

# **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

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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

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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.

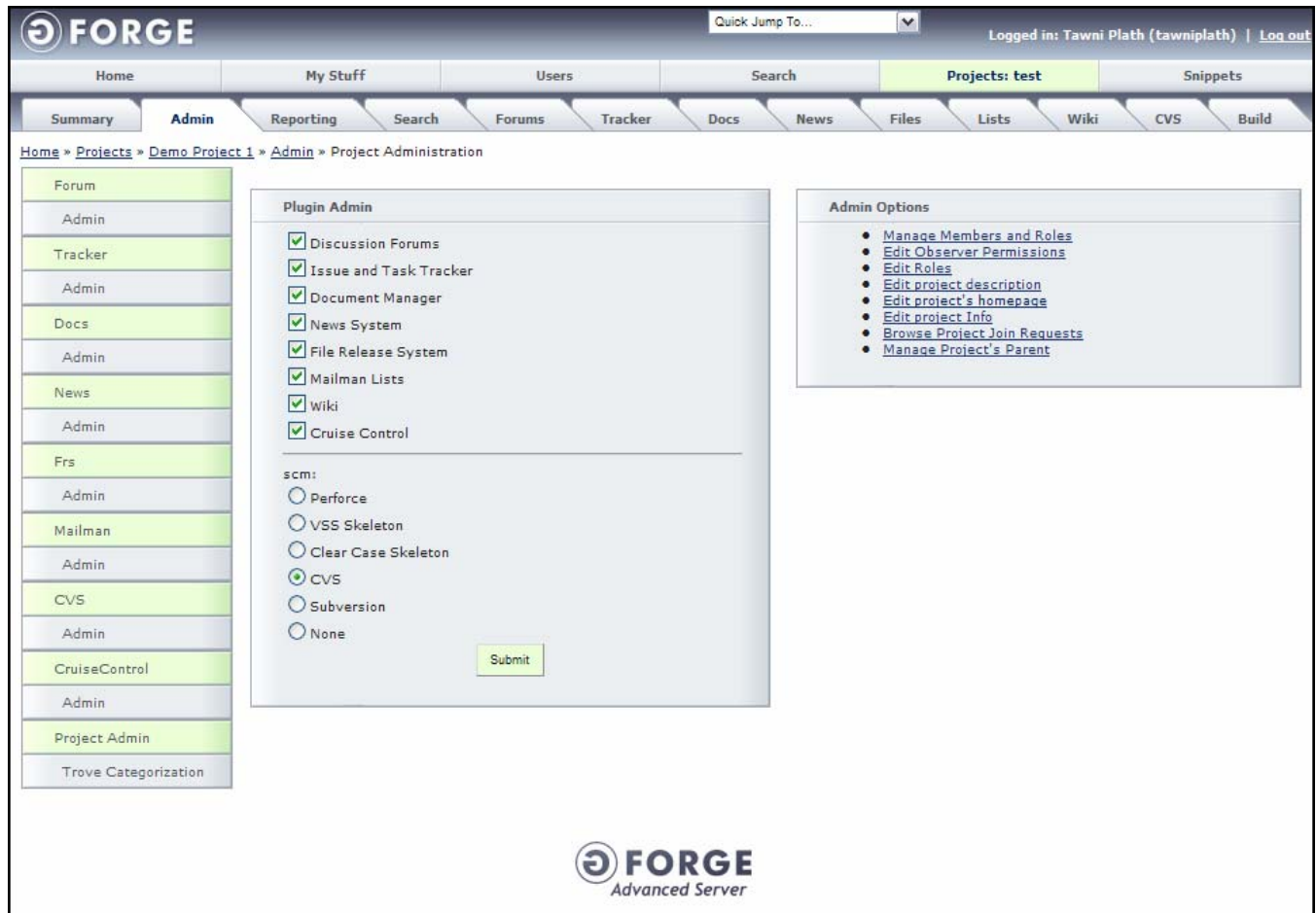


Figure 1-1. Project Admin

### 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

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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.



The screenshot shows the Forge Project Administration interface. The top navigation bar includes 'Home', 'My Stuff', 'Users', 'Search', 'Projects: test', and 'Snippets'. The 'Admin' tab is selected. The main content area is titled 'Manage Members and Roles' and contains a table of users. The table has four columns: 'Full name', 'Role', 'Update', and 'Remove'. Two users are listed: 'Tawni Plath (tawniplath)' and 'Timothy Perdue (bigdisk)'. The 'Role' column has a dropdown menu with options: 'Admin', 'Senior Developer', 'Junior Developer', 'Doc Writer', 'Support Tech', 'Web Developer', 'Product Manager', 'Project Manager', and 'QA Tester'. The 'Update' column has 'Update' buttons, and the 'Remove' column has 'Remove' buttons. A 'Search Users' input field is also visible.

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.

The screenshot shows the 'Edit Observer' page in GForge. The page title is 'Edit Observer' and it includes a sub-header: 'This page is used to edit the permissions and access levels of non-members of your project. (Non-members includes not logged in users)'. The main content is a table with the following structure:

Section	Subsection	Setting	Description
<b>Project-wide access</b>			
	-	Public	Private projects can only be accessed by members
<b>Forum Privileges</b>			
	web_module_forum	Private	Private forums can only be accessed by members with Read or higher permissions
	open-discussion2	Public	Private forums can only be accessed by members with Read or higher permissions
	mail-module	Public	Private forums can only be accessed by members with Read or higher permissions
	developers	Public	Private forums can only be accessed by members with Read or higher permissions
	help	Public	Private forums can only be accessed by members with Read or higher permissions
	test-forum	Public	Private forums can only be accessed by members with Read or higher permissions
	documentation	Public	Private forums can only be accessed by members with Read or higher permissions
<b>Tracker Privileges</b>			
	Documentation Tracker	Private	Private trackers can only be accessed by members with Read or higher permissions
	Amgen Tracker	Public	Private trackers can only be accessed by members with Read or higher permissions
	Bugs	Public	Private trackers can only be accessed by members with Read or higher permissions
	Feature Requests	Public	Private trackers can only be accessed by members with Read or higher permissions
	Patches	Public	Private trackers can only be accessed by members with Read or higher permissions
	Support Requests	Public	Private trackers can only be accessed by members with Read or higher permissions
	Mail Module Support	Public	Private trackers can only be accessed by members with Read or higher permissions
	Web Module Development	Private	Private trackers can only be accessed by members with Read or higher permissions
	GForge App 1	Public	Private trackers can only be accessed by members with Read or higher permissions
	iuoikqli	Public	Private trackers can only be accessed by members with Read or higher permissions
	Test Subproject2	Public	Private trackers can only be accessed by members with Read or higher permissions
	ms application	Public	Private trackers can only be accessed by members with Read or higher permissions
	test-project-gobi	Public	Private trackers can only be accessed by members with Read or higher permissions
	Project - gobi	Public	Private trackers can only be accessed by members with Read or higher permissions
<b>Package Privileges</b>			
	ce-html	Public	Private packages can only be accessed by members
	ce-smtp	Private	Private packages can only be accessed by members
	gf-edu	Public	Private packages can only be accessed by members
	ce-lib	Public	Private packages can only be accessed by members
	ce-app	Public	Private packages can only be accessed by members
	ce-webdev	Public	Private packages can only be accessed by members
	ce-db	Public	Private packages can only be accessed by members
	test2	Public	Private packages can only be accessed by members
	gf-docs	Public	Private packages can only be accessed by members
<b>Wiki Privileges</b>			
	-	Private	Private wikis can only be accessed by members with Read or higher permissions
<b>SCM Privileges</b>			
	-	Public	Private repositories can only be accessed by members with Read or higher permissions

At the bottom of the page, there is a 'Save changes' button.

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.

The screenshot shows the GForge Admin interface. The top navigation bar includes 'Home', 'My Stuff', 'Users', 'Search', 'Projects: test', and 'Snippets'. Below this is a secondary navigation bar with 'Summary', 'Admin', 'Reporting', 'Search', 'Forums', 'Tracker', 'Docs', 'News', 'Files', 'Lists', 'Wiki', 'CVS', and 'Build'. The main content area shows the breadcrumb 'Home » Projects » Demo Project 1 » Admin » Browse Role' and a table of roles.

Role Name	Edit	Delete
Admin	<a href="#">Edit</a>	No user must be using the role in order to delete it
admin-dev	<a href="#">Edit</a>	<a href="#">Delete</a>
Default Role	<a href="#">Edit</a>	No user must be using the role in order to delete it
Doc Writer	<a href="#">Edit</a>	<a href="#">Delete</a>
Junior Developer	<a href="#">Edit</a>	<a href="#">Delete</a>
Product Manager	<a href="#">Edit</a>	<a href="#">Delete</a>
Project Manager	<a href="#">Edit</a>	<a href="#">Delete</a>
Project Manager	<a href="#">Edit</a>	<a href="#">Delete</a>
QA Tester	<a href="#">Edit</a>	<a href="#">Delete</a>
Senior Developer	<a href="#">Edit</a>	No user must be using the role in order to delete it
Support Tech	<a href="#">Edit</a>	<a href="#">Delete</a>
Web Developer	<a href="#">Edit</a>	<a href="#">Delete</a>

An 'Add new Role' button is located at the bottom right of the table.

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.

Home » Projects » Demo Project 1 » Admin » Add new Role

Role Name:

Section	Subsection	Setting	Description	
<b>Project Admin</b>	-	None	Project admin can do anything in this project	
<b>Project-wide Forum Admin</b>	-	None	Admin can modify all forums	
<b>Forum</b>	web_module_forum	Read	Private forums can only be accessed by members with Read or higher permissions	
	open-discussion2	Read	Private forums can only be accessed by members with Read or higher permissions	
	test-forum	Read	Private forums can only be accessed by members with Read or higher permissions	
	help	Read	Private forums can only be accessed by members with Read or higher permissions	
	developers	Read	Private forums can only be accessed by members with Read or higher permissions	
	mail-module	Read	Private forums can only be accessed by members with Read or higher permissions	
	sdfdsdf	Read	Private forums can only be accessed by members with Read or higher permissions	
	documentation	Read	Private forums can only be accessed by members with Read or higher permissions	
	<b>Project-wide Tracker Admin</b>	-	None	Admin can modify all trackers
	<b>Tracker</b>	Documentation Tracker	Read/Add	Private trackers can only be accessed by members with Read or higher permissions
Amgen Tracker		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
Feature Requests		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
Patches		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
Support Requests		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
Bugs		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
Mail Module Support		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
Web Module Development		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
ms application		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
Doc Update2		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
Doc Update3		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
Project - gobi		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
test-project-gobi		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
Test Subproject2		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
GForge App 1		Read/Add	Private trackers can only be accessed by members with Read or higher permissions	
<b>Doc Manager</b>	-	Read/Post	Admin can modify/approve documents	
<b>File Release System</b>	-	Read	Users with write can manage releases and packages	
<b>Wiki</b>	Project wiki	No Access	Private wikis can only be accessed by members with Read or higher permissions	
<b>SCM - Source Code Repository ( scm cvs )</b>	-	Read	Private repositories can only be accessed by members with Read or higher permissions	
<b>CruiseControl Admin</b>	-	None	CruiseControl administration	

Save changes

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.

The screenshot shows the GForge Project Administration interface. The top navigation bar includes 'HOME', 'MY STUFF', 'USERS', 'PROJECTS: TEST', and 'SNIPPETS'. The 'ADMIN' tab is selected. The main content area shows a table of roles with the following data:

Role Name	Edit	Delete
Admin	<a href="#">Edit</a>	No user must be using the role in order to delete it
admin-dev	<a href="#">Edit</a>	<a href="#">Delete</a>
Default Role	<a href="#">Edit</a>	No user must be using the role in order to delete it
Doc Writer	<a href="#">Edit</a>	No user must be using the role in order to delete it
Junior Developer	<a href="#">Edit</a>	<a href="#">Delete</a>
Product Manager	<a href="#">Edit</a>	<a href="#">Delete</a>
Project Manager	<a href="#">Edit</a>	<a href="#">Delete</a>
Project Manager	<a href="#">Edit</a>	<a href="#">Delete</a>
QA Tester	<a href="#">Edit</a>	<a href="#">Delete</a>
Senior Developer	<a href="#">Edit</a>	<a href="#">Delete</a>
Support Tech	<a href="#">Edit</a>	<a href="#">Delete</a>
Web Developer	<a href="#">Edit</a>	<a href="#">Delete</a>

An 'Add new Role' link is visible at the bottom right of the table.

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.

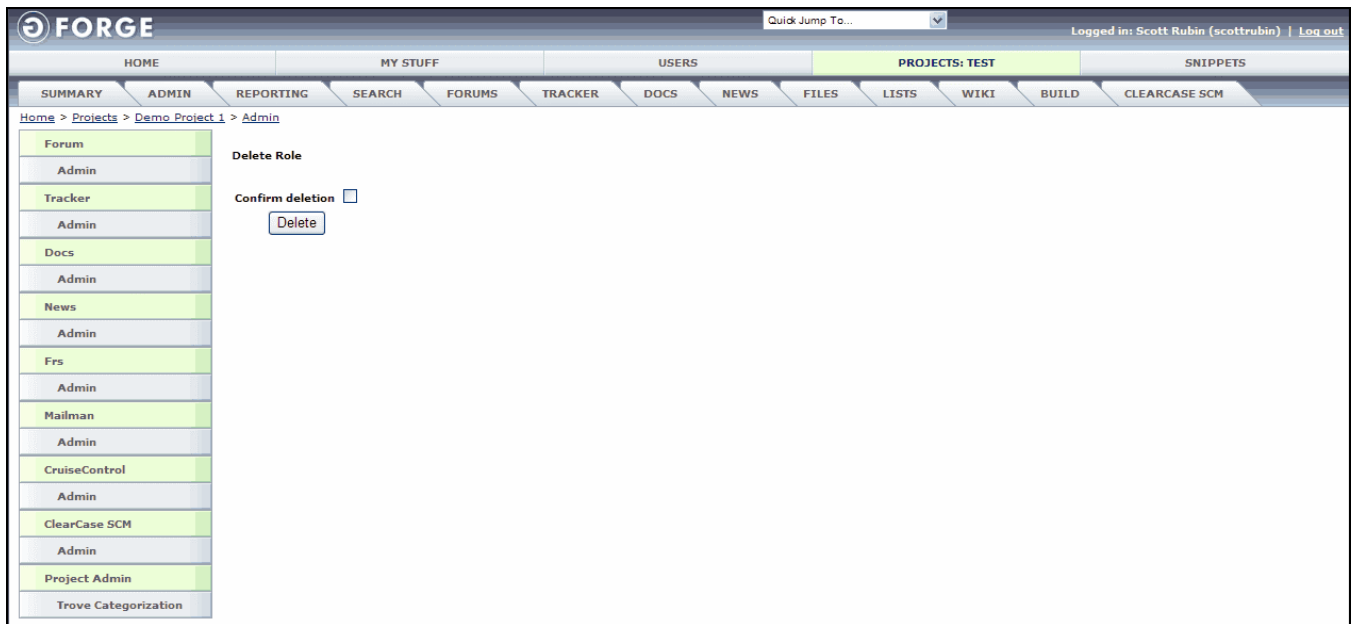


Figure 1-7. Delete Role

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.

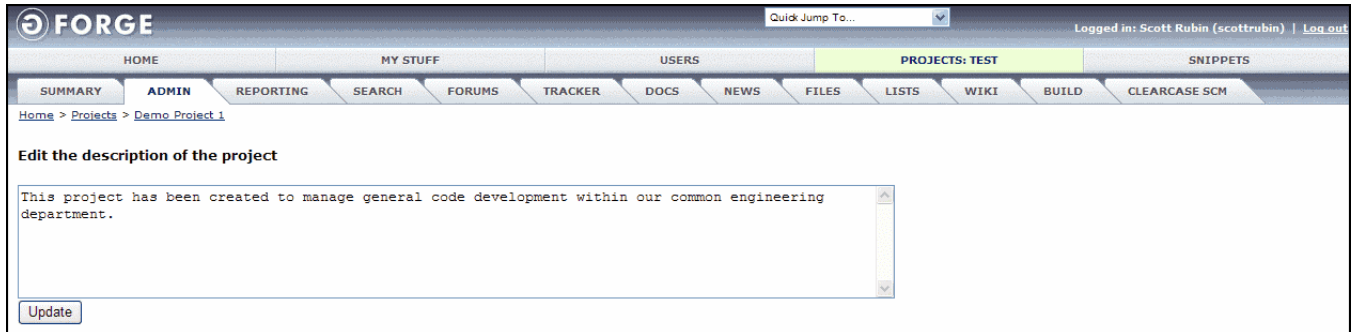


Figure 1-8. Edit Project Description

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





## 1.9 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.

The screenshot shows the GForge Project Administration interface. The top navigation bar includes 'HOME', 'MY STUFF', 'USERS', 'PROJECTS: TEST', and 'SNIPPETS'. Below this is a secondary navigation bar with tabs for 'SUMMARY', 'ADMIN', 'REPORTING', 'SEARCH', 'FORUMS', 'TRACKER', 'DOCS', 'NEWS', 'FILES', 'LISTS', 'WIKI', 'BUILD', and 'CLEARCASE SCM'. The main content area shows the breadcrumb 'Home > Projects > Demo Project 1 > Admin'. On the left is a sidebar menu with items like Forum, Admin, Tracker, Docs, News, Fps, Mailman, CruiseControl, ClearCase SCM, Project Admin, and Trove Categorization. The main content area is titled 'Edit Project' and contains the following fields:

- Full name:** Demo Project 1
- Account name (lowercase):** test
- Homepage URL:** test.work2.perdue.net

At the bottom of the form is a '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.

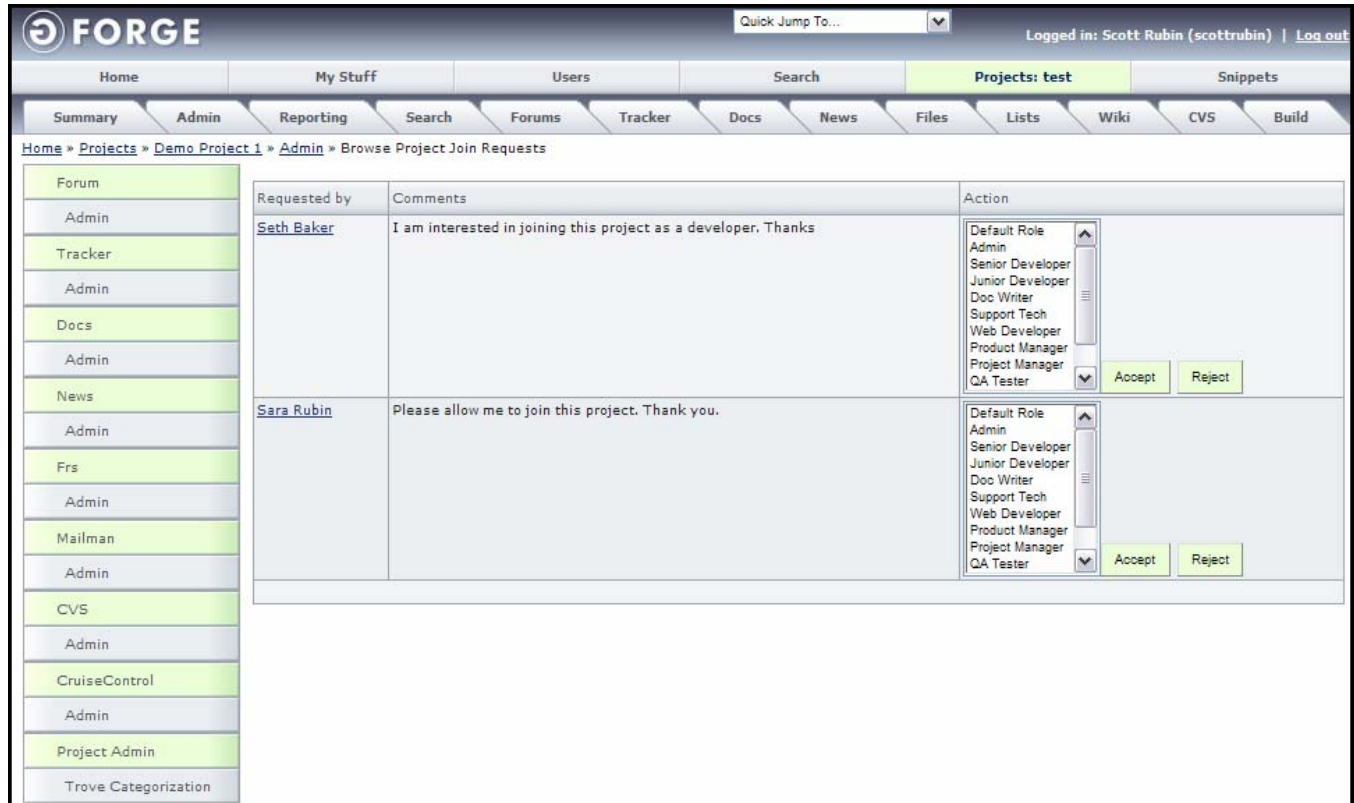


Figure 1-11. Browse Project Join Requests

### 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.

When you set a project as the parent of this project, you will inherit the users and their permissions.

Parent Project	Remove
GForge Documentation Update	<a href="#">Remove</a>

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.

The screenshot shows the Forge Project Administration interface. The top navigation bar includes 'HOME', 'MY STUFF', 'USERS', 'PROJECTS: TEST', and 'SNIPPETS'. The 'PROJECTS: TEST' tab is active. Below the navigation bar, there is a breadcrumb trail: 'Home > Projects > Demo Project 1 > Admin'. The main content area is titled 'Trove categorization' and contains several dropdown menus for selecting project metadata:

- Development Status:** 5 - Production/Stable
- License:** Apache Software License
- Operating System:** Linux
- Spoken Language:** Japanese
- Programming Language:** Delphi/Kylix
- Topic:** (empty)
- Intended Audience:** Developers

A 'Submit' button is located at the bottom of the form.

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.

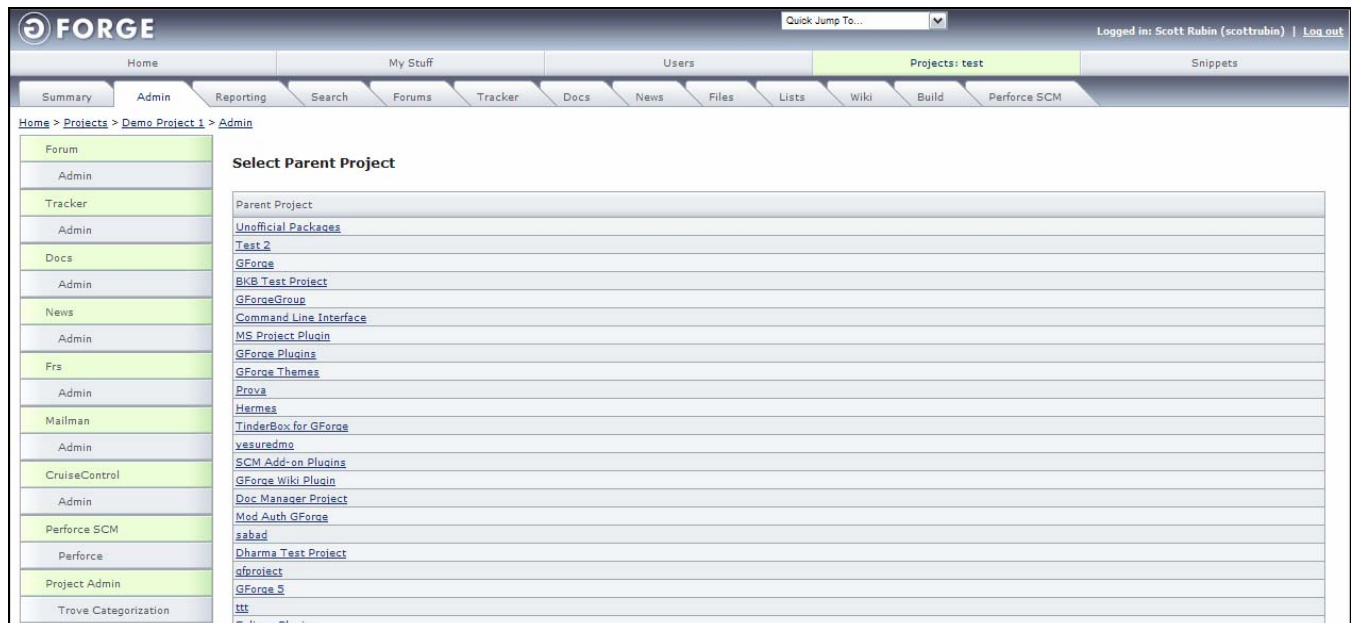


Figure 1-14. Parent Project

## 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.

The screenshot shows the GForge web interface. At the top, there's a 'FORGE' logo and a 'Quick Jump To...' dropdown. The user is logged in as 'Scott Rubin (scottrubin)'. The navigation menu includes 'Home', 'My Stuff', 'Users', 'Search', 'Projects: test', and 'Snippets'. Under 'Projects: test', there are sub-tabs for 'Summary', 'Admin', 'Reporting', 'Search', 'Forums', 'Tracker', 'Docs', 'News', 'Files', 'Lists', 'Wiki', 'CVS', and 'Build'. The 'Forums' tab is active, showing a breadcrumb trail: 'Home » Projects » Demo Project 1 » Forums » Admin » Browse Forum'. On the left, there are two menu items: 'Forums' (highlighted) and 'Admin'. The main content area displays a table of forums:

Forum Id	Forum Name	Description	Edit	Delete Forum
133	web_module_forum	This forum discusses the web module development.	<a href="#">Edit Forum</a>	<a href="#">Delete Forum</a>
1	open-discussion2	test description	<a href="#">Edit Forum</a>	<a href="#">Delete Forum</a>
12	test-forum	This is the description	<a href="#">Edit Forum</a>	<a href="#">Delete Forum</a>
2	help	This is a discussion group for help	<a href="#">Edit Forum</a>	<a href="#">Delete Forum</a>
3	developers	Developer Forum2	<a href="#">Edit Forum</a>	<a href="#">Delete Forum</a>
138	mail-module	Mail module development discussion	<a href="#">Edit Forum</a>	<a href="#">Delete Forum</a>
989	sdfdsf	dfdf	<a href="#">Edit Forum</a>	<a href="#">Delete Forum</a>
215	documentation	Documentation Discussion	<a href="#">Edit Forum</a>	<a href="#">Delete Forum</a>

At the bottom right of the table, there is an 'Add new Forum' button.

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.

The screenshot shows the GForge Tracker Admin interface. At the top, there is a navigation bar with 'FORGE' logo, a 'Quick Jump To...' dropdown, and user information 'Logged in: Scott Rubin (scottrubin) | Log out'. Below this is a secondary navigation bar with tabs for 'Home', 'My Stuff', 'Users', 'Projects: test', and 'Snippets'. A third navigation bar contains 'Summary', 'Admin', 'Reporting', 'Search', 'Forums', 'Tracker', 'Docs', 'News', 'Files', 'Lists', 'Wiki', 'CVS', and 'Build'. The main content area shows a breadcrumb trail: 'Home > Projects > Demo Project 1 > Tracker > Admin'. Below this is a table of trackers.

Tracker Type	Tracker Name	Edit	Delete	Edit Fields, Auto-Assign, Workflow
Issues	Documentation Tracker	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	Support Requests	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	Bugs	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	Amgen Tracker	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	Mail Module Support	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	Feature Requests	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	Patches	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
Tasks	Web Module Development	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	Project - gobi	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	test-project-gobi	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	ms application	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	Test Subproject2	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>
	GForge App 1	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Fields, Auto-Assign, Workflow</a>

At the bottom right of the table, there is a button labeled 'Add new Tracker'.

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**.

The screenshot shows the 'Add new Tracker' form in the GForge Project Administrator. The interface includes a navigation bar with tabs for Home, My Stuff, Users, Projects: test (selected), and Snippets. Below the navigation bar are sub-tabs for Summary, Admin, Reporting, Search, Forums, Tracker (selected), Docs, News, Files, Lists, Wiki, CVS, and Build. The breadcrumb trail is 'Home > Projects > Demo Project 1 > Tracker > Admin'. The form fields are:

- Tracker Name \***: Text input field.
- Description \***: Text input field.
- Is Public**:
- Restrict Browse**:
- Email All Updates**:
- Email Address for Notifications**: Text input field.
- Due Period (days)\***: Text input field with '15' entered.
- Submit Instructions**: Text area with up/down arrows.
- Browse Instructions**: Text area with up/down arrows.
- Tracker Type**: Radio buttons for 'Issue Tracker' (selected) and 'Task Tracker'.
- Clone fields from:** Dropdown menu with '-- Select tracker --'.
- Add**: Green button.

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.

Documentation Tracker

Browse

Query

E-mail Gateway

Stop monitoring

Workflow rules

Admin

To define auto-assign rules, choose which field should be the field that triggers auto-assignment rules, then edit the values of the field to set an assignee for each value.

To define transition rules, edit the values for the status field, choose which field should have the transition rules applied to it, then edit the values of the field and add rules to each value as needed.

Field Name	Field Type	Auto Assign By	Use Workflow	Commit Rules	Is Required	Show On Submit Form	Order By	Edit	Delete	Edit Field Values
Hardware	Select	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Field Values</a>
Product	Select	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Field Values</a>
Operating System	Select	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Field Values</a>
Component	Select	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Field Values</a>
Version	Select	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Field Values</a>
Severity	Select	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Field Values</a>
Resolution	Select	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Field Values</a>
Status	Status	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7			<a href="#">Edit Field Values</a>
Documentation	Check Box			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit Field Values</a>
URL	Text Field				<input type="checkbox"/>	<input checked="" type="checkbox"/>	9	<a href="#">Edit</a>	<a href="#">Delete</a>	
Test Text Area	Text Area				<input type="checkbox"/>	<input checked="" type="checkbox"/>	10	<a href="#">Edit</a>	<a href="#">Delete</a>	
Don't Use Auto-Assign/Workflow		<input checked="" type="radio"/>								

Submit

[Add New Checkbox Field](#)  
[Add New Multi-Select Field](#)  
[Add New Select Field](#)  
[Add New Radio Field](#)  
[Add New Text Field](#)  
[Add New Text Area](#)  
[Add New FRS Release Field](#)

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.

The screenshot shows the GForge Tracker Admin interface. The top navigation bar includes 'HOME', 'MY STUFF', 'USERS', 'PROJECTS: DOCUPDATE', and 'SNIPPETS'. Below this is a secondary navigation bar with 'SUMMARY', 'ADMIN', 'REPORTING', 'SEARCH', 'FORUMS', 'TRACKER', 'DOCS', 'NEWS', 'FILES', 'LISTS', 'WIKI', 'BUILD', and 'CLEARCASE SCM'. The main content area is titled 'Add new Tracker Extra Field' and contains the following form fields:

- Field Name\***: A text input field.
- Is Required\***: A checkbox.
- Field Order\***: A text input field.
- Show On Browse\***: A checkbox.
- Show On Submit Form\***: A checkbox.
- Add**: A button.

On the left side of the form, there is a sidebar with a warning message: 'This is a Tracker Folder within Issues'. Below this message are several links: 'Browse', 'Query', 'Monitor tracker', 'Workflow rules', and 'Admin'.

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

Element Name	Auto Assign To	Workflow	Can Commit	Default Selected	Sort Order	Delete
Other	Unassigned	<a href="#">Transition Rules</a>	<input type="checkbox"/>	<input type="radio"/>	0	<a href="#">Delete</a>
Sun	Unassigned	<a href="#">Transition Rules</a>	<input type="checkbox"/>	<input type="radio"/>	1	<a href="#">Delete</a>
SGI	Unassigned	<a href="#">Transition Rules</a>	<input type="checkbox"/>	<input type="radio"/>	2	<a href="#">Delete</a>
PC	Unassigned	<a href="#">Transition Rules</a>	<input type="checkbox"/>	<input type="radio"/>	3	<a href="#">Delete</a>
Macintosh	Unassigned	<a href="#">Transition Rules</a>	<input type="checkbox"/>	<input type="radio"/>	4	<a href="#">Delete</a>
HP	Unassigned	<a href="#">Transition Rules</a>	<input type="checkbox"/>	<input type="radio"/>	5	<a href="#">Delete</a>
DEC	Unassigned	<a href="#">Transition Rules</a>	<input type="checkbox"/>	<input type="radio"/>	6	<a href="#">Delete</a>
All	Unassigned	<a href="#">Transition Rules</a>	<input type="checkbox"/>	<input type="radio"/>	7	<a href="#">Delete</a>

[Add new Field Element](#)

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

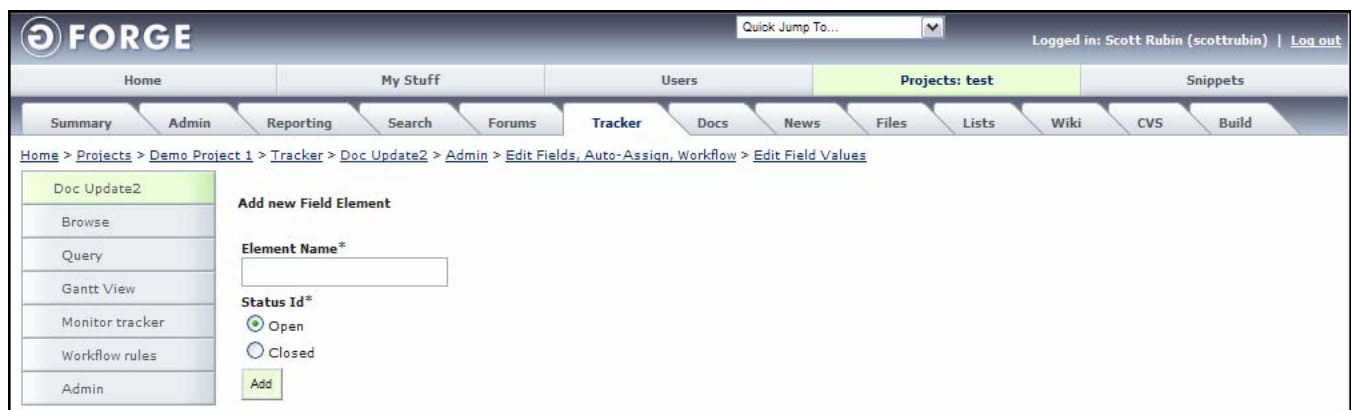


Figure 3-6. Adding a New Tracker Field Element

**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.

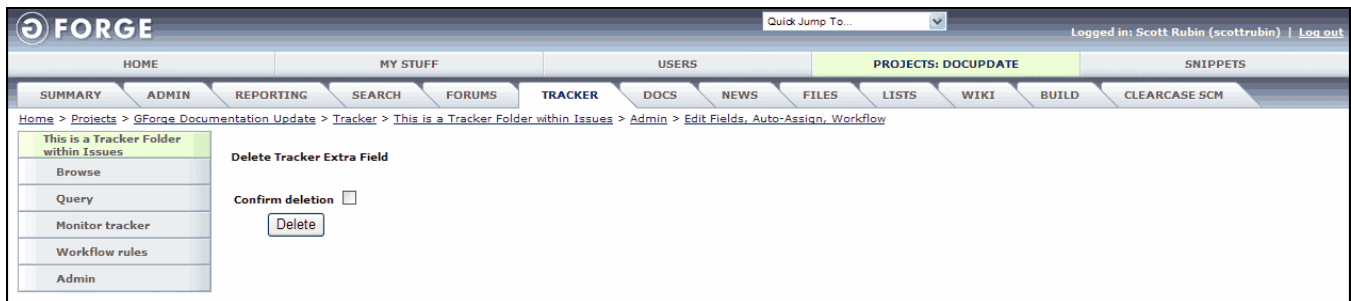


Figure 3-7. Delete Tracker Field

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.

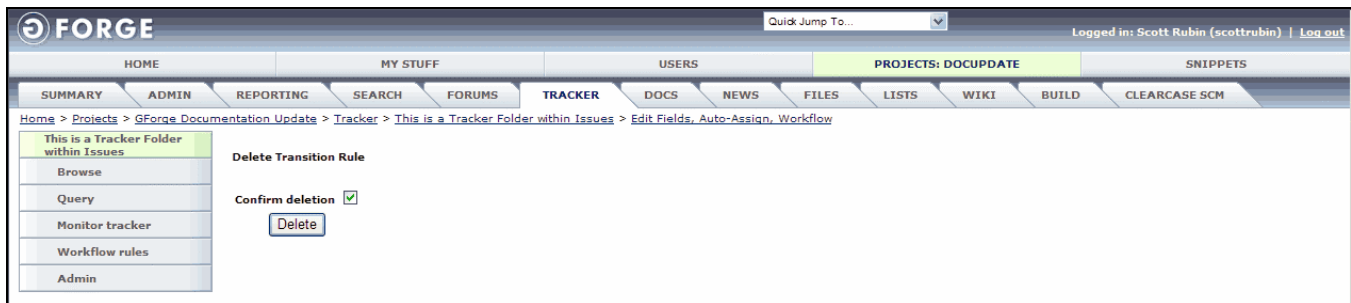


Figure 3-9. Confirm Transition Rule Deleting

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.

The screenshot shows the GForge Document Manager interface. The top navigation bar includes 'Home', 'My Stuff', 'Users', 'Search', 'Projects: test', and 'Snippets'. Below this is a secondary navigation bar with 'Summary', 'Admin', 'Reporting', 'Search', 'Forums', 'Tracker', 'Docs', 'News', 'Files', 'Lists', 'Wiki', 'CVS', and 'Build'. The 'Docs' tab is selected, and the 'Admin' link is highlighted. The main content area shows a tree view of folders under '[Root Folder]', including 'App Module', 'Mail Module', 'incoming', 'Uncategorized Submissions', 'Web Module', and 'Animals'. The 'Animals' folder is expanded to show sub-folders: 'Poodle', 'Pitbull', 'Jack Russel', 'Samoveds', and 'Dalmatian'. A table below the tree view lists the folders with columns for 'Filename', 'Edit', and 'Delete'. At the bottom of the folder list are buttons for 'Update Folders', 'Add New File', and 'Create Folder Here'. Below the folder list is a section for 'Pending Docs' with a table listing documents.

Filename	Edit	Delete
[Root Folder]		
App Module	<a href="#">Edit Folder</a>	<a href="#">Delete Folder</a>
Mail Module	<a href="#">Edit Folder</a>	<a href="#">Delete Folder</a>
incoming	<a href="#">Edit Folder</a>	<a href="#">Delete Folder</a>
Uncategorized Submissions	<a href="#">Edit Folder</a>	<a href="#">Delete Folder</a>
Web Module	<a href="#">Edit Folder</a>	<a href="#">Delete Folder</a>
Animals	<a href="#">Edit Folder</a>	<a href="#">Delete Folder</a>
Poodle		
Pitbull		
Jack Russel		
Samoveds		
Dalmatian		

Edit	Version #	Changes	Date	Author
<a href="#">Doublestuff4.JPG</a>	1		01/06/07	<a href="#">Tawni Plath</a>
<a href="#">aileenshao_1180151318.jpg</a>	1		05/27/07	<a href="#">tivi alum</a>
<a href="#">CPMG-SEC1.pdf</a>	1		06/19/07	<a href="#">daniele menozzi</a>
<a href="#">flux-api.pdf</a>	1		05/03/07	<a href="#">JM Dubois</a>

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**.

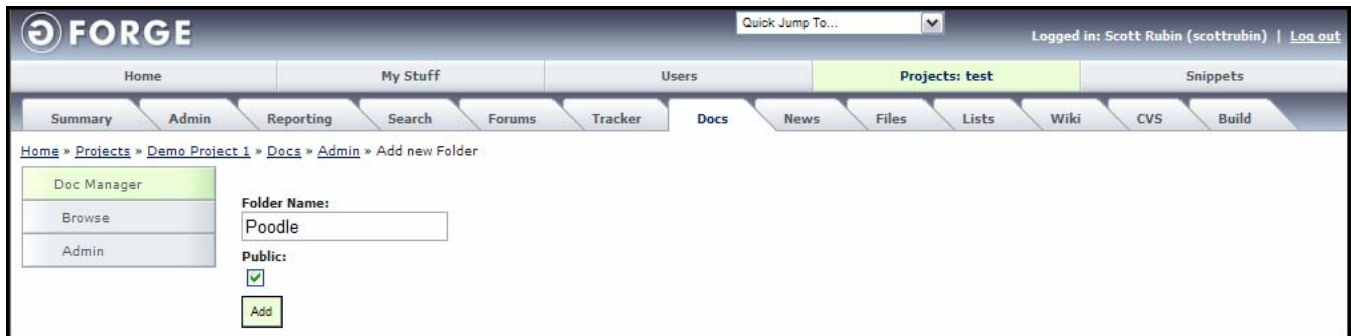


Figure 4-2. Add Folder

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.

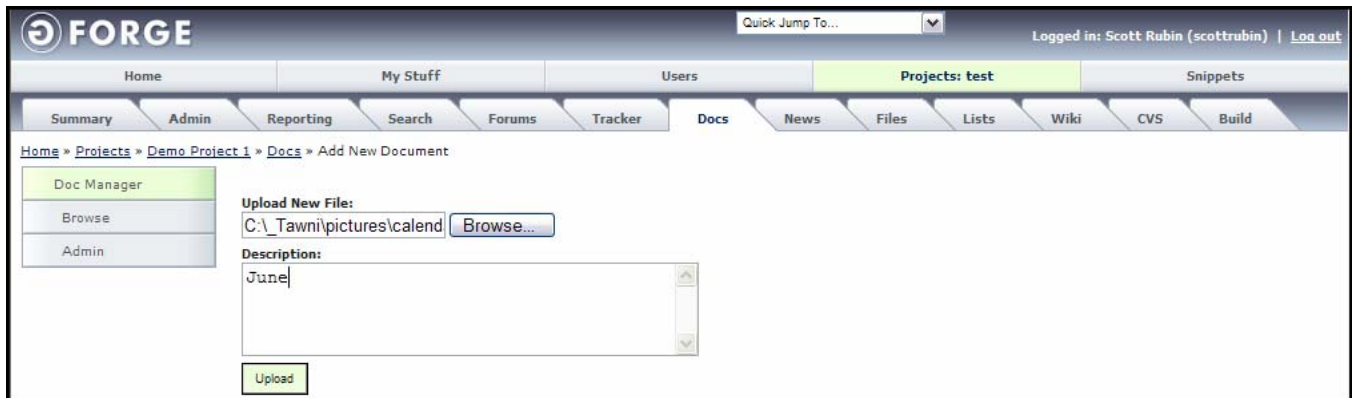


Figure 4-5. Add New Document

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.

The screenshot shows the GForge Document Manager interface. The top navigation bar includes 'Home', 'My Stuff', 'Users', 'Search', 'Projects: test', and 'Snippets'. Below this is a secondary navigation bar with 'Summary', 'Admin', 'Reporting', 'Search', 'Forums', 'Tracker', 'Docs', 'News', 'Files', 'Lists', 'Wiki', 'CVS', and 'Build'. The 'Docs' tab is selected, and the breadcrumb path is 'Home » Projects » Demo Project 1 » Docs » Admin » Browse Documents'. A left sidebar contains 'Doc Manager', 'Browse', and 'Admin'. The main content area displays a tree view of folders and files. The 'Animals' folder is expanded to show 'Dogs', which includes 'Poodle', 'Pitbull', 'Jack Russel', 'Samoyeds', and 'Dalmatian'. Two files are listed in the main table:

Navigation	Filename	Locked	Edit	Delete
[Root Folder]	<a href="#">Krystalumpup23.jpg</a>		<a href="#">View Details</a>	<a href="#">Delete File</a>
<a href="#">Animals</a> <a href="#">Dogs</a>	<a href="#">p9302287.JPG</a>		<a href="#">View Details</a>	<a href="#">Delete File</a>

At the bottom of the main content area, there are buttons for 'Update Folders', 'Add New File', and 'Create Folder Here'. Below the main content is a 'Pending Docs' section with a table:

Edit	Version #	Changes	Date	Author
<a href="#">Doublestuff4.JPG</a>	1		01/06/07	<a href="#">Tawni Plath</a>
<a href="#">aileenshao_1180151318.jpg</a>	1		05/27/07	<a href="#">tivi alum</a>
<a href="#">CPMG-SEC1.pdf</a>	1		06/19/07	<a href="#">daniele menozzi</a>
<a href="#">flux-api.pdf</a>	1		05/03/07	<a href="#">JM Dubois</a>

Figure 4-6. Expanded Document Group

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

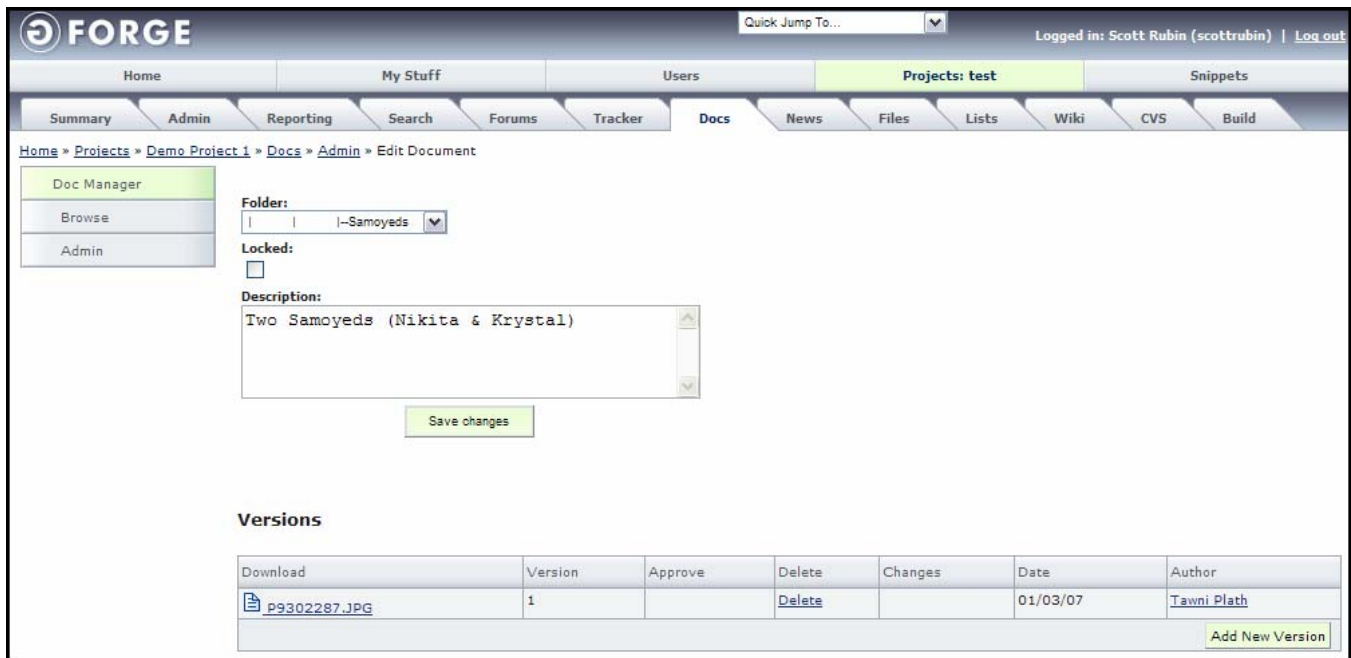


Figure 4-7. Document Attributes

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.

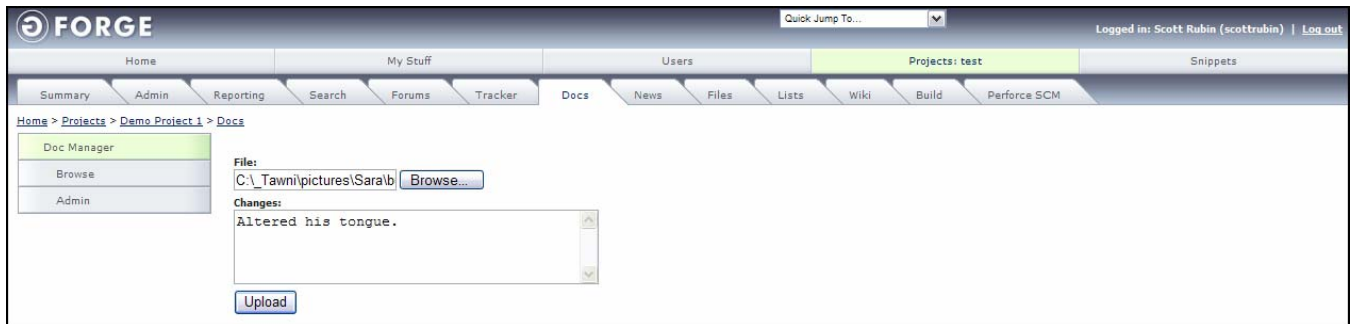


Figure 4-8. Upload New Version

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.

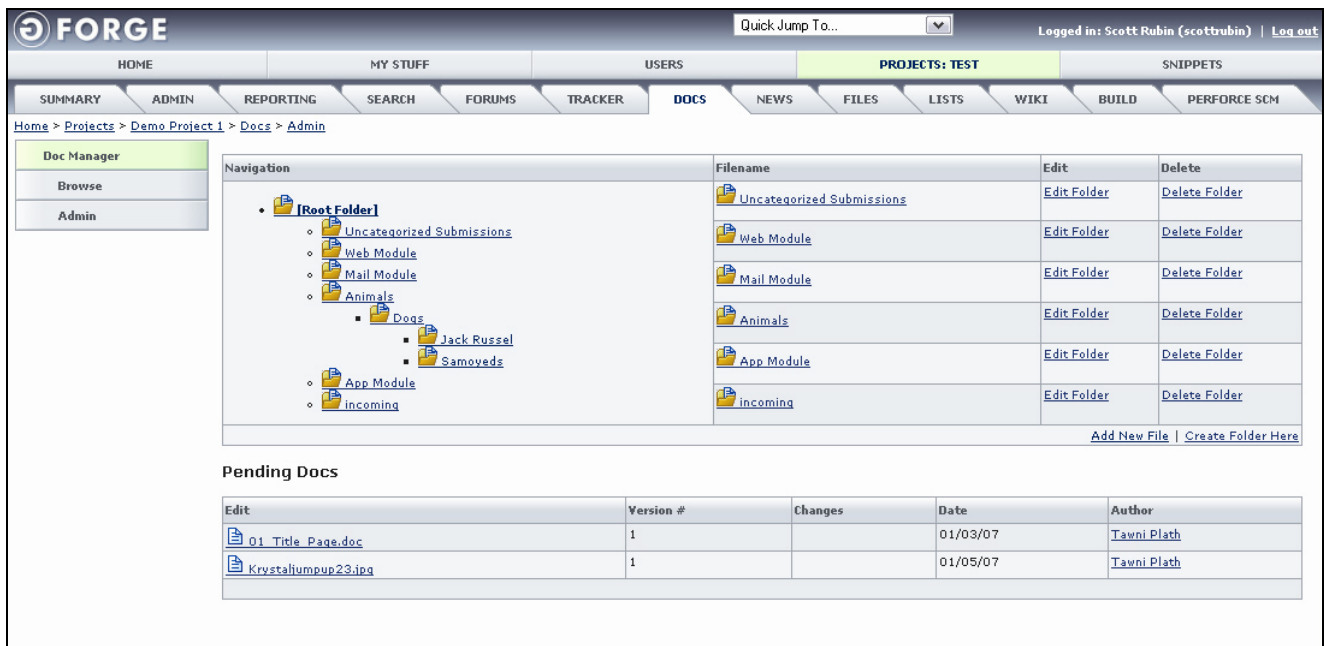


Figure 4-9. Pending Submitted Documents

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

The screenshot shows the Forge Document Manager interface. The top navigation bar includes 'HOME', 'MY STUFF', 'USERS', 'PROJECTS: TEST', and 'SNIPPETS'. Below this is a secondary menu with 'SUMMARY', 'ADMIN', 'REPORTING', 'SEARCH', 'FORUMS', 'TRACKER', 'DOCS', 'NEWS', 'FILES', 'LISTS', 'WIKI', 'BUILD', and 'PERFORCE SCM'. The breadcrumb trail is 'Home > Projects > Demo Project 1 > Docs > Admin'. The left sidebar has 'Doc Manager', 'Browse', and 'Admin' buttons. The main content area is titled 'View Details' and contains a 'Folder' dropdown menu set to 'I-Samoyeds', a 'Locked' checkbox, and a 'Description' text area with the text 'Krystal (a female Sammy) about to jump up for a treat.'. Below the description is a 'Save changes' button. At the bottom, there is a 'Versions' table with one entry for 'Krystaljumpup23.jpg'.

Download	Version #	Approve	Delete	Changes	Date	Author
<a href="#">Krystaljumpup23.jpg</a>	1	<a href="#">Approve</a>	<a href="#">Delete</a>		01/05/07	<a href="#">Tawni Plath</a>

[Add New Version](#)

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.

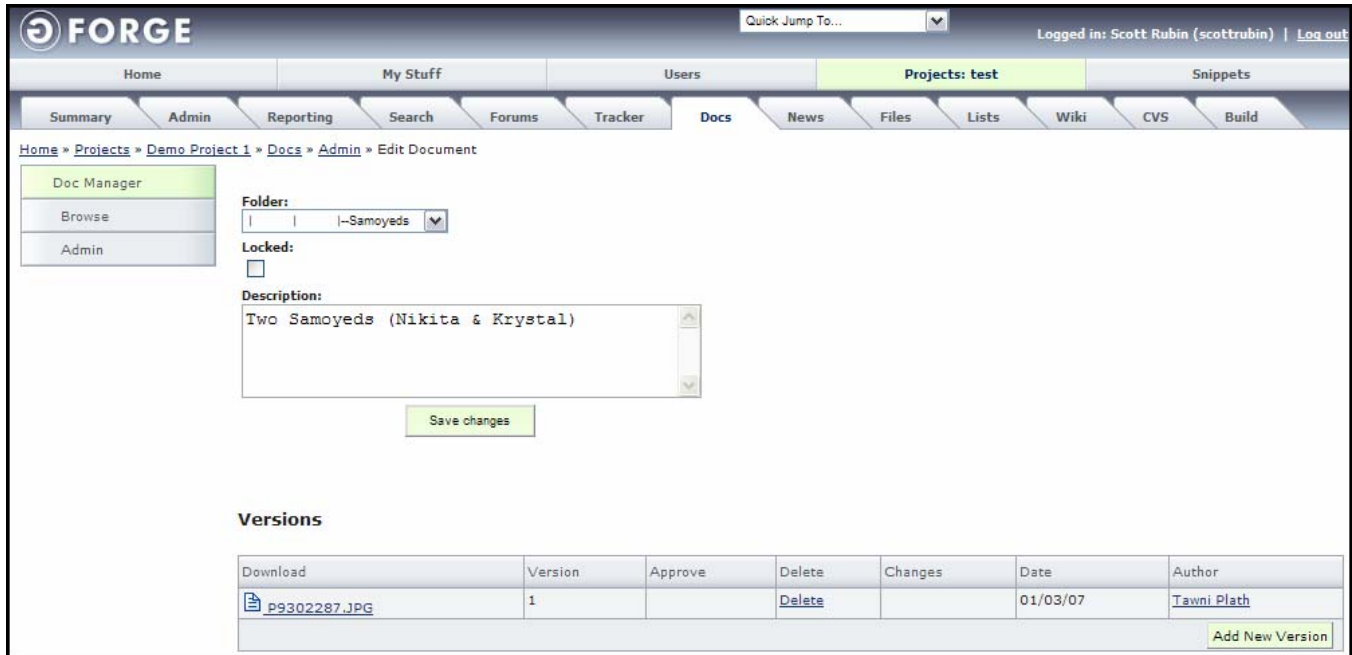


Figure 4-11. Historical Document Details

**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.





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.

Package Name	Latest Release	Maturity	Files	FileSize	Downloads
<a href="#">ce-app</a>	<a href="#">1.1</a>	Not Categorized	<a href="#">mirc345.exe</a>	27.56 Kb	171
<a href="#">ce-db</a>	<a href="#">tr23333</a>	Not Categorized	<a href="#">nasaliza.zip</a>	12.98 Kb	35
<a href="#">ce-lib</a>	<a href="#">testing-sendnotice</a>	Not Categorized	<a href="#">base64.jar</a>	5.48 Kb	1238
<a href="#">ce-lib</a>	<a href="#">test-release</a>	Not Categorized	<a href="#">kilroy.zip</a>	17.2 Kb	215
<a href="#">ce-smtp</a>	<a href="#">1.0.0</a>	Not Categorized	<a href="#">smtp.zip</a>	1.24 Mb	1
<a href="#">documents</a>	<a href="#">docsupdate</a>	1 - Planning	<a href="#">01 Title Page.doc</a>	357 Kb	2

Figure 6-1. Files Tab

2. Click the **Admin** link.

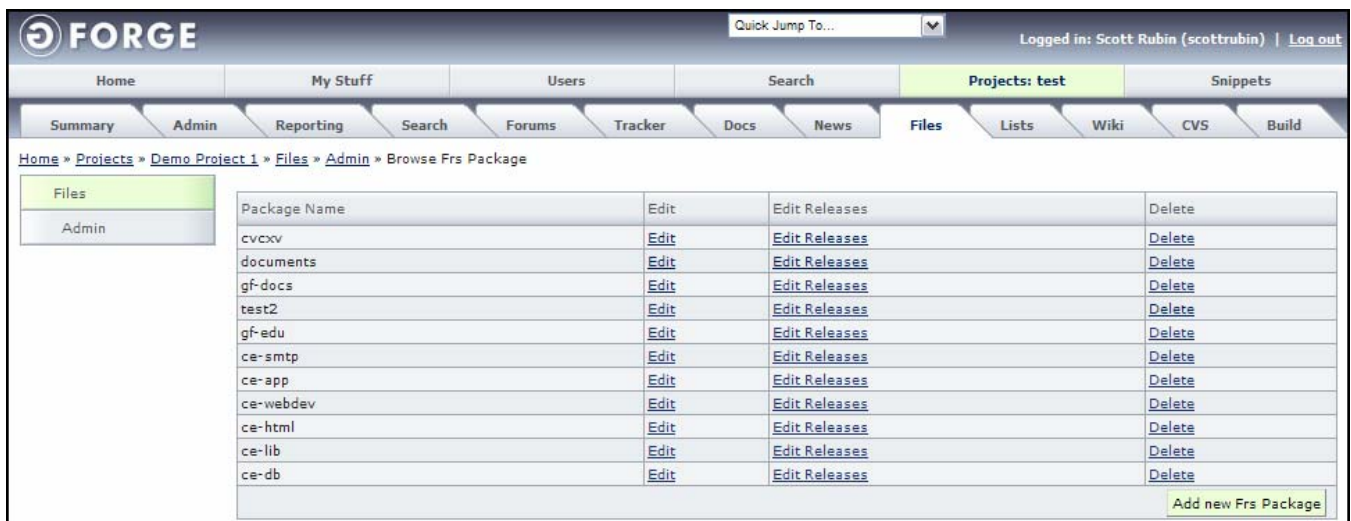


Figure 6-2. Files Admin

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.

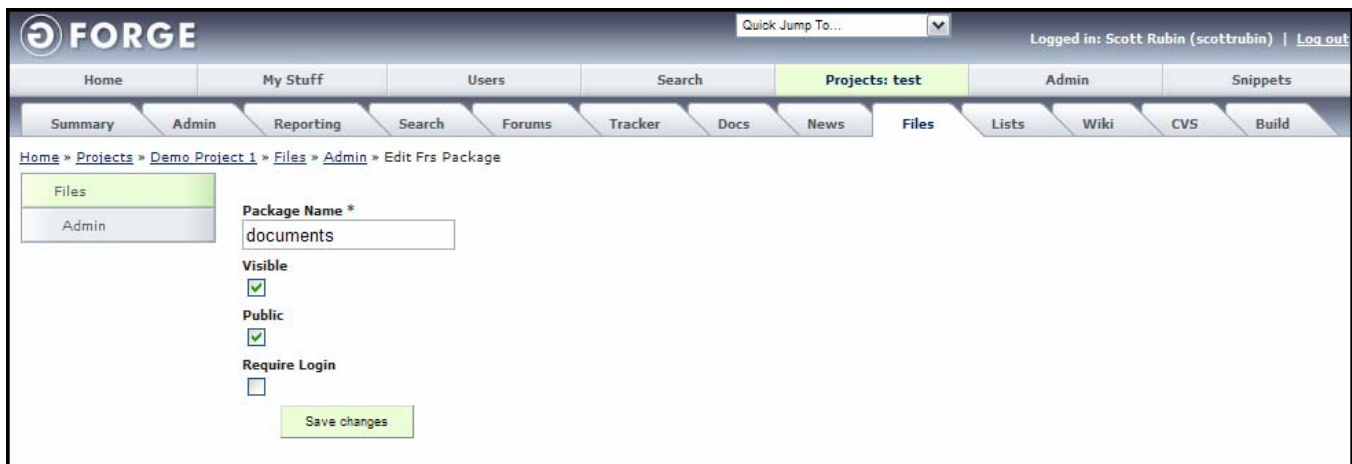


Figure 6-4. Editing Packages

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.

**FORGE** Quick Jump To... Logged in: Tawni Plath (tawniplath) | [Log out](#)

Home My Stuff Users Search **Projects: docupdate** Snippets

Summary Reporting Search Forums Tracker Docs News **Files** Lists Wiki SVN Build

Home » Projects » GForge Documentation Update » Files » Admin » Add Release

Files Admin

**Add Release**

Release Name \*

Release Notes

Changes

Preserve my pre-formatted text

Released

Release Date

Project Upload files

Add new File

Development Status

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.



**FORGE** Quick Jump To... Logged in: Tawni Plath (tawniplath) | Log out

Home My Stuff Users Search **Projects: docupdate** Snippets

Summary Reporting Search Forums Tracker Docs News **Files** Lists Wiki SVN Build

Home » Projects » GForge Documentation Update » Files » Admin » Edit Frs Release

Files Admin

### Edit Frs Release

Release Name \*

Release Notes

Changes

Visible

Preserve my pre-formatted text

Released  
 Yes

Release Date

File Name	File Type	File Size	Md5 Hash	Posted By	Delete
editFRS.gif	image/gif	39621	443c80a9f52726dfa9a6ddb167f8295	<a href="#">Tawni Plath</a>	<input type="checkbox"/> Delete
diskusage.png	image/png	4558	5297c7682a798c1fc1fb2f35deeb132c	<a href="#">Timothy Perdue</a>	<input type="checkbox"/> Delete

Project Upload files

Add new File

Development Status

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.

The screenshot shows the GForge web interface. The top navigation bar includes 'Home', 'My Stuff', 'Users', 'Search', 'Projects: test', and 'Snippets'. Below this is a secondary navigation bar with 'Summary', 'Admin', 'Reporting', 'Search', 'Forums', 'Tracker', 'Docs', 'News', 'Files', 'Lists', 'Wiki', 'CVS', and 'Build'. The 'Lists' tab is active. The breadcrumb trail is 'Home » Projects » Demo Project 1 » Lists » Browse Mailman Lists'. On the left, a sidebar shows 'Mailman' and 'Admin' tabs, with 'Mailman' selected. The main content area contains a table of mailing lists:

List Name	Description	Subscription	Create Date
<a href="#">test-pub1234 archives</a>	pub1234 pub1234 pub1234	<a href="#">Subscribe/Unsubscribe/Preferences</a>	2007-07-26 17:19:50
<a href="#">test-priv1234 archives</a>	pub1234 pub1234 pub1234	<a href="#">Subscribe/Unsubscribe/Preferences</a>	2007-07-26 17:20:02
<a href="#">test-1234 archives</a>		<a href="#">Subscribe/Unsubscribe/Preferences</a>	2006-05-02 15:47:48
<a href="#">test-commits archives</a>	cvcs commits	<a href="#">Subscribe/Unsubscribe/Preferences</a>	2006-05-02 15:47:48
<a href="#">test-tawni archives</a>	Mailing List Test	<a href="#">Subscribe/Unsubscribe/Preferences</a>	2006-05-02 15:47:48

Figure 7-1. Lists Tab

2. Click the **Admin** link.

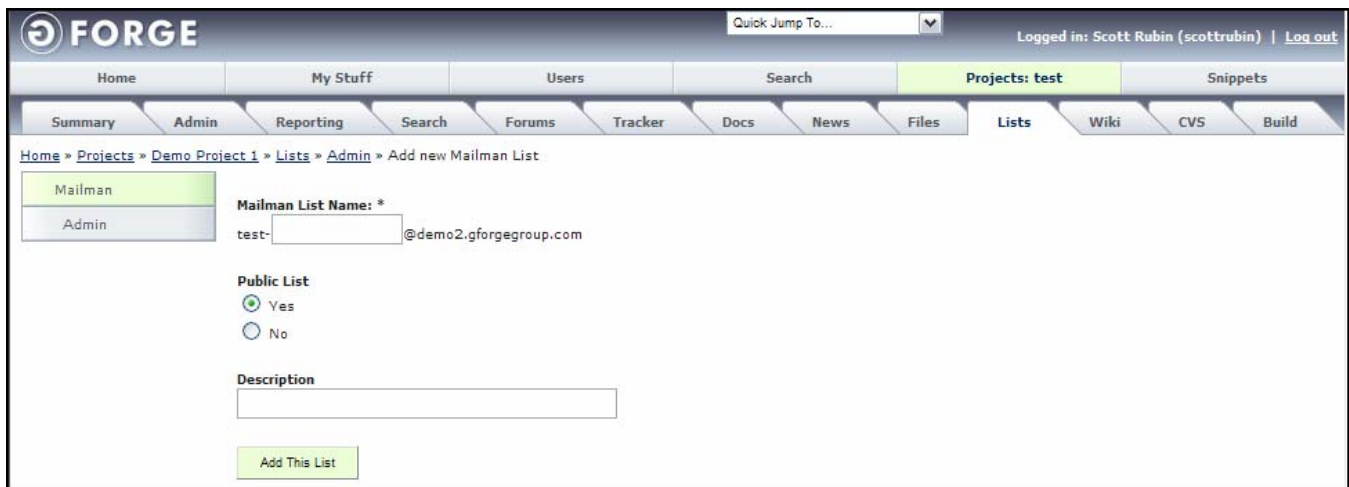
The screenshot shows the GForge web interface. The top navigation bar is the same as in Figure 7-1. The secondary navigation bar is the same, but the 'Admin' tab is active. The breadcrumb trail is 'Home » Projects » Demo Project 1 » Lists » Admin ». On the left, the 'Admin' tab is selected in the sidebar. The main content area contains a table of mailing lists with administrative actions:

List Name	Edit	Delete	Administrate
test-pub1234	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Administrate</a>
test-priv1234	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Administrate</a>
test-1234	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Administrate</a>
test-commits	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Administrate</a>
test-tawni	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Administrate</a>

An 'Add new Mailman List' button is visible at the bottom right of the table area.

Figure 7-2. Lists Admin

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



The screenshot shows the Forge web interface. At the top, there is a navigation bar with tabs for Home, My Stuff, Users, Search, Projects: test (selected), and Snippets. Below this is a secondary navigation bar with tabs for Summary, Admin, Reporting, Search, Forums, Tracker, Docs, News, Files, Lists (selected), Wiki, CVS, and Build. The main content area shows a breadcrumb trail: Home » Projects » Demo Project 1 » Lists » Admin » Add new Mailman List. On the left, there is a sidebar with 'Mailman' and 'Admin' buttons. The main form contains the following fields and options:

- Mailman List Name: \***: A text input field containing 'test-' followed by a cursor, and an email address '@demo2.gforgegroup.com'.
- Public List**: Two radio buttons, 'Yes' (selected) and 'No'.
- Description**: A text input field.
- Add This List**: A green button at the bottom.

*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.

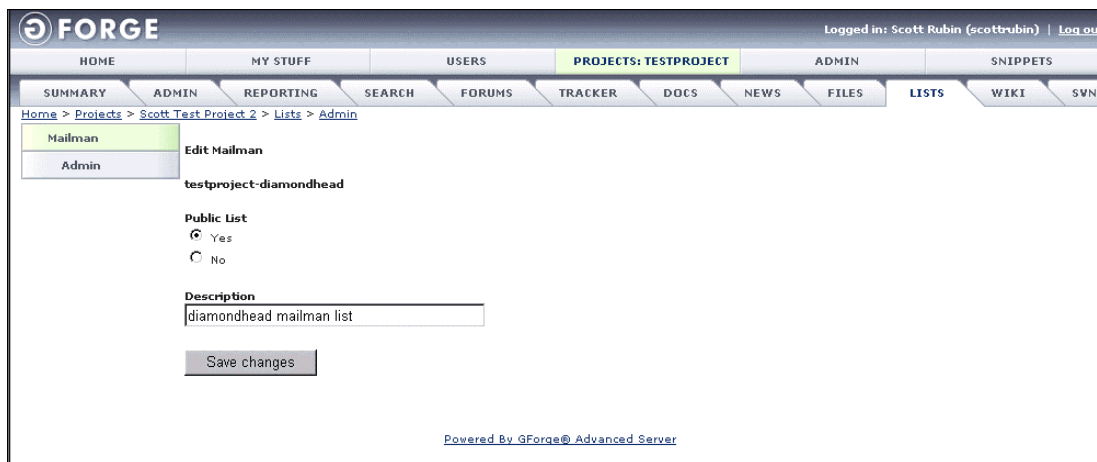


Figure 7-4. Update Mailing List

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.

**Test-1234 Administrator Authentication**


List Administrator Password:


*Important:* From this point on, you must have cookies enabled in your browser, otherwise no administrative changes will take effect.

Session cookies are used in Mailman's administrative interface so that you don't need to re-authenticate with every administrative operation. This cookie will expire automatically when you exit your browser, or you can explicitly expire the cookie by hitting the *Logout* link under *Other Administrative Activities* (which you'll see once you successfully log in).

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[Test-1234 list run by noreply at gforge.org](#)  
[Test-1234 administrative interface \(requires authorization\)](#)  
[Overview of all demo2.gforgegroup.com mailing lists](#)

 version 2.1.8






Figure 7-5. Administrate Mailing Lists

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## 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.



The screenshot displays the GForge SVN Admin interface. At the top, the GForge logo is on the left, and a 'Quick Jump To...' dropdown is on the right. The user is logged in as 'Scott Rubin (scottrubin)'. The navigation bar includes 'Home', 'My Stuff', 'Users', 'Projects: test', and 'Snippets'. Below this, a secondary navigation bar contains 'Summary', 'Admin', 'Reporting', 'Search', 'Forums', 'Tracker', 'Docs', 'News', 'Files', 'Lists', 'Wiki', 'SVN', and 'Build'. The breadcrumb trail reads 'Home » Projects » Demo Project 1 » SVN » Admin » Edit Project Scm'.

The main content area is divided into several sections:

- SVN** (highlighted in the left sidebar):
  - Access info
  - Browse
  - Statistics
  - SVN Reference
  - Admin
  - Administration (highlighted):
    - Edit repository ACLs
- Require tracker item ID on commit:**
- Send Commit Emails to Mailing List:**
- Custom access instructions:** A rich text editor with a toolbar (Source, Bold, Italic, Underline, ABC, X<sub>2</sub>, X<sub>2</sub>, etc.) and a text area.
- Custom browse instructions:** A rich text editor with a toolbar (Source, Bold, Italic, Underline, ABC, X<sub>2</sub>, X<sub>2</sub>, etc.) and a text area.
- External URL for browsing the repository:**
- Repository control:**

This repository is not controlled by gforge and therefore will not be created or access-controlled by the GForge system. External repositories can be linked using commit scripts. See the documentation for additional help.  
 If you want GForge to handle the repository for you, click [here](#).
- 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.

The screenshot shows the GForge web interface. The top navigation bar includes 'Home', 'My Stuff', 'Users', 'Search', 'Projects: test', and 'Snippets'. Below this is a secondary navigation bar with 'Summary', 'Admin', 'Reporting', 'Search', 'Forums', 'Tracker', 'Docs', 'News', 'Files', 'Lists', 'Wiki', 'SVN', and 'Build'. The main content area shows the breadcrumb 'Home » Projects » Demo Project 1 » SVN » Admin » Browse/Edit ACLs'. On the left is a sidebar menu with 'SVN', 'Access info', 'Browse', 'Statistics', 'SVN Reference', 'Admin', 'Administration' (highlighted), 'Edit repository ACLs', and 'Edit commit filters'. The main content area contains a table with the following data:

ACL ID	ACL path:	Use for Web Publishing	Edit	Delete	User permissions
9	/data/docs	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit permissions</a>
11	/data/docs/1	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit permissions</a>
Don't use Web Publishing		<input checked="" type="radio"/>			

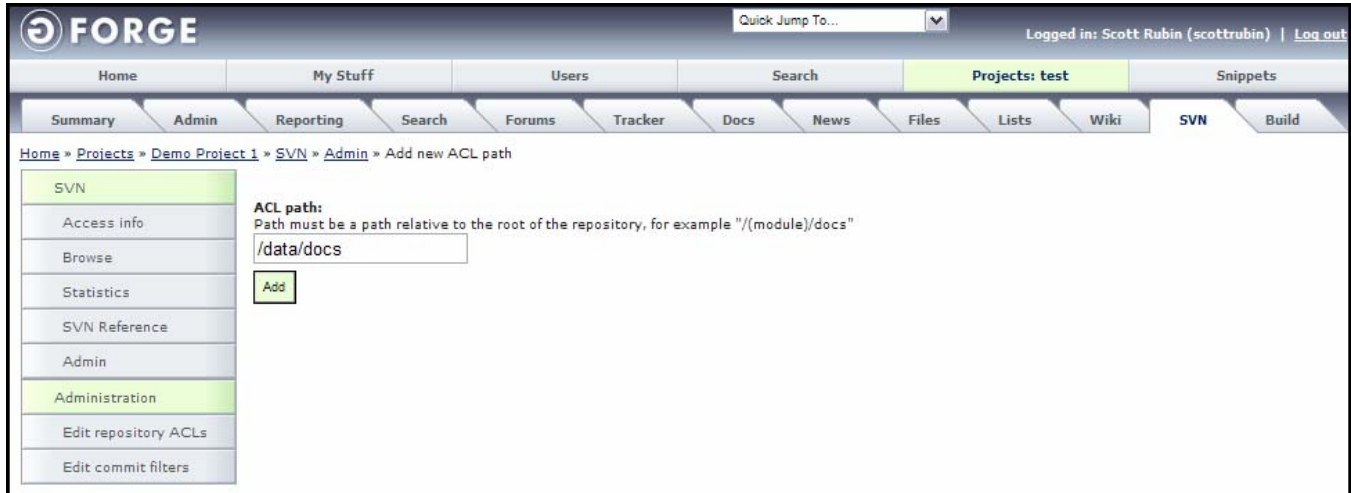
At the bottom right of the table are buttons for 'Update' and 'Add new ACL'.

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.

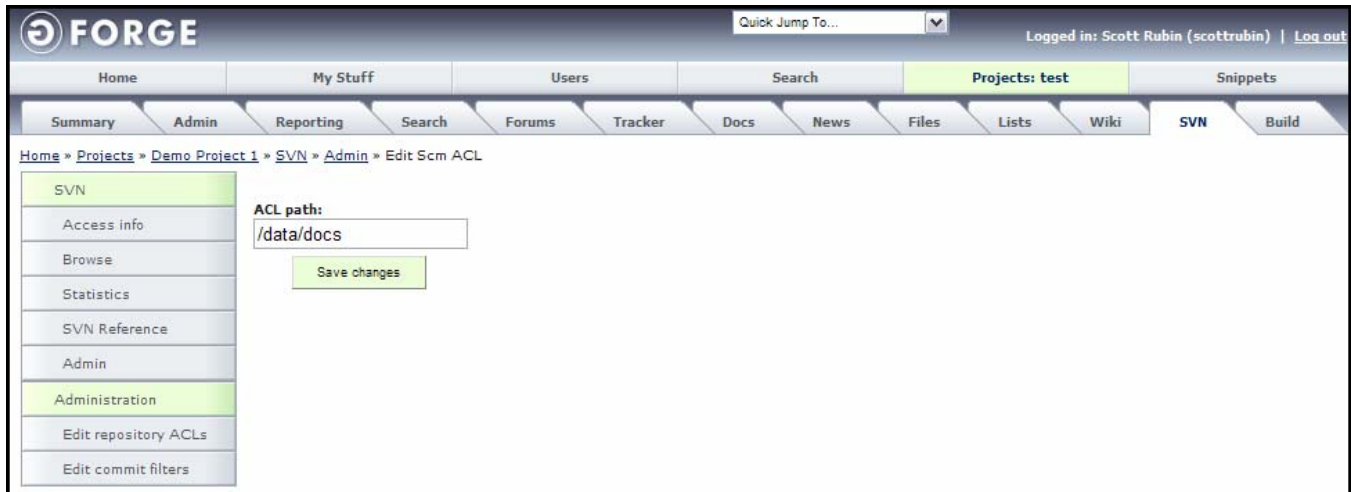


Figure 8-4. Editing Repository ACL

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.

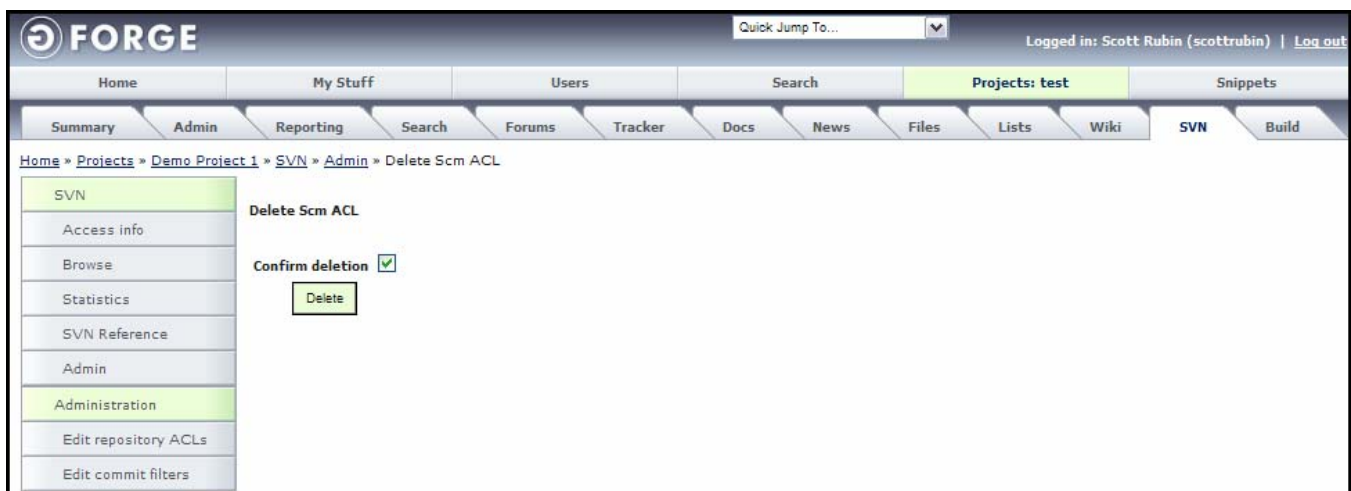


Figure 8-5. Delete Repository ACL

### 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.

The screenshot shows the GForge web interface. The breadcrumb trail is: Home > Projects > Demo Project 1 > Perforce SCM > Admin. The left sidebar has a menu with 'Administration' selected, and 'Edit repository ACLs' is the active link. The main content area is titled 'Edit permissions for path /data/docs'. Below the title is a text box: 'This is a list of the users that have access to the repository. You can customize the access level for each user in this ACL.' Below this is a table with three columns: 'User', 'Repository access', and 'Directory access'.

User	Repository access	Directory access
Ruben Gutierrez	Write	Write
Tony Bibbs	Write	Write
Tawni Plath	Write	Read
Steve Hawkins	Write	Write
Marcelo Mottalli	Write	Write
Matt Diephouse	Write	Write
Demo User	Write	Write
Doug Coker	Write	Write
Timothy Pardue	Write	Write
Scott Rubin	Write	Write

A 'Submit' button is located at the bottom center of the table area.

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.

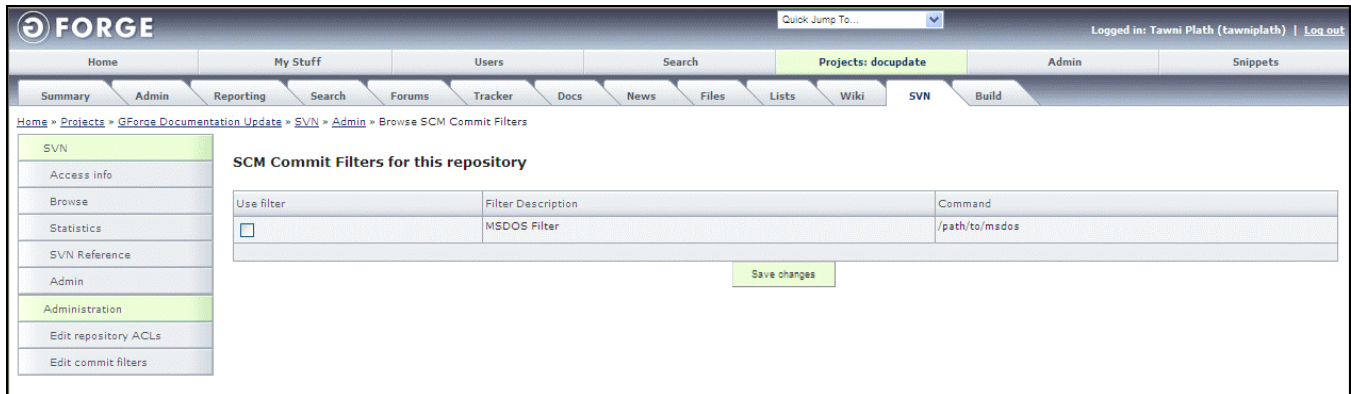


Figure 8-7. Commit Filters

**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.

The screenshot displays the GForge CVS Admin interface. At the top, the GForge logo is on the left, and a 'Quick Jump To...' dropdown is on the right. The user is logged in as 'Scott Rubin (scottrubin)'. The navigation bar includes 'Home', 'My Stuff', 'Users', 'Projects: test', and 'Snippets'. Below this, a secondary navigation bar contains 'Summary', 'Admin', 'Reporting', 'Search', 'Forums', 'Tracker', 'Docs', 'News', 'Files', 'Lists', 'Wiki', 'CVS', and 'Build'. The breadcrumb trail reads 'Home » Projects » Demo Project 1 » CVS » Admin » Edit Project Scm'. The left sidebar menu includes 'CVS', 'Access info', 'Browse', 'Statistics', 'CVS Reference', 'Admin', 'Administration' (highlighted), and 'Edit repository ACLs'. The main content area contains two sections: 'Custom access instructions' and 'Custom browse instructions', each with a rich text editor. Below these is an 'External URL for browsing the repository:' field and a 'Repository control' section with a '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/scm cvs/` 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.

Home » Projects » Demo Project 1 » CVS » Admin » Browse/Edit ACLs

ACL ID	ACL path:	Use for Web Publishing	Edit	Delete	User permissions
9	/data/docs	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit permissions</a>
11	/data/docs/1	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit permissions</a>
Don't use Web Publishing		<input checked="" type="radio"/>			

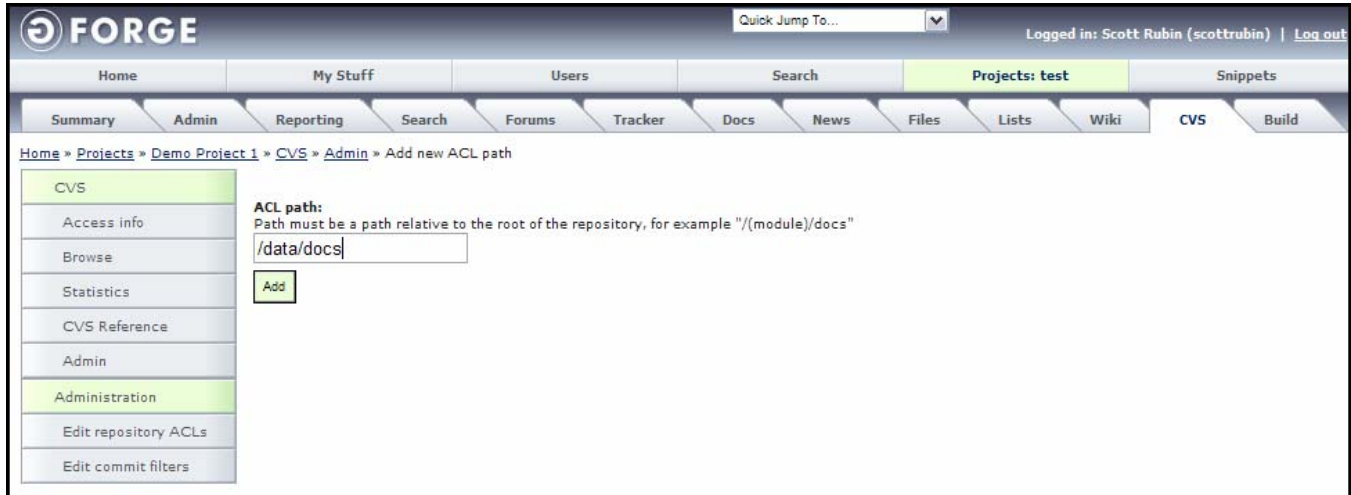
[Update](#) [Add new ACL](#)

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.

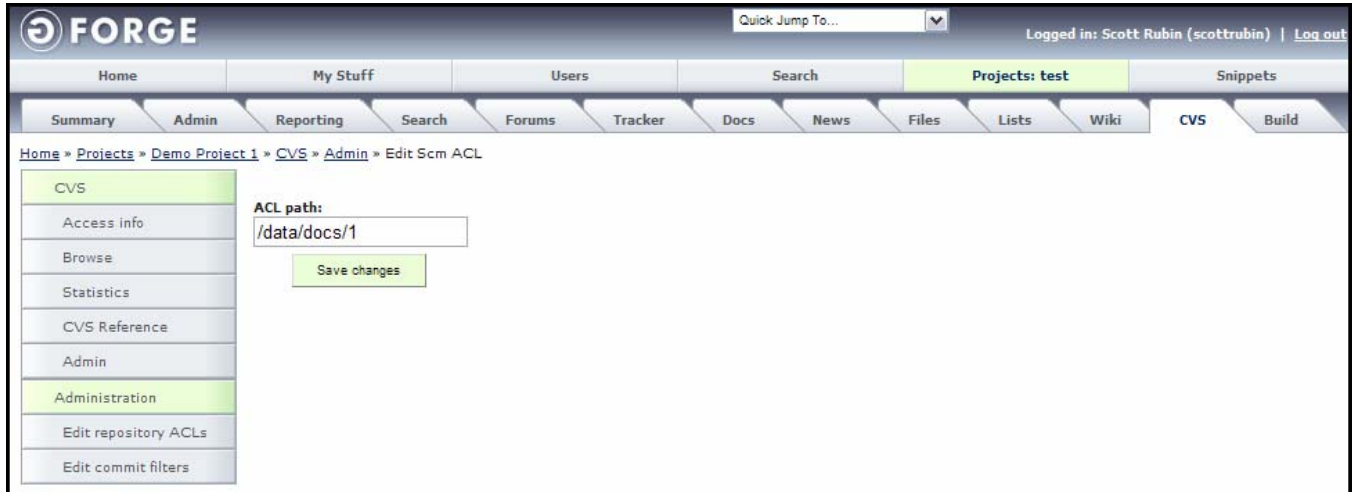


Figure 9-4. Editing Repository ACL

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.

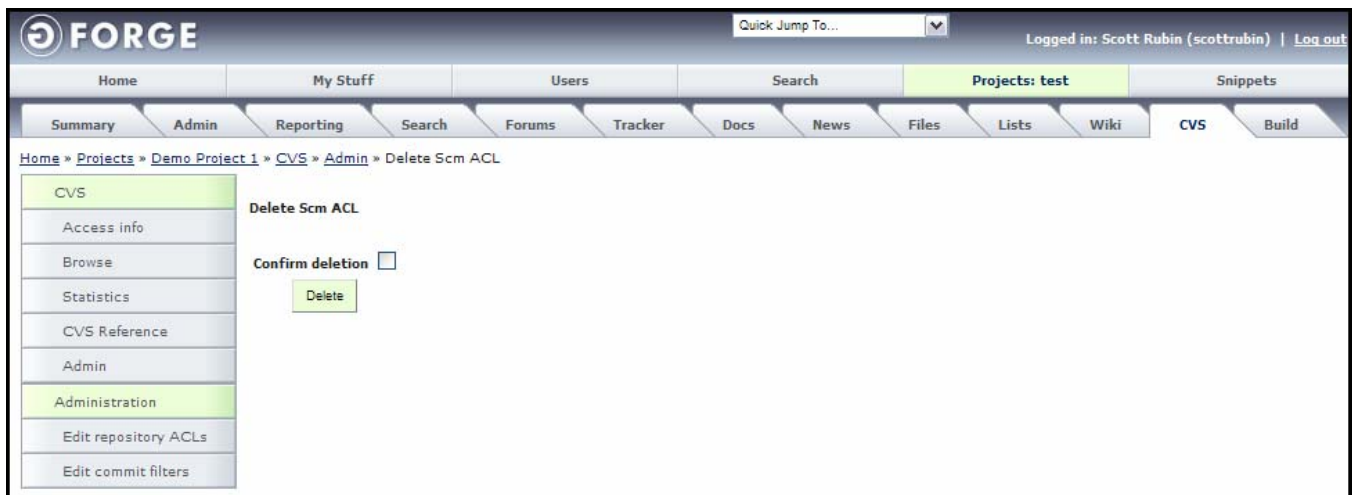


Figure 9-5. Delete Repository ACL

### 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.

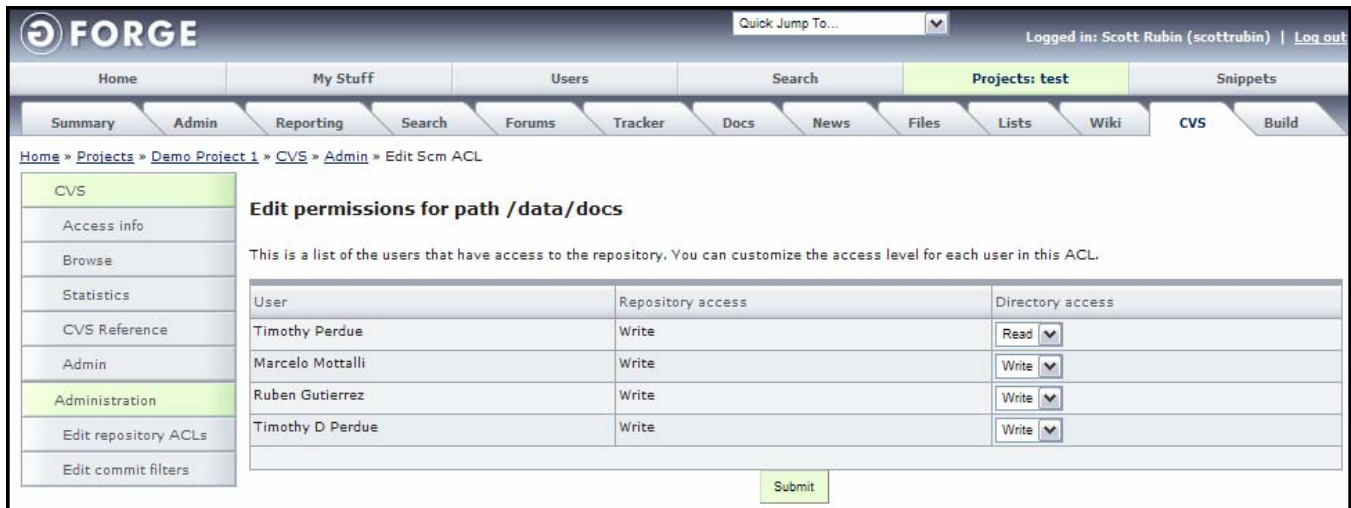


Figure 9-6. Edit Permissions

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.

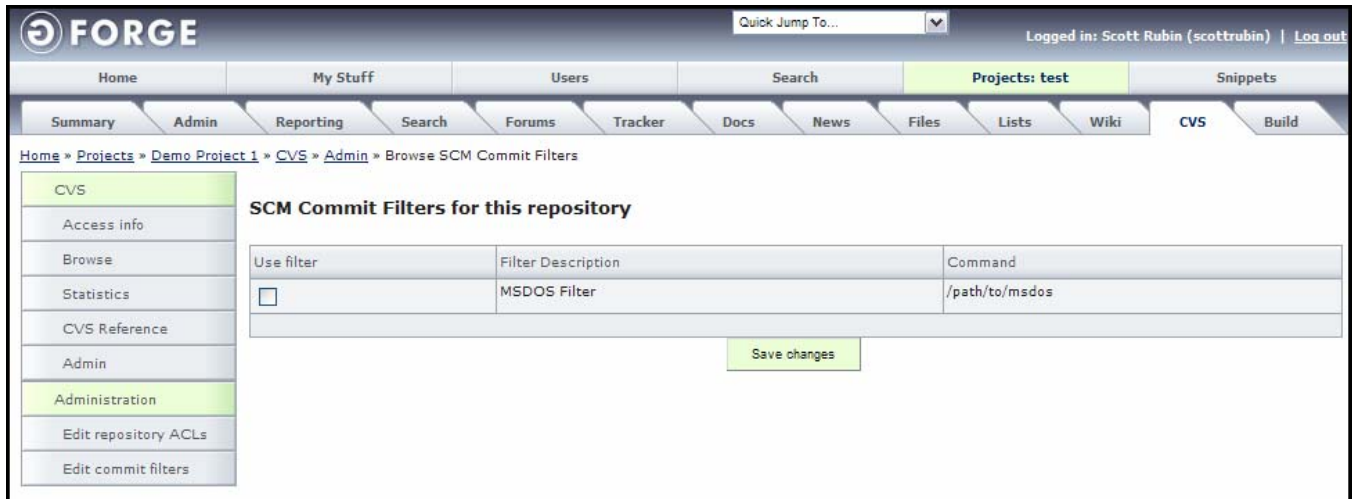


Figure 9-7. Commit Filters

**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.

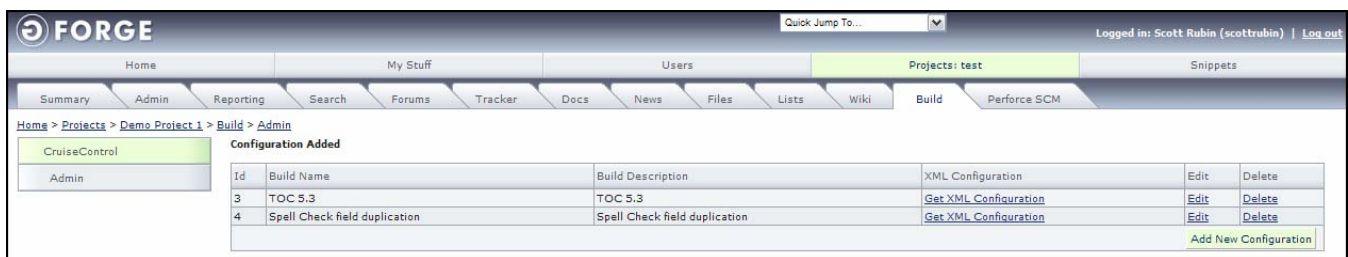


Figure 10-1. CruiseControl

### 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.

The screenshot shows the Forge CruiseControl interface. At the top, there's a navigation bar with 'FORGE' logo, a search box, and user information 'Logged in: Scott Rubin (scottrubin) | Log out'. Below this is a secondary navigation bar with tabs: Home, My Stuff, Users, Projects: test (highlighted), and Snippets. A third navigation bar contains various menu items: Summary, Admin, Reporting, Search, Forums, Tracker, Docs, News, Files, Lists, Wiki, Build, and Perforce SCM. The main content area shows a breadcrumb trail: Home > Projects > Demo Project 1 > Build > Admin. On the left, there's a sidebar with 'CruiseControl' and 'Admin' links. The main area is titled 'Add New Configuration' and contains the following form fields:

- Open Ticket in Tracker:** A dropdown menu with 'Bugs' selected.
- Assignee:** A list box containing 'Nobody', 'Ruben Gutierrez', 'Tony Bibba', 'Tawni Plath' (highlighted), 'Marcelo Mottali', 'Demo User', 'Scott Rubin', and 'Timothy Perdue'.
- Submitter:** A dropdown menu with 'Timothy Perdue' selected.
- Build Name\*:** A text input field containing 'TOC 5.3 update'.
- Build Description\*:** A text area containing 'TOC 5.3 update'.
- Submit:** A button at the bottom of the form.

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.

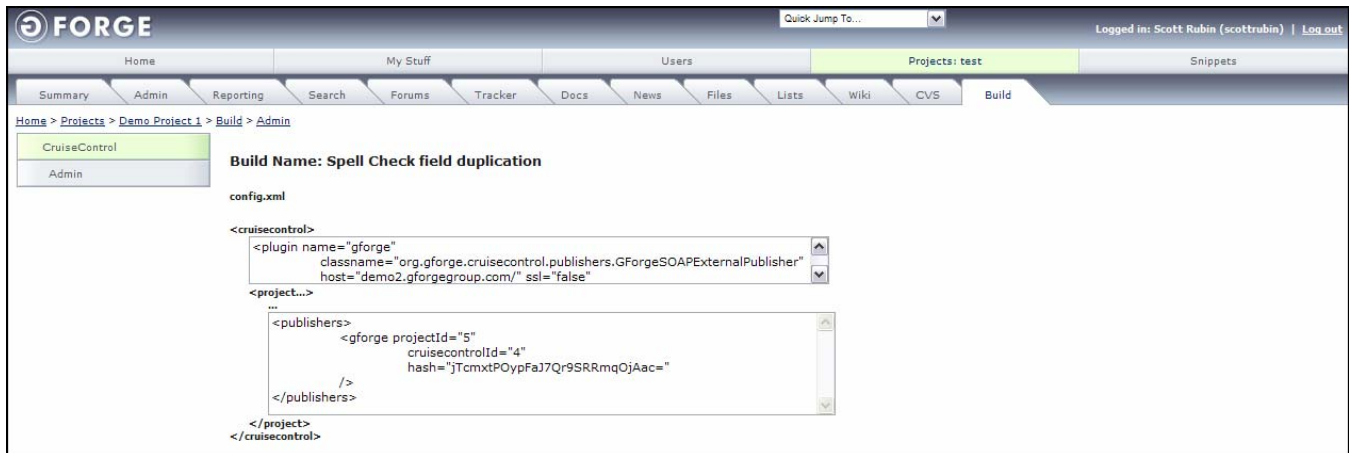


Figure 10-3. XML Code

### 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.

The screenshot shows the GForge Project Admin interface for editing ClearCase SCM settings. The page title is "Edit SCM for this project". The breadcrumb trail is "Home > Projects > Demo Project 1 > ClearCase SCM > Admin". The left sidebar contains "ScmCC", "Access info", and "Admin". The main content area has the following fields:

- Hostname:**
- Root Directory:**
- Custom access instructions:** A rich text editor with a toolbar (Source, Bold, Italic, Underline, ABC, x2, x3, List, Unlink, Link) and a large empty text area.
- Custom browse instructions:** A rich text editor with the same toolbar and a large empty text area.
- External URL for browsing the repository:**

A "Submit" button is located at the bottom right of the form. The GForge logo and "Advanced Server" text are at the bottom center of the 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.

The screenshot shows the GForge Project Admin interface. The top navigation bar includes 'HOME', 'MY STUFF', 'USERS', 'PROJECTS: TEST', and 'SNIPPETS'. Below this is a secondary navigation bar with 'SUMMARY', 'ADMIN', 'REPORTING', 'SEARCH', 'FORUMS', 'TRACKER', 'DOCS', 'NEWS', 'FILES', 'LISTS', 'WIKI', 'BUILD', and 'VSS'. The main content area is titled 'Edit SCM for this project' and contains the following fields:

- Database server:**
- Database location in server:** (i.e. \project\_name\Database.ini)
- Custom access instructions:** A rich text editor with a toolbar and a large text area.
- Custom browse instructions:** A rich text editor with a toolbar and a large text area.
- External URL for browsing the repository:**

A 'Submit' button is located at the bottom right of the form. The GForge logo and 'Advanced Server' text are visible at the bottom center of the 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.

FORGE Quick Jump To... Logged in: Scott Rubin (scottrubin) | Log out

Home My Stuff Users **Projects: test** Snippets

Summary Admin Reporting Search Forums Tracker Docs News Files Lists Wiki Build Perforce SCM

Home » Projects » Demo Project 1 » Perforce SCM » Admin » Edit Project Scm

Perforce  
Access info  
Browse  
Perforce Reference  
Admin  
Administration  
Edit repository  
ACLs

### Edit SCM for this project

**Require tracker item ID on commit**

**Send Commit Emails to Mailing List**

**Custom access instructions:**

Source [Rich Text Editor]

**Custom browse instructions:**

Source [Rich Text Editor]

External URL for browsing the repository:

**Repository control:**  
This repository is not controlled by gforge and therefore will not be created or access-controlled by the GForge system. External repositories can be linked using commit scripts. See the documentation for additional help.  
If you want GForge to handle the repository for you, click [here](#).

Submit

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.

The screenshot shows the GForge web interface. The top navigation bar includes 'Home', 'My Stuff', 'Users', 'Projects: test', and 'Snippets'. Below this is a secondary navigation bar with 'Summary', 'Admin', 'Reporting', 'Search', 'Forums', 'Tracker', 'Docs', 'News', 'Files', 'Lists', 'Wiki', 'Build', and 'Perforce SCM'. The main content area shows a breadcrumb trail: 'Home > Projects > Demo Project 1 > Perforce SCM > Admin'. On the left is a sidebar menu with 'Perforce', 'Access info', 'Browse', 'Perforce Reference', 'Admin', 'Administration', and 'Edit repository ACLs'. The main content area is titled 'Browse/Edit ACLs' and contains the text: 'The ACLs are directories in your repository whose access can be customized.' Below this is a table with the following data:

ACL ID	ACL path:	Edit	Delete	User permissions
9	/data/docs	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit permissions</a>
11	/data/docs/1	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Edit permissions</a>

An 'Add new ACL' button is located at the bottom right of the table.

*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.

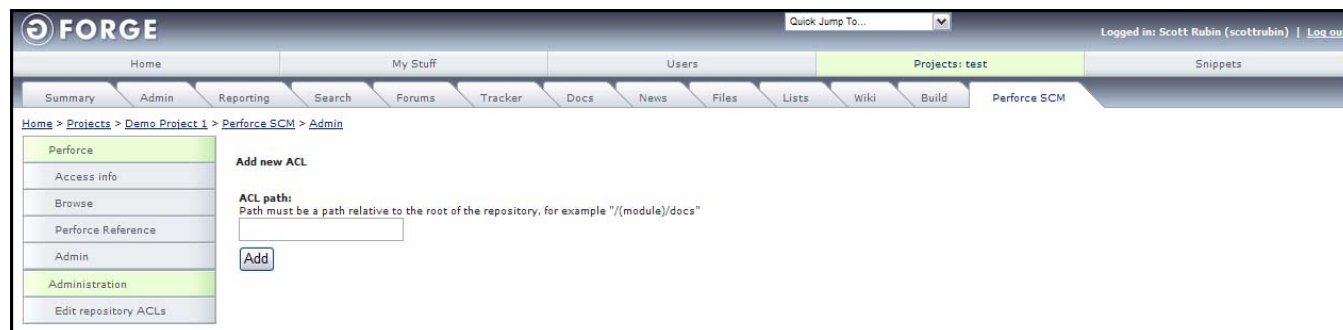


Figure 13-3. Adding Repository ACL

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.

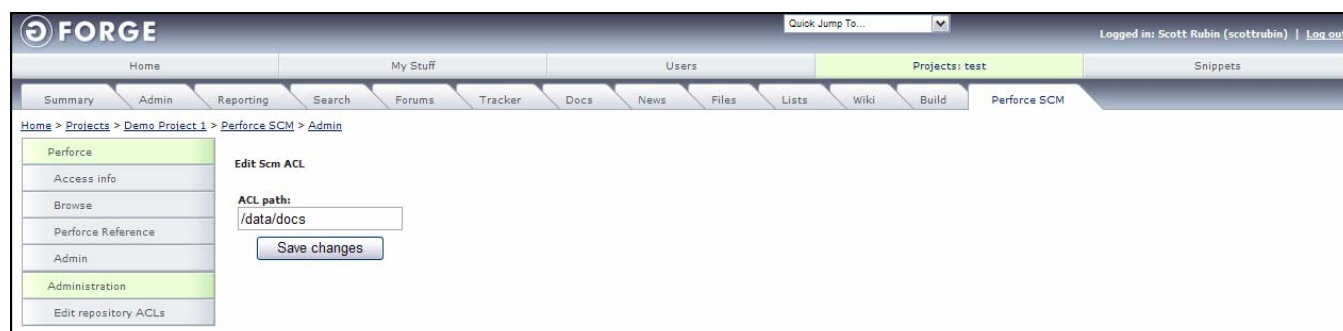


Figure 13-4. Editing Repository ACL

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.



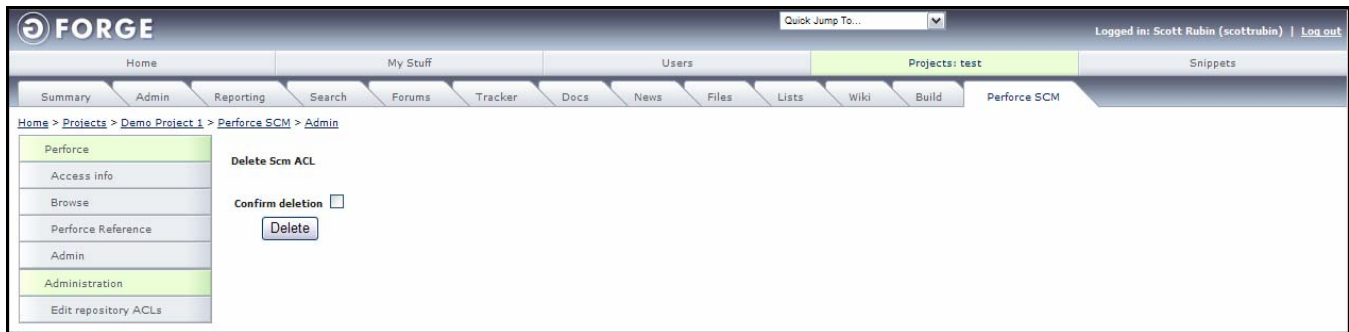


Figure 13-5. Delete Repository ACL

### 13.3.4 Editing ACL Permissions

To edit the ACL permissions for a directory:

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

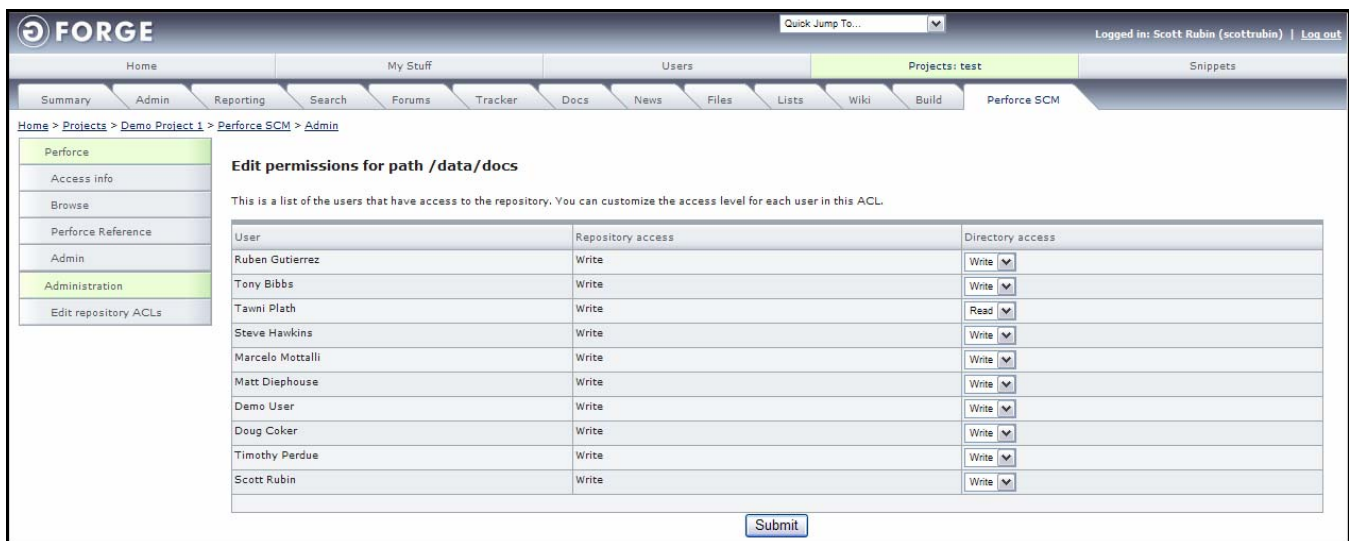


Figure 13-6. Edit Permissions

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

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