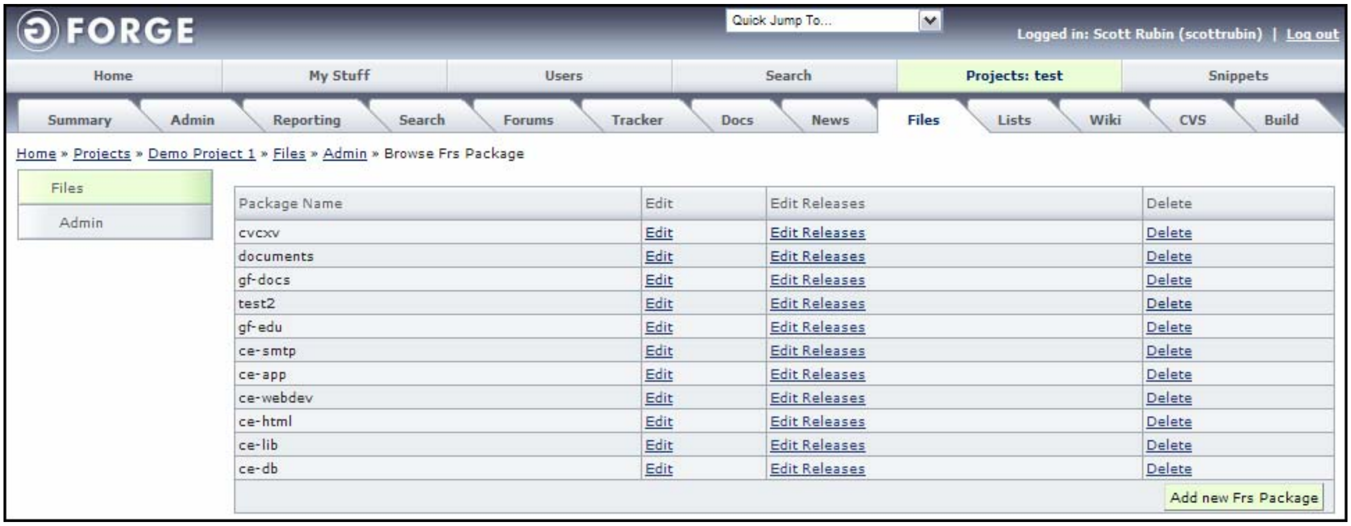

Figure 6-2. Files Admin

3. Click the **Add New Frs Package** button.

Figure 6-3. Add New Frs Package

4. Enter the **Package Name**.
5. Select **Visible** if required. If left unselected, only administrators will be able to view the File.
6. Select **Public** if required. If Public, all users can view the file. If Public is left unselected, only users of the Project can view the File.
7. Select **Require Login** if required. If Requires Login is selected, only users that are currently logged into GForge can view the File.
8. Click the **Add** button. Refer to Figure 6-3 on page 6-2.

6.1.2 Editing Packages

To edit the Package information:

1. Click the **Files** tab for your Project.
2. Click the **Admin** link.
3. Click the **Edit** link next to the Package Name you desire to edit. Refer to Figure 6-2 on page 6-2.

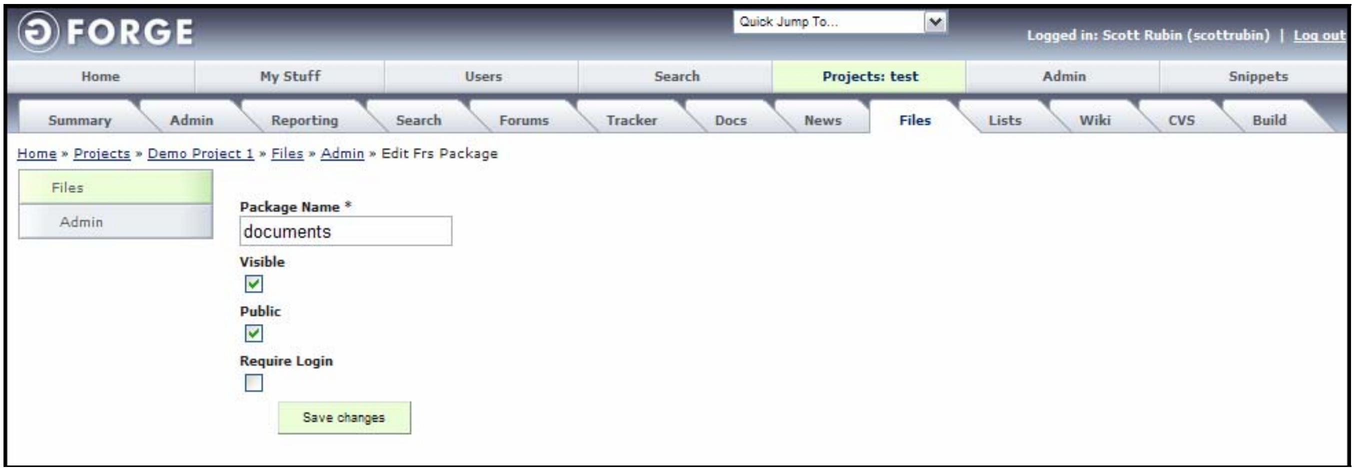

Figure 6-4. Editing Packages

4. **Edit** any information required. Refer to Figure 6-3 on page 6-2.
5. Click the **Save Changes** button.

6.1.3 Deleting a Package

To delete a Package:

1. Click the **Files** tab for your Project.
2. Click the **Admin** button.
3. Click the **Delete** button.

Figure 6-5. Deleting a Package

4. Select the **Confirm deletion** checkbox.
5. Click the **Delete** button.

6.2 Maintaining File Releases

This section details how to add and edit File Releases.

6.2.1 Adding a New File Release

To add a new Release:

1. Click the **Files** tab for your Project.
2. Click the **Admin** link.
3. Click **Edit Releases**. Refer to Figure 6-2 on page 6-2.

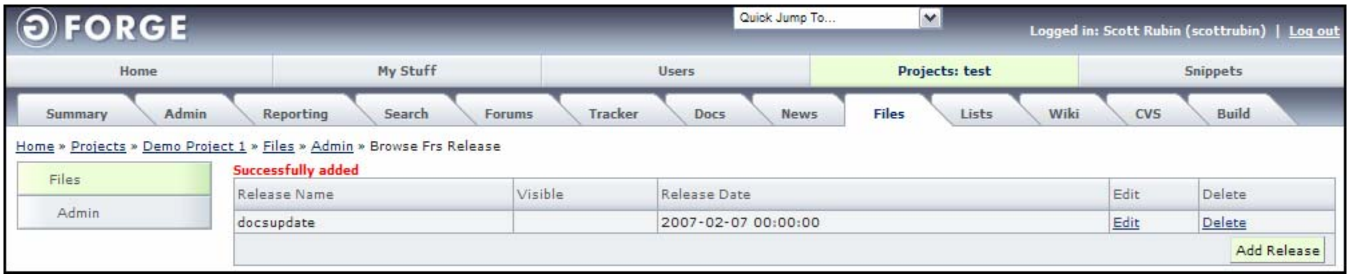

Figure 6-6. Edit Release

4. Click the **Add Release** button.
5. **Enter** all available information.
6. Click the **Add Release** button. Refer to Figure 6-7 on page 6-5.

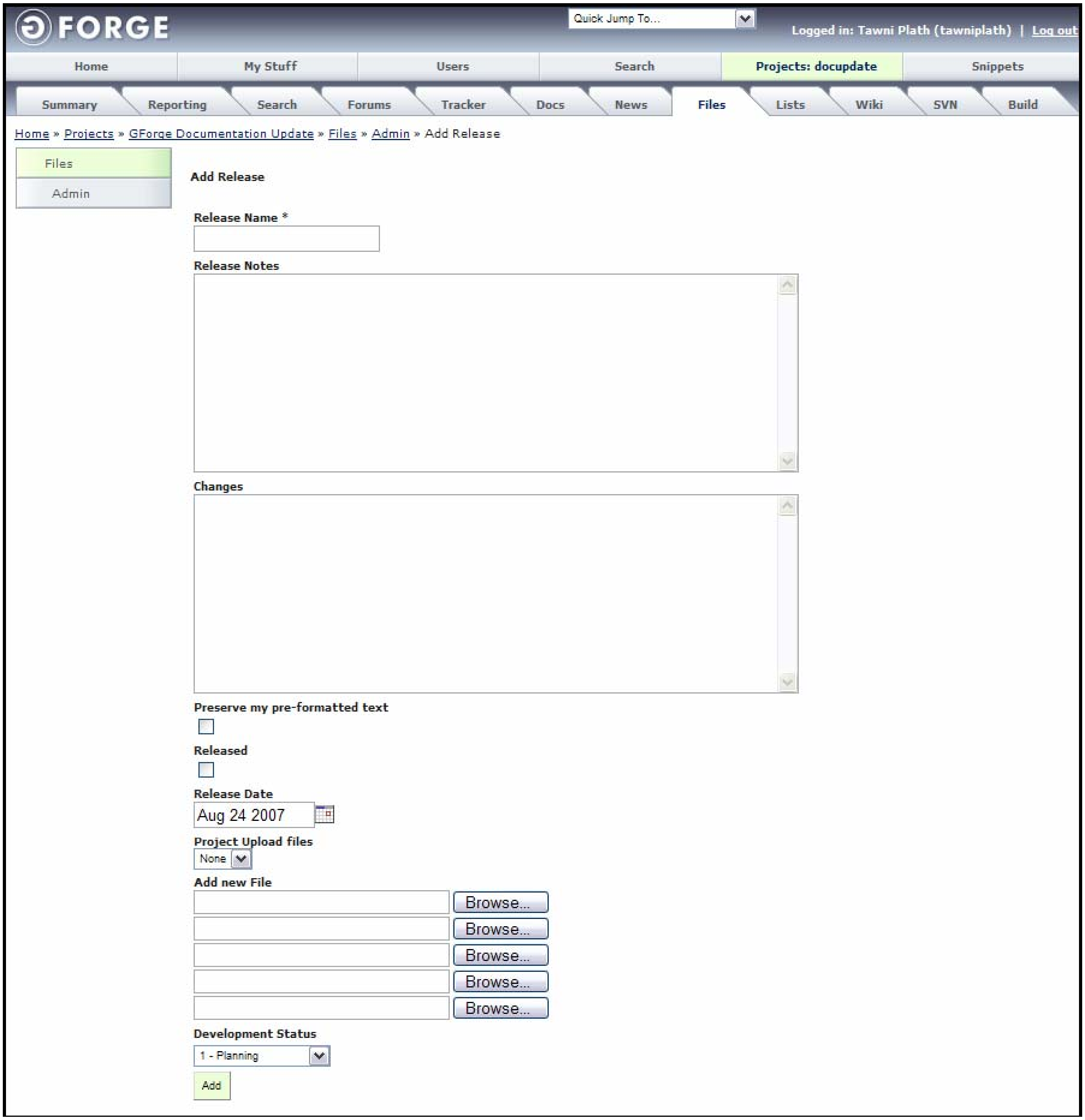

Figure 6-7. Add New Release

Release Name – Name of the Release you are creating.

Release Notes – Detailed description of the Release.

Changes – Detailed description of the changes in this Release.

Preserve my pre-formatted text – Preserves the formatting of the text entered.

Released – If selected, the Release will be considered complete and appears on the Files tab if it is the most current Release, as Files attached to it, and is in a 'visible' Package. If the Package is not marked as visible or the Release has a future date or does not have any associated files, the file will not appear on the Files tab. When this field is selected for the first time, users who are monitoring the Package will be notified of the Release.

Project Upload Files – List of files uploaded by FTP.

Release Date – Date of the original Release.

Add new File – Files associated with this Release.

Development Status – Status at the time of Release.

- ❖ **Note:** You can associate Tracker Items to Releases, even future Releases, by creating a custom field in your Trackers of type Release. The Release type of extra field is pre-populated with a list of Packages and Releases, so you can create defects, tasks, feature requests, and such and have them linked to the Release. You can then view the 'roadmap' for your project on the Reporting tab.

6.2.2 Editing an Existing File Release

To edit information in a File Release:

1. Click the **Files** tab for your Project.
2. Click the **Admin** link.
3. Click **Edit Releases**.

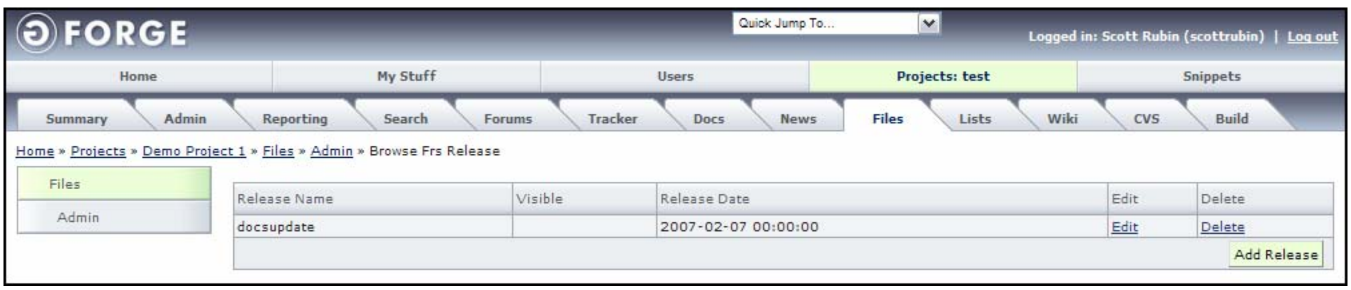

Figure 6-8. Edit Release

4. Click the **Edit** link next to the Release Name you desire to edit.
5. **Edit** any required information. Refer to Figure 6-9.
6. Click the **Save Changes** button.

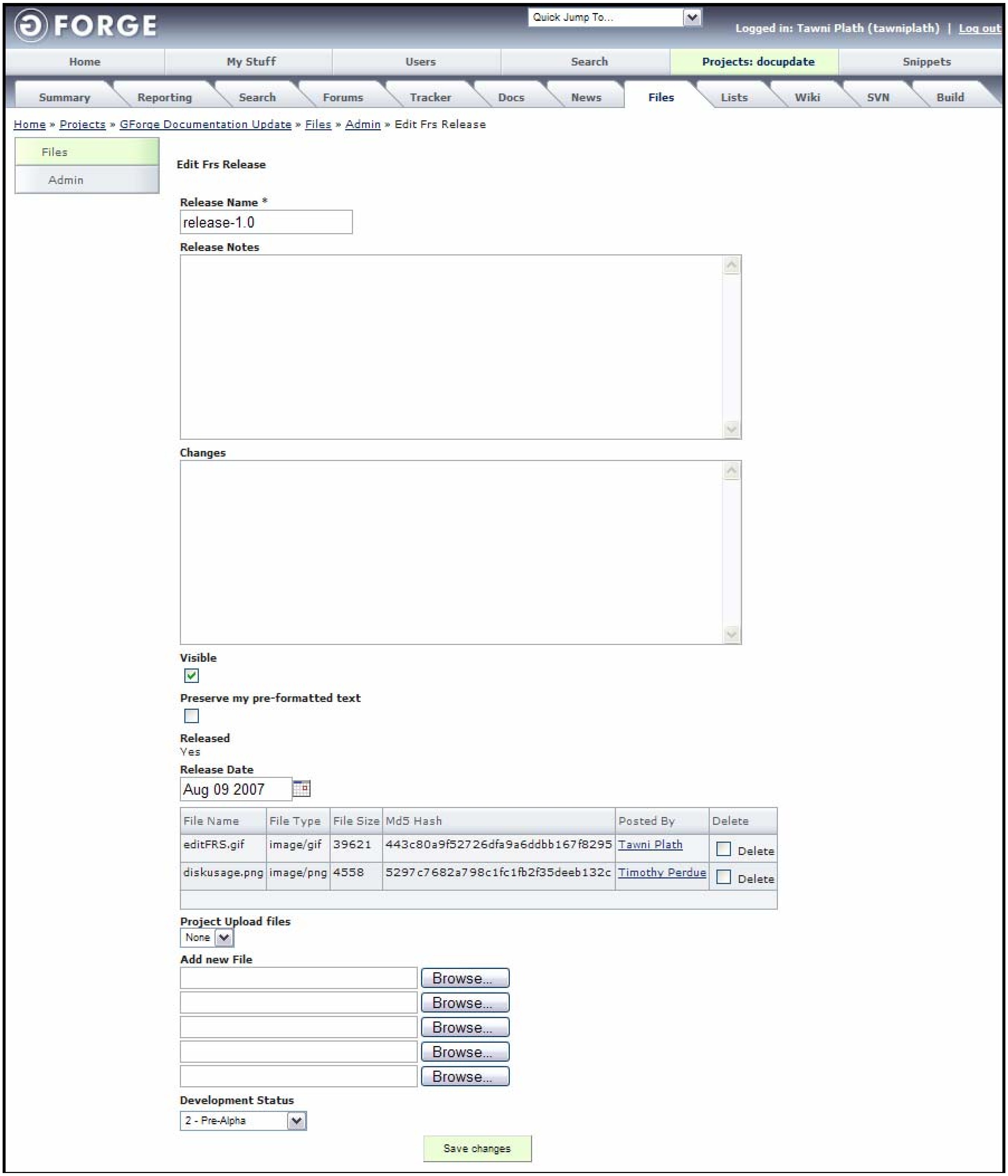

Figure 6-9. Editing File Releases

Release Name – Name of the Release you are creating.

Release Notes – Detailed description of the Release.

Changes – Detailed description of the changes in this Release.

Visible – If left unselected, only administrators will be able to view the File

Preserve my pre-formatted text – Preserves the formatting of the text entered.

Released – If selected, the Release will be considered complete and appears on the Files tab if it is the most current Release, as Files attached to it, and is in a 'visible' Package. If the Package is not marked as visible or the Release has a future date or does not have any associated files, the file will not appear on the Files tab. When this field is selected for the first time, users who are monitoring the Package will be notified of the Release.

Release Date – Date of the original Release.

File Name – Name of the file being edited.

File Type – Type of file being edited.

File Size – Size of the file being edited.

Md5 Hash – 32-character hexadecimal number expressing the file size.

Posted By – Original user that posted the file.

Delete – If selected the file will be deleted when the save changes button is clicked.

Project Upload files – List of files uploaded by FTP.

Add new File – Files associated with this Release.

Development Status – Status at the time of Release.

- ❖ **Note:** You can associate Tracker Items to Releases, even future Releases, by creating a custom field in your Trackers of type Release. The Release type of extra field is pre-populated with a list of Packages and Releases, so you can create defects, tasks, feature requests, and such and have them linked to the Release. You can then view the 'roadmap' for your project on the Reporting tab.

6.2.3 Deleting a Release

To delete a File Release:

1. Click the **Files** tab for your Project.
2. Click the **Admin** button.
3. Click the **Edit Releases** link.
4. Click the **Delete** link next to the Release Name you desire to delete.

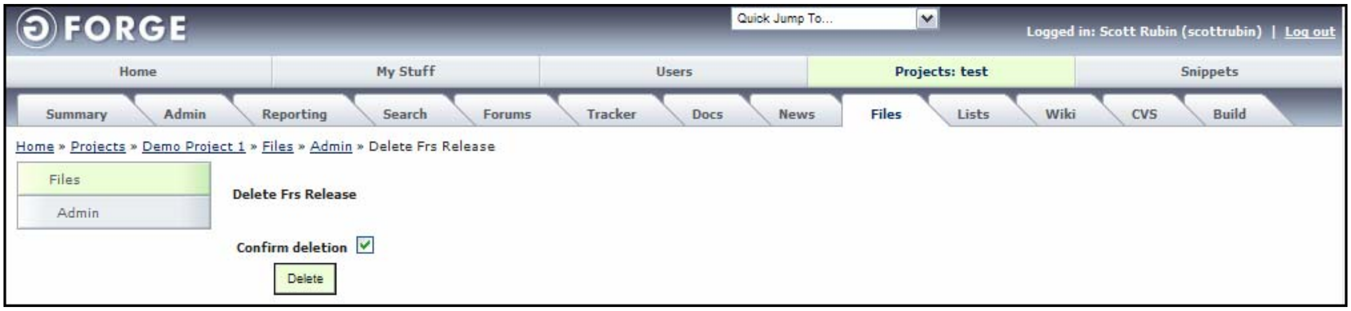

Figure 6-10. Deleting a Release

5. Select the **Confirm deletion** checkbox.
6. Click the **Delete** button.

Section 7 – Mailing Lists

All GForge users can participate in Mailing Lists for communication purposes. Users can subscribe to any mailing list in GForge to receive e-mails when a message is posted. Once a month, the Mailman e-mails the user their password and instructions on how to edit their preferences or unsubscribe.

7.1 Adding a Mailing List

To create a mailing list for a **Project**:

1. Click the **Lists** tab for your Project.

Figure 7-1. Lists Tab

2. Click the **Admin** link.

Figure 7-2. Lists Admin

3. Click the **Add new Mailman List** button.

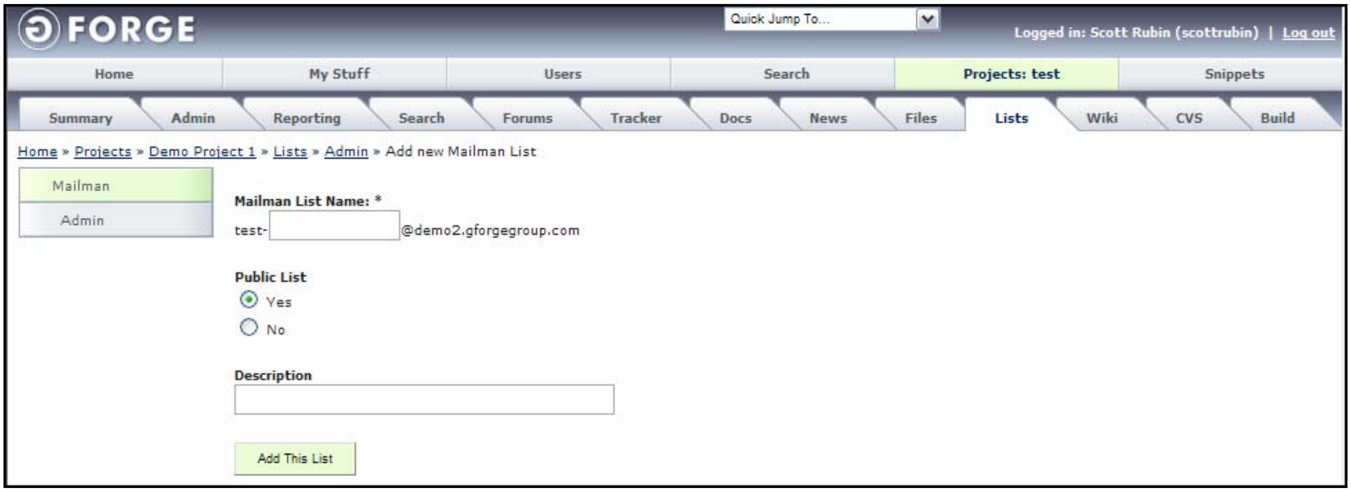

Figure 7-3. Add New Mailman List

4. Enter the **Mailman List Name**. Mailman List Names must meet the following criteria:

- Only characters allowed are letters and numbers.
- Must be at least four characters in length.
- Cannot exceed 12 characters.

5. Select the **Is Public** Yes or No radio button. Public Mailing Lists can be used by anyone.

6. Enter a **Description** for the Mailing List.

7. Click the **Add This List** button.

❖ **Note:** You receive an e-mail within 24 hours providing you with your Mailing List Password.

7.2 Editing a Mailing List

To edit and update a Mailing List for a Project:

1. Click the **Lists** tab for your Project.
2. Click **Edit**. Refer to Figure 7-2 on page 7-1.
3. Change the **Is Public** attribute, if required. Refer to Figure 7-4.

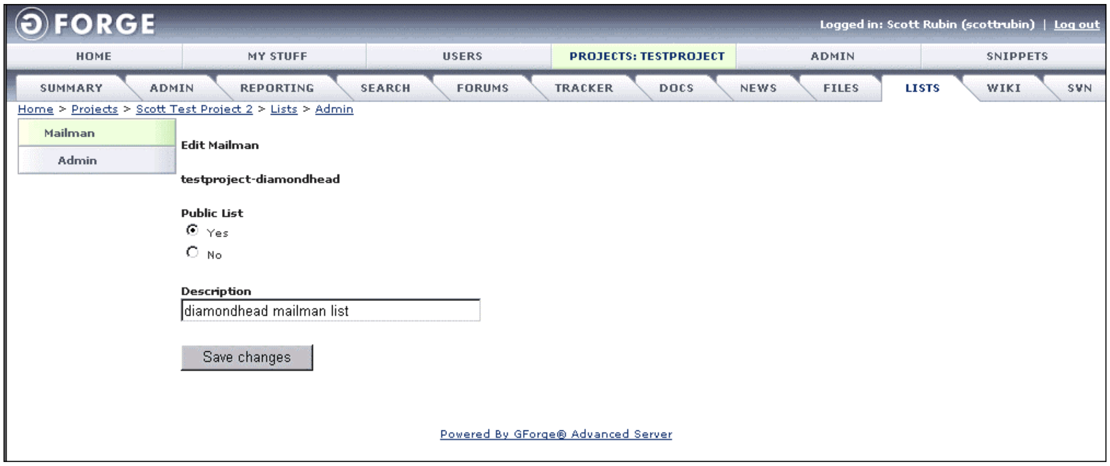

Figure 7-4. Update Mailing List

4. Edit the **Description** field, if required.
5. Click the **Save Changes** button.

7.3 Deleting a Mailing List

To permanently delete a Mailing List for a Project:

1. Click the **Lists** tab for your Project.
2. Click the **Admin** link.
3. Click the **Delete** link. Refer to Figure 7-2 on page 7-1.
4. Select the **Confirm Deletion** checkbox.
5. Click the **Delete** button.

7.4 Administrate a Mailing List

To administrate a Mailing List for a Project:

1. Click the **Lists** tab for your Project.
2. Click the **Admin** link.
3. Click the **Administrate** link.
4. Enter your **List Administrator Password**.
5. Click the **Let me in** button.

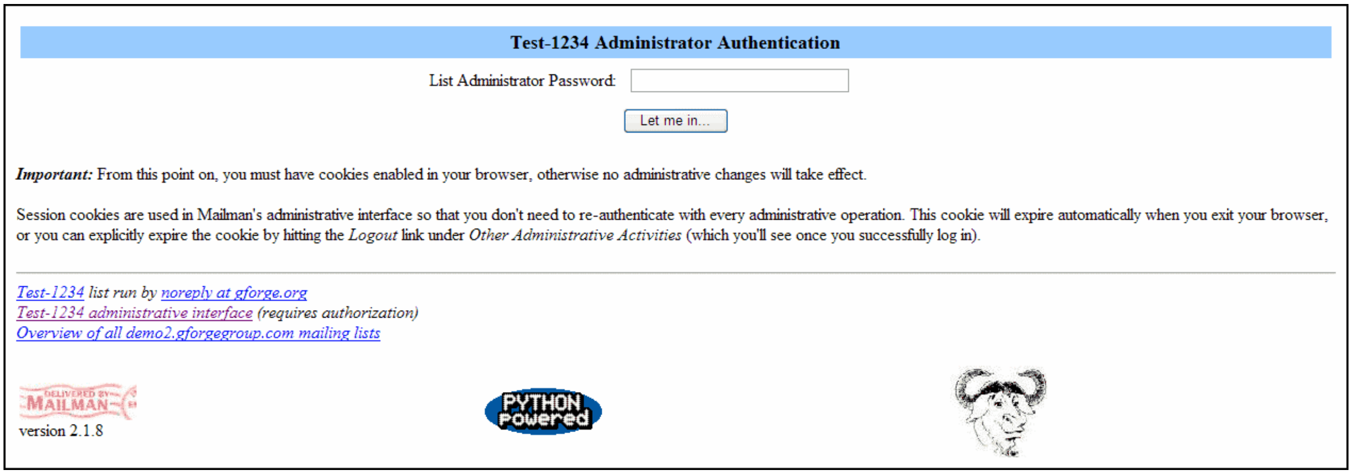

Figure 7-5. Administrate Mailing Lists

Section 8 – Subversion (SVN)

Use the Subversion (SVN) plug-in for Source Code Management (SCM). The SVN tab provides in-depth support for repositories, including automatically creating blank repositories, permission control, statistics, and history browsing for each Project.

The Subversion integration included in GForge AS allows for full integration with GForge, including: creating blank repositories when a Project is created; adding users and groups to the permission system so the users can commit changes to code; enforcing the requirement of a Tracker Item Id on commit if chosen by the Project Administrator; linking commits to Tracker Items, so the changed files and other commit information displays on the Commits tab of the Tracker Item; emailing differences of commits to the commits mailing list if the Project Administrator chooses; and displaying commits on the Activity Report for the Project.

❖ **Note:** Select the Subversion SCM type in the Project Admin page.

8.1 Using SVN

1. Click the **SVN** tab for your Project.
2. Click the **Admin** link.
3. Select **Require Tracker item ID on commit** if desired. This forces your programmers to include a tracker item id in their commit message before they can commit a change to the repository.
4. Click the **Send Commit Emails to Mailing List** checkbox to send all committed e-mails to the list.
5. Enter any **Custom access instructions** to tell your users how to access the repository. These instructions appear on the Access Info page.
6. Enter any **Custom browse instructions** to tell your users how to browse the repository. These instructions appear on the Browse Repository page.
7. Enter an **External URL for browsing the repository**.
8. Click the **here** link to enable GForge **Repository control**.
9. Click the **Yes** button if GForge is controlling your repository.
10. Click the **Submit** button.

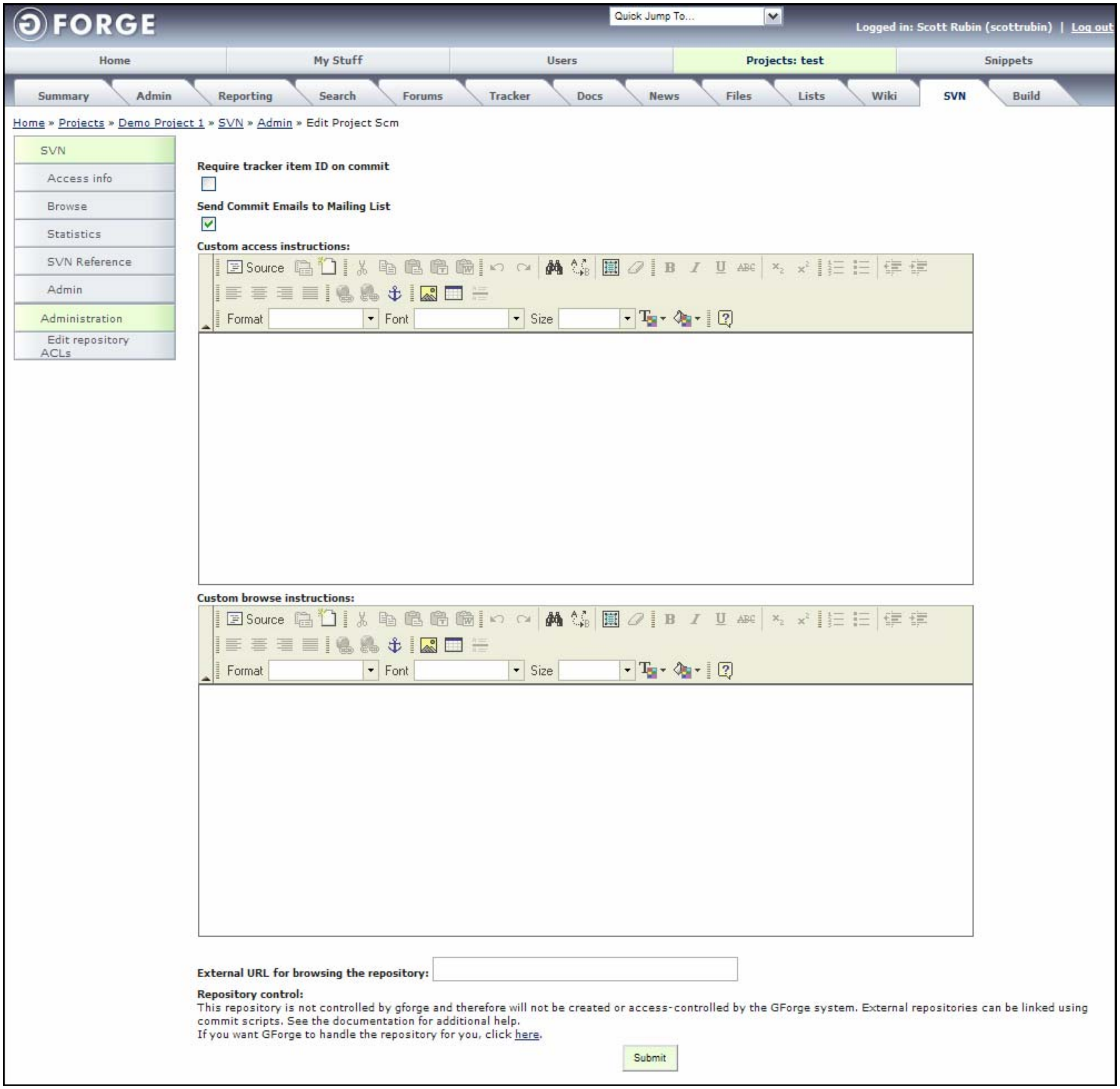

Figure 8-1. SVN Admin

8.2 External Repositories

External repositories can be linked to your Project by choosing to turn off the control of the repository. When you do this, GForge will not create the blank repository for the Project or add any users to the Project. You can still link Tracker Items and use directory-level Access Control List (ACL) permissions for your repository even if it is an external repository. See the README file in the plugins/scmsvn/ directory for the latest information on setting up an external, uncontrolled repository.

8.3 Maintaining the Access Control List (ACL) Repository Module

The Access Control List (ACL) is a list of permissions for any directory in the SCM tree. The list specifies who or what is allowed to read or write to the specified directory and what operations are allowed to be performed by the users in question. When a commit is performed on your SCM tree, the ACLs find any matching directories and the user is either granted or denied permission to perform the commit, depending on their role and ACL settings for the specified directory.

8.3.1 Viewing the Repository ACL List

To view the ACL list:

1. Click the **Admin** link.
2. Click the **Administration** link.
3. Click the **Edit Repository ACLs** link.

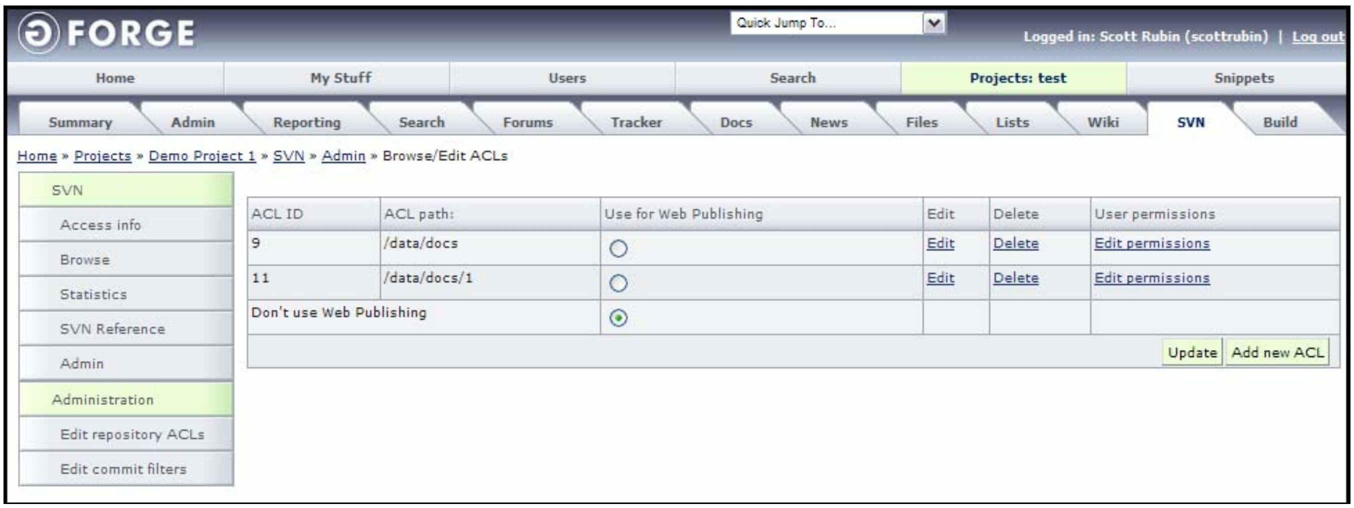

Figure 8-2. Edit Repository ACLs

8.3.2 Adding a Repository ACL Path

To add a new Repository ACL:

1. Click the **Edit Repository ACLs** link.
2. Click the **Add new ACL** link.

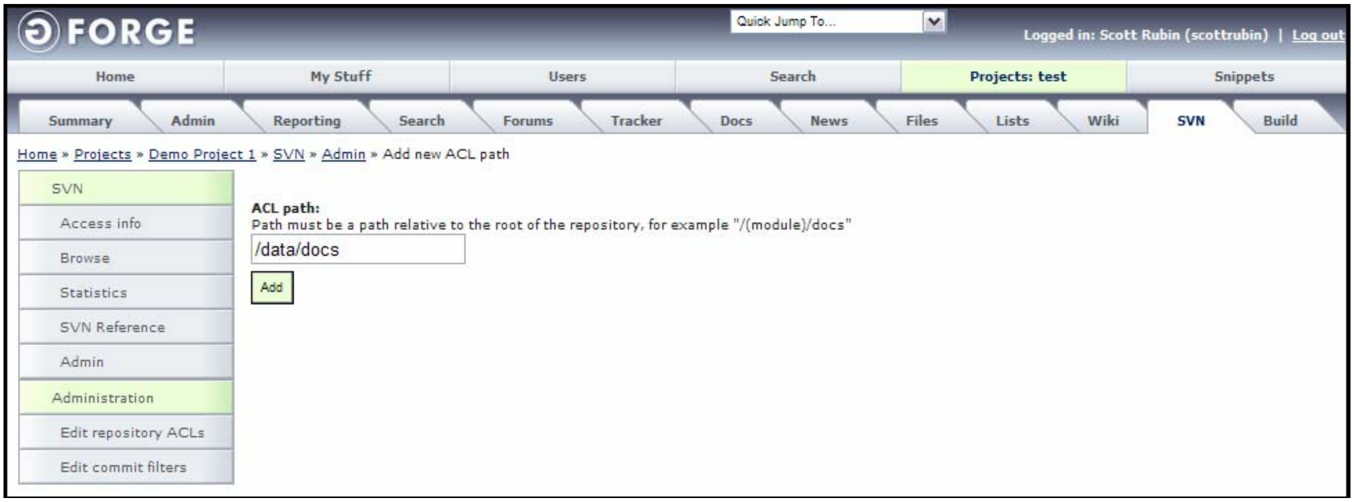

Figure 8-3. Adding Repository ACL

3. Enter the **ACL path** relative to the root of the repository, for example "/(module)/docs". This ACL affects the specified directory and all directories and files beneath it.
4. Click the **Add** button.
5. Select the **Use for Web Publishing** checkbox to define a directory that enables GForge to automatically push the data to an external website. Refer to Figure 8-2. The README file in the root directory of your GForge installation can assist you in understanding and the configuration of this feature, which is not enabled by default in GForge AS.
6. Click the **Update** button.

8.3.3 Editing a Repository ACL Path

To edit Repository ACLs:

1. Click the **Edit Repository ACLs** link.
2. Click the **Edit** link next to the ACL path you desire to edit.

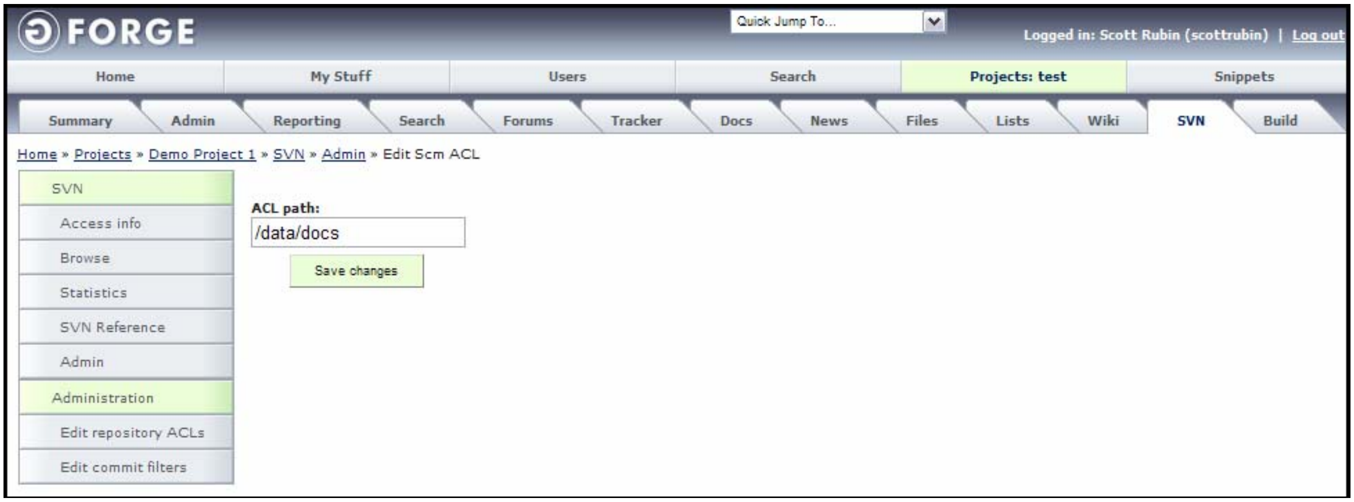

Figure 8-4. Editing Repository ACL

3. Edit the **ACL path**.
4. Click the **Save Changes** button.

8.3.4 Deleting a Repository ACL Path

To delete a Repository ACL path:

1. Click the **Edit Repository ACLs** link.
2. Click the **Delete** link next to the ACL path you desire to delete.
3. Select the **Confirm deletion** checkbox.
4. Click the **Delete** button.

Figure 8-5. Delete Repository ACL

8.3.5 Editing ACL Read/Write Directory Access Permissions

To edit the ACL Read/Write directory permissions for a directory:

1. Click the **Admin** link.
2. Click the **Administration** link.
3. Click the Edit Repository ACLs link.
4. Select **Read** or **Write** in the **Directory access** drop-down list box.

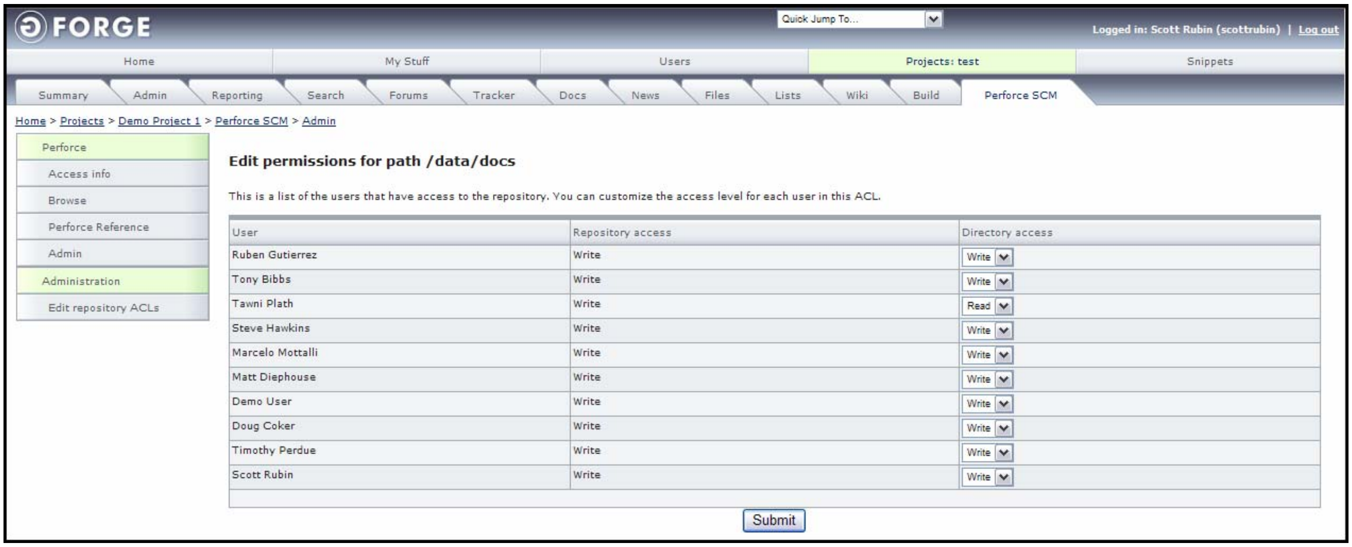

Figure 8-6. Edit ACL Permissions

5. Select the **Directory access** Read/Write option for each user in the list.
6. Click the **Submit** button.

8.3.6 Updating all Repository ACL Paths

To update all Repository ACLs data:

1. Click the **Edit Repository ACLs** link.
2. Click the **Update** button.

8.4 Editing Commit Filters

A project manager can choose which defined filters to use with each Project and GForge automatically adds the filter to the Project.

To use a Commit Filter:

1. Click the **Edit commit filters** link.
2. Select the **Use Filter** checkbox of the filter you desire to commit.
3. Click the **Save changes** button.

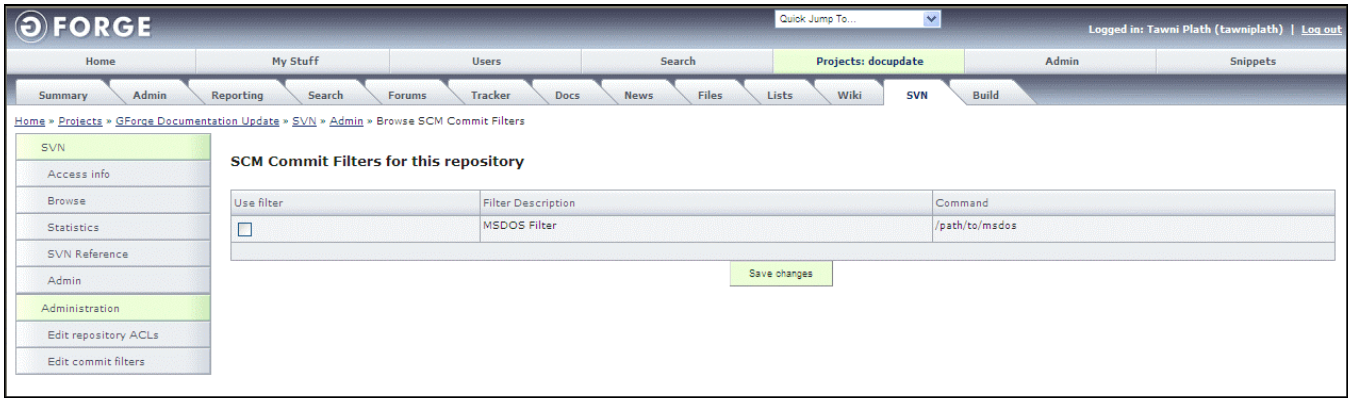

Figure 8-7. Commit Filters

Use filter – Requires the SCM filter to commit.

Filter Description – Description of the SCM filter.

Command – Command executed by the SCM Filter. The Command is entered via the Edit repository ACLs link.

Save Changes – Commits any selected filters.

Section 9 – Concurrent Versioning System (CVS)

Use the CVS (Concurrent Versioning System) plug-in for Source Code Management (SCM).

The CVS integration included in GForge AS allows for full integration with GForge, including: creating blank repositories when a Project is created; adding users and groups to the UNIX layer so the users can commit changes to code; enforcing the requirement of a Tracker Item Id on commit if chosen by the Project Administrator; linking commits to Tracker Items, so the changed files and other commit information displays on the Commits tab of the Tracker Item; emailing differences of commits to the commits mailing list if the Project Administrator chooses; and displaying commits on the Activity Report for the Project.

- ❖ **Note:** Select the CVS SCM type in the Project Admin page.

9.1 Using CVS

1. Click the **CVS** tab for your Project.
2. Click the **Admin** link.
3. Select **Require Tracker item ID on commit** if desired. This forces your programmers to include a tracker item id in their commit message before they can commit a change to the repository.
4. Click the **Send Commit Emails to Mailing List** checkbox to send all committed e-mails to the list.
5. Enter any **Custom access instructions** to tell your users how to **access** the repository. These instructions appear on the Access Info page.
6. Enter any **Custom browse instructions** to tell your users how to **browse** the repository. These instructions appear on the Browse repository page.
7. Enter an **External URL for browsing the repository**.
8. Click the **here** link to enable GForge repository control.
9. Click the **Yes** button if GForge is controlling your repository.
10. Click the **Submit** button.

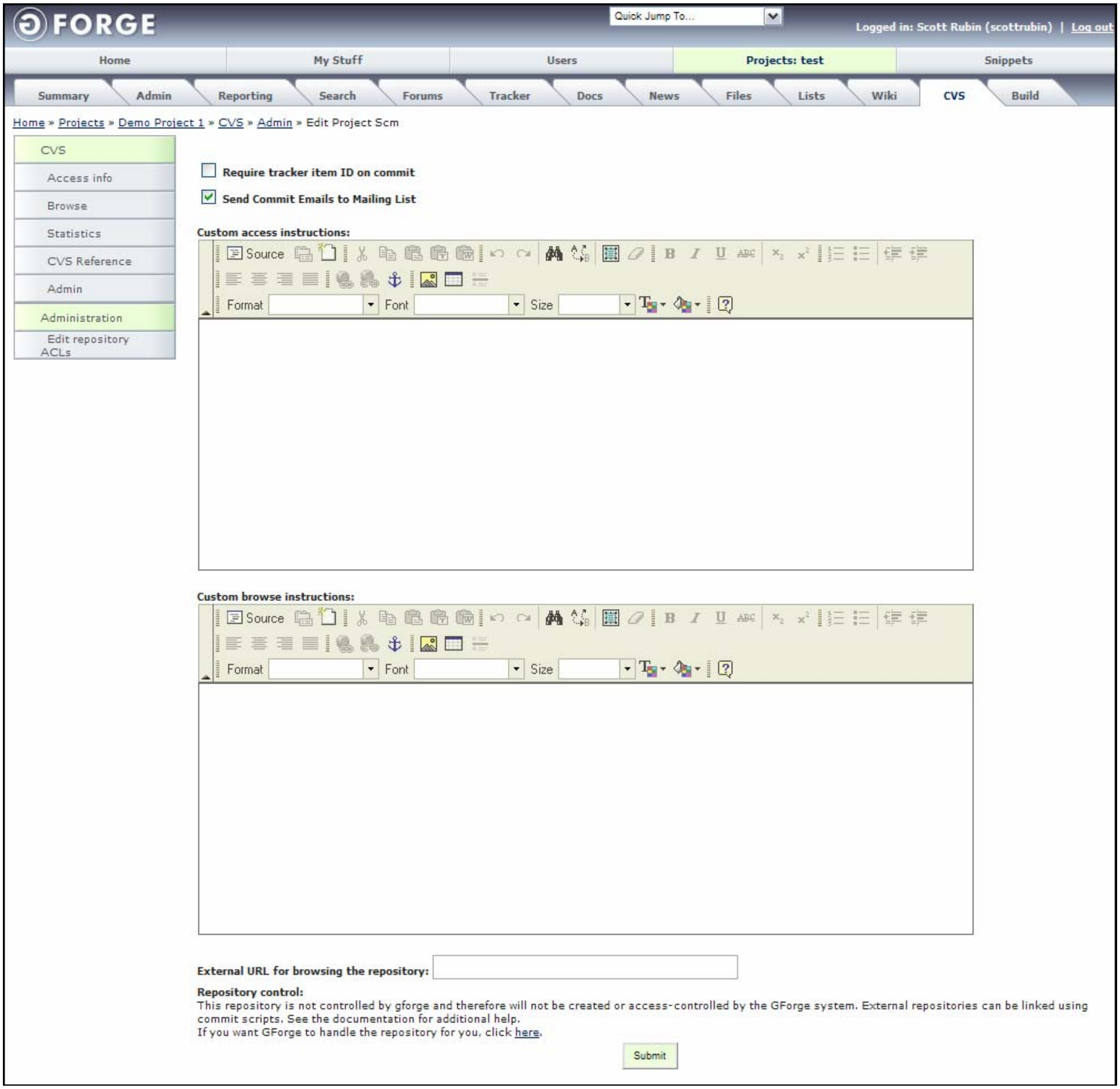

Figure 9-1. CVS Admin

9.2 External Repositories

External repositories can be linked to your Project by choosing to turn off the control of the repository. When you do this, GForge will not create the blank repository for the Project or add any users to the Project. You can still link Tracker Items and use directory-level Access Control List (ACL) permissions for your repository even if it is an external repository. See the README file in the plugins/scmcvs/ directory for the latest information on setting up an external, uncontrolled repository.

9.3 Maintaining the Access Control List (ACL) Repository Modules

The Access Control List (ACL) is a list of permissions for any directory in the SCM tree. The list specifies who or what is allowed to read or write to the specified directory and what operations are allowed to be performed by the users in question. When a commit is performed on your SCM tree, the ACLs find any matching directories and the user is either granted or denied permission to perform the commit, depending on their role and ACL settings for the specified directory.

9.3.1 Viewing the Repository ACL List

To view the Repository ACL List:

1. Click the **Admin** link.
2. Click the **Administration** link.
3. Click the **Edit Repository ACLs** link.

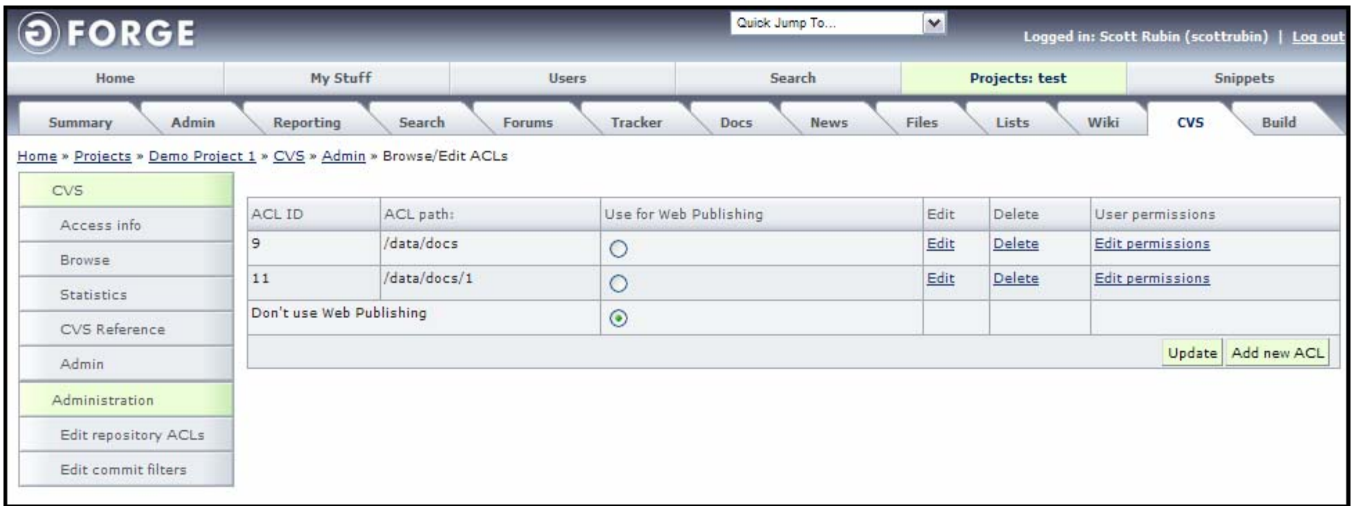

Figure 9-2. Edit Repository Modules

9.3.2 Adding a Repository ACL Path

To add a new Repository ACL:

1. Click the **Edit Repository ACLs** link.
2. Click the **Add new ACL** link.

Figure 9-3. Adding Repository ACL

3. Enter the **ACL path** relative to the root of the repository, for example "/(module)/docs". This ACL will affect the specified directory and all directories and files beneath it.
4. Click the **Add** button.
5. Select the **Use for Web Publishing** checkbox to define a directory that enables GForge to automatically push the data to an external website. Refer to Figure 9-2. The README file in the root directory of your GForge installation can assist you in understanding and the configuration of this feature, which is not enabled by default in GForge AS.
6. Click the **Update** button.

9.3.3 Editing Repository ACL Paths

To edit Repository ACLs:

1. Click the **Edit Repository ACLs** link.
2. Click the **Edit** link next to the ACL path you desire to edit.

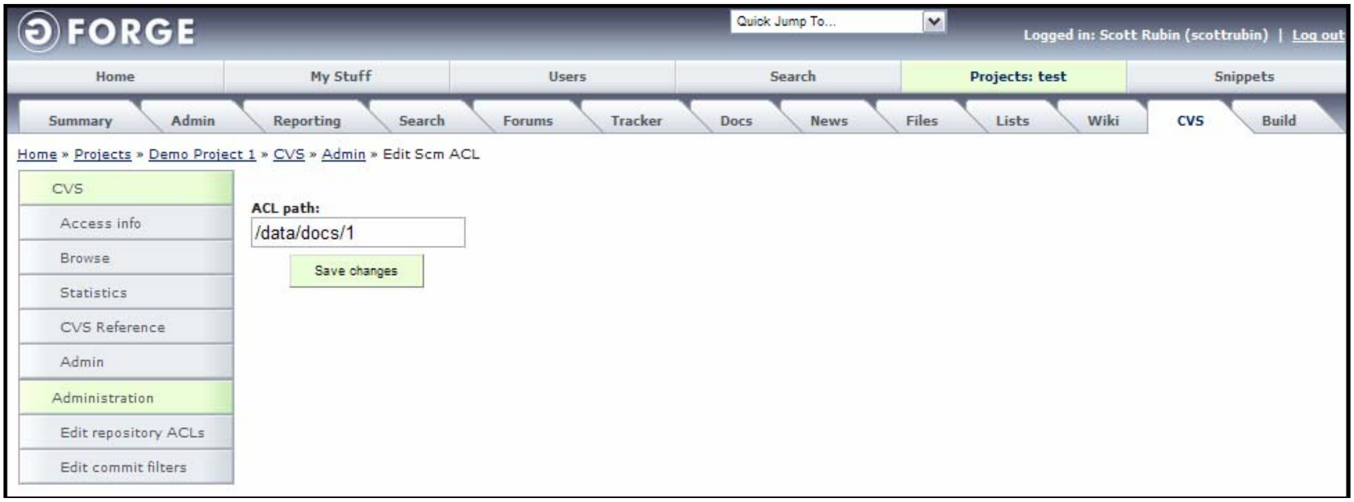

Figure 9-4. Editing Repository ACL

3. Edit the **ACL path**.
4. Click the **Save Changes** button.

9.3.4 Deleting a Repository ACL Path

To delete a Repository ACL path:

1. Click the **Edit Repository ACLs** link.
2. Click the **Delete** link next to the ACL path you desire to delete.
3. Select the **Confirm deletion** checkbox.
4. Click the **Delete** button.

Figure 9-5. Delete Repository ACL

9.3.5 Editing ACL Read/Write Directory Access Permissions

To edit the ACL Read/Write directory permissions for a directory:

1. Click the **Admin** link.
2. Click the **Administration** link.
3. Click the **Edit Repository ACLs** link.
4. Select **Read** or **Write** in the **Directory access** drop-down list box.

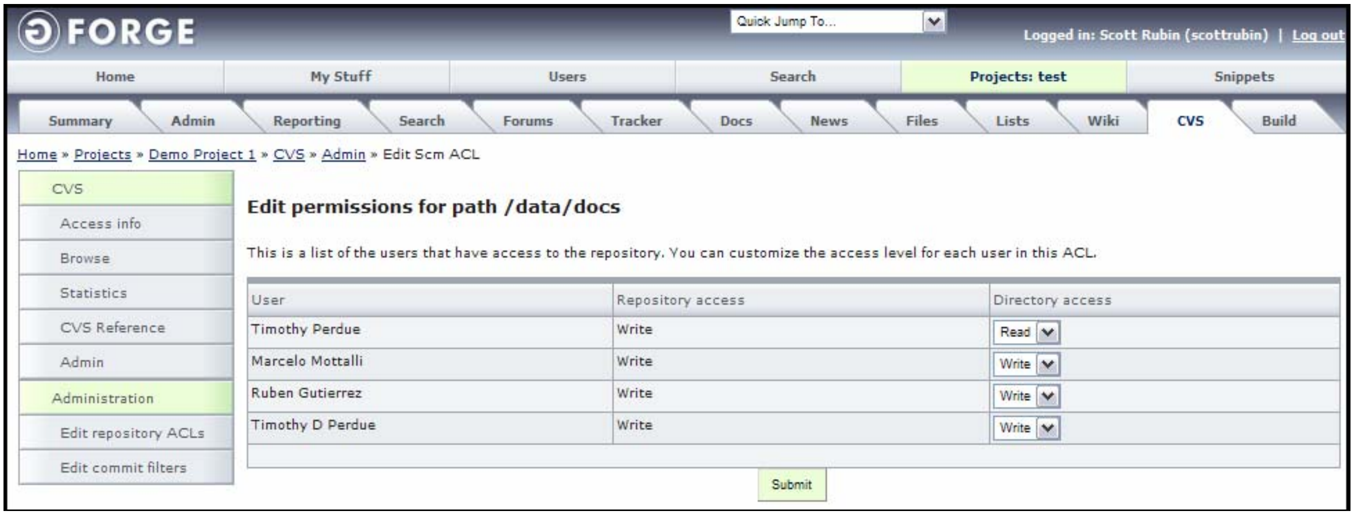

Figure 9-6. Edit Permissions

5. Select the **Directory access** Read/Write option for each user in the list.
6. Click the **Submit** button.

9.3.6 Updating all Repository ACL Paths

To update all Repository ACLs data:

1. Click the **Edit Repository ACLs** link.
2. Click the **Update** button.

9.4 Editing Commit Filters

A project manager can choose which defined filters to use with each Project and GForge automatically adds the filter to the Project.

To use a Commit Filter:

1. Click the **Edit commit filters** link.
2. Select the **Use Filter** checkbox of the filter you desire to commit.
3. Click the **Save changes** button.

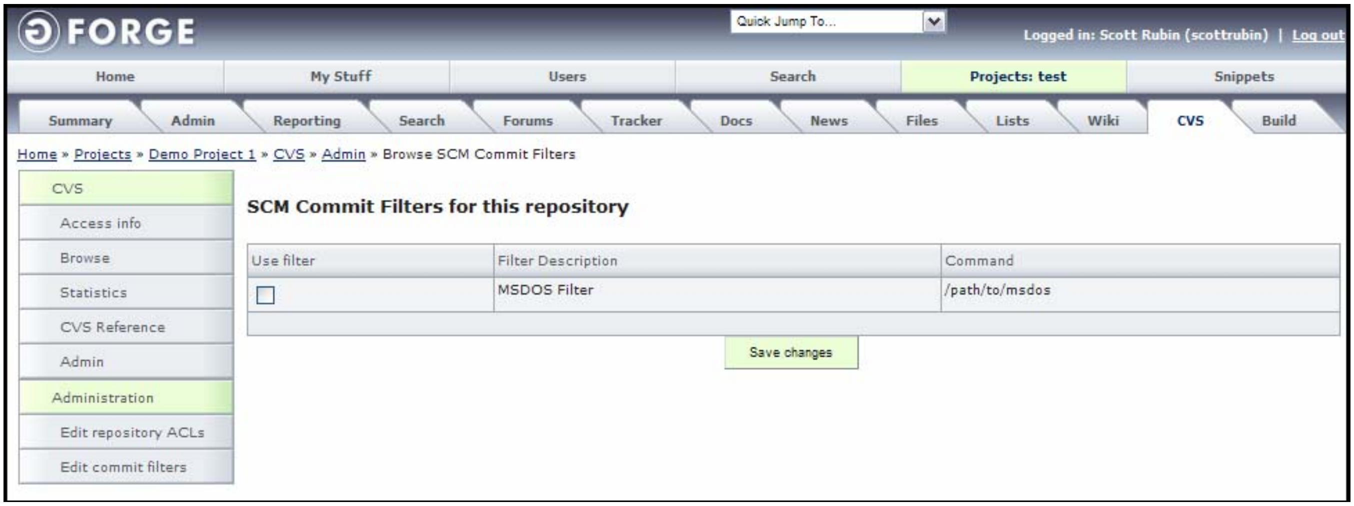

Figure 9-7. Commit Filters

Use filter – Requires the SCM filter to commit.

Filter Description – Description of the SCM filter.

Command – Command executed by the SCM Filter. The Command is entered via the Edit repository ACLs link.

Save Changes – Commits any selected filters.

Section 10 – CruiseControl

CruiseControl is a framework for a continuous build process. It includes, but is not limited to, plug-ins for e-mail notification, Ant, and various source control tools. A web interface is provided to view the details of the current and previous builds.

The GForge CruiseControl integration lets you define multiple builds per project and view the status of each build on the build tab. If a failure occurs during a build, a ticket is automatically opened in the tracker and assigned to the designated user. When the error is corrected in a subsequent build, the ticket is closed automatically.

1. Click the **Build** tab in your Project.
2. Click the **Admin** link.

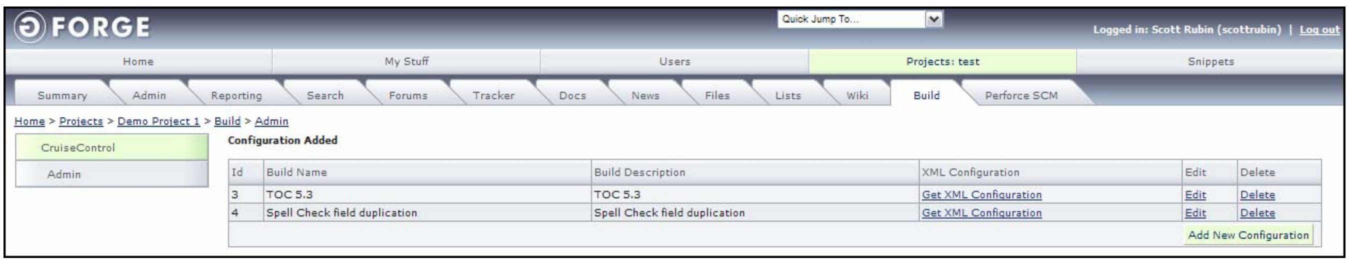

Figure 10-1. CruiseControl

10.1 Adding a Build

To add a build in CruiseControl:

1. Click the **Build** tab in your Project.
2. Click the **Admin** link.
3. Enter the **Add New Configuration** button.
4. Enter the data.
5. Click the **Submit** button.

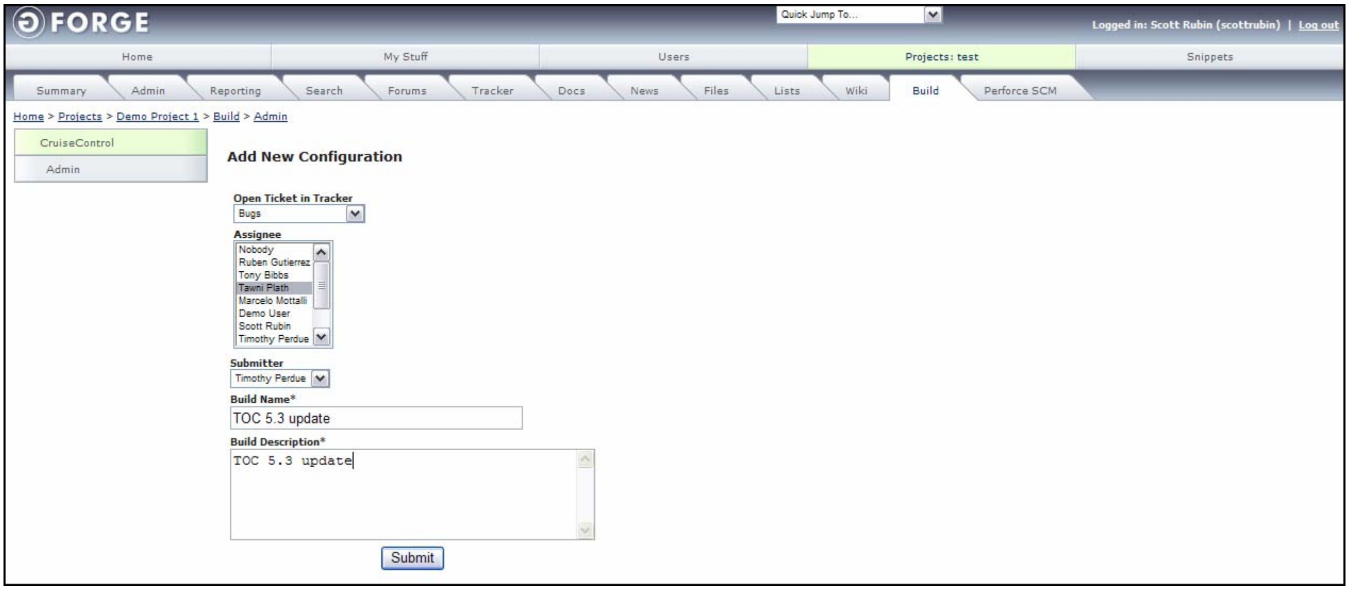

Figure 10-2. CruiseControl (Build)

Open Ticket in Tracker – Select the Tracker under which to add the event.

Assignee – Select to whom the Tracker should be assigned.

Submitter – Person who is entering the build.

Build Name – Name of the build.

Build Description – Description of the build.

10.2 Acquiring the XML Code

To view the XML code associated with a build in CruiseControl:

1. Click the **Build** tab in your Project.
2. Click the **Admin** link.
3. Enter the **Get XML Configuration** link.

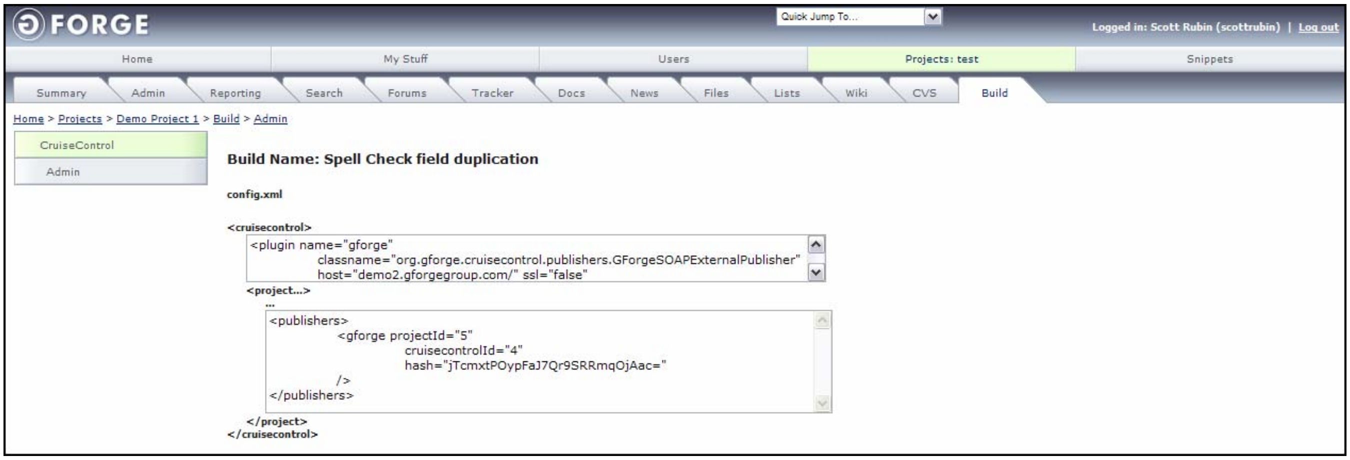

Figure 10-3. XML Code

10.3 Editing a Build

To edit a build in CruiseControl:

1. Click the **Build** tab in your Project.
2. Click the **Admin** link.
3. Enter the **Edit** link next to the build you desire to edit.
4. Change the data.
5. Click the **Submit** button.

10.4 Deleting a Build

To delete a build in CruiseControl:

1. Click the **Build** tab in your Project.
2. Click the **Admin** link.
3. Enter the **Delete** link next to the build you desire to delete.
4. Select the **Are you sure** checkbox.
5. Click the **Delete** button.

Section 11 – ClearCase

IBM® Rational® ClearCase® provides management and control of software development assets. Integration with design, development, build, test, and deployment tools provides a comprehensive solution for controlled access to software assets across the full lifecycle.

The ClearCase plug-in only allows a limited interaction with ClearCase, where you may specify the location of the repository, and write any custom access and browse instructions that your users may find useful to access your repository. GForge does not create blank ClearCase repositories for your Project, nor control who can access them or link items to the Tracker.

❖ **Note:** Select the ClearCase type in the Project Admin page.

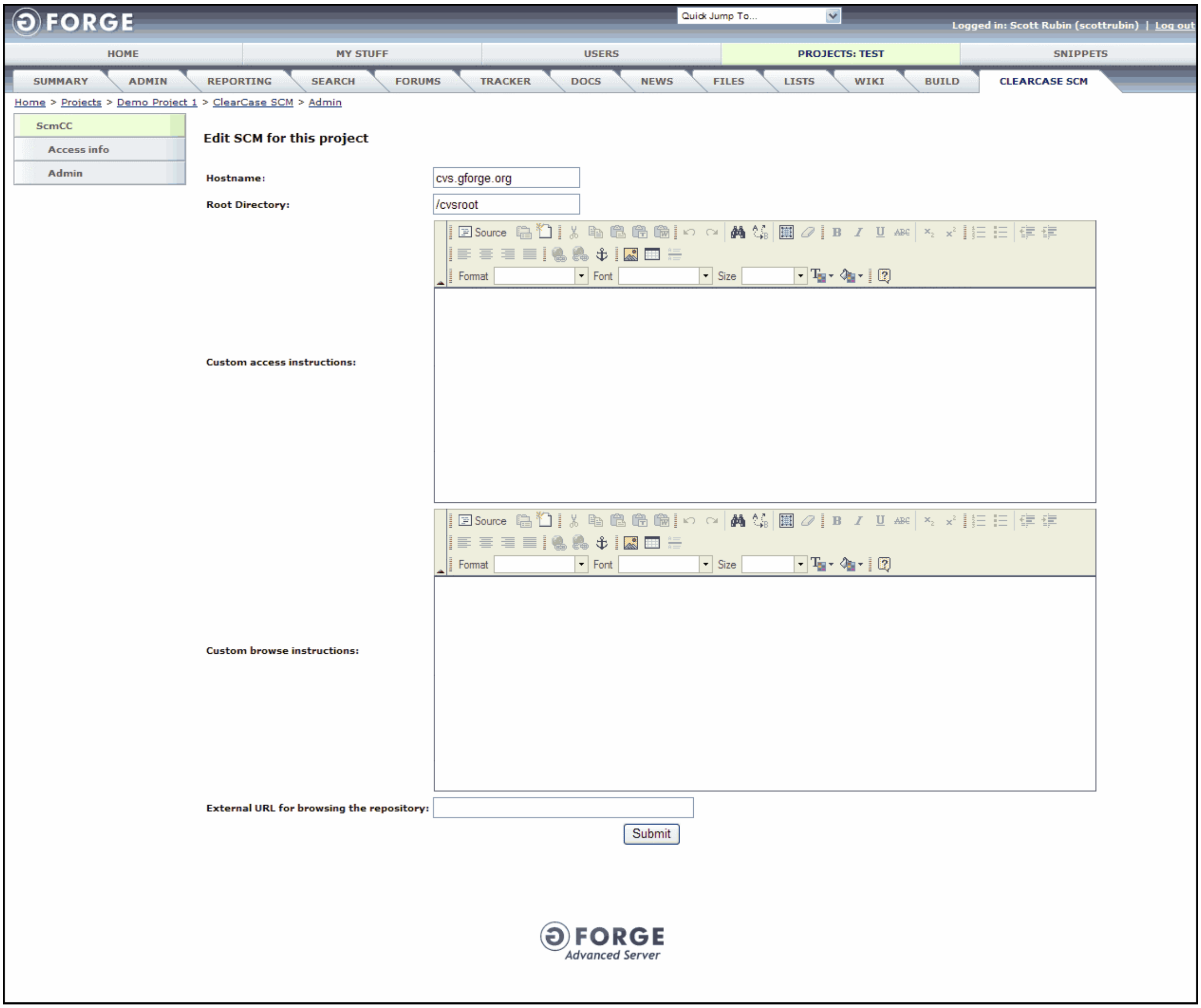

Figure 11-1. ClearCase

Hostname – Enter the Hostname for the ClearCase server.

Root Directory – Enter the Root Directory where the ClearCase server is located.

Custom access instructions – Enter any custom instructions to tell your users how to access your ClearCase repository.

Custom browse instructions – Enter any custom instructions to tell your users how to access the ClearCase browser.

External URL for browsing the repository – Enter an external URL for the ClearCase server.

Section 12 – Visual Source Safe

Visual Source Safe provides management and control of software development assets. Integration with design, development, build, test, and deployment tools provides a comprehensive solution for controlled access to software assets across the full lifecycle.

The VSS plug-in only allows a limited interaction with Visual Source Safe, where you may specify the location of the repository, and write any custom access and browse instructions that your users may find useful to access your repository. GForge does not create blank VSS repositories for your project, nor control who can access them or link items to the Tracker.

- ❖ **Note:** Select the VSS Skeleton type in the Project Admin page.

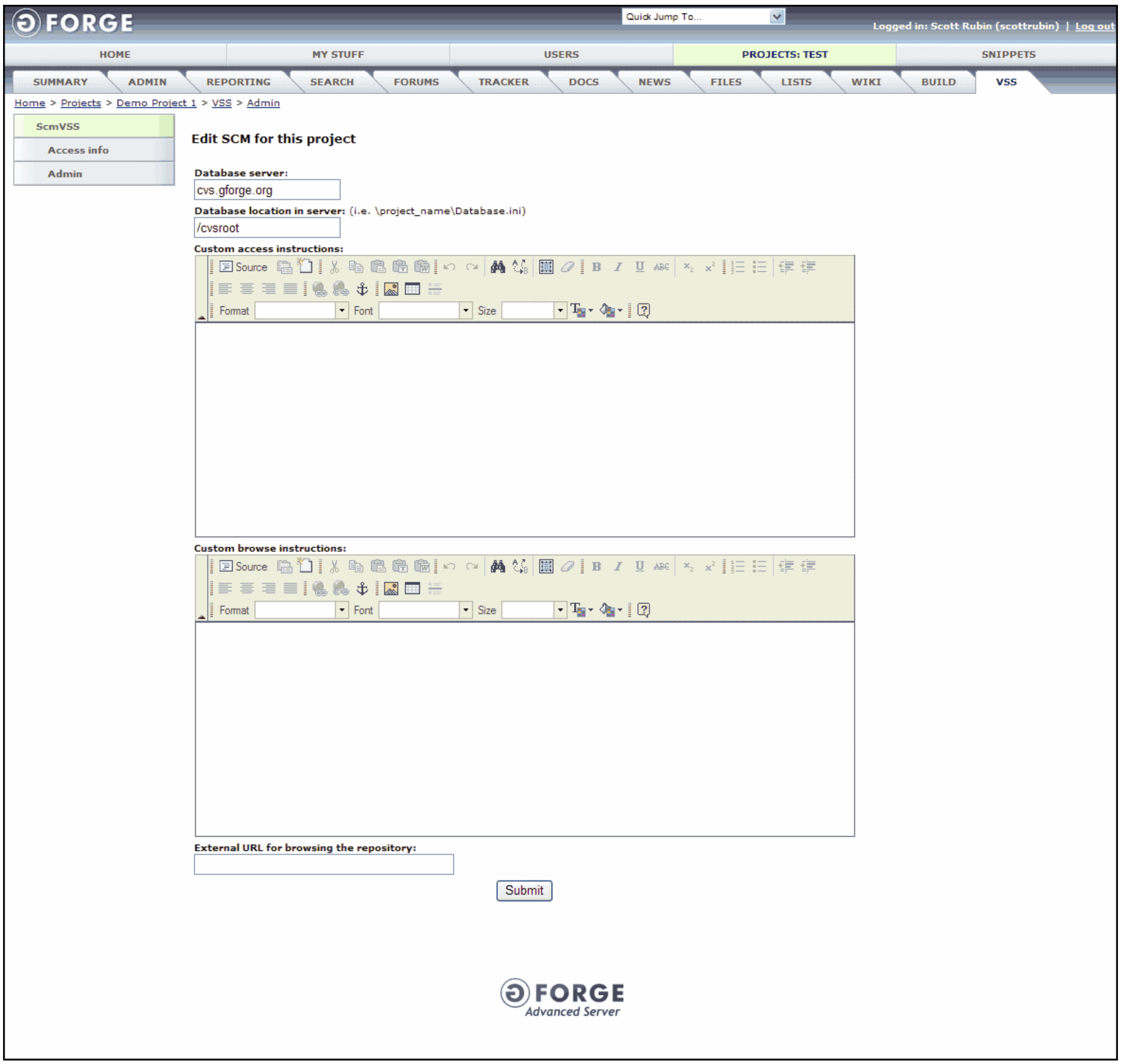

Figure 12-1. VSS (Visual Source Safe)

Database server – Enter the name database server for the Visual Source Safe server.

Database location in server – Enter the location of the database server where the Visual Source Safe server is located.

Custom access instructions – Enter any custom instructions to tell your users how to access Visual Source Safe.

Custom browse instructions – Enter any custom instructions to tell your users how to access the Visual Source Safe browser.

External URL for browsing the repository – Enter an external URL for the Visual Source Safe server.

Section 13 – Perforce SCM

Perforce is a Source Code Management (SCM) system based on a client/server architecture. Users of Perforce client programs connect to a Perforce server and use Perforce client programs to transfer files between the server's file repository and individual client workstations.

The Perforce integration included in GForge AS allows for full integration with GForge, including: creating blank repositories when a Project is created; adding users and groups to the Perforce repository so the users can commit changes to code; enforcing the requirement of a Tracker Item ID on commit if chosen by the Project Administrator; linking commits to Tracker Items, so the changed files and other commit information displays on the Commits tab of the Tracker Item; emailing differences of commits to the commits mailing list if the Project Administrator chooses; and displaying commits on the Activity Report for the Project.

❖ **Note:** Select the Perforce SCM type in the Project Admin page.

13.1 Using Perforce SCM

1. Click the **Perforce SCM** tab for your Project.
2. Click the **Admin** link.
3. Select **Require Tracker Item ID on commit** if desired. This forces your programmers to include a Tracker Item ID in their commit message before they can commit a change to the repository.
4. Click the **Send Commit Emails to Mailing List** checkbox to send all committed e-mails to the list.
5. Enter any **custom instructions** to tell your users how to **access** the repository.
6. Enter any **custom instructions** to tell your users how to **browse** the repository.
7. Enter an **External URL for brosing the repository**.
8. Click the **here** link to enable GForge repository control.
9. Click the **Yes** button if GForge is controlling your repository.
10. Click the **Submit** button.

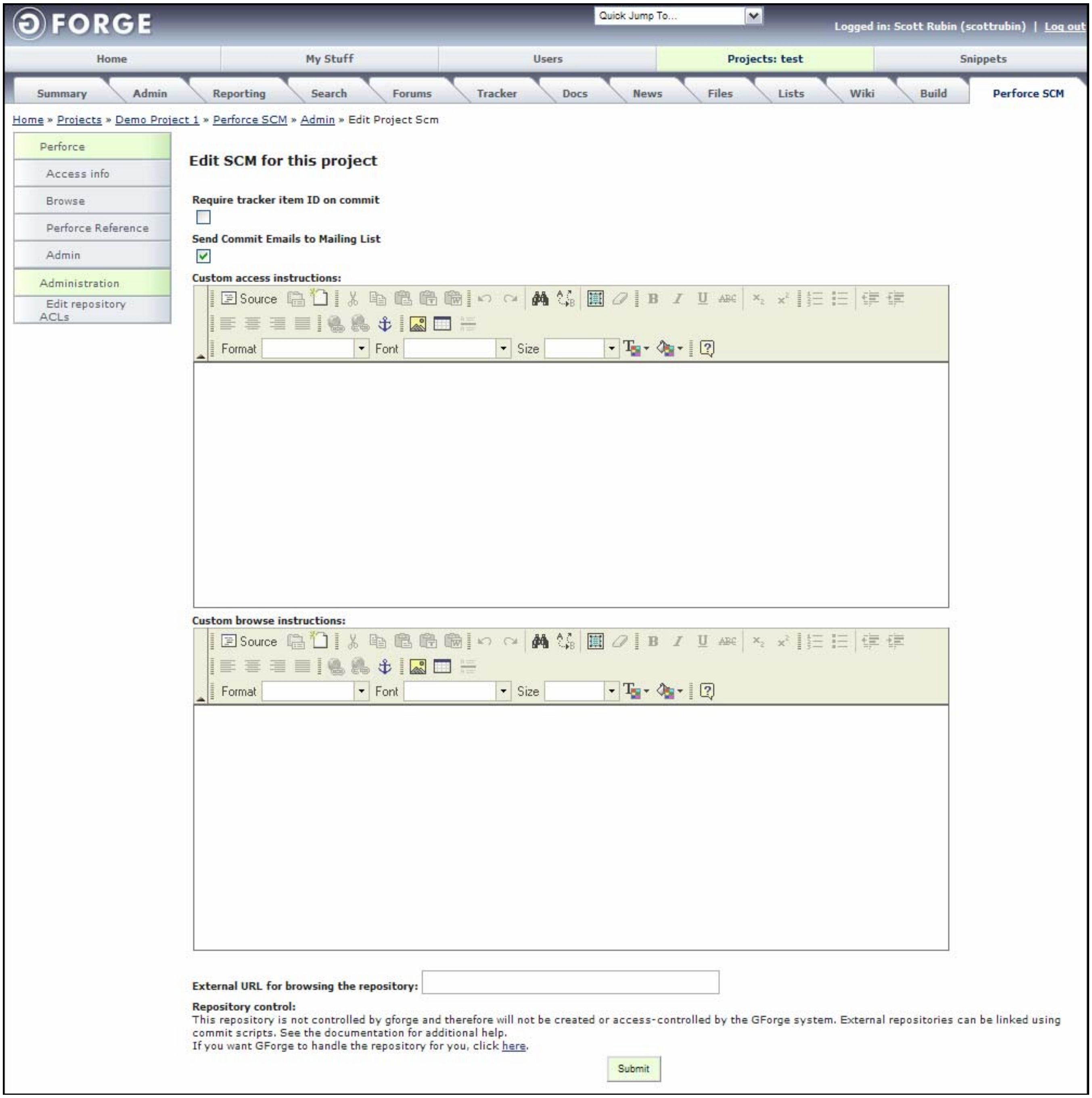

Figure 13-1. Perforce

Require Tracker Item ID on commit – Select to require users to log a Tracker Item when they add, delete, or checkout a file. This forces your programmers to include a Tracker Item ID in their commit message before they can commit a change to the repository.

Send Commit Emails to Mailing List – Select to send an advisory e-mail when a user adds, deletes, or checks out a file.

Custom access instructions – Enter any custom instructions to tell your users how to access Perforce.

Custom browse instructions – Enter any custom instructions to tell your users how to access the Perforce browser.

13.2 External Repositories

External repositories can be linked to your Project by choosing to turn off the control of the repository. When you do this, GForge will not create the blank repository for the Project or add any users to the Project. You can still link Tracker Items and use directory-level Access Control List (ACL) permissions for your repository even if it is an external repository. See the README file in the plugins/scmperforce/ directory for the latest information on setting up an external, uncontrolled repository.

13.3 Maintaining Repository ACLs

The Access Control List (ACL) is a list of permissions for any directory in the SCM tree. The list specifies who or what is allowed to read or write to the specified directory and what operations are allowed to be performed by the users in question. When a commit is performed on your SCM tree, the ACLs find any matching directories and the user is either granted or denied permission to perform the commit, depending on their role and ACL settings for the specified directory.

1. Click the **Admin** link.
2. Click the **Perforce Admin** link.
3. Click the **Edit Repository ACLs** link.

Figure 13-2. Edit Repository ACLs

ACL ID – Internal identification number associated with the ACL.

ACL path – Relative path to the files.

13.3.1 Adding Repository ACLs

To add a new Repository ACL:

1. Click the **Edit Repository ACLs** link.
2. Click the **Add new ACL** link.

Figure 13-3. Adding Repository ACL

3. Enter the **path** relative to the root of the repository, for example "/(module)/docs". This ACL will affect the specified directory and all directories and files beneath it.
4. Click the **Add** button.

13.3.2 Editing Repository ACLs

To edit Repository ACLs:

1. Click the **Edit Repository ACLs** link.
2. Click the **Edit** link next to the ACL path you desire to edit.

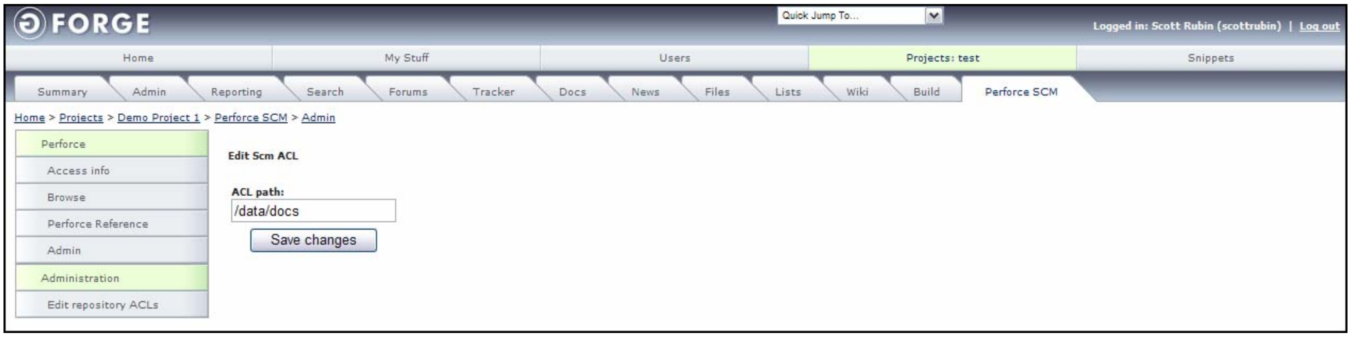

Figure 13-4. Editing Repository ACL

3. Edit the **ACL path**.
4. Click the **Save Changes** button.

13.3.3 Deleting a Repository ACL

To delete a Repository ACL path:

1. Click the **Edit Repository ACLs** link.
2. Click the **Delete** link next to the ACL path you desire to delete.
3. Select the **Confirm deletion** checkbox.
4. Click the **Delete** button.

Figure 13-5. Delete Repository ACL

13.3.4 Editing ACL Permissions

To edit the ACL permissions for a directory:

1. Click the **Edit Permissions** link.

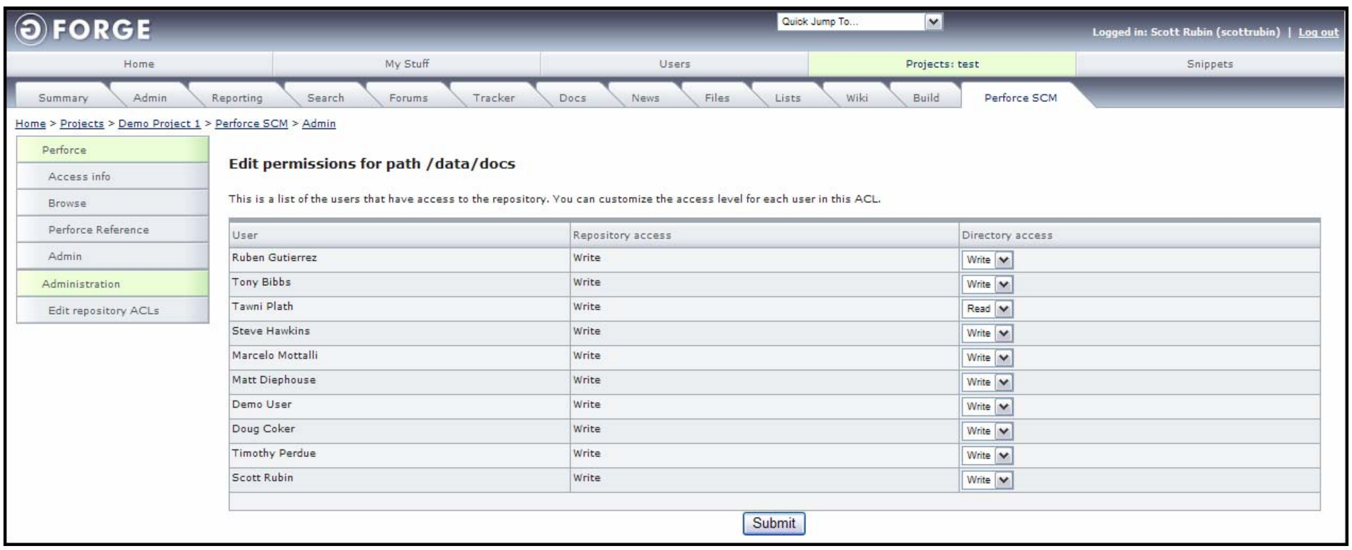

Figure 13-6. Edit Permissions

2. Select the **Directory access** Read/Write option for each user in the list.
3. Click the **Submit** button.

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