

SourceForge 3.4 User Guide

User Guide

SourceForge 3.4 Enterprise Edition

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About This Book

This User Guide introduces SourceForge™ Enterprise Edition 3.4 and describes how users can benefit from the capabilities and resources that SourceForge offers.

Target Audience

This book is for developers, managers, and administrators of SourceForge installations.

Users of this book should be familiar with or have some knowledge of the following areas:

- Software development tasks
- Application development management tasks
- Application administrative tasks
- Web browser interface
- Integrated Development Environment (IDE)
- Software Configuration Management (SCM) systems.

Related Documentation

- *SourceForge 3.4 Installation and System Administration Guide*

Conventions

The following table shows the specific typeface elements used in this guide:

Convention	Usage
<i>Italic</i>	File names, file paths, and directory names (<i>C:\Applications</i>) URLs and protocol names (<i>http://www.vasoftware.com</i>)
Fixed Width	Literals and code samples

SourceForge Introduction

This introductory chapter provides a high-level overview of SourceForge resources in the following major sections:

- “Navigating in SourceForge” on page 3
- “Functionality of SourceForge” on page 7
- “SourceForge Home Page” on page 8
- “User Information” on page 10
- “Project-Specific Resources” on page 14
- “Special Interest Groups (SIGs)” on page 37
- “Application-Wide Resources” on page 38
- “SourceForge.net” on page 47
- “SourceForge Collaborative Development Process” on page 48
- “VA Software Customer Advisory Council” on page 51

Sections in this chapter provide references to appropriate sections in the book for details on using SourceForge resources.

Logging In to SourceForge

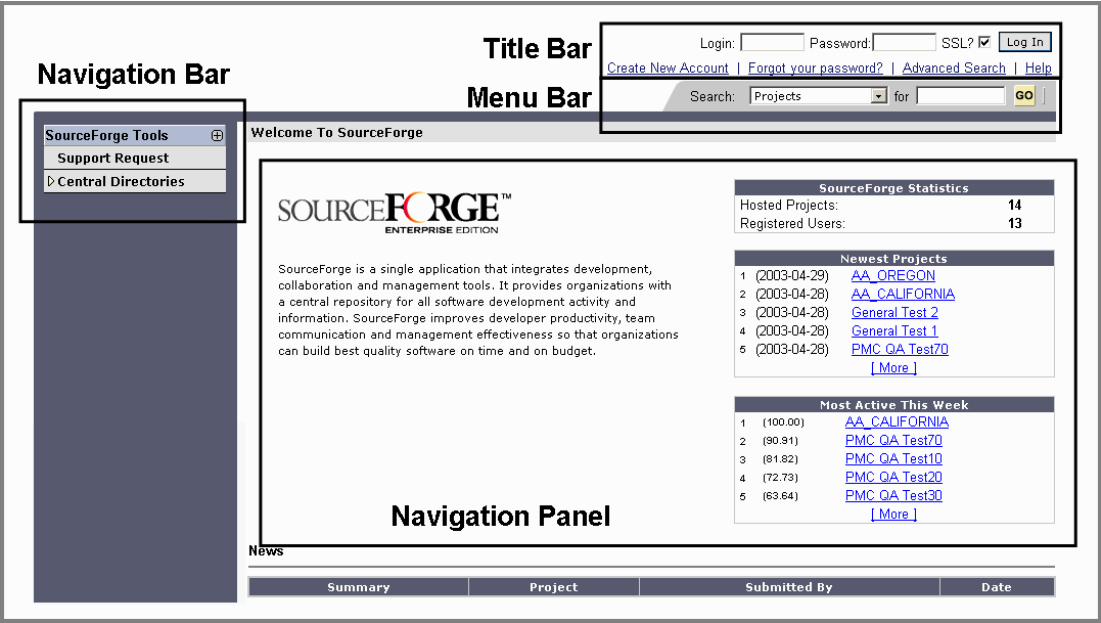


Figure 1. SourceForge Home Page

Users log in to SourceForge with a valid login name and password, via a secure web connection using 128-bit SSL encryption.

➡ For details on logging into SourceForge and performing project activities, refer to “Logging In and Out of SourceForge” on page 61.

Navigating in SourceForge

SourceForge provides a friendly web-based graphical user interface (GUI) for project members to participate in product development activities and for administrators to manage the users and project activities. The GUI has a consistent look and feel throughout SourceForge.

The four main areas of display—title bar, menu bar, navigation panel, and main screen—constitute the SourceForge GUI. These main areas are constant throughout SourceForge.

Title Bar

The title bar displays the following information to users before logging into SourceForge:

- Login – input field for username
- Password – input field for password
- SSL – checkbox for activating the secure shell (SSL)
- Log In – command button to login to SourceForge
- Forgot your password? – link to an area where users can create a new password
- Create New Account – link to an area where users can provide registration information



Figure 2. Title Bar - Before Logging In

The title bar displays the following information to users after logging into SourceForge:

- My Page – tab to display a user’s personal information page
- Jump – drop-down list of bookmarked URLs
- GO – command button to jump to bookmarks
- Log Out – command button to log out of SourceForge

Menu Bar

The menu bar displays the following information:

- Search for — selection and input areas for specifying items to be located in specific areas of SourceForge
- Advanced Search — link to an area where users can specify search criteria
- GO — command button to start the search
- Help — link to the SourceForge Help Center
- Project — drop-down list of projects of which the user is a member. Displays once the user is logged in.

The area below the menu bar displays the login name of the current user.

Navigation Panel

The navigation panel (Figure 3 on page 5 and Figure 4 on page 6) contains several links to SourceForge resources presented in a hierarchical tree structure. This panel is dynamically constructed and only displays links to tools the logged-in user has permissions to access. Links connecting to SourceForge application-wide resources are displayed on the lower section of the navigation panel (Figure 3 on page 5), and project-specific resources appear on the upper section (Figure 4 on page 6).

The navigation panel contains the following SourceForge-wide information:

- Central Directories — contains links to the project map, code library, project assistance wanted listing, news items, and SourceForge tools for project development. This section displays first when the application is launched.
- Account — links to a registered user's personal information. It also contains links to the registered user's personal profile page and personal log page.
- Bookmark This Page — links to an area where users can view current bookmarks, delete bookmarks, or add new bookmarks.
- Register New Project — links to an area where users can provide information about projects they want to create.
- Support Request — links to a page displaying support request information and SourceForge Help Center.
- Tracker Power Search - links to the tracker power search page where users can define and save cross-project tracker searches.

- SourceForge Admin — displays only for SourceForge application administrators. It links to an area where the administrators can perform SourceForge management tasks.

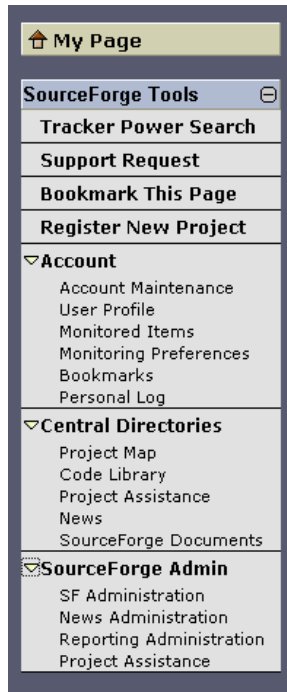


Figure 3. Navigation Panel - Links to SourceForge-Wide Resources

The navigation panel contains the following project-wide information to users, based on their access permissions:

- Project Web Server - link to free-format web pages associated with the project.
- Trackers — links to a list of trackers associated with the current project. Also contains links to the default trackers.
- The default software configuration management system (SCM) — links to the SCM repository. Also contains a link to browse the contents of the SCM repository.
- Document Manager — links to a page displaying the categories under which all the documents for the current project are stored. Also contains a link for submitting new documents to be stored in the document manager.
- Task Manager — links to a page displaying the various task groups for the current project.
- File Publisher — links to a page displaying a list of all the files released for the current project with their release information.
- Mailing Lists — links to a page displaying a list of all the mailing lists created for the current project.

- News — links to a page displaying a list of all the news items published for the current project. Also contains a link to submit news items.
- Forums — links to a page displaying a list of all the discussion forums for the current project. Also contains a link for each forum using which users can select to monitor a specific forum.
- Reporting — links to a page displaying a list of saved reports and a list of report templates to generate new reports.
- Project Management - launches the Project Management Console (PMC).
- Administrator — contains several links to perform management tasks for the current project.

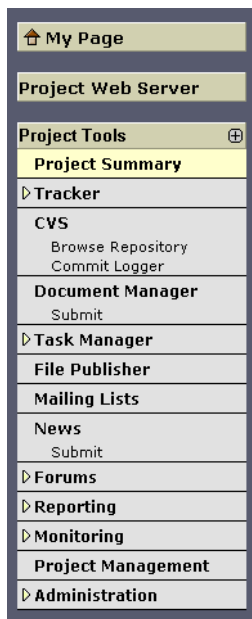


Figure 4. Navigation Panel - Links to Project-Wide Resources

Functionality of SourceForge

SourceForge provides a variety of integrated resources to facilitate successful development and management cycles. Some of these resources are globally available across all projects while some others are configurable to be used within specific projects and be available for specific project members.

Using SourceForge resources, users can perform the following high-level tasks:

- Create projects
- Define project members and thus create a project team
- Define project tasks and assign them to project members
- Create and store documents within the application
- Control document versions
- Review documents
- File bug reports and feature requests
- Assign bug-fixing responsibilities
- Create discussion forums
- Participate in discussion forums
- Create mailing lists
- Post messages to mailing lists
- Post news items
- Generate reports at project-level as well as application-level
- Monitor project performance and activities
- Audit project change history
- Request for system-level support

To accomplish these and a wide range of other tasks, SourceForge provides the “project” as a workspace that offers dedicated environments where specific development tasks are performed by dedicated teams, as illustrated in the following schematic diagram. The sections following the diagram describe the various SourceForge resources available for performing these tasks.

SourceForge Home Page

A user’s introduction to the SourceForge environment is the SourceForge Home page.

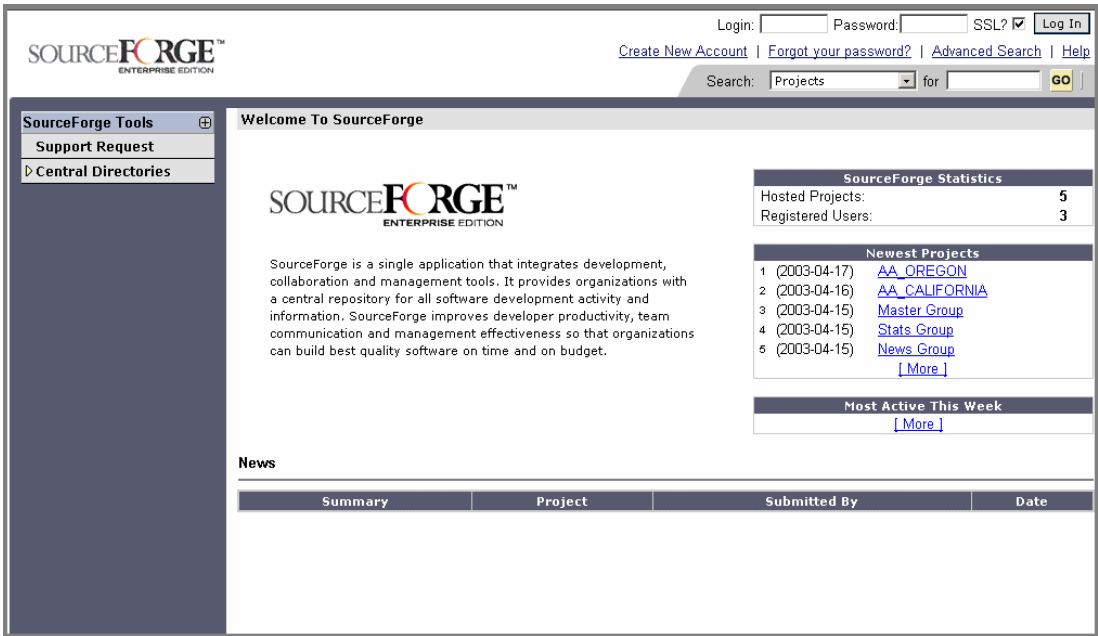


Figure 5. SourceForge Home Page

The SourceForge Home page offers news and information of general interest to all SourceForge users, including:

- SourceForge Statistics
This section provides a count of registered users and SourceForge hosted projects.
- Top Projects Downloads
This section connects you to an area that displays categorized project statistics, such as most active projects, top project downloads, and top forum postings.
- Most Active This Week
This section lists the most active projects in the current week, with their ranking and percentile. The percentile is based on the ranking while the ranking is calculated based on project usage (including forums, bugs, and releases) statistics. The project mostly used is ranked 1 with an activity percentile of 100. From this section, you can access the project summary page for each project.

- News

This section summarizes the latest news with associated project name, submitter name, and date of news submission. In addition, it links to the user profile page of each news submitter.

- Links to SourceForge-Wide Tools

The navigation panel contains links to the various tools available throughout SourceForge across all projects.

User Information

SourceForge provides certain areas for each user to maintain their personal account, project information, user profile, and log entries concerning their project-specific activities.

User Account

Users can change their SourceForge account information such as the password and e-mail address, and manage secure shell (SSH) account information such as public keys. Public keys are stored in SourceForge for quick access to CVS in cases where CVS is used as the software configuration management (SCM) repository.

⇒ For details on maintaining user account, refer to “Account Maintenance” on page 63.

Account Maintenance

Account: admin

Welcome, **Dave Henry**

View and change account preferences here.

[View My Member Profile](#)

[Edit My Skills Profile](#)

Preferences

Registered:

None

User ID:

1

Login Name:

admin

[\[Change Password\]](#)

*Full Name:

Language:

Timezone:

Hits per Screen:

Email Address:

dhenry@vasoftware.com

[\[Change Email Address\]](#)

☐

Access [My Page](#) without being logged in.

Update

Reset

Shell Account Information

CVS/SSH Shared Authorized Keys: 0 [\[Edit Keys\]](#)

Figure 6. Account Maintenance page

My Page

Once logged in, SourceForge users are directed to their respective personalized information page (or “My Page”), which automatically assembles relevant information and consolidates it for user convenience. Any time after logging in and working within SourceForge, users can access their “My Page” directly via the My Page tab on the menu bar.

The screenshot displays the SourceForge 'My Page' interface. At the top, the SourceForge logo and 'ENTERPRISE EDITION' are visible. The user is logged in as 'Administrator', with links for 'Advanced Search', 'Help', and 'Logout'. Below the login bar, there's a 'Project' dropdown set to '-- My Projects --' and a 'Search' bar with 'Projects' selected. The main content area is titled 'My Page' and is divided into several sections:

- My Assigned Items:** A table listing tasks with columns for 'Summary' and 'Due Date'. Tasks include '131: Low Level Design' (2002-11-07), '133: Write Reusable Components' (2002-12-20), '134: Implement Main Modules' (2003-01-08), '135: Implement Admin Utilities' (2002-12-17), '137: Unit Test Plans' (2002-11-12), '138: Integration Test Plans' (2002-11-14), and '140: Test Scripts' (2002-11-26). A 'View all 16 items' link is present.
- My Projects:** A list of projects including 'JavaAppServ', 'Master Group', 'News Group', 'Components', and 'Stats Group'. A 'Remove from Project' button is visible.
- My Open Submitted Tracker Artifacts:** A section showing 'No open tracker submissions'.
- Monitored Items:** A section showing 'No Monitored Items'.

The left sidebar contains navigation links under categories like 'SourceForge Tools', 'Account', 'Central Directories', and 'SourceForge Admin'.

Figure 7. My Page

The SourceForge “My Page” serves as a gateway to an individual user’s projects, with an integrated view of:

- My Assigned Items, such as bugs and project-related tasks
- My Submitted Items, such as tracker artifacts
- My Projects
- My Monitored Items, such as file releases, forums, documents, SCM activity, and tracker artifacts

User Profile

Each user has a publicly accessible profile within SourceForge. The user profile includes information such as user ID, login name, full name, e-mail address, and a list of projects of which they are members. The user profile also includes a link to the user’s personal log, which provides an area for users to periodically record their project-specific activities. This personal information is available to anyone who selects a user’s name from locations within SourceForge, such as from the list of project members.

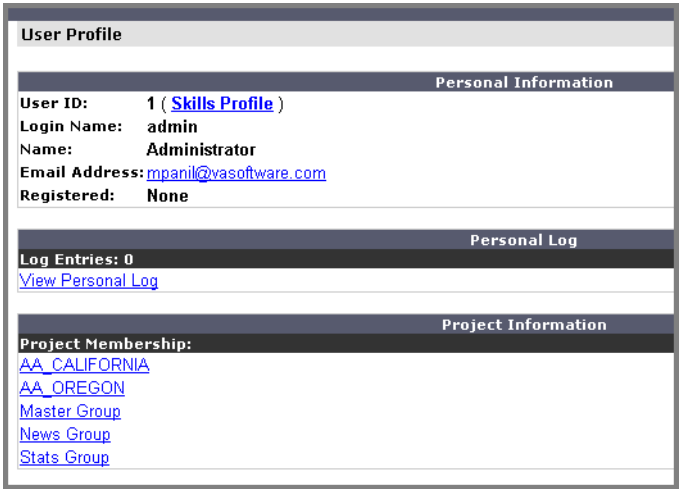


Figure 8. User Profile page

⇒ For details on modifying personal information, refer to “Updating Your User Profile” on page 66.

Skills Profile

As part of the user profile, SourceForge users can optionally publish a skill-set profile by submitting a resume, and listing their skills and experience level across different technical and project areas. The resume and list of skills are available to other users only if the owner of the profile makes them publicly viewable.

Skill-set profiles are channels for developers to make their skills known to the rest of the organization, and help co-developers and managers quickly identify internal sources of expertise for consultation and/or collaboration.

⇒ For details on creating and updating one's skill-set profile, refer to "Modifying Your Skills Profile" on page 67.

Personal Log

Personal Log is the area within SourceForge where users periodically record their project activities. Users have the option to make their personal logs available for public view to share project information and project status with team members and managers. All users can monitor publicly available personal logs and choose to receive automatic e-mail notices when new log entries are posted.

⇒ For details on creating, updating, and viewing personal log entries, refer to "Creating and Updating Personal Log Entries" on page 68 and "Viewing Personal Log Entries" on page 69.

Project-Specific Resources

Projects are SourceForge-hosted workspaces that provide dedicated environments for dedicated teams to perform specific development tasks. Permission to use project resources is set on per member basis.

Project Information

Every project has a summary page, which serves as a centralized workspace for all project members and provides a high-level overview for non-project members who wish to observe project progress. This page includes a brief description of the project, as well as links to various development tools and published file releases. It also links to a project member list, including e-mail addresses and direct links to individual user profiles and skill-set profiles.

The development tools available via the Project Summary page are enabled by project administrators as deemed necessary for the benefit of project members.

Project Summary - AA_CALIFORNIA
AA_CALIFORNIA desc.

Project Admins (1)
[Administrator](#)
Members (1)
[\[View All Project Members\]](#)

Project Summary

Area	Total	Latest
Tracker Artifacts	2 Open / 3 Total	2003-04-21
CVS	0 last 7 days / 0 Total	2003-04-16
Documents	0	2003-04-16
Tasks	0 Open / 0 Total	2003-04-16
File Releases	0	2003-04-16
News	0	2003-04-16
Forum Posts	3 last 7 days / 3 Total	2003-04-16
Mailing Lists	0 last 7 days / 0 Total	2003-04-16

Project Map Categorization
[Categorize project.](#)
Registered: 2003-04-16
Project Web Server
[Browse](#)

Latest News
[Administer](#) : [Submit](#)

Subject	Submitter	Date	Replies
No news has been submitted			

Trackers (2 Open/3 Total)
[Administer](#)

Name	Description	Open / Total	Latest
Bugs	Bug Tracking System	1 / 2	2003-04-18
Feature Requests	Feature Request Tracking System	1 / 1	2003-04-18
Patches	Patch Tracking System	0 / 0	2003-04-16
Support Requests	Tech Support Tracking System	0 / 0	2003-04-16

Documents
[Administer](#)

Category	Latest
No Documents Found	

Tasks (0 Open/0 Total)
[Administer](#)

Task Group	Latest
No Tasks Found	

File Releases
[Administer](#)

Package	Release	Date	Download	Notes	Monitor
No files are available for download.					

Mailing Lists (0 last week/0 Total)
[Administer](#)

List	Latest
No Mailing Lists Found	

Forums (3 last week/3 Total)
[Administer](#)

Forum	Latest
Open Discussion (1 last week / 1 total)	2003-04-16
Help (1 last week / 1 total)	2003-04-16
Developers (1 last week / 1 total)	2003-04-16

SCM

Action	Last 7 days	Last 30 days	Total
Commits	0	0	0
Adds	0	0	0

Figure 9. Project Summary page

Project administrators can perform project management activities via the Project Administration Summary page.

Project Admin Summary
AA_N.California Group : Project Admin Summary

Project Information	Tool Admin
AA_N.California Group Project. 2003.	Project Management Console
Edit Project Information	Tracker Admin
View Audit Log	SCM Admin
Edit Project Map Categorization	Document Manager Admin
	Task Manager Admin
	File Publisher Admin
	Mail Admin
	News Admin
	Forum Admin

Project Assistance

[Create Project Assistance Listing](#)

[View Project Assistance Listings](#)

Add User to Project

***Login Name :**
(Enter the Login Name here and add to list below)

[Lookup Username](#)

Roles :
(Select Roles for all Users to be added to the Project. Make user-specific revisions below)

Default
Developer
Employee
Manager
new admin

Figure 10. Project Administration Summary page

The Project Administration Summary page allows the administrator add registered members to the project and provides access to several project administration tools.

⇒ For details on managing project information, refer to “Managing Project Information” on page 156.

Role-Based Access Control System (RBAC)

The role-based access control (RBAC) system provides project administrators with the ability to closely regulate access to the information and tools within each project. “Role” in SourceForge is an abstract concept representing a collective set of permissions to use SourceForge resources. Project administrators assign roles to project members. Subsequently, project members receive privileges to access certain data and perform certain functions within SourceForge, based on the roles they are assigned and the corresponding access permissions associated with each role.

For the benefit of the administrators, the SourceForge RBAC system offers five pre-defined roles: Project Admin, Manager, Developer, Employee, and Visitor. SourceForge administrators can edit these pre-defined roles for the entire application, and project administrators can edit them for specific projects. SourceForge administrators can also create new roles for the entire application, while project administrators can create new roles for specific projects.


The SourceForge RBAC system also provides three default user types—Project Member, Registered User, and Unauthenticated User— to indicate a user’s project membership and login status. Each of these default user classes is associated with a default role. Every SourceForge user belongs to one or more of these user classes. Administrators can assign additional roles to these user types.

Figure 11 on page 17 displays an area where administrators can view the roles assigned to each project member.

View Assigned Roles for Members
[AA, CALIFORNIA](#) : [Project Admin Summary](#) : [Role Admin](#) : View Assigned Roles for Members

To edit a user's role assignments, click on a user.
Click on an assigned role to edit the role.

Project Members		
User	Assigned Roles	View All User Permissions
Administrator (admin)	Developer , Employee , Manager , Project Admin , Tool Access , Visitor	View
TOM Stoppard (tstoppard)	AA COMPLIANCE REVIEWER , AA_Developer	View

Default User Classes 

Name	Assigned Roles	View All User Permissions
Project Member	Developer	View
Registered User	Employee	View
All Users	Visitor	View

Figure 11. Assigned Roles for Members

⇒ For details on using the RBAC system, refer to “Using Role-Based Access Control (RBAC)” on page 167.

Project Web Server

One of the most important parts to managing a project is to provide existing and potential project members with information about the project. SourceForge provides each project with a virtual host via the Project Web Server. Each project has its own space for web content and CGI scripts. PHP scripts are also supported on the project web server, allowing project members to build a more refined web presence for their project.

Web pages may be uploaded to the project Web Server using any WebDAV-enabled client. DavExplorer, an open source application, is delivered with SourceForge to expedite the creation of project web pages.

Software Configuration Management (SCM)

Software Configuration Management (SCM) helps development teams coordinate and control the changes they make to source code, to avoid the conflicts and confusion caused by simultaneous updates, modifications to shared code, and code fixes impacting multiple versions and releases.

Organizations can select their preferred SCM tools. Project administrators can create, configure, and manage their SCM tools through a single interface. SCM tools can be selected on a per-project basis at project creation time.

SourceForge provides CVS (Concurrent Versions System) for use as the default, integrated SCM solution, and out-of-the-box integration with Rational® ClearCase® and Merant PVCS Version Manager.

➡ For details on using CVS, the default SourceForge SCM, refer to Appendix A.

Issue Trackers

The SourceForge issue tracking system provides development teams with the flexibility they need to track and manage issues ranging from code defects to feature requirements. It is an extensible system for organizing and tracking data related to a project.

Individual data contained within a tracker are referred to as artifacts. For example, a bug report is considered an artifact. Depending on the access permissions provided to them, project members can submit artifacts to trackers. They can also choose to monitor specific tracker artifacts. Project and tracker administrators can change data elements that describe an artifact after it has been submitted. Artifacts are color coded according to the priority of the issues they address. The priority range can be set from one to five (1-5).

Administrators can perform mass updates of tracker artifacts. Such an activity is highly efficient and important, for example, when numerous bugs are fixed and can be closed en masse.

Submitted artifacts can be searched and browsed using flexible filtering and display functionality. The artifact information contained in the result set can be exported as a *.csv* (comma delimited) file for use in other applications. Also, the information within an artifact detail screen can be e-mailed to a list of e-mail addresses. When the status of a tracker artifact changes, e-mail updates are sent to the artifact's assignee and submitter, and other users who have opted to monitor the status of the tracker artifact.

Default Trackers

When a project is started, the following default trackers are created automatically:

- **Bugs Tracker**
Maintains bug reports and status lists for each project.
- **Feature Request Tracker**
Manages requests from stakeholders to add features or to fulfill certain requirements. Feature requests can be prioritized or grouped by release number.
- **Support Request Tracker**
Manages requests from end-users or fellow developers seeking assistance on a particular software application.

- Patch Tracker
Enables tracking of individual patches to a code repository. Patch management is useful for groups that want to implement code review processes before code is committed to a repository.

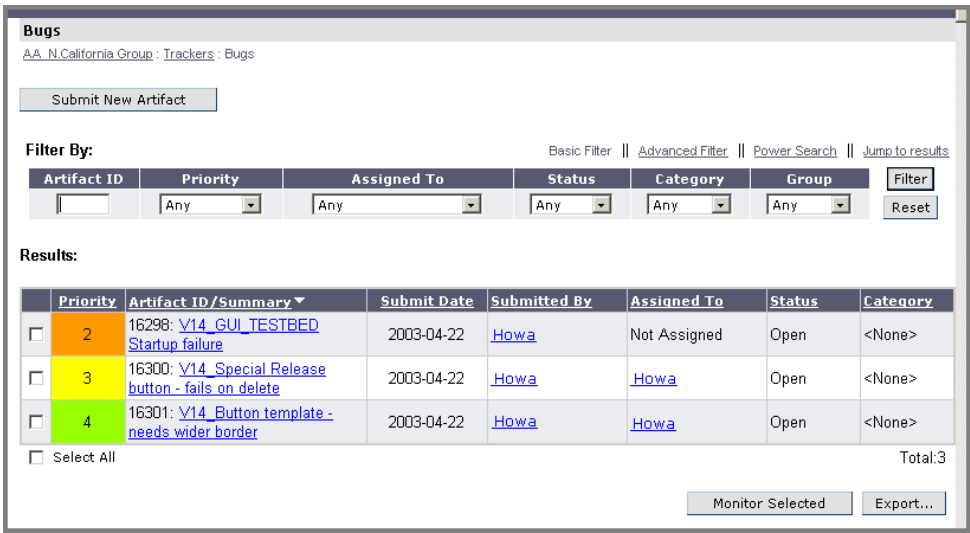


Figure 12. Bugs Tracker

- ⇒ For details on using the trackers, refer to “Using Trackers” on page 93.
- Project administrators can restrict access to trackers based on RBAC settings, and can easily configure the standard trackers provided with each project.
- ⇒ For details on managing trackers, refer to “Tracker Administration” on page 194.

Custom Trackers

- Project administrators can create new trackers for each project and configure them for access by specific project members.
- ⇒ For details on creating and configuring new trackers, refer to “Tracker Administration” on page 194.

Tracker Power Search

Tracker Power search enables you to create a search with complex criteria, then save the search so the same search may be repeated again without having to re-enter the criteria.

Tracker Power search processes search criteria in multiple trackers across multiple projects.

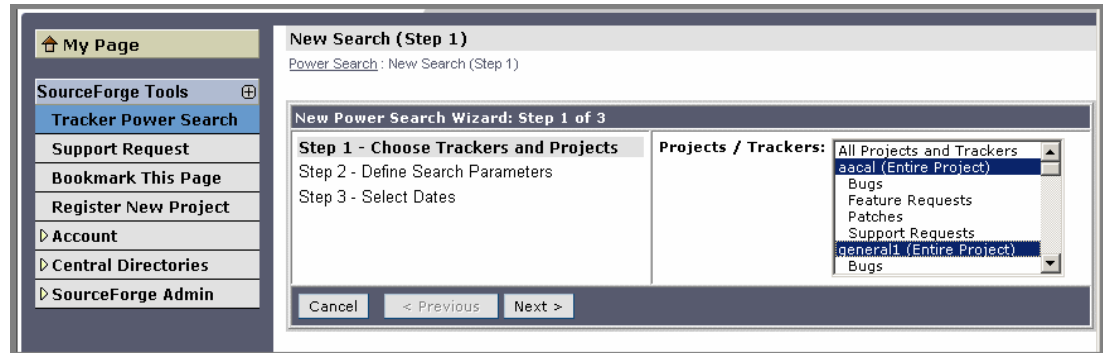


Figure 13. Tracker Power Search

⇒ For details on using Tracker Power Search, refer to “Tracker Power Search” on page 105.

Tracker-SCM Integration

SourceForge offers flexible levels of integration between issue trackers and SCM tools. Tracker-SCM integration enables tracker issue status to be updated at the same time modified code is committed, directly through the SCM tool. This SourceForge functionality reduces the administrative effort required for developers to record their changes, while providing managers with a means of enforcing traceability and accountability of project activities.

Project administrators can use three levels of Tracker-SCM integration, as shown in Figure 14 on page 23, to accommodate various stages of product development:

- **Allow Status Change:** Developers with SCM commit access permission can change the status of an issue (within a corresponding issue tracker).
- **Require Tracker ID:** Developers cannot commit code without linking commits to one or more tracker issues.
- **Restrict to Tracker Item Owner:** Developers cannot commit code that does not link to one or more issues that are specifically assigned to them.

Tracker-SCM Integration can be an extremely powerful feature for developers and managers to benefit from the following functionality:

- Linking code checkins to tracker items allows every code update to be related to a bug, a feature request, a requirement, or other tracked item.
- By making a tracker ID mandatory when checking in code, all code changes are traceable to a bug, a feature request, a requirement, or other tracked item.
- By making tracker IDs mandatory, developers are encouraged to handle single tracker artifacts at a time. Code checkins are thus more granular, and changes to the code are easily attributable to tracked artifacts. Granular checkins also reduces the number of files being worked on and hence reduces conflicts that need to be resolved when many developers are updating files simultaneously.

Examples:

A developer using CVS through a command-line client submits a code patch that fixes a bug. This developer can add a comment and close the bug posted in the bugs tracker—directly through the command-line client at the same time the code is committed.

A manager coordinating a code-freeze testing phase of a project selects the “restrict” mode in order to enforce traceability and accountability as team members are assigned bugs and issues for resolution—and prevent last-minute feature addition.

SCM Integration Admin

AA_CALIFORNIA : Project Admin Summary : SCM Integration Admin

Project:AA_CALIFORNIA

Tracker-SCM Configuration

By enabling the SCM Templates listed below, a text template will be provided to the user when checking code into the SCM repository. This template will prompt the user for a Tracker ID number and, optionally, a change in the status of that ID. The commit message along with a list of all the files that were changed will be added as a follow-up to the Tracker artifact. If a status change was entered, the status of the Tracker artifact will also be updated.

*Note: The user committing to the SCM will have to be a Tracker admin or Editor of a assigned tracker, for the tracker status to be updated. If they do not have these permission, only a comment will be added, no status change will occur.

Module	Engage Commit Logger	Allow Status Change	Default Status Change	Require Tracker ID	Restrict to Tracker Item Owner
Update Template					

Flex Field	Required	Active
No flex fields defined		

Update Flex Fields

Flex Field:

☐ Required ☐ Active

Add Flex Field

Figure 14. Tracker-SCM Configuration

⇒ For details on managing the Tracker-SCM integration functionality, refer to “Managing the Tracker-SCM Integration” on page 237.

Task Manager

SourceForge provides a web-based task management system that allows project tasks to be assigned to project members.

Project managers can divide individual tasks into several phases of completion, and project members can update task status as they complete individual phases of a task. This granular approach provides an option to change course, if and when needed, and ensures increased efficiency even in the midst of a short product development cycle.

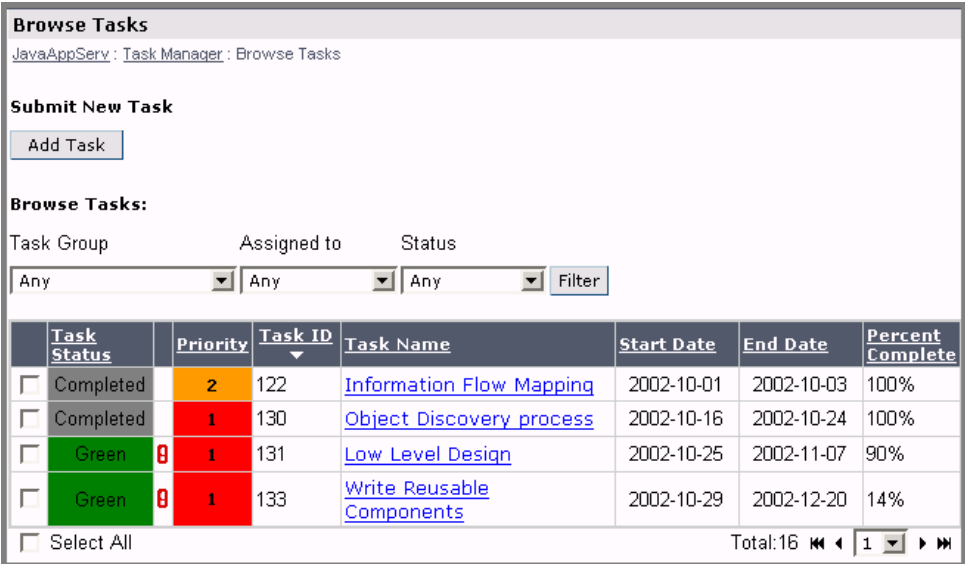


Figure 15. Task Manager

- ⇒ For details on using the task manager, refer to “Using the Task Manager” on page 129.
- ⇒ For details on managing tasks, refer to “Task Manager Administration” on page 221.

Document Manager

SourceForge provides a web-based document management system, the document manager, which lets users upload and categorize documents.

The document manager provides folders for storing and organizing documents. Users with the “document manager editor” permission can define and categorize these folders, and also create any number of sub-folders. Project members with access permission can freely move documents between folders.

All documents stored in the document manager are versioned, providing an historical archive. Documents may also be checked out by users and locked, preventing other users from making changes or overwriting files. Additionally, approval workflow rules can be established so that users submitting documents must have those documents reviewed and approved by authorized parties before they become generally available. Locking and approval workflow capabilities allow the document manager to serve as an environment for content creation and collaboration as well as publication and storage.

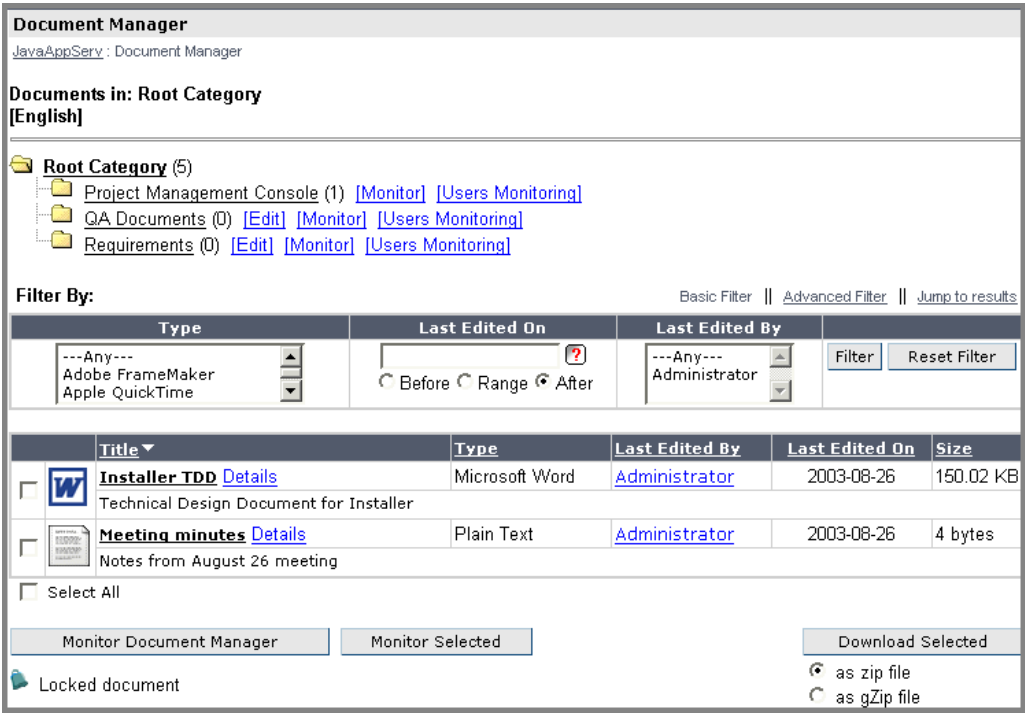


Figure 16. Document Manager

The contents of stored documents are also indexed and searchable (with Oracle). Over 180 binary document types can be searched—from Microsoft® Word®, Excel® and PowerPoint® to Adobe® PDF.

⇒ For information on SourceForge-supported binary document types, refer to Appendix B.

For added security, access to documents can be restricted on a user-level basis. Project administrators can create a list of users—members or nonmembers of a project—with access rights to a document, protecting sensitive materials.

⇒ For information on providing access permissions, refer to “Using Role-Based Access Control (RBAC)” on page 167.

⇒ For details on using the document manager, refer to “Monitoring” on page 108.

⇒ For details on managing documents, refer to “Document Manager Administration” on page 211.

Forums

Project administrators can create any number of public or private discussion forums. Discussion messages can be read individually or as entire threads, in four viewing modes: flat, threaded, nested, and ultimate.

- Flat — All messages are displayed in a linear list with the latest message placed at the top.
- Threaded — Messages are threaded in groups, where each group is consisted of a message, and subsequent replies.
- Nested — Messages are displayed in a linear list, where each reply is subsumed under its previous message.
- Ultimate — Any new message or message response is displayed at the top of the message list, so that active threads are always visible.

Project members can also choose to monitor individual forums on any accessible project, causing the text of newly posted discussion messages to be forwarded automatically via e-mail.

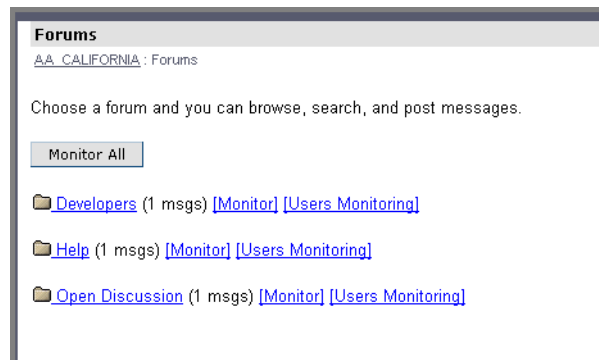


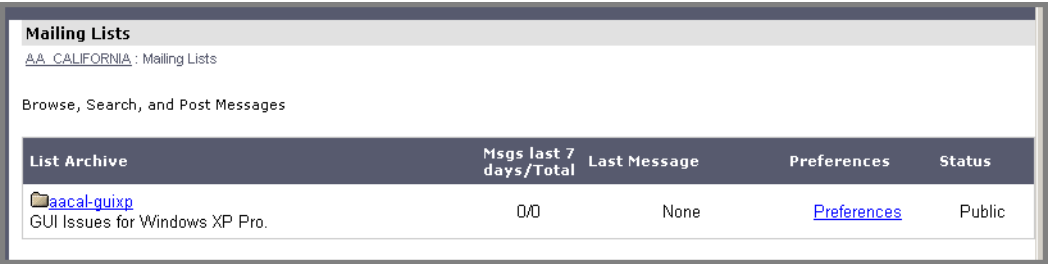
Figure 17. Forums

- ⇒ For details on using the forums, refer to “Participating in Discussion Forums” on page 135.
- ⇒ For details on managing the forums, refer to “Forum Administration” on page 182.

Mailing Lists

Mailing lists make it easy for SourceForge users to have focused discussions via e-mail. All messages posted to a mailing list are maintained in a searchable message archive, if Oracle is the underlying database, and contents of attachments are automatically captured and indexed in the document manager.

SourceForge provides the option to create and maintain multiple mailing lists per project. Project administrators create and maintain these mailing lists and set them as public or private as necessary.



Mailing Lists				
AA CALIFORNIA : Mailing Lists				
Browse, Search, and Post Messages				
List Archive	Msgs last 7 days/Total	Last Message	Preferences	Status
aacal-guixp GUI Issues for Windows XP Pro.	0/0	None	Preferences	Public

Figure 18. Mailing Lists

- ⇒ For details on using the mailing lists, refer to “Using Mailing Lists” on page 133.
- ⇒ For details on managing the mailing lists, refer to “Mailing Lists Administration” on page 185.

File Publisher

The SourceForge file publishing system provides a standard repository for software and documentation files released for each project. Released files are indexed in the “File Releases” area on the Project Summary page.

The project administrator or a member with the file release technician permission for each project determines when to release files for a project and how often subsequent releases should occur.

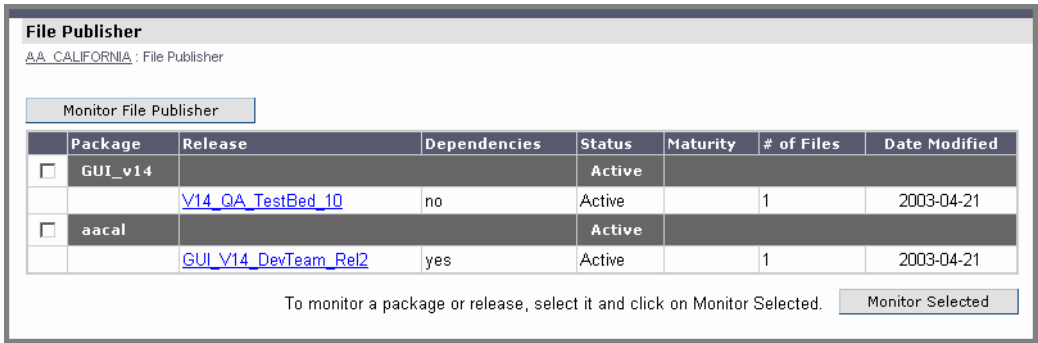


Figure 19. File Publisher

- ⇒ For details on using the file publisher, refer to “Using the File Publisher” on page 139.
- ⇒ For details on managing the file publisher, refer to “File Publisher Administration” on page 224.

News Items

Project administrators can post important bulletins and updates to the project news system for display on the Project Summary page.

Each headline in the News section on the Project Summary page links to a news posting with its own embedded discussion forum.

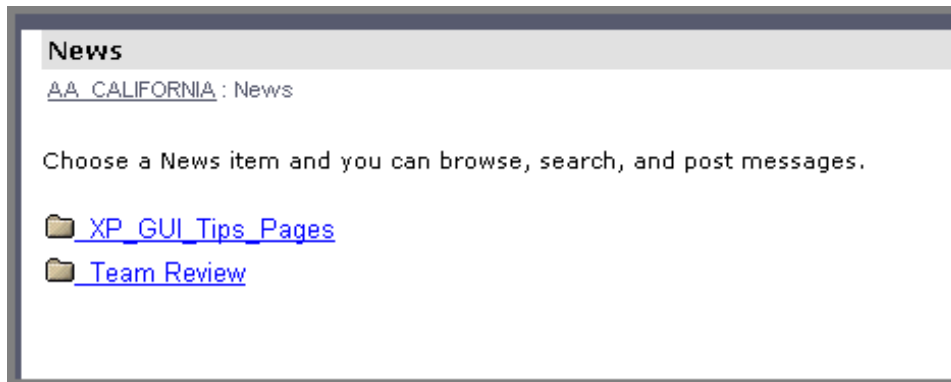


Figure 20. News Items

- ⇒ For details on viewing the news items, refer to “Browsing News Items” on page 81.
- ⇒ For details on managing the news items, refer to “News Administration” on page 192.

Reporting on Project Usage

With SourceForge, administrators can monitor development activities at many different levels—from monitoring the activity of a single developer to monitoring progress on all active projects throughout the enterprise.

Reports can be automatically generated at regular intervals (weekly, monthly, or quarterly); exported for use with external applications (such as spreadsheets, text editors, or database programs) using comma-delimited (.CSV) files, and scheduled, run, and distributed automatically. Predefined report templates can further simplify the process.

Reporting

AA_CALIFORNIA : Reporting

Template Reports

Report Name	Actions	Date Created	Last Updated
<input type="checkbox"/> Template - User Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project Tracker Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project SCM Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project Activity Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project Task Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55

Delete Selected

Select All

Unselect All

Saved Reports

Project Name	Report Name	Actions	Date Created	Last Updated
No Saved Reports				

Reporting Engine

The reporting engine enables you to build reports on user, and project activity.
As a SourceForge admin, you can also run SourceForge-wide reports and reports on any user or project.

Create Multiple Project Report

Create a Project Report (AA_CALIFORNIA)

Figure 21. Reporting

SourceForge offers usage monitoring and reporting at the following levels:

- Project usage
- Tracker reporting
- Task Manager reporting

Project Usage Statistics

Project-level statistics provides a comprehensive view of project activities, such as project page views, bugs, and support requests.

Statistics can be displayed for the last seven days, the last 30 days, or monthly during the last three months in the following areas:

- Month/lifespan
- Rank
- Internal traffic (page views)
- File downloads
- Issues opened and closed
 - Bugs
 - Support
 - Patches
 - All Trackers
- Tasks opened and closed
- SCM activity

Tracker Reporting

Reporting at the tracker level provides aging and distribution reports for all project trackers. Project members and administrators can easily create several types of reports for any of their issue trackers.

- Aging Report

Displays three graphs for a selected time period, including:

 - Average turnaround time for closed items
 - Number of items submitted
 - Number of items still open
- Distribution by Assigned To

Shows the number of issues (open or otherwise) assigned to each tracker technician on the project during the specified time period.

- **Distribution by Category**
Reports the number of issues assigned in each available issue category during the specified time period.
- **Distribution by Group**
Reports the number of issues assigned to each group during the specified time period.
- **Distribution by Status**
Reports the number of issues for each status code during the selected time period.

Task Manager Reporting

Reporting at the task level provides aging and task reports. Project administrators can easily create several types of reports for any of their project tasks.

- **Aging Report**
Displays three graphs for a selected time period, including:
 - Average turnaround time for closed items
 - Number of tasks started
 - Number of incomplete tasks
 - **Tasks by Technician**
Shows the number of tasks (open or otherwise) assigned to each task technician on the project during the specified time period.
 - **Tasks by Task Group**
Shows the number of tasks (open or otherwise) assigned to each task group on the project during the specified time period.
- ⇒ For details on using reports, refer to “Using Project Statistics” on page 140.

Scheduling Reports

For users of Oracle, SourceForge provides a reporting engine which provides comprehensive and detailed user-defined reports on user, project-wide activities, and application-wide activities. It also includes the functionality to schedule reports.

- ⇒ For details on scheduling reports, refer to “Scheduling Reports” on page 150.

Monitoring

Monitoring is an efficient mechanism that automatically notifies users when status or other changes are made to objects held within SourceForge. For example, monitoring is turned on for tracker artifacts when submitted by a user. The user who created the artifact is notified by e-mail of any changes or updates made to the artifact. Also the current owner of the artifact is notified and all users who have contributed to the artifact.

Monitoring may be configured to send e-mail notification ‘immediately’ upon the occurrence of an event, the user may choose to receive a daily ‘digest’ of summarized monitoring information.

The Monitored Items shows the user all of the items they are monitoring within a project and permits the user to see all items they are monitoring across all of the projects to which they are registered.

Users may set their Monitoring Preferences on a per-tool, per-project basis to send no email, immediate email or a daily digest of all monitored events. Users may also Pause Monitoring for a period of time, perhaps when traveling on business or on vacation, and then restart it upon their return.

Audit Log

The Audit Log provides a consolidated view of a project’s change history, including a member list with access to individual member’s user profile.

Project administrators can observe how a project changes over time in terms of its membership.

Audit Log
[AA_CALIFORNIA](#) : [Project Admin Summary](#) : [Audit Log](#)

Project Change History

Field	Old Value	New Value	Date ▾	By
status	P	A	2003-04-16	admin
approved	x		2003-04-16	admin
Added User	tstoppard		2003-04-17	admin

Figure 22. Audit Log

⇒ For details on using the audit log, refer to “Auditing Project Change History” on page 163.

Project Assistance

Project administrators can post internal requests for developer assistance through an “assistance wanted” tool specifying a job description and skill requirements. All registered users can view job postings and respond.

The project assistance wanted listing saves time and effort to find people with skills suitable for a specific job or to be available for ad hoc consulting. Listings can help managers identify potential project team members, experts in specific areas who can serve as consultants, and opportunities for inter-project collaboration.

- ⇒ For details on using the project assistance listing, refer to “Project Assistance” on page 80.
- ⇒ For details on managing the project assistance listing, refer to “Project Assistance Administration” on page 164.

Project Management Console

SourceForge also provides integrated project planning, management, and reporting capabilities through the Project Management Console (PMC).

The PMC enables new levels of project management effectiveness, visibility, and control by combining real-time tracking and metrics reporting with SourceForge’s rich set of collaborative development tools. Visually intuitive charts, graphs, and traffic-light indicators give managers a high-level view of software project status at a glance. Managers can quickly drill down to the details via interactive Gantt charts, audit logs, and graphic views of tasks and task dependencies.

With the PMC, potential problems are identified early, so that managers can quickly track and resolve them before they impact project schedules and budgets.

Using the PMC, project plans can always be current. Project plans are created within SourceForge, or imported from and exported back to Microsoft® Project®.

Since it automates status updates and project tracking, SourceForge frees managers and developers alike from unnecessary meetings and tedious administrative tasks. With the PMC, development teams spend less time reporting their activity and more time being active.

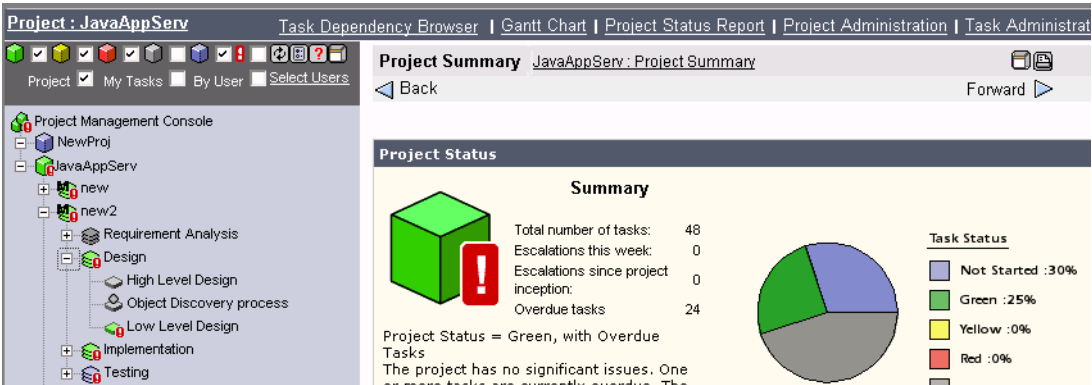


Figure 23. Project Management Console

For details on using the Project Management Console, see “Using the Project Management Console” on page 245.

Special Interest Groups (SIGs)

Special Interest Groups (SIGs) are specialized topic areas within SourceForge that host closely related projects. These specialized projects are open communities for developers with shared interests and skills. Topics may include any relevant areas of development. SIGs provide a means for grouping projects, for example, by division or organization.

You can think of SIGs as containers for related projects, serving as a location for SourceForge features created there shared by members of all constituent projects, such as mailing lists, forums, and news. SIGs maintain separate records of membership, news, forums, and mailing lists from constituent projects. All data (such as news and activities) within a SIG is aggregated.

SIG members can efficiently use the tools available within SIGs. Tools can be used within each SIG or across all SIGs. SIGs are created just like other projects but upon specifying that they are SIGs.

Registered users submit a new SIG request in the same way as they do for a project. The SourceForge Administrator assigns the type to be SIG when the SIG is approved. The SIG then displays on the project list of the user's personal information page ("My Page").

⇒ For details on creating SourceForge projects, refer to "Creating Your Own Project" on page 88.

Application-Wide Resources

SourceForge offers a number of application-wide resources for all registered users regardless of their project-status, and certain privileges for administrators to manage these resources. The following sections describe these resources: Bookmarks, Project Map, Search, Code Library, and project assistance listing.

Bookmarks

Users can create and edit their favorite bookmarks, or delete them when necessary. The system saves and lists those bookmarks for the users to access any time they are within SourceForge. These bookmarks are accessible on the Jump drop-down list on the menu bar. Bookmarks are available to the user wherever they log in to SourceForge. They are not tied to a browser.

⇒ For details on managing bookmarks, refer to “Bookmarks” on page 72.

Finding Projects

Project Map

The project map provides a single centralized location to quickly view, sort, or find development projects throughout an organization. By browsing the project map, users can easily identify opportunities for code reuse and collaboration within an organization.

Project administrators can specify how their projects should be categorized. Default category choices are:

- Programming Language
- Operating System
- Development Status
- Environment
- Intended Audience
- Natural Language

Project administrators also can assign multiple sub-categories to a given project (for example, when a single project uses multiple programming languages) and define new categories.

The project map, if efficiently used, can be a powerful tool to promote reuse and to prevent re-work. Lack of visibility into ongoing projects may trigger reinventing the wheel. Using appropriate categories in the project map will prevent such repetitions.



Figure 24. Project Map

⇒ For details on using the project map, see “Browsing the Project Map” on page 73.

Browsing All Projects

In addition to the Project Map, SourceForge also provides a Browse All Projects list that allows users to browse a list of all SourceForge projects.

Browse All Projects	
This page displays a listing of all projects that you have access to view.	
Project ▾	Description
JavaAppServ	This project manages the Java App Server development project.
Master Group	Master group
News Group	Group to hold site news
Server Dev	This project is the repository for server-side dev
Stats Group	Group to hold site statistics

Figure 25. Browse All Projects list

⇒ For details on using the Browse All Projects list, see “Browsing All Projects” on page 75.

Search Engine

SourceForge captures and automatically indexes information stored in the database, making virtually all data within the environment searchable. Oracle lets users search for items in all the areas of SourceForge, while IBM DB2 and PostgreSQLPostgreSQL searches are restricted to users and projects.

Search functionality covers not only meta-data (such as, bug descriptions) and stored text data (for example, discussion forum comments), but also the contents of most industry-leading binary document formats, such as Microsoft® Word®, Excel®, and PowerPoint® and Adobe® PDF.

Searches may be global in scope, or restricted on a per-project or per-tool basis.

Searches may also be made across all files managed by SCM products in a project where the SCM is either CVS, ClearCase or PVCS. The search may be made across files managed by all SCM products in a project, or selectively across file managed by CVS or PVCS. Searches across SCM managed files may also be disabled, to eliminate the search time across vast numbers of source code files.

Multiple search options are available, as shown in Figure 26 , including a “search all” function that lets you search through all SourceForge content. You can also limit your searches to topic areas, such as projects or forums, and search topics within a specific project.

Several search types are available to refine the search based on keywords provided. You can perform advanced SourceForge-wide searches ranging from simple “find items containing any of the provided words” to fuzzy-logic.

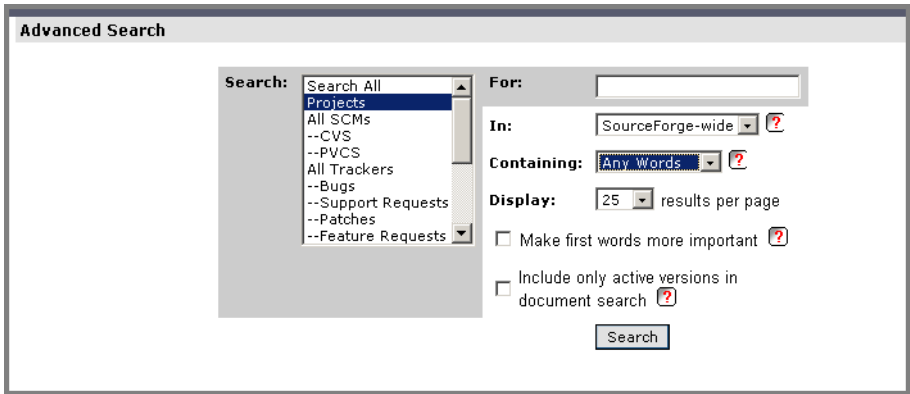


Figure 26. Search Engine: Advanced Search

Search functionality of SourceForge on Oracle, DB2, and PostgreSQL

The following table outlines the differences between the search functionalities provided by Oracle 9i, DB2 8.1, and PostgreSQL 7.2 and higher.

Table 1. Search Functionality: Oracle, DB2, and PostgreSQL

Functionality	Oracle 9i	DB2 8.1	PostgreSQL 7.2 and higher
Search virtually all application data: software/group, all trackers, forums, tasks, CVS, PVCS, ClearCase, mailing lists, people, code snippets, user diaries, help wanted.	Available	Partially available. Search is limited to software/group, trackers, forums, and people.	Partially available. Search is limited to software/group, trackers, forums, and people.
Document search (binary and non-binary.) This includes the ability to limit a search to only active versions of a document.	Available. Oracle Text (formerly Intermedia) enables binary document search.	Not available	Not available
Search respects Role-based access control.	Available	Available	Available
Search all and multi-area search.	Available	Not available	Not available
Ability to search within “my projects”	Available	Not available	Not available
Includes all words, any words, substring, exact phrase, fuzzy match, and topic searches.*	Available	Not available	Not available
Enables users to select the number of results per page as ewll as a weighted order display (referred to in the user interface as “make first words more important”).**	Available	Not available	Not available

*Search types:

- All words— returns only documents that have all of the keywords entered (“AND” search).
- Any words — returns documents that have any of the keywords entered (“OR” search).
- Substring — returns documents that contain words with the substring in them. For example, a substring search on “think” will return documents with the keywords such as “think,” “unthinkable,” and “thinktank.”
- Exact phrase — returns only documents that have the exact phrase entered.
- Fuzzy match — returns results that are “close” matches to the keywords entered, often correcting common spelling errors.
- Topic — search returns results that include keywords that are topically related to the keyword. For example, a search on “sport” returns documents that include the word “baseball.”

**A weighted order search returns results based on the order in which the keywords are entered.

For example, if the search string is “java application development,” the search gives more weight to documents that include the keyword “java” than to those that include “application,” which in turn will be given more weight than documents including only the keyword “development.”

⇒ For details on using the search engine, refer to “Using the Search Engine” on page 82.

Code Library

The code library lets users search for and share reusable code system-wide. Code components can be packaged and stored centrally, for sharing among users, projects, and teams. Code can also be stored and cataloged on the basis of programming language and application category.

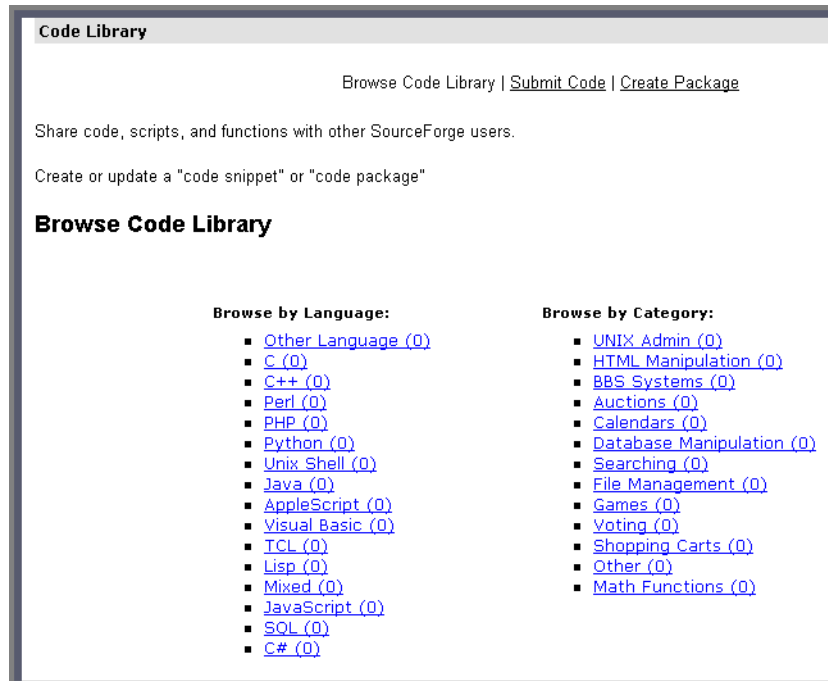


Figure 27. Code Library

⇒ For details on using the Code Library, refer to “Using the Code Library” on page 76.

SourceForge-wide Reporting

SourceForge-wide reporting offers a top-level view of all activities, such as projects, downloads, bugs, and SCM commits. SourceForge application administrators can monitor a number of SourceForge-wide statistics:

- SourceForge-wide aggregate statistics
- Project comparison statistics
- SourceForge page views
- New users and new projects
- Most recent logins
- Language statistics

SourceForge administrators obtain greater visibility into software development activities throughout the enterprise, and can predict and mitigate problems early in the development lifecycle.

The screenshot displays the 'Reporting' section for 'AA_CALIFORNIA'. It features two main tables: 'Template Reports' and 'Saved Reports'.

Template Reports Table:

Report Name	Actions	Date Created	Last Updated
<input type="checkbox"/> Template - User Report	Create from	4/16/2003 20:08:38	4/16/2003 20:08:38
<input type="checkbox"/> Template - Project Tracker Report	Create from	4/16/2003 20:08:38	4/16/2003 20:08:38
<input type="checkbox"/> Template - Project SCM Report	Create from	4/16/2003 20:08:38	4/16/2003 20:08:38
<input type="checkbox"/> Template - Project Activity Report	Create from	4/16/2003 20:08:38	4/16/2003 20:08:38
<input type="checkbox"/> Template - Project Task Report	Create from	4/16/2003 20:08:38	4/16/2003 20:08:38

Below the table are buttons: [Delete Selected](#), [Select All](#), and [Unselect All](#).

Saved Reports Table:

Project Name	Report Name	Actions	Date Created	Last Updated
AA_CALIFORNIA	<input type="checkbox"/> BUG_-_Weekly_Report	View Run Modify Create Schedule	4/21/2003	4/21/2003

Below the table are buttons: [Delete Selected](#), [Select All](#), and [Unselect All](#).

Figure 28. SourceForge-Wide Reporting

⇒ For details on managing reports, refer to “Monitoring SourceForge-Wide Statistics” on page 322.

Scheduling Reports

For users of Oracle, SourceForge provides a reporting engine that provides comprehensive and detailed user-defined reports on user, project-wide activities, and application-wide activities. It also includes the functionality to schedule reports.

⇒ For details on scheduling reports, refer to “Scheduling Reports” on page 150.

SourceForge.net

SourceForge Enterprise Edition is intended for deployment within medium and large organizations. VA Software is very confident of the performance and scalability of SourceForge to meet the needs of such organizations as the capabilities of SourceForge have been exercised across a large user base of active software developers via SourceForge.net.

SourceForge.net is the world's largest Open Source software development website, with the largest repository of Open Source code and applications available on the Internet.

SourceForge.net provides free services to Open Source developers.

Since its launch in November 1999, this fast-growing SourceForge community has fueled software innovation on software platforms including Linux, UNIX, Microsoft, Palm, and Apple. *SourceForge.net's* robust online services facilitate real-time software collaboration and distribution across virtual teams. Specialized communities, called Foundries, enhance peer-level participation around specific technologies.

With an average of 16,000-19,000 separate code changes happening daily, and developer-to-developer e-mails ranging from 800,000 to 1,000,000 on a daily basis, more Open Source developers collaborate on more projects at *SourceForge.net* than anywhere on the web.

⇒ To participate in SourceForge.net activities, visit: <http://www.sourceforge.net>



Figure 29. SourceForge.net home page

SourceForge Collaborative Development Process

Today, many organizations are closely examining process methodology in an effort to improve their overall efficiency and productivity. To that end, process improvement initiatives have become increasingly important and useful in today's business climate. In addition to improving operations, a mature process infrastructure can often open up new business opportunities and markets. In many cases, however, organizations struggle with outdated, insufficient, or overly complicated processes that often create rather than eliminate barriers to efficiency.

Existing tools often do not lend themselves to supporting development process, and those that do often support only existing, predefined methodologies, and cannot be adapted to the specific requirements of an organization without expensive customization. The SourceForge Collaborative Development Process™ (CDP™) provides a practical and flexible solution that enables process attainment and improvement, without the unnecessarily cumbersome overhead often associated with other process improvement methodologies.

The CDP is a comprehensive, end-to-end lifecycle model, suitable for deployment in an organization beginning a process initiative from the ground up. However, it is also designed in a modular fashion, allowing organizations with a level of established process to select the areas that best supplement their existing process infrastructure.

Software Engineering Institute Software Capability Maturity Model

The Software Engineering Institute (SEI) Capability Maturity Model for Software (SW-CMM®) is a framework that describes the key elements of an effective software process. Encompassing an evolutionary improvement path from ad hoc, immature processes to mature, disciplined processes, the SW-CMM defines five process maturity levels ranging from Level 1 to Level 5. Each maturity level is comprised of Key Process Areas (KPA's), defining a series of activities that, when performed consistently and effectively, help organizations meet established goals for process capability at a defined maturity level.

For the benefit of SourceForge customers who are interested in using the SW-CMM as a basis for process improvement or regulatory compliance, each stage of the CDP defines one or more processes that equate to goals associated with SW-CMM Level 2 or 3 KPA's. *SourceForge and the Capability Maturity Model for Software, A Supplement to the SourceForge Collaborative Development Process* provides detailed mappings for using SourceForge and the CDP to fulfill each key practice of the SW-CMM Level 2 and 3. References are provided throughout the CDP chapters and checklists are included at the end of each phase to help ensure that required activities are completed.

Collaborative Development Process is a separate product which may be licensed from VA Software.

Audience

The CDP is designed for software development professionals performing a wide variety of functions. Users who will benefit most from the material presented are those working as software developers, testers, system engineers, quality assurance staff, product managers, business analysts, process improvement specialists, information technology (IT) managers, and those with a management or oversight responsibility for software product development and associated functions. Professionals in other, related fields such as product marketing, technical support, training, sales engineering, and professional services will also benefit.

Contents

The CDP materials consist of a primary manual, organized according to the phases of a typical software product lifecycle. Each phase consists of a series of activities and deliverables that when completed, represent the achievement of a major milestone in the product's development.

The phases defined in the SourceForge Collaborative Development Process (CDP) are:

- 1.** Product Definition
- 2.** Design
- 3.** Development
- 4.** Release Preparation
- 5.** Release
- 6.** Sustaining Engineering

A Cross-Lifecycle Principles chapter is also included that describes the concepts and activities you will be working with throughout all phases of the CDP.

As indicated by the following diagram, the CDP is a continuous process, with the data and knowledge collected during the post-release analysis of one development project providing input into the next. In this way, a persistent pattern of continuous process improvement is achieved.

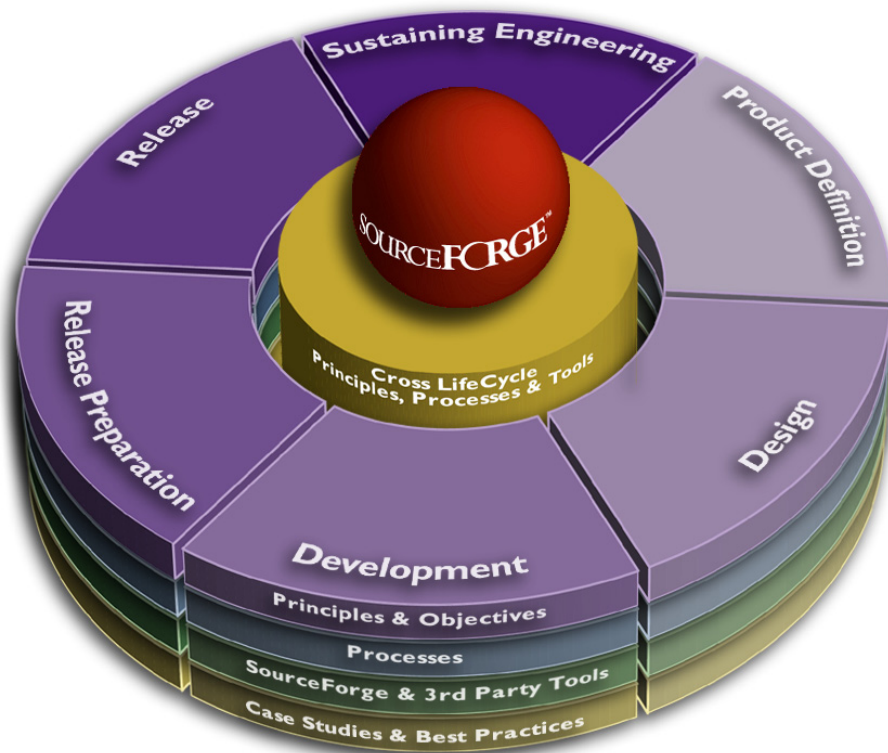


Figure 30. SourceForge Collaborative Development Process

In each chapter, the principles and overall objectives of the phase are defined. Specific detail is provided on the inputs and outputs of each phase, with detailed descriptions of all required and recommended processes, activities, documents, and other materials. Flowcharts depict recommended workflow processes, and SourceForge Best Practices provide methods for using SourceForge to enable specific CDP activities. Customizable templates are also included for all required documents.

A supplementary manual, *SourceForge and the Capability Maturity Model for Software, A Supplement to the SourceForge Collaborative Development Process*, is provided for users using the SW-CMM model for process improvement.

VA Software Customer Advisory Council (CAC)

The VA Software Customer Advisory Council (CAC) is a selected group of highly valued members of the VA customer community who come together periodically with VA Staff to discuss the benefits, challenges, and future direction of SourceForge and adjunct products. Benefits to members include frequent opportunities to communicate directly with VA senior staff, to directly input enhancement and other requests, and to participate in defining future VA product strategy. Members are invited to attend one or more off-site events annually, and to participate in quarterly Web-based seminars covering a variety of topics. Members may also be invited to participate in additional activities from time to time.

Members are responsible for making efforts to attend all scheduled CAC events and participating as requested by VA Software.

⇒ For membership information, contact: cac@vasoftware.com

⇒ CAC members may access the VA Software CAC website at: <http://www.vasoftware.com/cac/>

SourceForge Users and Privileges

This chapter assumes that you have a good understanding of the SourceForge resources described in *Chapter 1, Introducing SourceForge*.

As described in *Chapter 1, Introducing SourceForge*, SourceForge offers a wide range of resources for its users to facilitate and make their product development efforts successful.

For the sake of ensuring data stability and security, SourceForge provides the flexibility to restrict access to its various areas and functionality on a per user basis.

SourceForge users can be broadly categorized as follows:

- Non-Project Members
- Project Members
- Project Administrators
- Application Administrators
- System Administrators

This chapter defines these types of users and describes their privileges to use SourceForge.

Non-Project Members

Non-Project members are registered users of SourceForge, but they are not members of some projects.

Non-project members can only view project information that has been designated by individual project administrators as visible to this type of users.

Based on their access permissions, these users can use SourceForge resources as noted here:

- Access their personal page (“My Page”).
 - Access and edit their personal account information.
 - Access and edit their skill-set information.
 - Create and update their personal log entries.
 - Create and update their bookmarks.
 - Submit requests for obtaining technical support for using SourceForge.
 - Use the project map to browse projects.
 - Use the code library.
 - Browse job postings and respond to them.
 - Browse application-wide news items.
 - Use the search engine to locate some information stored within SourceForge areas that are publicly viewable.
- ⇒ For details on using SourceForge as a non-project member, refer to “For Non-Project Members” on page 71.

Project Members

Project members are registered users of SourceForge and assigned as members of specific projects by a project administrator. A user can be a member of many projects and there can be many project members assigned to a project.

Project members have all the privileges of non-project members, and **based on their access permissions** they can use additional SourceForge resources as noted here:

- Create their own project to become an administrator for that project.
 - Remove themselves from projects.
 - Browse tracker artifacts and submit tracker issues.
 - Monitor how a project is performing.
 - Use the Software Configuration Management system (SCM) to download/submit data.
 - Generate and store Secure Shell (SSH) keys for easy access to CVS, if CVS is their choice of the SCM system. (Other SCM systems supported are PVCS and Rational ClearCase.
 - View, subscribe/unsubscribe to a mailing list.
 - Browse project news.
 - Browse the list of discussion forums, choose to monitor a forum, and stop monitoring a forum.
 - Browse documents stored in the document manager.
 - View, review, translate, print, submit, and edit documents.
 - Browse and modify tasks.
 - Download files from the file publisher.
- ⇒ For details on using SourceForge as a project member, refer to “For Project Members” on page 87.

Project Administrators

When a registered user requests that a new project be created, a SourceForge application administrator receives that request and approves or rejects it, and the requestor receives an automatic e-mail notification accordingly. When a SourceForge application administrator approves a project, the project creator automatically becomes an administrator for that project. There can be more than one administrator for a project.

Project administrators have all the privileges of project members. In addition, they have administrative privileges and have a high-level overview of a project they administer. Specifically, they can perform the following tasks:

- Edit a project's information.
 - Monitor how project membership changes over time.
 - Create and edit job postings for a project.
 - Create new roles and/or assign default roles to project members.
 - Add/Update discussion forums.
 - Create mailing lists and set preferences for a mailing list.
 - Manage project-specific news.
 - Create new trackers with a desired set of field preferences.
 - Edit and configure the fields of existing trackers.
 - View/move/edit/delete documents in the document manager.
 - Protect documents in the document manager by restricting access to the desired documents.
 - Create task groups.
 - Create/edit file packages.
 - Create/edit file releases.
 - Monitor project-level and tracker level performance statistics.
 - Configure SCM modules for tracker integration.
- ⇒ For details on using SourceForge as a project administrator, refer to “Project Administration” on page 155.

Application Administrators

SourceForge application administrators are registered users of SourceForge and enjoy all the privileges that SourceForge offers. SourceForge application administrators are the equivalent of “root” or “administrator” accounts and have access to **all** project data, public and private.

SourceForge application administrators have the highest overview of the enterprise. Specifically, they can perform the following tasks:

- Manage SourceForge users, in terms of their membership status.
 - Manage SourceForge projects, in terms of their approval status.
 - Maintain the SourceForge project map in terms of adding new categories and updating existing categories.
 - Establish job categories for individual projects.
 - Send SourceForge-wide e-mail messages.
 - Approve SourceForge-wide news items.
 - Monitor SourceForge-wide performance statistics.
 - Monitor SourceForge-wide facilities log.
 - Manage SourceForge configuration utilities such as supported languages, string translation, and 404-page redirection.
- ⇒ For details on using SourceForge as an application administrator, refer to “SourceForge Administration” on page 285.

System Administrators

SourceForge system administrators have the responsibility to maintain system-specific data.

- ⇒ For details on using SourceForge as a system administrator, refer to the *SourceForge 3.4 Installation and Administration Guide*.

CHAPTER 3

Getting Started

This chapter assumes that you have a good understanding of the SourceForge resources and user privileges described in the preceding chapters.

This chapter describes how one can become registered members and use SourceForge.

Major Topics:

- “Creating a New Account” on page 60
- “Logging In and Out of SourceForge” on page 61
- “Account Maintenance” on page 63
- “User Information” on page 66
- “Using the SourceForge Help Center” on page 70

Creating a New Account

All users can create a new account.

To create a new account:

1. On the SourceForge Home page, click Create New Account below the Log In button.
The Register New Account page displays.

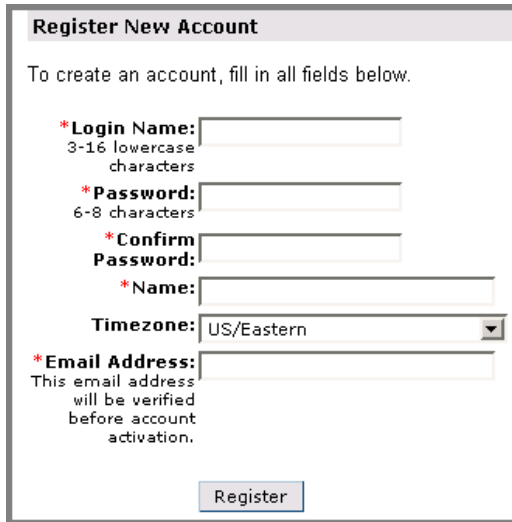
A screenshot of the 'Register New Account' page. The page has a light gray header with the title 'Register New Account'. Below the header, it says 'To create an account, fill in all fields below.' There are six required fields, each marked with a red asterisk: 'Login Name:' (with a note '3-16 lowercase characters'), 'Password:' (with a note '6-8 characters'), 'Confirm Password:', 'Name:', 'Timezone:' (a dropdown menu currently showing 'US/Eastern'), and 'Email Address:' (with a note 'This email address will be verified before account activation.'). At the bottom right of the form is a 'Register' button.

Figure 31. Register New Account page

2. On the Register New Account page:
 - a. Enter a login name and password in appropriate fields.
 - b. Confirm the password.
 - c. Enter your full name in the Name field.
 - d. Select a zone from the Timezone drop-down list.
 - e. Enter your e-mail address in the Email Address field.
 - f. Click Register.

You will receive an e-mail notification confirming your account creation with instructions for logging into that account.

Logging In and Out of SourceForge

To have all the benefits of SourceForge resources, you must become a registered user by logging into SourceForge.

To log into SourceForge for the first time:

1. Respond to the e-mail notification confirming your account creation.
2. Log into SourceForge.

To log into SourceForge after the first time:

1. Enter your SourceForge login name and password in the text fields located in the top right corner of SourceForge Home page.
2. If you want to keep your SourceForge pages secure, make sure that the SSL box is checked.
3. Click Log In.

To log out of SourceForge:

Any time after logging in and working within SourceForge, if you want to exit SourceForge click the Log Out button located in the top right corner of the page.

To regain access to SourceForge if you forget your password:

1. Click the “Forgot your password?” link below the Password field.
The Lost Account Password page displays.
2. Enter your SourceForge login name.
3. Click Submit.

The Lost Password Confirmation page displays informing you about an e-mail notification containing instructions to access your SourceForge account.

4. Follow the URL sent in the e-mail.
The Lost Password Login page displays.
5. Enter a new password and confirm it.
6. Click Update.

The Password Changed page displays.

7. Log into SourceForge using the new password.

To change your password after logging in:

- 1.** Click Account in the navigation panel.
- 2.** On the Account Maintenance page, scroll down to the Preferences section.
- 3.** Click Change Password.
- 4.** On the Change Password page:
 - a. Enter old password in the Old Password field.
 - b. Enter the new password in the Password field.

The password must be between 6 and 8 characters long, and should not contain any spaces.
 - c. Re-enter the new password in the Confirm New Password field.
 - d. Click Update.

Account Maintenance

The Account Maintenance page displays your SourceForge account information. You can view and edit the following account information:

- User profile
- Skills profile
- Account preferences including your password, full name, language, time zone, and email address
- Hits per screen

This controls the number of items that are displayed on the user's screen for items such as tasks, tracker artifacts, documents (for regular users) and users, projects (for SourceForge Administrators).

Editing Personal Account information

You can modify your personal account information, such as the name, password, e-mail address, language preference, and time zone.

To edit your personal account:

1. Click Account in the navigation panel.

The Account Maintenance page displays.

The screenshot shows the 'Account Maintenance' page. At the top, it says 'Account: admin'. Below that, a welcome message 'Welcome, Dave Henry' is displayed, followed by the instruction 'View and change account preferences here.' There are two links: 'View My Member Profile' and 'Edit My Skills Profile'. The 'Preferences' section contains the following fields: 'Registered: None', 'User ID: 1', 'Login Name: admin' with a '[Change Password]' link, '*Full Name: Administrator' in a text box, 'Language: English' in a drop-down menu, 'Timezone: GMT' in a drop-down menu, 'Hits per Screen: 10' in a drop-down menu, and 'Email Address: dhenry@vasoftware.com' with a '[Change Email Address]' link. There is a checkbox for 'Access My Page without being logged in.' which is currently unchecked. At the bottom of the preferences section are 'Update' and 'Reset' buttons. The 'Shell Account Information' section at the bottom shows 'CVS/SSH Shared Authorized Keys: 0' with an '[Edit Keys]' link.

Figure 32. Account Maintenance page

2. Edit your full name, if necessary.
3. In the Language drop-down list, specify the language of your choice.
4. In the Timezone drop-down list, specify the desired time zone.

- 5.** Optionally, click Change Password to provide updated password.
 - a. On the Change Password page, enter your current password in the Old Password field.
 - b. Enter the new password in the next field.
 - c. Re-enter the new password in the third field to confirm new password.
 - d. Click Update.
- 6.** Optionally, click Change Email Address to provide new e-mail address.
 - a. On the Change Email Address page, enter your new e-mail address in the text field.
 - b. Click Send Confirmation to New Address.
- 7.** Click Update.

User Information

SourceForge keeps your personal profile information in two types of profiles: User Profile and Skills Profile. You can also maintain a record of your project activities using the Personal Log area. You can create and save log entries via the Personal Log page. You can make these entries viewable to the public or keep them private. If log entries are publicly viewable, other users can choose to monitor your entries. Each new entry marked public will be automatically mailed to all users who are monitoring your log.

⇒ For details on viewing personal logs, refer to “Viewing Personal Log Entries” on page 69.

Updating Your User Profile

You can update your personal profile via the Account Maintenance page. The current information is displayed on the personal profile (User Profile) page.

Modifying Your Skills Profile

You can add new skills to your profile and/or modify your skills profile via the Account Maintenance page. You can also set your skills profile to be “public.”

To modify a skills profile:

- 1.** Click Account in the navigation panel.
The Account Maintenance page displays.
- 2.** Click Edit My Skills Profile.
The Edit Your Profile page displays.
- 3.** To update profile status and description:
 - a. Select the Yes radio button to make the profile publicly viewable. Or, select No to keep the profile private.
By default, the skills profile is not publicly viewable. You must select Yes to make it public.
 - b. Enter a description of your skill-set in the Resume/Description of Experience text box.
 - c. Click Update Profile.
- 4.** To add a new skill to your profile:
 - a. In the Add a New Skill section, specify the skill, skill-level, and experience-level in the drop-down lists.
 - b. Click Add Skill.
- 5.** To delete a skill from your profile:
Click the Delete button corresponding to the skill you want to delete.
- 6.** To modify a skill in your profile:
 - a. Make the changes using the drop-down lists corresponding to the skill you want to update.
 - b. Click Update.
- 7.** Make sure you have provided all updated information.
- 8.** Click Finished.

Creating and Updating Personal Log Entries

You can periodically record your project-specific activities in your personal log.

To create a personal log entry:

- 1.** Expand the Account menu in the navigation panel.
- 2.** Click Personal Log.
The Personal Log page displays.
- 3.** On the Personal Log page:
 - a. Enter a short description for this log entry in the Summary field.
 - b. Enter the details of the entry in the Details text box.
 - c. Select the Public check box to make this entry publicly viewable.
 - d. Click Submit to save this entry.

The new entry is added to the list of existing entries in the Personal Log Entries section of the Personal Log page.

To edit a personal log entry:

- 1.** Follow steps 1-2 to create a personal log entry.
- 2.** On the Personal Log page:
 - a. Click the entry in the Personal Log Entries section.
 - b. The Personal Log page for this entry is displayed.
 - c. Edit the entry as necessary.
 - d. Click Submit to save your edits.

Viewing Personal Log Entries

You can view log entries of other users if they have made the log entries publicly viewable.

To view a personal log:

1. Select a project.

You can click the name of the desired project listed on SourceForge Home page (Most Active This Week section) or on My Page (My Projects section).

The Project Summary page displays.

2. Click “View All # Members” in the Members section.

3. On the Project Member List page, click the desired name in the Member column.

The project member’s User Profile page displays.

4. Click View Personal Log in the Personal Log section.

The project member’s Personal Log page displays the log entries with a summary and posted date for each entry.

5. Click the desired entry.

The Personal Log page displays the details of the selected entry.

Using the SourceForge Help Center

The SourceForge Help Center connects you to areas within SourceForge where you can:

- Obtain user documentation
- File requests for SourceForge support
- Contact the SourceForge application administrator

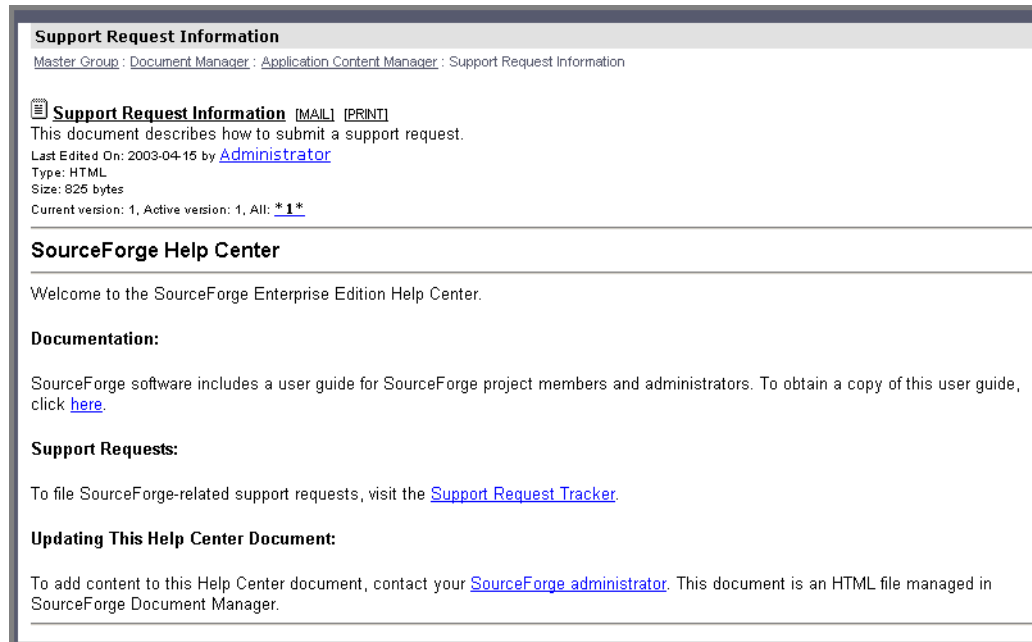


Figure 33. SourceForge Help Center

CHAPTER 4

For Non-Project Members

This chapter assumes that you have a good understanding of the SourceForge resources, user privileges, and the information for beginners described in the preceding chapters.

As noted in *Chapter 2, SourceForge Users and Privileges*, non-project members are registered users of SourceForge, but they are not yet members of any SourceForge projects.

This chapter describes how non-project members can use SourceForge resources.

Major topics:

- “Bookmarks” on page 72
- “Using SourceForge-Wide Resources” on page 73

Bookmarks

You can create your favorite and frequently used web pages as bookmarks from the Manage Bookmarks page.

Creating Bookmarks

To create bookmarks:

- 1. Click Bookmark This Page in the navigation panel.
The Manage Bookmarks page displays.
- 2. In the Add New Bookmark section of the Manage Bookmarks page:
 - a. Enter the URL for the bookmark in the URL field.
 - b. Enter a title for the bookmark in the Title field.
 - c. Click Add Bookmark.

Deleting Bookmarks

You can delete bookmarks any time after you have created them.

To delete bookmarks:

- 1. Click Bookmark This Page in the navigation panel.
The Manage Bookmarks page displays a list of existing bookmarks in the Current Bookmarks section.

Manage Bookmarks

Add New Bookmark

Title	URL	Overwrite
<input type="text"/> Max. length 40	<input type="text" value="http://"/> Must start with http(s):// or ftp://	<input type="checkbox"/>

Add Bookmark

Current Bookmarks

Title	URL	Delete
<input type="text" value="VA Software Home"/> Max. length 40	<input type="text" value="http://www.vasoftware.com/"/> Must start with http(s):// or ftp://	<input type="checkbox"/>
<input type="text" value="Visual Studio .NET - Good Info site"/> Max. length 40	<input type="text" value="http://searchvb.techtarget.com/vsnetBWL/0,294114,si"/> Must start with http(s):// or ftp://	<input type="checkbox"/>

Submit

Figure 34. Manage Bookmarks page

- 2. Select the Delete check box corresponding to the bookmark(s) to delete.
- 3. Click Submit.
This command deletes all the bookmarks you have selected.

Using SourceForge-Wide Resources

Based on your access permissions, you can use the following SourceForge-wide resources that are available across all SourceForge projects: Project Map, Code Library, Project Assistance Wanted listing, News, and the search engine.

You can also view project-specific items, such as tracker artifacts, news items, and forum discussions, provided these tools are enabled for the project and that you have appropriate access permissions.

Browsing the Project Map

Using the project map, you can locate a project or browse projects by category.

To locate a project on the project map:

1. Expand Central Directories in the navigation panel.
2. Click Project Map.

The Project Map page displays.

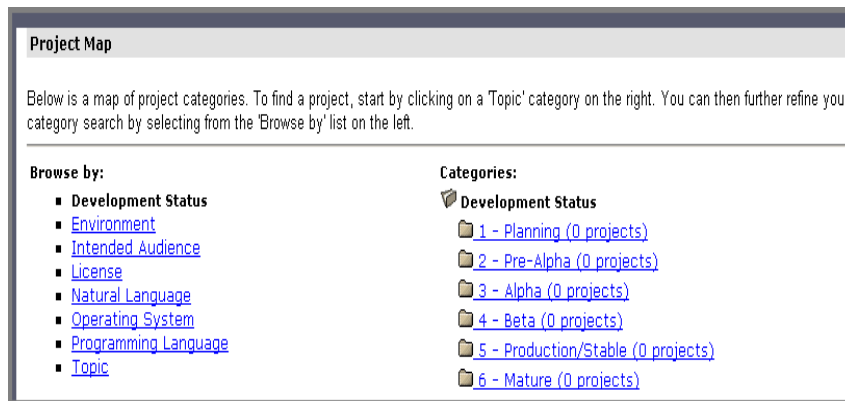


Figure 35. Project Map

3. Select a topic from the topic list on the right.

A list of sub-topics under the specified parent topic displays.

Individual projects subsumed directly under a parent topic are listed in a separate section on the bottom.

To browse projects by category on the project map:

- 1.** Expand Central Directories in the navigation panel.
- 2.** Click Project Map.
The Project Map page displays.
- 3.** Select a category from the Browse by list on the left.
A list of sub-categories under the specified parent category displays on the right.
- 4.** Click a desired sub-category name on the right.
A list of individual projects directly under the specified category displays on the bottom.

Browsing All Projects

In addition to the Project Map, SourceForge also provides a Browse All Projects list that allows users to browse a list of all SourceForge projects. Users will only be able to browse those projects that they have permissions via RBAC to see. Gated community, or restricted, users will not see projects of which they are not a member.

To browse all projects:

1. Expand Central Directories in the navigation panel.
2. Click Browse All Projects.

The Browse All Projects page displays the name and description of each project.



Browse All Projects	
This page displays a listing of all projects that you have access to view.	
Project ▼	Description
JavaAppServ	This project manages the Java App Server development project.
Master Group	Master group
News Group	Group to hold site news
Server Dev	This project is the repository for server-side dev
Stats Group	Group to hold site statistics

Figure 36. Browse All Projects page

Clicking the title of a project takes you to the project home page.

Using the Code Library

Non-registered users can browse the code library. Registered users can submit new code, submit new versions of code, create code packages, and submit new versions of packages--all to be stored in the code library and shared with other registered users.

To browse the code library:

- 1. Expand the Central Directories menu in the navigation panel.
- 2. Click Code Library.

The Code Library page displays, listing the programming languages and categories.

- 3. Select a language or category to browse.

The Snippet Library page displays, listing snippets and packages with corresponding IDs, brief descriptions, and names of authors.

- 4. Click the desired snippet ID or package ID to view the snippet versions or package versions respectively.
 - a. If you select the snippet ID, the latest snippet version displays.
 - b. If you select the package ID, the package version and snippets in that package displays.

View Code Detail

[Browse Code Library](#) | [Submit Code](#) | [Create Package](#)

Create and bind a channel

Type: Sample Code (HOWTO)

Category: Other

License: Other

Language: Java

Description: Create and bind a channel for publishing data

Versions of this Snippet

Snippet Version ID▼	Download Version	Date Posted	Author	Delete
Changes since last version: First Posted Version				
1	V1.1	2003-04-22	admin	

Download a raw-text version of this code by clicking on the number in the "Download Version" column

Latest Snippet Version: V1.1

```
public static void main(String[] args) throws Exception {  
    // Skip name space updates  
    FolderLib.disableContextWatcher();  
  
    // Create a specification of the channel we want to create
```

Figure 37. Snippet versions listed

To download a snippet from the snippet library:

1. Follow the steps for browsing the code library, until you see a list of snippets.
2. Click the desired Snippet ID.

The versions of the selected snippet are listed now.

3. Click the version number in the Download Version section.

The snippet displays in a browser window. Copy and paste it into the target application.

To submit code:

1. Expand the Central Directories menu in the navigation panel.
2. Click Code Library.

The Code Library page displays, listing the programming languages and categories.

3. On the Code Library page, press Submit Code.

The Submit a New Snippet page displays.

4. Fill in the required fields on the Submit a New Snippet page:

Then click Submit.

To post a new snippet version:

1. Expand the Central Directories menu in the navigation panel.
2. Click Code Library.

The Code Library page displays, listing languages and categories.

3. Locate the snippet to be updated in the Language or Category list.

4. Click the desired snippet ID on the Snippet Library page.

The versions of the selected snippet are listed now.

5. Click Submit a New Version (on the bottom of the page).

The Post a New Version page displays.

6. Fill in the required fields on the Post a New Version page:

Then click Submit.

To create a code package:

All registered members can create and submit new code into the code library.

1. Expand the Central Directories menu in the navigation panel.

2. Click Code Library.

The Code Library page displays, listing languages and categories.

3. Click Create Package.

The Submit a New Snippet Package page displays.

4. Fill in the required fields on the Submit a New Snippet Package page:

Then click Submit.

You can now add snippets to this package.

To post a new package version:

1. Expand the Central Directories menu in the navigation panel.

2. Click Code Library.

The Code Library page displays, listing languages and categories.

3. Locate the package to be updated by using the Language or Category list.

4. Click the desired package ID on the Snippet Library page.

The versions of the selected package are listed now.

5. Click Submit a New Version (on the bottom of the page).

The Post a New Version page displays.

6. Fill in the required fields on the Post a New Version page:

Then click Submit.

To add code snippets to a package:

If you are the creator of a code package, you can add code snippets to the package.

1. Expand the Central Directories menu in the navigation panel.

2. Click Code Library.

The Code Library page displays, listing languages and categories.

3. Locate the package you want to update.

4. Click the ID of the desired package.

5. Click the pencil icon next to the version to which you wish to add a code snippet.

The Add Snippets to a Package page displays.

6. Enter the version ID for the code snippet in the Snippet Version ID field.

7. Click Submit.

To delete code snippets from a package:

If you are the creator of a code snippet, you can delete it from its package. And, if you want to remove a snippet from the library's snippet list, you must remove it from all the packages in which it is included.

- 1.** Expand the Central Directories menu in the navigation panel.
- 2.** Click Code Library.
The Code Library page displays, listing languages and categories.
- 3.** Locate the snippet you want to delete.
- 4.** Click the ID of the desired snippet.
- 5.** Click the trash can icon next to the snippet version you want to delete.

Project Assistance

Using the project assistance listing, you can browse a menu of job categories to find projects in need of help. You can respond to a job posting by sending a message to the job poster from the job posting page.

To browse job postings:

1. Expand the Central Directories menu the navigation panel.
2. Click Project Assistance Wanted.

A list of job categories displays.

3. In the “Project Assistance Wanted - Latest Posts” section, click the desired job title to view the details.

The job description page displays.

4. Click the project title (For Project) to view the summary of the project associated with the job posting.

To respond to a job posting:

1. Follow the steps 1-3 described for browsing job postings.
2. On the job description page, click the contact name next to Contact Info.

The Send Message page displays.

3. On the Send Message page:
 - a. Enter the text of your message in the Message box.
 - b. Click Send Message.

An e-mail message is sent to the job poster.

Browsing News Items

You can read all publicly available news items using the news tool.

To browse news items:

1. Expand Central Directories in the navigation panel.

2. Click News.

A list of news items displays.

3. Click the desired news item to view.

The news description page displays a news summary, news date, author's name, and the message.

a. Select a display mode from the first drop-down list.

Options: Flat, Threaded, Nested, Ultimate

— Flat: All messages are displayed in a linear list with the latest message placed at the top.

— Threaded: Messages are threaded in groups, where each group is consisted of a message, and subsequent replies.

— Nested: Messages are displayed in a linear list, where each reply is subsumed under its previous message.

— Ultimate: Any new message or message response is displayed at the top of the message list, so that active threads are always visible.

b. Specify the desired number of items to display from the second drop-down list.

c. Click Change View.

Using the Search Engine

The search area is located in the menu bar, above the main screen. Based on your access permissions and the public/private settings of specific areas, the search engine lets you locate information from anywhere within SourceForge.



Figure 38. Search tab

➡ For information on searching with Oracle vs. PostgreSQL, refer to “Browsing All Projects” on page 40.

Basic Search

To perform a simple search:

- 1.** Select the desired topic area from the Search drop-down list.
You can select multiple items in this list by holding down the `Ctrl` key and selecting the desired items.
- 2.** Enter the term you are searching for in the “for” text field.
The search term must be at least two characters long.
- 3.** Click GO.
 - a. If the search term is found, the result is displayed.
 - b. If the search term is not found, a note to that effect is displayed.In either case, the Advanced Search option also is displayed.

Advanced Search

Advanced Search enables the user to search for items that have a particular string in their title. You may search across all projects of which you are a member.

Note: Items added to a project, such as a document or tracker artifact, may not be available by the Advanced Search immediately. Indexes used by the search are built periodically.

To perform an advanced search:

1. Click Advanced Search on the menu bar.

The Advanced Search page displays.

Figure 39. Advanced Search page

2. On the Advanced Search page:
 - a. Select the desired topic area from the Search drop-down list.
You can select multiple items in this list by holding down the Ctrl key and selecting the desired items. The Search All option lets you search through all SourceForge content.
 - b. Specify a project in the “In” drop-down list. Or, select SourceForge-Wide if you don’t want to restrict your search to any particular project.
 - c. Enter the term you are searching for in the For text field.
The search term must be at least two characters long.
 - d. Check the box below the For text field, to specify that the first words must be given more weight.
You can launch the Help text window by clicking the ‘?’ button, and learn more about searching by weighted order of words.
When documents are being searched, the search can be restricted to only the current versions of documents by selecting the check mark labeled: Include only active versions.

3. In the Containing drop-down list, specify the mode of search.

Options: All Words, Any Words, Substring, Exact Phrase, Fuzzy Match, Topic.

All Words - returns only documents that have all of the keywords entered ("AND" search).

Any Words - returns documents that have any of the keywords entered ("OR" search).

Substring - returns documents that contain words with the substring in the. For example, a substring search on "think" returns documents with the keywords "think," "unthinkable," and "thinktank.")

Exact Phrase - returns only documents that have the exact phrase entered.

Fuzzy Match - returns results that are "close" matches to the keywords entered, often correcting common spelling errors.

Topic - returns results that include keywords that are topically related to the keyword. For example, a search on "sport" returns documents that include the word "baseball."

4. In the Display drop-down list, specify the number of results to be displayed.

5. Click Search.

- a. If the search term is found, the result is displayed.
- b. If the search term is not found, an error message is displayed.
- c. If the search triggers a database error (maybe because you are not logged in), an error message is displayed.

Searching SCM-managed files

Searches may also be made across files managed by SCM products in a project, where the SCM is either CVS, ClearCase or PVCS. The search may be made across files managed by all SCM products in a project, or selectively CVS or PVCS. Searches across SCM managed files may also be disabled, to eliminate the search time across vast numbers of source code files. This capability is only available to SourceForge Administrators.

To control SCM rules for all searches:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Select the “SCM Search” link which is located beneath the header: SourceForge Utilities.
The Search Preferences screen will appear.
3. Select or de-select the check box next to each of the SCMs listed. The choice will enable or disable searches across files managed by that SCM.
4. Click the Save button.

To control SCM rules for individual searches

- ⇒ On the Advanced Search page, in the Search drop down list, select the desired SCM products, all SCMs or none.

Advanced Search and Trackers

Non-open status tracker artifacts are not returned by Advanced Search. If the want to search for non-open tracker items, use tracker filtering. See “Browsing Tracker Artifacts” on page 94.

CHAPTER 5

For Project Members

This chapter assumes that you have a good understanding of the SourceForge resources, user privileges, and user actions described in the preceding chapters.

Projects are workspaces within SourceForge that offer dedicated environments where specific development tasks are performed by teams. Project administrators, who are the owners and “gatekeepers” of individual projects, define a set of developers to work on a project and those developers are called project members. Any registered member of SourceForge can become a member of a project as assigned by a project administrator.

This chapter describes how project members can use SourceForge.

Major topics:

- “Project Membership” on page 88
- “Maintaining Your Shell Account Information” on page 92
- “Using Trackers” on page 93
- “Monitoring” on page 108
- “Using the Task Manager” on page 129
- “Using Mailing Lists” on page 133
- “Participating in Discussion Forums” on page 135
- “Using the File Publisher” on page 139
- “Using Project Statistics” on page 140

Note: For details on using CVS, please refer to Appendix A.

Project Membership

Your personal information page—My Page—lists all the projects of which you are a member.

⇒ Click the My Page tab on the top right of the screen to view all the projects of which you are a member.

The projects are listed in the My Projects section.

Creating Your Own Project

SourceForge provides the flexibility for registered members to create their own projects and subsequently assemble a team of developers to work on those projects. (Note: The ability of a user to register new projects may be disabled by the SourceForge Administrator, in which case only the SourceForge Administrator will be allowed to register new projects. See “Managing Projects” on page 296.)

Project Templates

You can create templates upon which new projects may be based. A template is nothing more than a project with certain features that you wish all other projects to inherit when they are created. This is particularly valuable to ensure that all projects possess a common and required feature. For example: You may create a custom tracker, with artifacts that contain custom fields, and require that all projects created must contain this custom tracker. To facilitate this requirement, you would create a project with the custom tracker defined to serve as a template for all other projects that are subsequently created. All projects which are created with this template would possess the custom tracker. This enables an administrator to define a project element once, then ensure all other projects inherit the element.

Templates may only be used by their creator. For example, a SourceForge Administrator can create project templates which they can use to create other projects. Project Administrators can use only their own templates to create other projects.

Project Template Features

The table below describes the features that a new project may inherit from a template:

Table 2. Project features inherited through project template

Component	Template Configuration data	Dependency
User	User's existing details (User Name, full name, email, skills) - User becomes a member of the project	
Roles	Project roles	
Role Assignments	Users assignments to projects.	Users and Roles
Tracker	Custom trackers, including new fields, e-mails for notification, and associations.	
Task Manager	All Master Group Task groups	
Project Management Console (PMC)	- Master Task Group settings. (Settings such as Master Task Group owner, number of days to retain deleted items.) - Project Exception Settings. - Message templates (newly created.)	
Document Manager	Document category hierarchy. (No actual documents copied.) Configuration settings, time for locked files reminder.	
File Publisher	Package, release, maturity levels, release dependencies.	
SCM and SCM Tracker integration	Module names and their properties.	Properties tracker.
Monitoring	Monitoring preferences.	
Forums	Copies names of non-default forums	
Mailing List	Copies names of non-default mailing lists.	

To create a project:

1. Click Register New Project in the navigation panel.
The Register New Project page displays.
2. On the Register New Project page:
 - a. Optionally, select a template for the project you are about to register from the Select Template drop-down list. This list displays if projects have been created already. These projects are typically those created by the SourceForge Administrator or other projects you have already created.
 - b. Enter a name for the project in the Project Name field.
The project name is a short informal description of your project and is limited to 40 alpha-numeric characters.
 - c. Enter a short name for your project in the Project Short Name field.
The short name should be between 3 and 15 characters in lower case, and can contain only characters, numbers, and dashes.
Note: When creating a new SourceForge project using ClearCase as your SCM, you are limited to 8 characters when choosing the New VOB or Existing VOB options.
If you choose the Existing Subdirectory option, you can use up to the full 15 characters.
 - d. Enter a brief description of your project in the Project Description box.
This description must be at least 10 characters long, and it will be shown on the Project Summary page.
Note: If you want to create a SIG, identify the project as a SIG in the description.
 - e. Click Register Project and the Select Configuration screen appears.

The tools selected are based on the template project that was chosen in the register new project screen. Select only tools you wish to be part of this project. To exclude a tool, deselect the check box. After the selections are complete, click Continue.

Your new project request is sent to the SourceForge administrator. You will receive an email confirmation when your project is approved.

Removing Yourself from a Project

Project members can remove themselves from a project on their “My Page.” This ‘removal’ does not delete the project, but merely removes the member from the project. The project name is also removed from the member’s My Page.

Project administrators cannot remove themselves from a project they are managing. Such projects are marked with a red cross symbol.

To remove yourself from a project:

- 1.** Select the My Page tab on the top right of the screen.
My Page displays.
- 2.** On My Page:
 - a. View the list of project names displayed in the My Projects section.
Trash can icons with red crosses indicate the projects for which you are assigned as a project administrator. You cannot remove yourself from those projects.
 - b. Click the unmarked trash can icon adjacent to the project to remove.

Maintaining Your Shell Account Information

Secure shell (SSH) is a tool for secure remote login over insecure networks. It provides an encrypted terminal session with strong authentication of both the server and the client, using public-key cryptography.

SSH features include:

- A variety of user authentication methods tunneling arbitrary TCP connections through the SSH session, protecting insecure protocols such as IMAP and allowing secure passage through firewalls.
- Automatic forwarding of X-Windows connections
- Support for external authentication methods, including Kerberos and SecurID
- Secure file transfers

To establish quick access to the SourceForge CVS repository, you can use SSH.

Adding SSH keys to SourceForge

To add secure shell (SSH) public keys to SourceForge or edit the keys, first you must generate them. You can generate public keys by running the following command from your SSH installation directory:

```
ssh-keygen
```

⇒ For details on installing SSH and generating SSH public keys, refer to Appendix A.

To store SSH keys in SourceForge:

1. Make sure you are logged into SourceForge.
The Account Maintenance page displays.
2. Click Account in the navigation panel.
3. Scroll down to the Shell Account Information section.
4. Click Edit Keys.
The Change Authorized Keys page displays.
5. Copy the public key from the *.pub* file in your SSH installation directory.
6. On the Change Authorized Keys page:
 - a. Paste your public key in the text box.

Note: You cannot upload more than one key (including different key types) per host, where host is defined as a computer with a hostname or IP Address such as a workstation or server.

- b. Click Update.

Using Trackers

If you have appropriate access permissions, you can browse the artifacts in default and custom trackers, and also submit a tracker artifact.

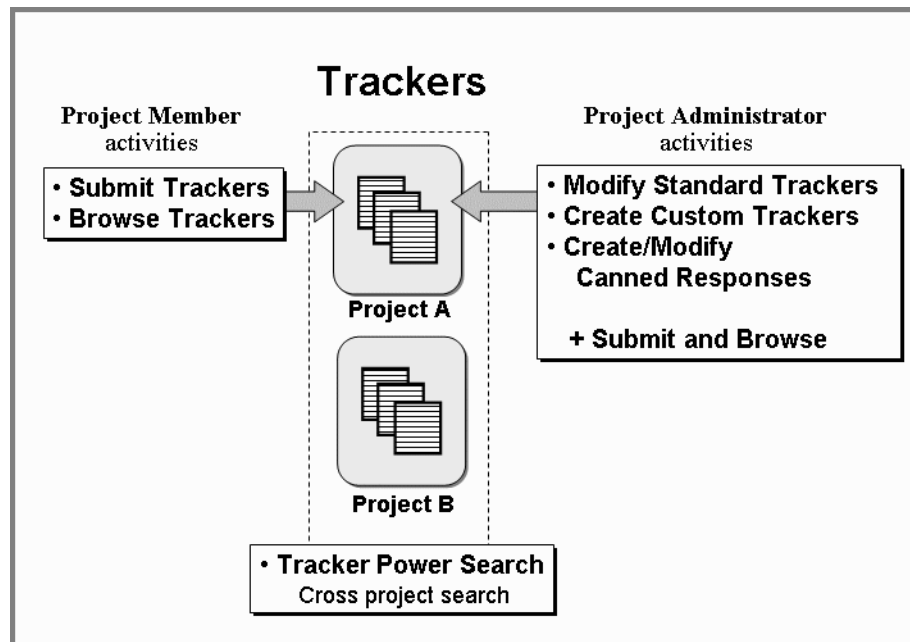


Figure 40. Tracker Activities

You can browse and filter tracker artifacts by any of the following criteria: Assignee, Status (Open, Closed, Pending, and other user-defined values), Category, or Group. You can also sort the sub-set of filtered artifacts by any of the following criteria in ascending or descending order: tracker artifact ID number, priority, summary, open date, close date, submitter, or assignee.

Browsing Tracker Artifacts

SourceForge offers two methods of filtering tracker artifacts when browsing: basic filtering and advanced filtering.

Browsing Tracker Artifacts Using the Basic Filter

The basic filter is the default filter. The first time you visit a tracker, the artifacts are displayed using the default basic filter. If at any time you browse the artifacts in this tracker using the advanced filter, it will be the default filter when you view the same tracker the next time.

To browse tracker artifacts using the basic filter:

- 1. Make sure you are within the desired project.
- 2. Expand the Trackers menu in the navigation panel.
- 3. Click a tracker name to browse.

The tracker page displays the list of artifacts.

Feature Requests

[AA, N.California Group : Trackers : Feature Requests](#)

Item updated

Submit New Artifact

Filter By:

Basic Filter || [Advanced Filter](#) || [Power Search](#) || [Jump to results](#)

Artifact ID	Priority	Assigned To	Status	Category	Group	
<input type="text"/>	Any	Any	Any	Any	Any	<div>FilterReset</div>

Results:

	Priority	Artifact ID/Summary	Submit Date	Submitted By	Assigned To	Status	Category
<input type="checkbox"/>	4	16302: GUI V14 Use prime colors for readability	2003-04-22	none	Not Assigned	Open	<None>
<input type="checkbox"/>	3	16303: V14 dimension ctl for PALM and other PDRs	2003-04-22	Howa	Not Assigned	Open	<None>

☐ Select All

Total:2

Monitor Selected

Export...

Figure 41. Tracker Artifacts Basic Filter

4. On the tracker page, click Basic Filter, located above the Filter button.
 - a. If you know the ID of the artifact you want to view, enter that ID in the ID field. Click Filter.

The Artifact ID overrides other criteria for filtering.

The artifact details are displayed on a separate page for your viewing.
 - b. If you want to view the artifacts by other criteria, specify those criteria in the drop-down boxes. Click Filter.

The result set is displayed on the bottom of the screen.

Tracker artifacts are displayed using color-coding so that the most critical items are immediately identifiable. You can sort the tracker list using any of the column headings.

 - Click the subject of the desired artifact in the Artifact ID/Summary column.

The artifact details are displayed on a separate page for your viewing.

Browsing Tracker Artifacts Using the Advanced Filter

To browse tracker artifacts using the advanced filter:

- 1. Make sure you are within the desired project.
- 2. Expand the Trackers menu in the navigation panel.
- 3. Click a tracker name to browse.

The tracker page displays the list of artifacts.

- 4. On the tracker page, click Advanced Filter, located above the Filter button.

The Advanced Filter page displays.

The screenshot shows the 'Bugs' tracker page with the 'Advanced Filter' tab selected. The interface includes a 'Submit New Artifact' button at the top left. Below it, the 'Filter By:' section contains several input fields and dropdown menus. The 'Search Text' field has the value '13'. The 'Artifact ID' field is empty. The 'Submitted By' dropdown is set to 'Any'. The 'Assigned To' dropdown is set to 'Simon Temple'. The 'Priority' dropdown is set to '1 - Highest'. The 'Category' dropdown is set to 'Any'. The 'Group' dropdown is set to 'Any'. The 'Status' dropdown is set to 'Open'. Below these fields, there are date filters for 'Submit Date' and 'Last Modified', each with 'Before', 'Range', and 'After' options. At the bottom, there are checkboxes for 'Associated File Release' and 'Associated Document'.

Figure 42. Tracker Artifacts Advanced Filter

- 5. In the list boxes and drop-down lists on the tracker page, specify the artifact criteria to use as a filter.
- 6. Click Filter.
- 7. Click Jump to Results to view the filtered data.

Tracker artifacts are displayed using color-coding so that the most critical items are immediately identifiable. The artifacts matching your filtering criteria display in the sort order that you specified. You can sort the tracker list using any of the column headings.

- 8. Click the subject of the desired artifact in the Artifact ID/Summary column.

The artifact details are displayed on a separate page for your viewing.

Submitting Tracker Artifacts

When tracker artifacts are submitted, they can be automatically assigned based on the category selection that you have made. Supporting internal workflow processes, a tracker can be configured to assign artifacts in specific categories to project members.

Often data files (core dumps, examples, log files, and so on) need to be kept with a tracker artifact, especially for bug trackers. Files can be attached during and after the creation of a tracker artifact. This mechanism allows corroborating information to follow a bug report from creation to resolution, and be available to whomever is working to correct the defect.

To submit tracker artifacts:

1. Make sure you are within the desired project.
2. Expand the Trackers menu in the navigation panel.
3. Click Submit under the desired tracker name.

The Submit page displays.

Submit
AA CALIFORNIA : Trackers : Bugs : Submit

* Required field

* **Summary:** ?

* **Description:** ?

Priority: <None> ?

Category: <None> ? [admin](#) **Group:** <None> ? [admin](#)

Assigned To: <None> ?

Attach File: Browse... ?

File Description:

Associations

[Add New Association](#)

Save Cancel

Click to add associated items to this tracker artifact
(e.g.: documents, tasks and other tracker artifacts IDs)

Figure 43. Tracker Submit page

Note: The fields displayed on the tracker's Submit page are controlled by the way the project administrator has set them. The following steps describe how to use the input fields in a default tracker. Use the help button (?) to view the help text for other fields when they are displayed.

- 4.** Enter a summary of the tracker artifact in the Summary field.
- 5.** Enter a complete description of this tracker artifact in the Description box.
For bugs, enter a complete description of how to recreate the problem. Do not enter passwords or other confidential information.
- 6.** Optionally:
 - a. Specify a category for this artifact in the Category drop-down list.
 - b. Specify the desired group for this artifact in the Group drop-down list.
- 7.** In the Projected Hours field, enter the estimated number of hours it may take to address this artifact.
- 8.** If this tracker artifact refers to an external file:
 - a. Use the Browse button to upload and attach the file to the tracker artifact.
 - b. Enter a brief description of the file contents in the File Description field.
Note: You cannot simultaneously add and delete file attachments from a tracker artifact. You must save each transaction separately.
- 9.** Click Save to submit the artifact.

Submitting Tracker Artifacts via Email

You can also submit tracker artifacts via email. This enables you to submit tracker artifacts from any email client without having to log in to SourceForge. This feature must be enabled by the SourceForge administrator before you can submit artifacts via email.

To submit tracker artifacts via email:

- 1.** Obtain the correct email domain from your SourceForge administrator.
- 2.** Send an email addressed in the following format:

`<project_name>-<tracker_name>@domain`

For example:

`javaappserv-bugs@tracker.sourceforge.yourcompany.com`

This example will submit a tracker artifact to the bugs tracker in the javaappserv project.

- 3.** Enter the artifact summary in the email subject line.
- 4.** Enter the artifact description in the body of the email.

When submitted, SourceForge will attempt to match your email ID with the user IDs in SourceForge. If a match is found, you will be listed as the submitter of the artifact.

If no match is found, the email will be bounced and no artifact will be created.

You can only submit artifacts to trackers of projects in which you have the appropriate RBAC permissions.

Artifact Associations

Each tracker artifact can be associated with other tracker artifacts. The association is by artifact number. The associated artifact may be designated a “parent” or “child” association. This allows a piece of work, represented by a number of trackers, to be organized into a hierarchy of a parent tracker, with subordinate child trackers.

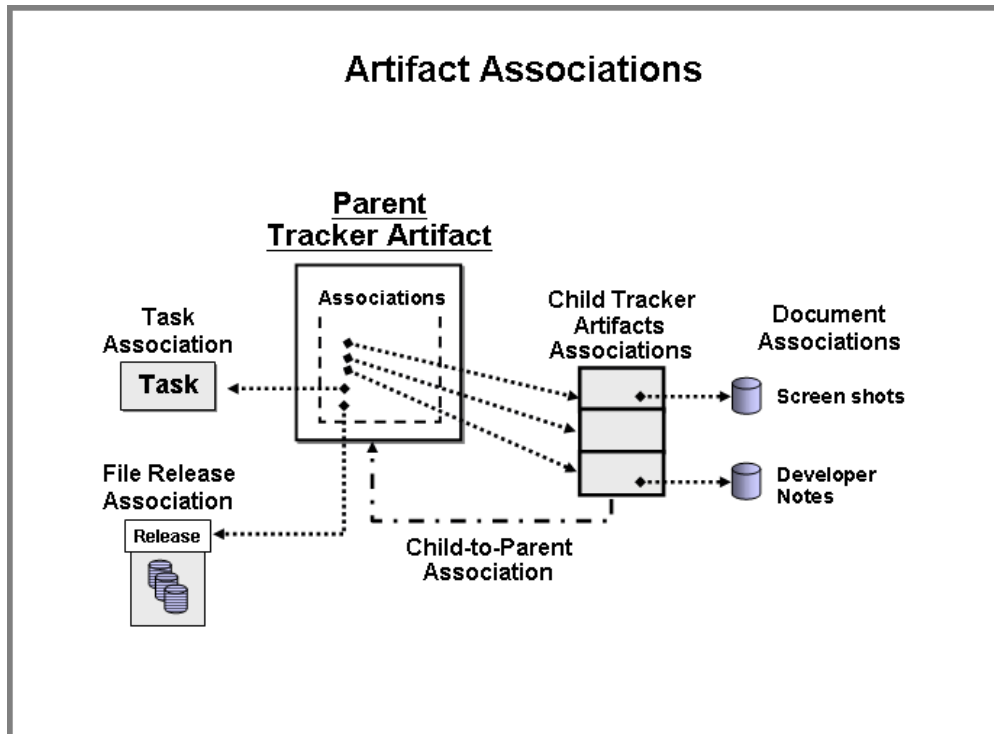


Figure 44. Tracker Artifact Associations

The diagram above shows an artifact that represents the “parent” tracker artifact for all work that needs to be done to complete the task with which it is associated. The work is divided up and a number of “child” tracker artifacts are created to represent a part of the work that needs to be done. Each child artifact will likely have an association back to its parent tracker artifact. Also, child tracker artifacts may have associations to helpful documents such as screen shots or developer notes to aid the user to complete the work represented by the artifact.

To associate a tracker artifact with other tracker artifacts:

1. In the navigation panel, click Tracker.
2. Select the tracker group then the tracker you wish to modify.
3. When the tracker screen appears, click Add New Association at the bottom of the screen. The add association page displays.

Tracker: Add Associations for Artifact #

Tracker Association Details

Parent Artifact ID

Child Artifact IDs (comma-separated)

Figure 45. Add Artifact Association page

4. Enter the numbers of the artifacts which represent with the parent or child artifacts relative to this tracker artifact.

Child Tracker artifact

QA - Detail View
SUPPLY_CHAIN_B : Trackers : QA : QA - Detail View

Submit New Artifact

Return To List < Previous Next > Email Stop Monitoring Users Monitoring

* Summary: QA_Check_Login_Session ?

Tracker: QA

Description: QA_Check_Login_Session

Submitted By: tstoppard

Submit Date: 2003-03-18
Last Modified: 2003-03-18

Associations

Artifact Associations View Hierarchy				
✖	Priority	ID/Summary	Assigned To	Tracker
Parent Association				
<input type="checkbox"/>		15659: QA tracker entry 002	Howa	QA
Child Associations				

Parent Tracker artifact

Figure 46. Artifact with parent artifact association

Restrictions

- You cannot associate artifacts across projects.
- Only the submitter of the artifact can create associations.
- Artifact associations cannot be edited but may be deleted.
- Do not make a tracker artifact a parent of itself. Although this is an illogical action, you will not receive an error message and the association information will be displayed as confirmation that the association was correctly added.

Editing Tracker Artifacts

If you have the appropriate RBAC permissions, you can edit tracker artifacts after submission.

To edit tracker artifacts:

- 1.** Make sure you are within the desired project.
- 2.** Expand the Trackers menu in the navigation panel.
- 3.** Browse to the desired tracker artifact using the basic or advanced filter.
(See “Browsing Tracker Artifacts” on page 94.)

- 4.** Make the desired edits.

Note: You cannot simultaneously add and delete file attachments from a tracker artifact. You must save each transaction separately.

- 5.** When finished, click Save.

Exporting Tracker Artifacts

You can export tracker atrifact details to a comma separated file. The file can be opened with Microsoft Excel or other tools that can import comma separated files.

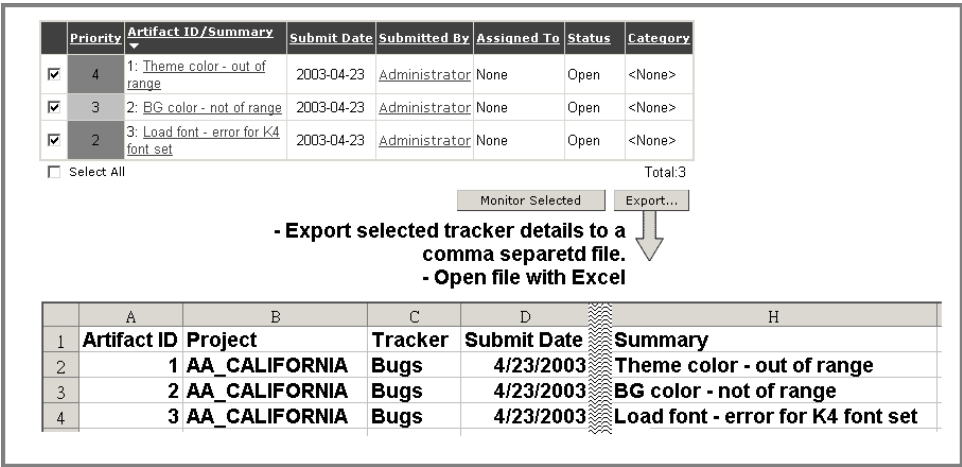


Figure 47. Exported tracker artifacts displayed using Excel

Tracker Power Search

Tracker Power search enables you to create a search with complex criteria, then save the search so the same search may be repeated again without having to re-enter the criteria. Once configured with the appropriate search criteria, a power search can be stored for future use. A power search can search multiple trackers across multiple projects.

To create a Tracker Power Search:

1. In the navigation panel, click Tracker Power Search

The New Search page displays.

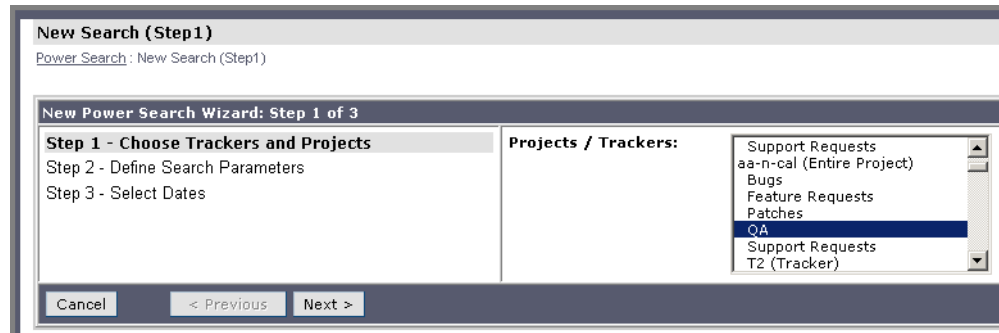


Figure 48. Tracker Power Search: New Search

2. Select the projects (all, or individual projects) and optionally specific trackers in those projects.

Then click Next.

The Edit Search page displays.

Search for the string "Mach" in the Summary section of all artifacts in the selected trackers

Edit Search (Step2)
Power Search : Edit Search (Step1) : Edit Search (Step2)

Edit Power Search Wizard: Step 2 of 3
Step 1 - Choose Trackers and Projects
Step 2 - Define Search Parameters
Step 3 - Select Dates

Search Text: Mach **In:** ☒ Summary ☐ Description ☐ Comments

Sort By: Artifact ID

Submitted By: ☐ NOT Group members Authenticated users

Assigned To: AND <None> Chris Elliott

Priority: AND <None> 1 - Highest

Category: AND <none>

Group: AND <none>

Status: AND pending

Cancel < Previous Next >

Search only artifacts with OPEN status

Figure 49. Tracker Power Search: Edit Search

3. Enter the selection criteria for the search.

The search fields are the corresponding fields in the trackers.

Note: Custom fields in tracker may not be used as search parameters. The example shows that only open trackers should be selected where the string "Mach" appears in the tracker summary.

Once the search is saved, the search string field may be altered and the search re-run without the need to alter any other parameters.

4. When the search parameters are complete, Click Next.

The Select Dates page displays.

Figure 50. Tracker Power Search: Select Dates

5. Select the dates that you would like to search.

Then click Finish.

6. Enter a name for the search.

Note: Do not use HTML tags in the names of your searches. HTML tags entered in the Search Name field will be rendered when viewing the search.

Then click Save.

The search is run and the results are displayed.

Priority	Artifact ID/Summary	Submit Date	Submitted By	Assigned To	Status	Project	Tracker	Category
3	15769: Driver Mach 4 - User Guide Regd. 20-Mar-03	2003-03-20	Howa	Howa	Open	AA_N. California Group	QA	<None>
3	15770: Driver Mach 4 - Installation Guide Regd 20-Mar-03	2003-03-20	Howa	Howa	Open	AA_N. California Group	QA	<None>
5	15771: Driver Mach 4 - Product Guide Regd 20-Mar-03	2003-03-20	Howa	Howa	Open	AA_N. California Group	QA	<None>

Figure 51. Tracker Power Search: Results

To run the search again with a different search string (“Mach” in the example above), click Change Search Text and alter the string as desired.

Monitoring

The activity of many SourceForge items may be monitored. Monitoring provides email notifications whenever a change occurs to a monitored item. Monitoring updates can also be displayed on your My Page. Items that can be monitored are:

- Tracker artifacts, trackers, and all trackers in a project
- Documents, document categories, and the entire Document Manager
- Tasks, task groups, and all tasks in the Task Manager or PMC
- File releases, packages, and all files in the File Publisher
- Forum threads, forums, and all forums in a project

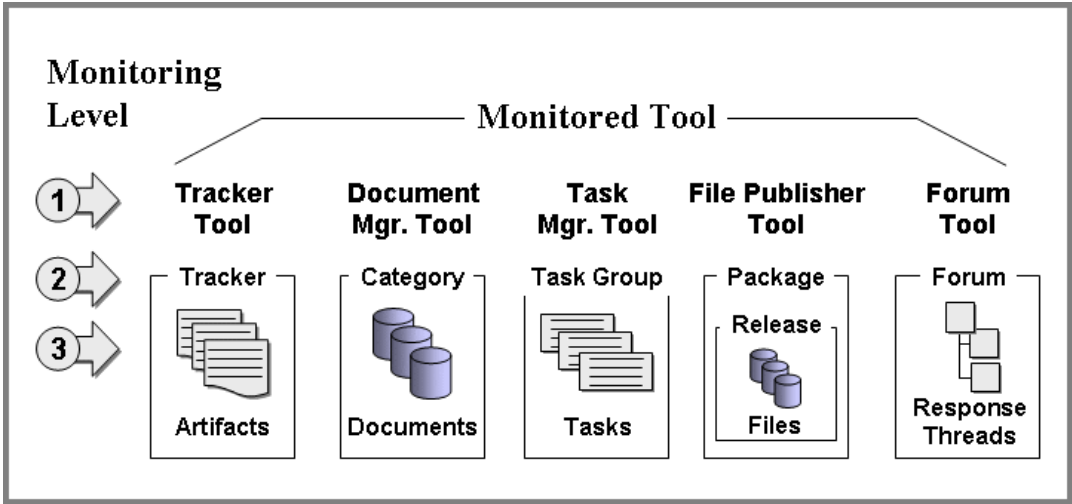


Figure 52. Items that can be monitored

A Monitor button appears at each level of tool administration to enable and disable monitoring.

Tracker monitoring notifications

You will receive tracker monitoring notifications as indicated in the table below.

Monitored item	Monitoring notifications
Tracker artifact	Whenever a field in the tracker artifact is modified.
Tracker	All of the above, plus Whenever an artifacts is added to the tracker.
All project trackers	All of the above, plus Whenever a new tracker is added or deleted from the project

Document Manager monitoring notifications

You will receive Document Manager monitoring notifications as indicated in the table below.

Monitored item	Monitoring notifications
Document	Whenever a document is edited, deleted, locked, unlocked, translated, or moved.
Document category	All of the above, plus Whenever a document in the category is edited or deleted.
Project Document Manager	All of the above, plus Whenever a category is added, edited, or deleted from a project.

Task Manager monitoring notifications

You will receive Task Manager monitoring notifications as indicated in the table below.

Monitored item	Monitoring notifications
Task	Whenever a task’s detail fields are edited.
Task group	All of the above, plus Whenever a task is added to the task group.
Project Task Manager	All of the above, plus Whenever a task group is added.

File Publisher monitoring notifications

You will receive File Publisher monitoring notifications as indicated in the table below.

Monitored item	Monitoring notifications
Release	Whenever a file is added or deleted.
Package	All of the above, plus Whenever a release is added, edited, or deleted from the package.
Project File Publisher	All of the above, plus Whenever a package is added, edited, or deleted..

Forum monitoring notifications

You will receive Forum monitoring notifications as indicated in the table below.

Monitored item	Monitoring notifications
Forum	All of the above, plus Whenever a response thread is added to the forum.
All project forums	All of the above, plus Whenever a new forum is added to the project.

Configuring Monitoring Preferences

You can configure your monitoring preferences for each tool that you are monitoring.

To customize tool monitoring:

1. Expand Monitoring in the navigation panel.
2. Select Preferences.

The Monitoring Preferences page displays.

Tool	Email	Display on My Page	Include My Changes
Trackers	Per Event	No	Yes
Document Manager	Per Event	No	Yes
Task Manager	Per Event	No	Yes
File Release	Per Event	No	Yes
Forums	Per Event	No	Yes

Set all of the above to: <No change> <No change> <No change>

Figure 53. Monitoring Preferences page

3. Adjust the settings for each tool as required.
4. Once you have updated your preferences, click Update.

Email options can be set to:

- Digest: Send all changes as one email each day, rather than one email for each event.
- Per Event: Each change will be sent as a separate email
- None: No notifications.

“Display on My Page” displays monitoring notifications on your My Page.

“Include My Changes” allows you to disable notifications for any changes you make yourself.

“Pause Monitoring” disables monitoring for a specified periods of time; for example, while you are on vacation. All settings are maintained and monitoring may be re-started whenever you choose.

You can also configure all tools with the same settings by selecting a setting from the “Set all of the above” pull-down at the bottom of each of the monitoring options.

Using the Document Manager

Document Manager manages all non-source code documents related to the project, such as manuals and user notes. Documents are stored within a category. Categories are functionally similar to file directories and are structured hierarchically. The base category is called Root Category. You may submit new documents to be shared with other users. Documents may be submitted one at a time, or a number of files may be listed on a single screen for uploading. Binary as well as text format files may be submitted. Document manager supports searching for files by various criteria, such as by category, status, file type as well as when files were last edited, to enable a user to isolate those files that have been recently altered. An advanced filtering by title, description and file content will be discussed later. From the list of files, you can select and access individual documents.

Document Manager

JavaAppServ : Document Manager

Documents in: Root Category
[English]

Root Category (5)

Project Management Console (1) [Monitor] [Users Monitoring]

QA Documents (0) [Edit] [Monitor] [Users Monitoring]

Requirements (0) [Edit] [Monitor] [Users Monitoring]

Filter By:

Basic Filter || Advanced Filter || Jump to results

Type	Last Edited On	Last Edited By	
<div>---Any---</div> <div>Adobe FrameMaker</div> <div>Apple QuickTime</div>	<div></div> <div>Before Range After</div>	<div>---Any---</div> <div>Administrator</div>	<div>Filter</div> <div>Reset Filter</div>

	Title	Type	Last Edited By	Last Edited On	Size
<input type="checkbox"/>	<div>Installer TDD Details</div> <div>Technical Design Document for Installer</div>	Microsoft Word	Administrator	2003-08-26	150.02 KB
<input type="checkbox"/>	<div>Meeting minutes Details</div> <div>Notes from August 26 meeting</div>	Plain Text	Administrator	2003-08-26	4 bytes

☐ Select All

Monitor Document Manager

Monitor Selected

Download Selected

☒ as zip file

☐ as gZip file

Locked document

Figure 54. Document Manager - Basic Filter options with file list

Browsing Documents

To browse documents via the Document Manager:

1. Click Document Manager in the navigation panel.
The Root Category page displays a list of sub-categories and individual documents stored in the Root Category.
2. Select the desired category or other filter settings then press Filter. Notice that Basic Filter is the default filter type.
3. Click the title of the desired document from the document list to see the document property screen.

To browse documents via the project summary page:

1. Access the Project Summary page via My Page > My Projects > [*desired project*]
2. Click Documents in the Project Summary section.
3. In the Documents section, click the title of the document to launch or save it.

Click Details to edit or view the details of a document.

The Document Details page displays.

A number of actions may be applied to a file, such as printing, moving, or copying. Some special capabilities are also available such as creating an Access List to restrict who may access or manipulate this file. A change history is maintained, and can be viewed.

Changes, or differences, between versions of the same file may also be viewed.

Opening, Printing and Deleting Documents

The print feature is available only for non-binary documents.

To print a document:

1. Click Document Manager in the navigation panel.
A list of documents and document categories is displayed on the Root Category page.
2. Drill down the desired category until you see a list of individual documents.
3. Click the name of the desired document.

The document's property page is displayed.

4. To open the document, click Open.

5. To print the document, click Print.

The document content is displayed in your browser.

Use the browser's Print feature to print the document.

6. To delete the document, click delete.

Mailing Documents

To mail a document:

1. Access the property page of the desired document, as described in the section “Browsing Documents” on page 113.
2. Click Mail.
The Mail Document page displays.
3. Enter the recipient’s e-mail address in the Recipient Email field.
4. Enter the subject of the mail message in the Subject field.
5. Optionally, enter a message in the Message text box.
6. Click Mail Document.

Comparing Different Versions of Documents

You can only compare different versions of text documents.

To compare different versions of a document:

1. Access the property page of the desired document, as described in the section “Browsing Documents” on page 113.
2. Click See Differences.
The Documentation - Differences page displays the information about the different versions available. You can see how many versions are available and which one is current.
3. Specify the versions to compare in the drop-down lists.
4. Click Show Differences.
The page displays the differences, where the changes are rendered in green preceded by a plus (+) symbol.

Viewing Document History

To view the change history of a document:

1. Access the property page of the desired document, as described in the section “Browsing Documents” on page 113.
2. Click View History.
The View Document Changes page displays a list of the various versions of the document.

Translating Documents

If you have the appropriate RBAC permission, you can translate documents.

To translate a document:

1. Access the property page of the desired document, as described in the section “Browsing Documents” on page 113.
2. Click Translate.
The Translate Document page displays.
3. Specify the target language in the Language drop-down list.
4. Specify the file type in the File Type drop-down list.
5. If the document is of non-binary type, paste it in the Paste Document box.
6. Click Translate Document.

Note: Documentation translation requires optional, language-specific translation tools.

Editing Document Information

If you have the appropriate RBAC permissions, you can modify the information about a document including its title, description, access type, activity status, and locked status. Only the most current version of a document can be edited.

To edit document information:

- 1. Access the property page of the desired document, as described in the Browsing Documents section.
- 2. Click Edit.

The Edit Document page displays.

Edit Document

AA CALIFORNIA : Document Manager : ANSI FIELD VALIDATION_V2 : Edit Document

Edit Document ANSI_FIELD_VALIDATION_V2 [English]

* Document Title:

ANSI FIELD VALIDATION_V2

Description:

* Administrative Title:

ANSI_FIELD_VALIDATION_V2

* Access Type:

Member Access

* Status:

Active

* File Type:

Plain Text

Version Comment:

Change Log

Make Active:

☒ Make this version the default version

Lock This Document

☐

Lock Comments:

Upload File:

Browse...

Paste Document:

Non-Binary Only

Updated - Needs confirmation from SWIFT team.

Update Document

Figure 55. Edit Document page

- 3.** Make the desired changes in the provided fields:
 - a. To change the title, use the Document Title field.
 - b. To change the description, use the Description field.
 - c. Enter the file name for the document in the Administrative Title field.
 - This name will be used in the URL for the document. It should not contain any spaces, and file extensions should be omitted. Each administrative title must be unique within a project.
 - d. To set the access type (Member Access, Private Access, Public Access), use the Access Type drop-down list.
 - e. To change the status of the document, use the Status drop-down list.
 - Selecting Active means that you are approving the document.
 - f. To make the current version the default, select Make Active.
 - g. To lock the document, select Lock This Document.
- 4.** Click Update Document.

Advanced Filter

You can refine the search for documents that you wish to appear in the document list by using the Advanced Filter.

Document Manager

AA_N.California Group : Document Manager

Filter By: [Basic Filter](#) || [Advanced Filter](#) || [Jump to results](#)

Search Text

In: ☐ Title ☐ Description ☐ Content

Submitted By:

---Any---
Adam Frey
Chris Elliott

File Type:

---Any---
AU
Adobe Photoshop image

Last Edited By:

---Any---
Adam Frey
Chris Elliott

Category:

Root Category
Application Content Manager
Pics

Date format: YYYY-MM-DD Date range format: YYYY-MM-DD - YYYY-MM-DD

Submit Date:

☒ Before ☐ Range ☐ After

Last Edited On

☒ Before ☐ Range ☐ After

Filter

Reset Filter

Figure 56. Advanced Filter

Advanced Filtering enables you to select files by the following criteria:

- Search for a specific string in title, contents or description of a document. The string is entered in the “Search Text” field and the “In” fields as set as required.
- “Containing” allows further precision of how the “Search Text” is searched for.

The filter settings below the “Search Text” box are part of the Basic Filter.

Monitoring Documents

Documents, once added to the project, may be monitored. The project member will be notified if any documents are changed or their status is altered such as being deleted. Notification may be via email or an entry placed in the Monitored section of the users My Page.

To enable Document Manager monitoring:

- 1. Click Document Manager in the navigation panel.
- 2. Click the Monitor Document Manager button at the bottom of the screen.

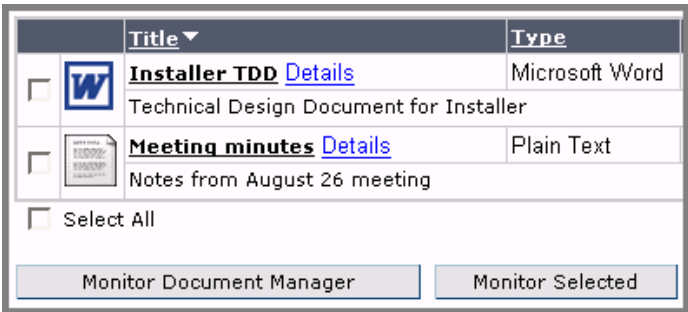


Figure 57. Enabling Document Manager monitoring

Submitting a Single Document

If you have the appropriate RBAC permissions, you can submit documents to the document manager.

To submit a single document:

- 1. Click Submit below Document Manager in the navigation panel.
The Documentation - New Submission page displays.

Documentation - New Submission

KVMH101PROJ : Document Manager : Documentation - New Submission

Add New File

Enter information to submit a document below.
You can also [upload multiple files](#).

Document Title:

Project_Report_Week12

Description:

Cross Departmental Integration Project

Document:

☒ Upload File:

Browse...

File Type:

Plain Text

Instructions for using referenced URLs ⓘ

☐ Paste Text:

File Type: Plain Text

Paste Document:

NEW:
Non-Binary Only
- Includes Tom Browns report from Overseas Shipping Dept.
- Barbara Smith updated Northern Region section.

Access Type:

Member Access

Category:

Root Category

Language:

English

☐ Lock This Document

Lock Comments:

☒ This document needs to be reviewed

Add File

Figure 58. Documentation - New Submission page

2. On the Documentation - New Submission page:
 - a. Click Browse to locate and upload the desired document, or paste the document if it is non-binary into the Paste Document box.
 - b. Specify the file type of the document, in the File Type drop-down list.

The “Referenced URL” option in the File Type list requires a fully qualified path to the object. Relative paths are not supported.
Example of a fully qualified path: *https://sf.vasoftware.com/projects/sfse*
Do not use the format: *www.location.com/filename*
 - c. Enter the name of the document in the Document Title field.

This name should be a brief title that describes the document.
 - d. Enter a description of the document in the Description field.

This description will appear just below the title in the document manager.
 - e. Select the access permission for this document from the Access Type drop-down list.

Member Access — Any member of the project with access to Document Manager can view the document.

Private Access — Only project administrators and documentation editors can view the document.

Public Access — Anyone with permission to access Document Manager can view the document.
 - f. Specify a category to file the document, in the Category drop-down list.
 - g. Specify the language of the document in the Language drop-down list.
 - h. If the document needs to be reviewed by a project member before it is made available to others, check the boxed labelled: ‘This document needs to be reviewed.’

The name of the document will appear on the administrators My Page in the “documents for review” section. See “Submitting a Document for Review” on page 123.
 - i. Click Add File.

Submitting Multiple Documents

To submit multiple documents:

- 1. Click Submit below Document Manager in the navigation panel.
The Documentation - New Submission page displays.
- 2. Click Upload multiple files to access the area to submit multiple documents.
The Documentation - New Submission page displays.
Multiple frames are provided to submit multiple documents.

The screenshot shows a web application titled "Documentation - New Submission". Below the title is a breadcrumb trail: "SUPPLY CHAIN PROJECT : Document Manager : Documentation - New Submission". The main content area contains two identical forms, each titled "Add New File".

The first form has the following fields:

- *Upload File:** A text box containing "C:\Documents and Settings\Ownr" and a "Browse..." button.
- File Type:** A dropdown menu with "Plain Text" selected.
- *Document Title:** A text box containing "White Paper for Supply Chain Project".
- Description:** A text box containing "Supply Chain white paper by Tom Brown. x 2356".
- Access Type:** A dropdown menu with "Member Access" selected.
- Category:** A dropdown menu with "Root Category" selected.
- Language:** A dropdown menu with "English" selected.

The second form has the following fields:

- *Upload File:** A text box containing "C:\Documents and Settings\Ownr" and a "Browse..." button.
- File Type:** A dropdown menu with "Microsoft Project" selected.
- *Document Title:** A text box containing "Supply Chain Project Exec. Pres. PPT".
- Description:** A text box containing "Supply Chain Project Exec. Pres. 2003".
- Access Type:** A dropdown menu with "Public Access" selected.
- Category:** A dropdown menu with "Root Category" selected.
- Language:** A dropdown menu with "English" selected.

Figure 59. Documentation - New Submission page for multiple documents

- 3. On the Documentation - New Submission page, enter the required information.
- 4. When you are finished adding all of your documents, click Upload Files.

Submitting a Document for Review

If desired, you can distribute a document for review when posting it to SourceForge. When a document is submitted for review, a Review Options page is displayed requesting the following details about the review.

- Required and optional reviewers
Required reviewers must approve or disapprove a document with their review.
- The date by which the document must be reviewed
- How long after the review date a reminder should remain on the reviewer's My Page
- Text for the email to the reviewers

Document Manager: Review Options
 AA CALIFORNIA : Document Manager : Document Manager: Review Options

Document Title: ANSI_FLD12_PLAN2
 Description: ANSI_FLD12_PLAN2

* Review Due By: 2003-05-21 date format: yyyy-mm-dd

Display overdue review notice on reviewer's My Page for: 1 week

☐ Include document as attachment to email notice
☒ Notify me when reviews are posted

Email Message to Reviewers: Simon,
 Please confirm plan is ANSI 9000 compliant.
 Thanks

Administrator
 Jaclin Frost
 Simon Temple

Add Reviewer(s)

Name	Required Review
Simon Temple	Yes

Submit

Figure 60. Document Review options page

To submit a document for review:

1. Submit the document as described in "Submitting a Single Document" on page 120.
2. Check "This Document Needs to be Reviewed".
Then click Submit.
3. Fill in the desired review parameters.
Then click Submit.

Upon submission, all reviewers will receive an email message containing the review details. The document will also appear on each reviewer's My Page in the Documents Awaiting Review section.

Reading Review Comments

If you check “Notify Me When Reviews are Posted”, you will receive an email notification whenever a reviewer posts a review. The email contains a link to the review comments.

You can also view all review comments at any time by clicking Read Review Comments on the Document Details page. The Document: Read Review page displays a list of all reviewers who have posted reviews with a link to each reviewer’s review comments.

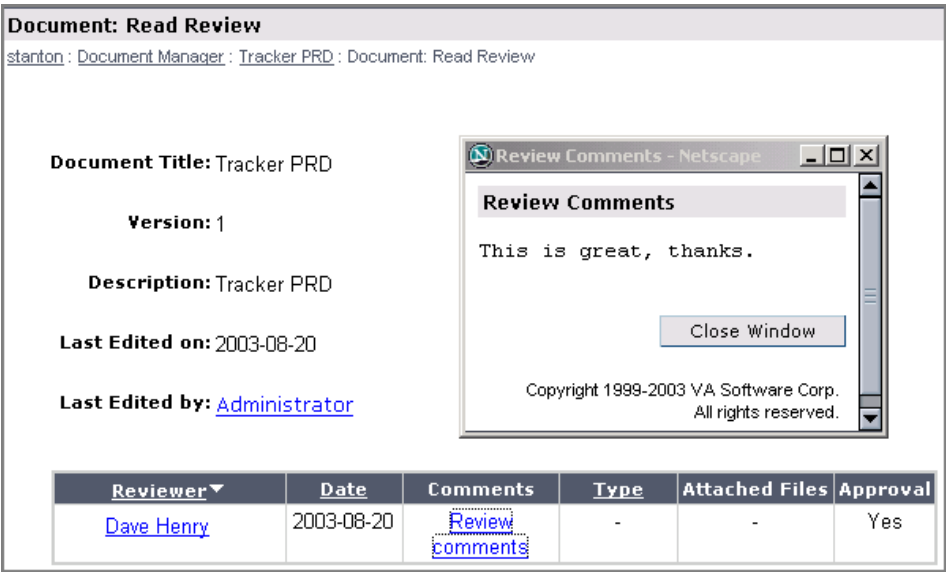


Figure 61. Document: Read Reviews page

The Document: Read Reviews page also indicates whether the reviewer approved or disapproved the document, and includes any files attached to reviews.

Editing Document Review Parameters

At any time after submitting a document for review, you can view the status of the review from the Review Options page. The Review Options page displays the details of the review, plus a summary of which reviewers have reviewed and approved the document.

From the Document Review Options page, you can:

- Edit any parameters of a review in progress
- Send email reminders to your reviewers
- Trigger review of an updated document by editing the Version to be Reviewed field.

Document Title: Tracker PRD
Description: Tracker PRD for SF 3.4
Version to be reviewed: 2(Active) ▼
***Review Due By:** 2003-09-05 date format: yyyy-mm-dd
Display overdue review notice on reviewer's My Page for: 1 week ▼
☒ Notify me when reviews are posted
 Administrator
 Dave Henry
 Rick Chen
 Add Reviewer(s)
 Use Ctrl + Click for multiple selections

Select	Name	Required Review	Status	Last review date	Approved
<input type="checkbox"/>	Dave Henry	Yes ▼	reviewed	2003-07-22	Yes
<input checked="" type="checkbox"/>	Rick Chen	Yes ▼	pending	Not yet reviewed	Yes

☐ Select All

Submit Reset Remove Selected Email Selected

Figure 62. Document Review Options page

To edit document review parameters:

1. Browse to the desired document's Document Details page.
2. Click Edit Review Options.

The Review Options page displays.

3. Edit the desired options.

To trigger review of an updated version of a document, post the new version, then updated the Version to be Reviewed field to the new version.

4. When you are finished, click Submit.

The document will be resubmitted for review with the updated parameters.

Reviewing Documents

If you have been assigned to review a document, you will see the name of that document listed on My Page. If the review-by date has passed, the document title will appear in red, and the status will be “Overdue.”

Documents Awaiting Review (2)				
Select	Title	Due Date	Status	Review
<input type="checkbox"/>	PRD	2003-08-19	Reviewed	Review
<input type="checkbox"/>	Tracker PRD	2003-09-05	Pending	Review
<input type="checkbox"/>	PRD Docman	2003-09-09	Pending	Review
<input type="button" value="Remove"/>				

Figure 63. Documents Awaiting Review

To review a document:

1. Click the My Page tab.
Scroll down to the Documents Awaiting Review section.
2. In the Documents Awaiting Review section, select the desired document, then click Review.

The Post Review Comments page displays.

Paste your comments below or upload a file containing your review

Paste Review (Text)

Paste review comments:

This is great. A few comments attached.

Upload Review

Document Title:

PRD Docman JS Comments

Upload File:

C:\Documents and Settings\jstar

File Type:

Microsoft Word

☒ I Approve

☐ I Disapprove

Figure 64. Document Post Review Comments page

- 3.** Enter your comments in the text box.
- 4.** If desired, you can upload a file such as a redlined or marked-up version of the document.
- 5.** If you are a required reviewer, check I Approve or I Disapprove.
Checking I Disapprove requires either a text entry or a file upload.
- 6.** When you are finished, click Update.

The review status of the document is updated on your My Page and an e-mail notification is sent to the document submitter.

Removing Documents from your My Page

Documents waiting for review will remain on your My Page until the date specified by the document submitter has passed. If desired, you can remove documents from your My Page before this date if:

- You have already reviewed the document, or
- You are not a required reviewer

You cannot remove a document if you are a required reviewer and have not yet reviewed the document.

To remove a document from your My Page:

1. Click the My Page tab.
Scroll down to the Documents Awaiting Review section.
2. In the Documents Awaiting Review section, the documents that you are allowed to remove display a check box.

Documents Awaiting Review (2)				
Select	Title	Due Date	Status	Review
<input type="checkbox"/>	PRD	2003-08-19	Reviewed	Review
<input type="checkbox"/>	Tracker PRD	2003-09-05	Pending	Review
<input type="checkbox"/>	PRD Docman	2003-09-09	Pending	Review
<input type="button" value="Remove"/>				

Figure 65. Documents Awaiting Review

3. Check the boxes next to the documents you want to remove.
Then click Remove.

The documents are now removed from your My Page.

Using the Task Manager

Based on your access permissions, you can browse tasks in the task manager, create task groups, and add tasks to task groups.

Viewing and Updating Tasks

SourceForge provides a number of ways of viewing and updating your assigned tasks depending on your access permission levels.

To view and update tasks:

- 1. Expand the Task Manager menu in the navigation panel.
- 2. Click the title of the desired task group.

The Browse Tasks page displays.

Browse Tasks
[JavaAppServ](#) : [Task Manager](#) : Browse Tasks

Submit New Task

Add Task

Browse Tasks:
Task Group Assigned to Status

Any Any Any

Filter

	Task Status	Priority	Task ID	Task Name	Start Date	End Date	Percent Complete
<input type="checkbox"/>	Completed	2	122	Information Flow Mapping	2002-10-01	2002-10-03	100%
<input type="checkbox"/>	Completed	1	130	Object Discovery process	2002-10-16	2002-10-24	100%
<input type="checkbox"/>	Green	8	131	Low Level Design	2002-10-25	2002-11-07	90%
<input type="checkbox"/>	Green	8	133	Write Reusable Components	2002-10-29	2002-12-20	14%

☐ Select All Total: 16 1

Figure 66. Browse Tasks page

3. Click the desired Task ID.

The Modify Task page displays the details of the selected task.

Modify Task

JavaAppServ : Task Manager : MasterTaskGroup2 : Modify Task

Users Monitoring

Submit ChangesCancel

*Task Name:
(Maximum 50 characters)

Information Flow Mapping

Type:

General Task

Percentage Complete:

70%

Planned Hours:
Decimals will be rounded

72

Actual Hours:
Decimals will be rounded

60

WBS #:

1.1

Priority:

2

Start Date:

October 1 2002

End Date:

October 21 2003

Figure 67. Modify Task page

4. Update the desired fields such as status and percentage complete.

5. When finished, click Submit.

You can also access a list of all tasks assigned to you in the My Assigned Items section of your My Page.

My Assigned Items		
Tasks		
		View all 24 items
Summary	Due Date	
Design		
1 111: Low Level Design	2002-11-07	
Implementation		
1 113: Write Reusable Components	2002-12-20	
1 114: Implement Main Modules	2003-01-08	
3 115: Implement Admin Utilities	2002-12-17	
Testing		
2 117: Unit Test Plans	2002-11-12	
2 118: Integration Test Plans	2002-11-14	
2 119: Load Test Plan	2002-11-21	
		View all...

Figure 68. My Assigned Items: Tasks

Creating Tasks

Provided you have the appropriate RBAC permissions, you can add any number of tasks to a task group.

To add a task to a task group:

- 1. Expand the Task Manager menu in the navigation panel.
- 2. Click the Add Task link under the desired task group name.

The Add a New Task page displays.

Add a New Task

[JavaAppServ](#) : [Task Manager](#) : [MasterTaskGroup2](#) : Add a New Task

Task Group:

Requirement Analysis

Task Type:General Task

WBS #:Will be assigned

Percent Complete:

Not Started

Priority:

5 - Lowest

*Task

Name:

Customer survey

(Maximum 50 characters)

*Task Details:

Develop and conduct a customer survey to collect requirements input.

(Maximum 4000 characters)

Start Date:

August

27

2003

End Date:

November

20

2003

Assigned To:

Dave Henry

Jim Martinez

Rick Chen

Ann Smiths

Dependent On Task:

None

140-Test Scripts

139-Load Test Plan

138-Integration Test Plans

137-Unit Test Plans

135-Implement Admin Utilities

134-Implement Main Modules

133-Write Reusable Components

Hours:

Decimals will be rounded

60

Actual Hours:

Decimals will be rounded

Figure 69. Add a New Task page

- 3.** On the Add a New Task page:
 - a. Select the percentage complete or Not Started from the Percent Complete drop-down list.
 - b. Specify the priority level of the task in the Priority drop-down list.
 - c. Enter a short title for the task in the Task Summary field.
 - d. Enter the details of the task in the Task Details field.
 - e. Specify a start date for the task using the drop-down lists under Start Date.
 - f. Specify an end date for the task using the drop-down lists under End Date.
 - g. Assign the task to a member by selecting a name from the Assigned To list.
 - h. As necessary, select a previously entered task that this task is dependent upon from the Dependent on Task list.
 - i. Enter the number of hours anticipated to be required to perform this task.
 - j. Click Submit.

Using Mailing Lists

Each project can have multiple mailing lists. These lists make it easy to communicate with a disperse body of staff. E-Mail messages sent using a SourceForge managed mailing list are stored in SourceForge as threaded archives, and are searchable by SourceForge users. Anyone can subscribe to a project mailing list that is public.

To subscribe to a mailing list:

1. Click Mailing Lists in the navigation panel.

The Mailing Lists page displays.

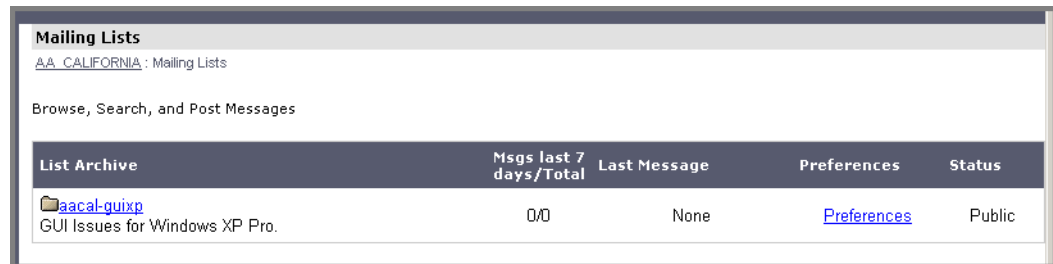


Figure 70. Mailing Lists page

2. On The Mailing Lists page, click Preferences of desired mailing list.
The project's mailing list information page displays.
3. Scroll down to the Subscribing to <mailing list> section on the list information page:
 - a. Enter your email address in the Your email address field.
 - b. Enter a password in the Pick a password field.
 - c. Re-enter the password in the Reenter password to confirm field.
 - d. Select the desired radio button (Yes/No) to indicate whether or not you want to receive list mail batched in a daily digest.
 - e. Click Subscribe.

To unsubscribe from a mailing list:

- 1.** Click Mailing Lists in the navigation panel.
The Mailing Lists page displays.
- 2.** On The Mailing Lists page, click Preferences on the row of the desired mailing list.
The project's list information page displays.
- 3.** Click Visit Subscriber List, in the *<mailing list>* Subscribers section.
The *<mailing list>* Subscribers page displays a list of e-mail addresses.
- 4.** On the *<mailing list>* Subscribers page, click your e-mail address.
- 5.** On the configuration page:
 - a. Enter your password near the Unsubscribe from button.
 - b. Click Unsubscribe from.

To send messages to a mailing list:

- 1.** Click Mailing Lists in the navigation panel.
The Mailing Lists page displays.
- 2.** Click Preferences next to the desired list.
The project's list information page displays the email address for this mailing list.
- 3.** Select the list name in the Using *<mailing list>* section of the list information page.
- 4.** Using your email client, send a message to this email address.
The message is sent to the mailing list.

Participating in Discussion Forums

Each project can have multiple discussion forums. These online forums allow members and other interested parties to discuss issues related to projects, sub-projects, and tasks. Messages posted to public forums are retained and are searchable by SourceForge users.

Messages can be read individually or as entire threads. The four types of message views include:

- **Flat** — All messages are displayed in a linear list with the latest message placed at the top.
- **Threaded** — Messages are threaded in groups, where each group is consisted of a message, and subsequent replies.
- **Nested** — Messages are displayed in a linear list, where each reply is subsumed under its previous message.
- **Ultimate** — Displays any new message or message response at the top of the message list. This ensures that active threads are always visible.

Browsing Forum Messages

To browse messages:

1. Expand the Forums menu in the navigation panel.
2. Click the name of the desired forum.
The forum's main page displays.
3. Click the desired forum topic ("Topic").

Messages posted to the forum are displayed.

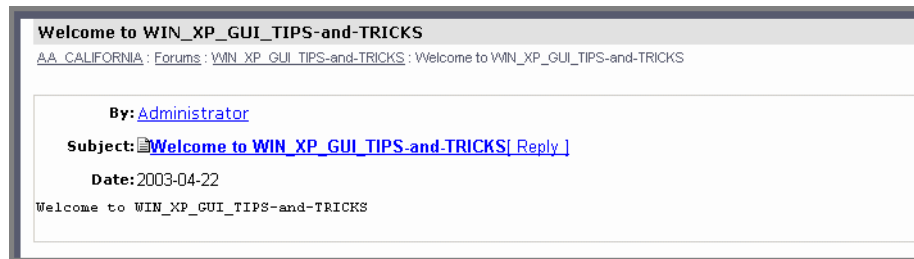


Figure 71. Forum Messages

Posting a Forum Message

After reading a message thread, you may wish to join the discussion. You join a discussion by posting a follow-up message to a message thread.

To post a follow-up message:

- 1. Expand the Forums menu in the navigation panel.
- 2. Click the name of the desired forum.

The forum’s main page displays.

- 3. Click the desired forum topic.

Messages posted to the forum are displayed.

- 4. Click the desired Subject [Reply] link.

The message is displayed with its ID.

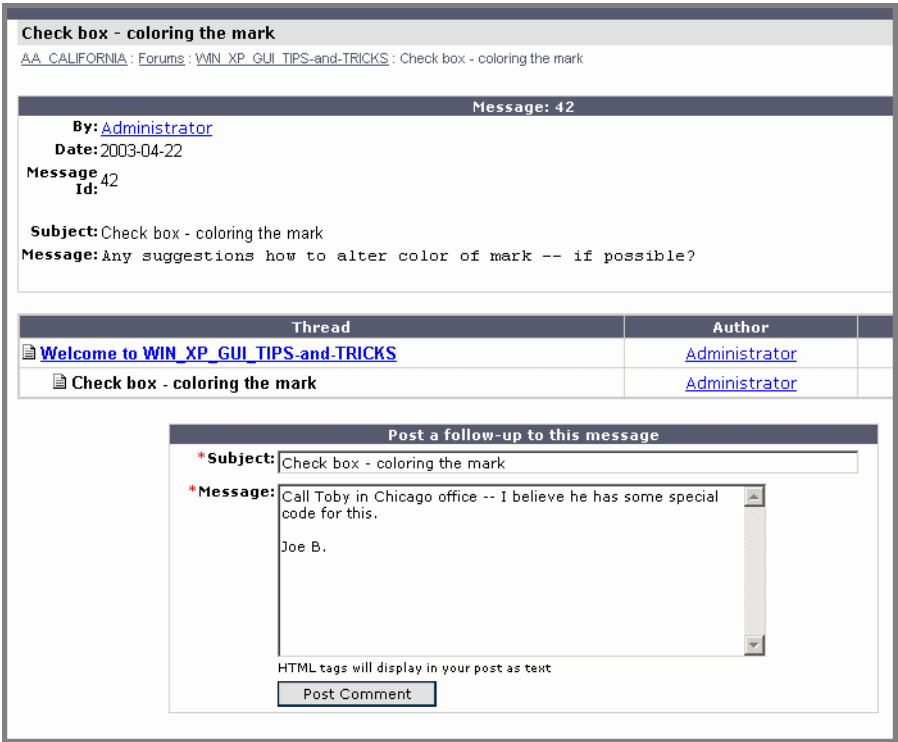


Figure 72. Forum Message Detail

- 5.** Scroll down to the section “Post a follow-up to this message.”
- 6.** Use the Subject field to modify the subject, if necessary.
In most cases, it is better to leave the subject unchanged so the message is identifiable as a follow-up to the original message in views other than threaded or nested.
- 7.** Enter the text of your follow-up message in the Message box.
- 8.** Click Post Comment to post your follow-up message to the forum.

Starting a New Forum Thread

You can start a new thread within a discussion forum by simply posting a new message that is unrelated to any existing messages.

Monitoring Forums

You can monitor selected forums by requesting that new messages be automatically sent to your e-mail address. You can also stop monitoring a forum as necessary.

To start monitoring a forum:

- 1.** Expand Forums in the navigation panel.
- 2.** Click the name of the desired forum.

The forum's main page displays.

- 3.** Click Monitor under the forum name in the navigation panel.

All new posts to this forum will automatically be sent to your e-mail address. The name of the forum is displayed in the Monitored Items > Forums section on your My Page.

To stop monitoring a forum:

- 1.** Select the My Page tab on the menu bar.

The My Page displays.

- 2.** Navigate to the section Monitored Items > Forums.
- 3.** Click the trash icon next to the name of the desired forum to halt monitoring.

Using the File Publisher

The file publishing system provides access to all the releases available for public usage. Files are downloaded one file at a time. However, a file is typically a zipped or compressed file containing all the files that represents a release.

Downloading File Releases

Files releases are displayed on:

- The Project Summary page
- By clicking File Publisher in the navigation panel

The download steps are shown in the figure below.

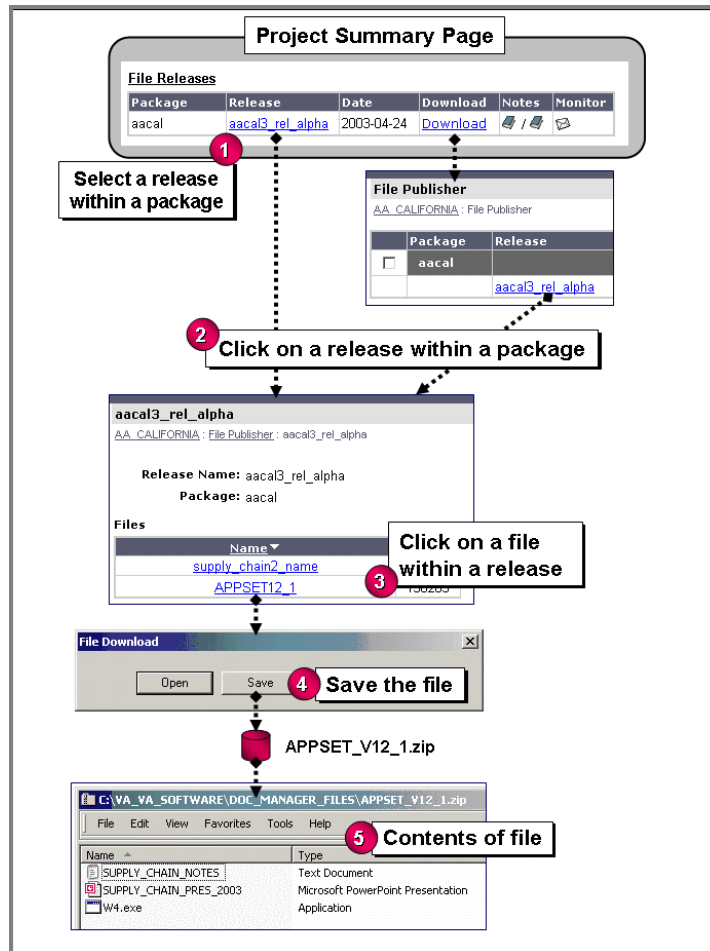


Figure 73. File Release - Download steps

Using Project Statistics

Project statistics are available for you to view if you have the appropriate RBAC permissions. The statistics can be displayed for the last seven days, thirty days, or monthly over the preceding three months.

Viewing Project Performance Information

To display project performance statistics:

- 1. Expand the Reporting menu in the navigation panel.
- 2. Click Statistics.

The Usage Statistics page displays.

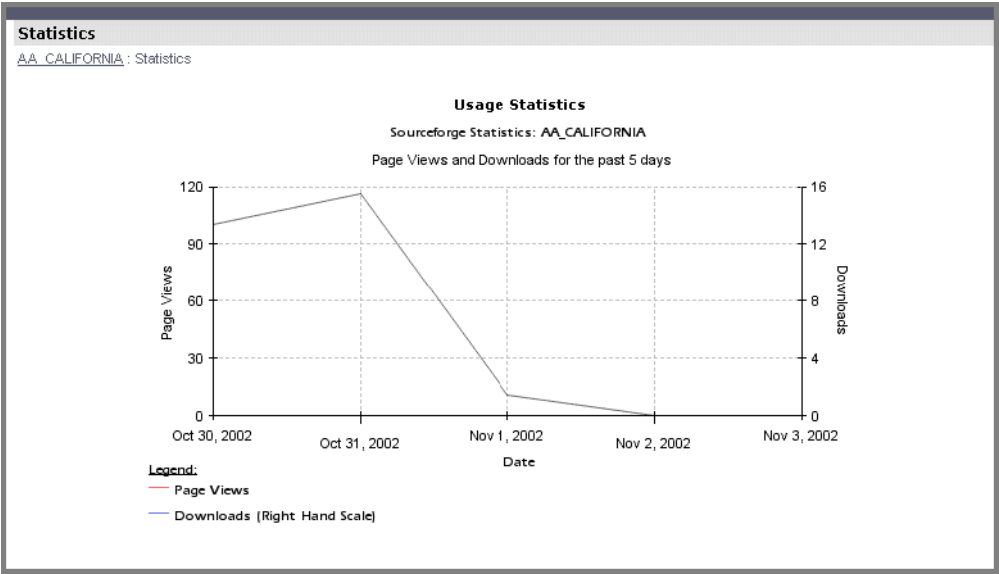


Figure 74. Project Usage Statistics

The graph on the Usage Statistics page shows the number of page views and downloads for the time period specified. The remaining statistical values are defined in the following table.

Table 3. Usage Statistics fields

Field	Description
Month/Lifespan	Time period for this statistic.
Rank	Project ranking in terms of activity.
Page Views	Number of time the pages for this project have been viewed over the time period specified.
D/I (Downloads)	Number of downloads from this project for the time period.
Tasks	Number of open and total (in parentheses) Tasks for this project for the time period.
SCM	Number of SCM commits and adds (in parentheses) for this project for the time period.
Trackers	
Bugs	Number of open and total (in parentheses) bug tracker items for this project for the time period.
Support	Number of open and total (in parentheses) support tracker items for this project for the time period.
Patches	Number of open and total (in parentheses) patch tracker items for this project for the time period.
All Trkr	Number of open and total (in parentheses) overall tracker items for this project for the time period.

Reporting on Projects

The SourceForge reporting function lets members accurately track project activity while minimizing project overhead requirements. SourceForge includes five predefined report templates and a wide range of custom reporting options. Additionally, reports can be scheduled to run at regular time intervals.

Only members with Document Manager editor and custom reporting permissions can create and save reports. You can view saved reports stored in the document manager if you have the appropriate RBAC permissions.

You can use the following report templates to automate your project reporting requirements:

- **User reports**

User reports let you monitor user activities, such as SCM adds and SCM commits.

- **Project Tracker reports**

Project reports let you report on all tracker activities (for example, artifacts open and closed etc.) for the project for which you are a project administrator. Administrators can create reports on all projects.

- **Project SCM reports**

Reports on all group SCM activities such as the number of SCM adds and SCM commits.

- **Project Activity reports**

Reports on group activities by percentile and activity ranking.

- **Project Task reports**

Reports on group-wide task activities.

Using Predefined Template Reports

To create and save a report:

- 1. Click Reporting in the navigation panel, then My Reports.

The Reporting page displays.

Reporting

AA_CALIFORNIA : Reporting

Template Reports

Report Name	Actions	Date Created	Last Updated
<input type="checkbox"/> Template - User Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project Tracker Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project SCM Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project Activity Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project Task Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55

Delete Selected

Select All

Unselect All

Saved Reports

Project Name	Report Name	Actions	Date Created	Last Updated
No Saved Reports				

Reporting Engine

The reporting engine enables you to build reports on user, and project activity.
As a SourceForge admin, you can also run SourceForge-wide reports and reports on any user or project.

Create Multiple Project Report

Create a Project Report (AA_CALIFORNIA)

Figure 75. Reporting page

- 2. Select one of the following report types from the list:
 - Template-User Report
 - Template-Project Tracker Report
 - Template-Project SCM Report
 - Template-Project Activity Report
 - Template-Project Task Report

3. Click 'Create from' link in the Actions column.

The Build a Report page displays.

Build a Report
AA_CALIFORNIA : Reporting : Build a Report

Build a Report

Step 2 of 4: Specify Report Options

Select the options for your report below. For help, read the [FAQ](#)

Project Activity

- Activity Percentile
- Activity Ranking
- Artifacts Closed
- Artifacts Opened
- Bugs Closed
- Bugs Opened
- Downloads (HTTP)
- File Releases

Current Project for Report: AA_CALIFORNIA

SourceForge administrators are allowed to list (comma separated) any project ids to report on:

Project ID List (eg. 1,2,3):

Figure 76. Build a Report page

4. Specify your report parameters.
The available parameters depend upon the type of report you have selected.
5. Specify the reporting period.
6. Specify a format for the report.
7. Specify a type for the report data: Aggregate Report or Averaging Report.
8. Specify a basis for this report: time interval or project.

9. When you are finished, click Preview Report.
The report preview section displays.

Build a Report
[AA_CALIFORNIA](#) : [Reporting](#) : Build a Report

Build a Report

Step 3 of 4: Preview Your Report

Below is a preview of your report. The report has not yet been created so you can still modify it.

Report Data Preview					
Group Name	Activity Percentile	Activity Ranking	Bugs Closed	Bugs Opened	Date
AA_CALIFORNIA	200	2	0	1	27-APR-03

Note: 10 row maximum for previews

Current Document Manager Project for report: AA_CALIFORNIA

Next Step

Modify the Report

Figure 77. Build a Report: Preview Your Report page

- 10.**To modify the report, click Modify the Report and repeat the preceding steps.
To proceed, click Next Step.
The Add New File page displays.
- 11.**Specify the name of the file in which to save the report.
- 12.**In the Add New File section:
- a. Enter a brief title for the report document in the Document Title field.
 - b. Enter a short description of the report in the Description field.
 - c. Specify the access level for this document from the Access Type drop-down list.
 - d. Specify a category for this report in the Category drop-down list.
 - e. Select a language for this report from the Language drop-down list.
 - f. Click Add File.
- A confirmation page displays giving the URL to access this report.
- The report is saved to the location specified in the confirmation message. You can access the report from the Saved Reports section of the Reporting main page, as shown in Figure 81 on page 150.

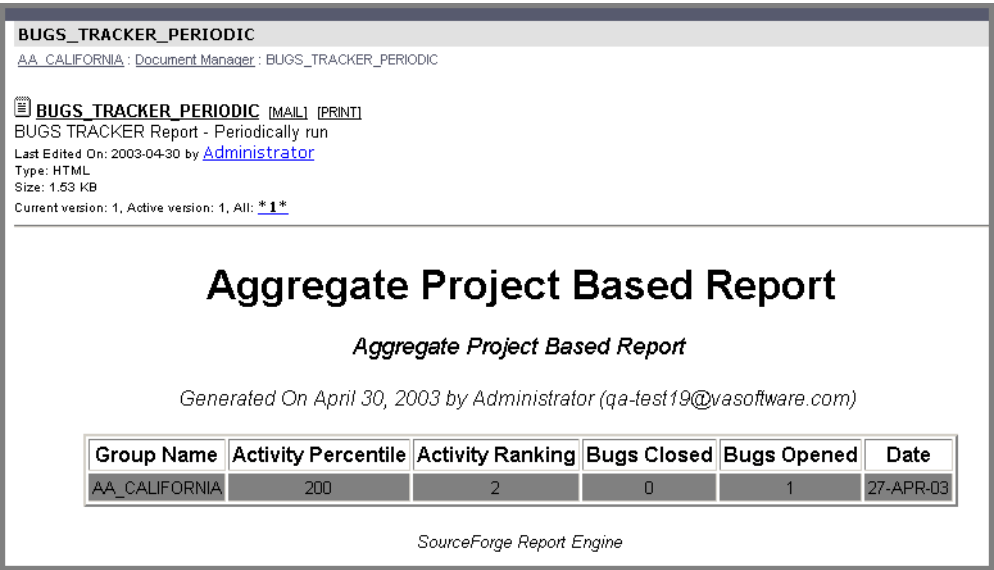


Figure 78. Sample Report page

Reporting on Trackers

Provided you have access to trackers, you can create the following types of reports for any of your project trackers:

- **Aging Report** — Displays three graphs for the time period selected.
 - **Average Turnaround Time for Closed Items (days)** — Shows the mean number of days a tracker artifact is open for each time period.
 - **Number of Items Submitted** — Shows the number of new tracker artifacts opened during each time period.
 - **Number of Items Still Open** — Shows the number of tracker artifacts currently open.
- **Distribution by Status** — Shows how many artifacts are set to each status.
- **Distribution by Assigned To** — Shows the number of artifacts assigned to each tracker technician during the time period selected. Items that are currently open are shown in red; others are shown in blue.
- **Distribution by Category** — Shows the number of artifacts assigned in each category during the selected time period. Items that are currently open are shown in red; others are shown in blue.
- **Distribution by Group** — Shows the number of items assigned in each group during the selected time period. Items that are currently open are shown in red; others are shown in blue.

Misc. Distribution Reports— You can generate these reports if the following fields are used in the Tracker: **Platform, OS, Browser, Version, Release, Issue Type, Customer.**

To create a report on trackers:

- 1. Expand the Reporting menu in the navigation panel.
- 2. Click Tracker Reporting.
- 3. Select the tracker for the report from the drop-down list.
This list includes the default trackers as well as any new trackers you have created.
- 4. Click OK.
- 5. Select the report type and time period from the drop-down lists.
- 6. Click Show to display the report.

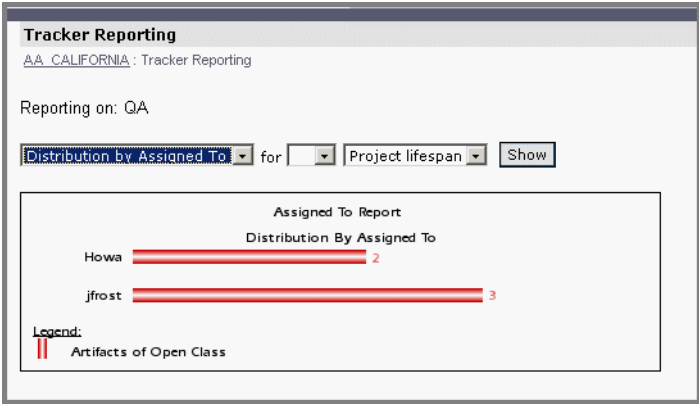


Figure 79. Trackers by User - Sample report

Reporting on Tasks

Provided you have the appropriate RBAC permission, you can create the following types of reports on task groups within SourceForge:

- **Aging Report** — Displays the average number of days a task remained open during the selected time period.
 - **Average Duration for Closed Tasks (Days)** — Shows the mean number of days a closed task was open during each time period.
 - **Number of Tasks Started** — Shows the number of new tasks started during each time period.
 - **Number of Incomplete Tasks** — Shows the number of tasks currently open.
- **Tasks by Technician** — Shows the number of items assigned to each task technician during the time period selected. Because a task can be assigned to more than one technician, some tasks may be counted more than once. Tasks that are currently open are shown in red; all others are shown in blue.
- **Tasks by Task Group** — Shows the number of tasks in each task group during the selected time period. Tasks that are currently open are shown in red; all others are shown in blue.

To create a report on tasks:

1. Expand Reporting in the navigation panel.
2. Click Task Manager Reporting.
The Task Reporting page displays.
3. Select the report type and time period from the drop-down lists.
4. Click Show to display the report.

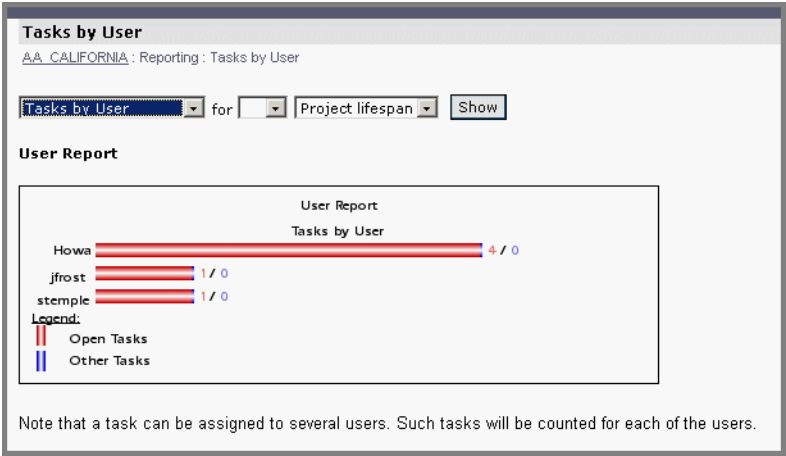


Figure 80. Tasks by Users - Sample Report

Scheduling Reports

The report scheduling function lets you schedule saved reports to run for a pre-defined time period or indefinitely. A scheduled report can be distributed using the Document Manager, project mailing lists, or by using customized email lists. You can distribute reports using any of these methods or all three in combination.

Reporting

AA_CALIFORNIA : Reporting

Template Reports

Report Name	Actions	Date Created	Last Updated
<input type="checkbox"/> Template - User Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project Tracker Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project SCM Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project Activity Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55
<input type="checkbox"/> Template - Project Task Report	Create from	4/28/2003 17:15:55	4/28/2003 17:15:55

Delete Selected

Select All

Unselect All

Saved Reports

Project Name	Report Name	Actions	Date Created	Last Updated
AA_CALIFORNIA	<input type="checkbox"/> TESTWED30_PDF2	View Run Modify Create Schedule	4/30/2003	4/30/2003
AA_CALIFORNIA	<input type="checkbox"/> BUGS_TRACKER_PERIODIC	View Run Modify Create Schedule	4/30/2003	4/30/2003
AA_CALIFORNIA	<input type="checkbox"/> TESTWED30_1	View Run Modify Create Schedule	4/30/2003	4/30/2003

Delete Selected

Select All

Unselect All

Figure 81. Saved Reports section

To schedule a report:

1. In the Saved Reports section of the Reporting main page, click Create Schedule next to the report you are about to schedule.

The Create Schedule page displays.

Create Schedule

AA CALIFORNIA : Reporting : Create Schedule

Create Schedule for BUG_-_Weekly_Report

Reporting Period

The reporting period is:

Since your report has a fixed end date, the report will include the same data every time the report is run.
You should first [change the reporting period](#).

Start Date for Schedule

The report schedule should start: April 22 2003

Frequency

☒ Run the report every day
☐ Run the report on the first day of the month every month

Duration

This schedule should last:

☒ Indefinitely
☐ Until April 22 2004

Figure 82. Create Schedule page

2. On the Create Schedule page:
 - a. To schedule a report to run on a weekly basis, set the frequency to “Run the report every week.”
 - b. To schedule a report to run on a monthly basis, set the frequency to “Run the report on the first day of the month every month.”
 - c. To schedule a report to run on a quarterly basis, set the frequency to “Run the report on the first day of the month every 3 months.”
 - d. Select the duration. For how long do wish the report to be run.

Before completing the report creation, you must choose how to distribute the report. A scheduled report can be distributed using the Document Manager, project mailing lists, or by using customized email lists. You can distribute reports using any of these methods or all three in combination.

To schedule a report and distribute through the Document Manager:

1. Click Reporting in the navigation panel.

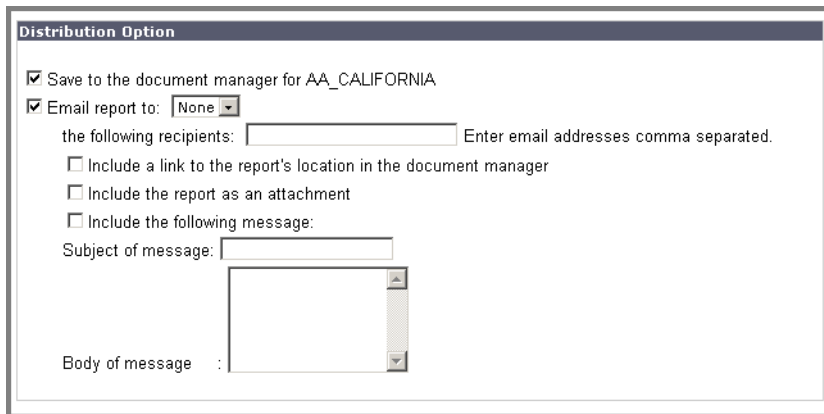
The Reporting main page displays.

2. In the Saved Reports section, click Create Schedule next to the desired report.

The Create Schedule page displays.

3. Specify the start date, frequency, and duration for the schedule.

4. Scroll down to the Distribution Option section.



The screenshot shows a dialog box titled "Distribution Option". It contains several checkboxes and input fields. The first checkbox, "Save to the document manager for AA_CALIFORNIA", is checked. The second checkbox, "Email report to:", is also checked, and its value is set to "None" in a dropdown menu. Below this, there is a text input field for "the following recipients:" with a placeholder text "Enter email addresses comma separated.". There are three more checkboxes: "Include a link to the report's location in the document manager", "Include the report as an attachment", and "Include the following message:", all of which are currently unchecked. Below the "Subject of message:" label is a text input field. At the bottom, there is a label "Body of message:" followed by a large text area for composing the message body.

Figure 83. Distributing Reports

5. Select "Save to the document manager for <project name>."
6. Click Create Schedule.

Distributing Reports via Email

To schedule a report and distribute through Email:

1. In the Saved Reports section of the Reporting main page, click Create Schedule next to the desired report.

The Create Schedule page displays.

2. Specify the start date, frequency, and duration for the schedule.
3. Scroll down to the Distribution Option section.
4. To schedule a report distribution via a project mailing list:
 - a. Check the Email Report To box.
 - b. Select a mailing list from the drop-down list.
5. To schedule a report to be distributed to specific individuals:
 - a. Check the Email Report To box.
 - b. Enter individual e-mail addresses, each separated by a comma, in the next field.

Distribution Option

☒ Save to the document manager for AA_CALIFORNIA

☒ Email report to: None

the following recipients: Enter email addresses comma separated.

☐ Include a link to the report's location in the document manager

☐ Include the report as an attachment

☐ Include the following message:

Subject of message:

Body of message :

Figure 84. Distributing Reports over Email

CHAPTER 6

Project Administration

This chapter assumes that you have a good understanding of the SourceForge resources, user privileges, and user actions described in the previous chapters.

When a registered user requests that a new project be created, a SourceForge application administrator receives that request and approves or rejects the request (this may be done automatically in some cases.) The requestor is notified of the decision via e-mail. When the application administrator approves the project, the user automatically becomes an administrator for that project.

All of the member privileges applicable to project members apply to project administrators.

This chapter describes the administrative privileges of project administrators.

Major Topics:

- “Managing Project Information” on page 156
- “Auditing Project Change History” on page 163
- “Project Assistance Administration” on page 164
- “Using Role-Based Access Control (RBAC)” on page 167
- “Tracker Administration” on page 194
- “Document Manager Administration” on page 211
- “Task Manager Administration” on page 221
- “Forum Administration” on page 182
- “Mailing Lists Administration” on page 185
- “Managing Mailman” on page 187
- “News Administration” on page 192
- “File Publisher Administration” on page 224
- “Managing the Tracker-SCM Integration” on page 237
- “Using the Project Management Console” on page 245

The Project Administration Summary page, as shown in Figure 85 on page 156 includes:

- Project information (with links to separate areas for editing project information and viewing project change history)
- Project map categorization information
- Tool Administration information
- Project Assistance information
- Input field for adding new members to the project
- List of Project Members (with a link to edit member access permission)

Note: Project Web Server is not included in this section as there are no administrative activities to be performed.

Adding Registered Users to a Project

You must add registered users to a project so they can become members of that project. You cannot add users to a project until they are confirmed registered SourceForge users.

Registered users may be added to a project:

- One user at a time.
- A group of users with identical roles.

To simplify the process of adding single or multiple users, user ids may be selected from a list of registered users known to SourceForge.

To add users to a project:

- 1.** Expand the Administration menu in the navigation panel.
- 2.** Click Project Admin.

The Project Administration Summary page displays.

- 3.** On the Project Administration Summary page:
 - a.** To add a user, enter the login name of the user you wish to add in the Login Name field. If you do not know the user's login id, you can select "Look Up Username" and a list of registered, active users will display.
Select the desired user, or multiple users, by selecting the check box adjacent to the user login id.
 - b.** Once the desired users have been selected, click Add Selected. You will be returned to the Project Administration Summary page. The selected user ids are listed in the text box beneath the Look Up Username. (See figure.)
- 4.** Select the role or roles you wish to apply to the new project members.
You can select multiple roles by holding the CTL key while selecting each of the desired roles. (All users in the selected list will receive the same roles.)
- 5.** Click the "Add User(s) to Project" button to add the users.

Editing Project Member Permissions

To edit project member permissions:

1. Expand the Admin menu in the navigation panel.
2. Click Project Admin.

The Project Administration Summary page displays.

3. Click Edit Member Permissions in the Project Members section.
4. The Role Administration page displays.

Refer to the section “Using Role-Based Access Control (RBAC)” on page 167 for details on role administration.

Role Admin
AA CALIFORNIA : Project Admin Summary : Role Admin

Role based access control allows project administrators to limit internal access based on configurable role assignments.


[Access Control FAQs](#)

[View Assigned Roles for Members](#)

[Modify Role Matrix](#)

Add Users to Your Project
[Add a new User](#)

Add Roles to Your Project
[Copy a role from another project](#)
[Create a new role](#)

Edit Project Roles 

Role Name	Description	Operations
Developer	A Developer on this project	Edit Role Edit User Assignments
Employee	An employee of your company	Edit Role Edit User Assignments
Manager	Project Manager	Edit Role Edit User Assignments
Project Admin	Project Administrator	Edit Role Edit User Assignments
Tool Access	A Member with access to all tools	Edit Role Edit User Assignments
Visitor	A visitor not employed by your company	Edit Role Edit User Assignments

Figure 86. Role Administration page

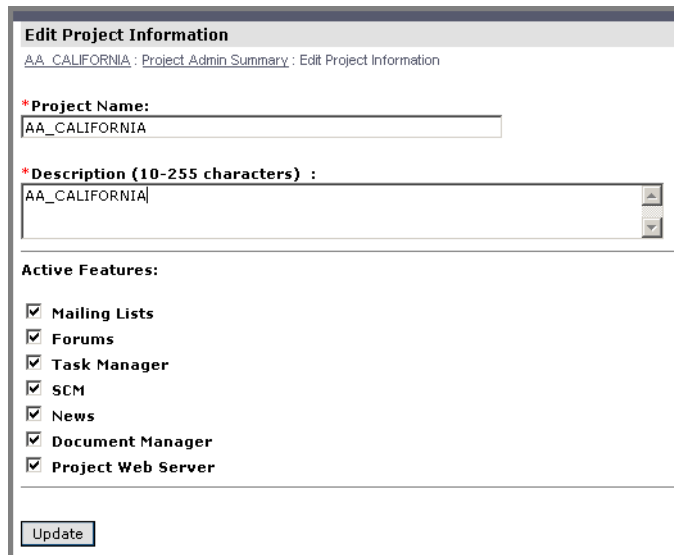
Editing Project Information

Each project has a project information page that lists the features enabled for the project. As necessary, you can activate or deactivate any of these enabled features at any time. You can also choose to receive notifications about new tasks assigned for the project.

To enable features for a project:

1. Expand the Admin menu on the navigation panel.
2. Expand the Project Admin menu.
3. Click Project Info.

The Edit Project Information page displays.



Edit Project Information
AA_CALIFORNIA : Project Admin Summary : Edit Project Information

***Project Name:**
AA_CALIFORNIA

***Description (10-255 characters) :**
AA_CALIFORNIA

Active Features:

- ☒ Mailing Lists
- ☒ Forums
- ☒ Task Manager
- ☒ SCM
- ☒ News
- ☒ Document Manager
- ☒ Project Web Server

Figure 87. Edit Project Information page

4. On the Edit Project Information page:
 - a. Check or uncheck the desired boxes in the Active Features section.
 - b. Click Update.

The updated information is populated through the specified roles, and all the project members who are assigned these roles will have access to the feature you just enabled.

The navigation tree in the navigation panel reflects the updated information by displaying only the enabled features for the project.

To receive notification about project tasks:

- 1.** Expand the Admin menu on the navigation panel.
- 2.** Expand the Project Admin menu.
- 3.** Click Project Info.
The Edit Project Information page displays.
- 4.** On the Edit Project Information page:
 - a. Enter your e-mail address in the New Task Assignments field.
 - b. Select Yes to receive notification on all task updates.

Editing Project Map Categorization

To edit project map categorization:

- 1. Expand the Admin menu in the navigation panel.
- 2. Click Project Admin.

The Project Administration Summary page displays.

- 3. In the Project Map Categorization section, click Edit Project Map Categorization.

The Edit Project Map Category page displays a list of root categories.

Edit Project Map Category

[AA - CALIFORNIA : Project Admin Summary : Edit Project Map Category](#)

Edit Project Map Categorization

Choose up to three categorizations for the project in each of the categories below.

Note: If you categorize a project in a specific category and a parent category, only the more specific categorization will be used.

Contact your SourceForge Administrator to request that a category be added to the project map.

Development Status ?

None Selected

None Selected

None Selected

Environment ?

None Selected

None Selected

None Selected

Figure 88. Edit Project Map Category page

- 4. Specify up to three categorizations for this project in each of the root categories.
- 5. Click Update All Category Changes.

162 Project Administration

Auditing Project Change History

The Audit Log page displays a consolidated view of a project's change history. You can find out how a project has changed over time in terms of its membership and other activities.

To view project change history:

1. Expand the Admin menu on the navigation panel.
2. Expand the Project Admin menu.
3. Click Audit Log.

The Audit Log page displays.

Audit Log				
AA CALIFORNIA : Project Admin Summary : Audit Log				
Project Change History				
Field	Old Value	New Value	Date ▼	By
status	P	A	2003-04-16	admin
approved	x		2003-04-16	admin
Added User	tstoppard		2003-04-17	admin

Figure 89. Audit Log page

The Audit Log page displays the project change history concerning the following items:

- Project activities (in the Field column).
- Old and changed descriptions of each activity in the Old Value and New Value columns respectively.
- Date of the activity in the Date column.
- Name of the administrator who performed the activity in the By column.

Names of users displayed on the Audit Log page link to their respective User Profile page.

⇒ For information on User Profile, refer to “User Information” on page 66.

Project Assistance Administration

The SourceForge application administrator defines job categories and skills that are required to carry out the various jobs. You can create job postings and edit job information.

Creating Job postings

You must describe the job and define the skills and levels of competency and experience for the job.

To create a job posting:

- 1. Expand the Admin menu in the navigation panel.
- 2. Expand Project Admin.
- 3. Click Project Assistance.

The Create a New Job page displays.

Create A New Job

[AA CALIFORNIA](#) : [Project Admin Summary](#) : [Project Assistance Wanted](#) : Create A New Job

Start by filling in the fields below. When you click continue, you will be shown a list of skills and

Create A New Job

* **Category:** Developer

* **Short Description:** SENIOR_JAVA_PROGRAMMER

Long Description: GUI Guru needed.
Must have knowledge of: C++, MS GUI classes.
Max length 4000 characters.

Continue >>

Figure 90. Create a New Job page

4. On the Create a New Job page:

- a. Select a category for this job from the Category drop-down list.
- b. Enter a brief description of the job in the Short Description field.
- c. Enter a detailed job description in the Long Description field.
- d. Click Continue.

The page displays a message indicating that the job was successfully posted.

You need to define the skill and levels of competency and experience for this job.

- e. Select a skill, competency level, and experience from the drop-down lists in the Add a New Skill section.
- f. Click Add Skill to add the skill to the Skill Inventory for the job.
- g. Continue adding skills until you have added all the relevant skills for the job.
- h. Click Finished.

Editing Job Information

You can make changes to a job posting at any time and also delete the posting. After two weeks, a job's status is automatically changed to deleted.

Job postings have one of the following statuses:

- **Open** — The job posting is open to applicants.
- **Filled** — The job has been filled.
- **Deleted** — The job posting no longer is available to be viewed except by project or SourceForge administrators.

To edit a project assistance wanted request:

- 1.** Expand the Admin link in the navigation panel.
- 2.** Expand Project Admin.
- 3.** Click List/Edit under Project Assistance.

The Project Assistance Wanted list displays.

- 4.** On the Project Assistance Wanted list page:

- a. Click the title of the posting to edit.

The job description is displayed.

- b. Click Edit Job.

- c. Make changes, as necessary.

You can delete a job posting by selecting Deleted from the status drop-down list.

Deleting a job posting removes the posting from view.

- d. Click Update Descriptions.

- e. Make changes to the Job Skills as necessary.

- f. Click Finished.

Using Role-Based Access Control (RBAC)

Role-based access control provides SourceForge administrators and project administrators with a mechanism to control which activities project members may carry out. This is accomplished by controlling how a user may manipulate a project “object” (such as a file, a tracker artifact, a document or a task) by granting the user the appropriate operation permissions. Operations are activities such as edit, view, create or delete. Operations are grouped into a “role.” A role, or roles, are assigned to a user. A user’s permissible operations (sometimes referred to as a user’s permissions) is the sum of all permissions in all roles they are assigned.

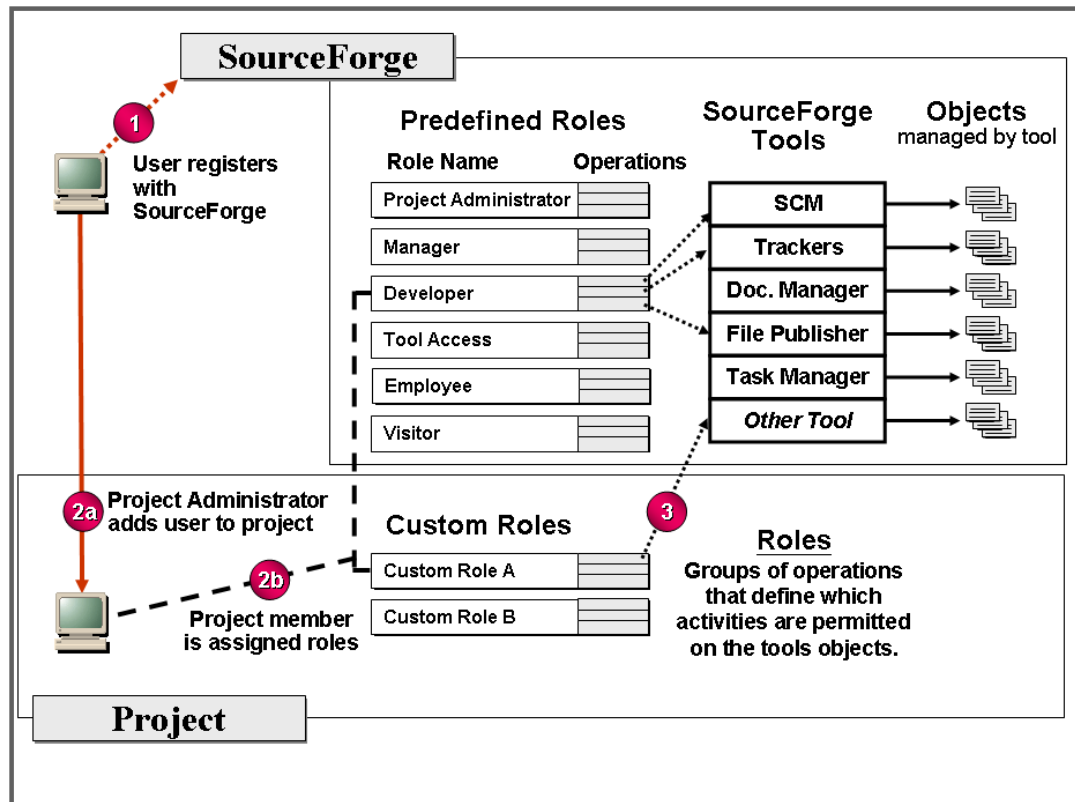


Figure 91. Users, Roles, and Operations

Pre-Defined Roles

There are six pre-defined roles in SourceForge. The default roles are:

- Project Admin
- Manager
- Tool Access
- Developer
- Employee
- Visitor

A pre-defined role is automatically assigned to a user dependent upon their login status and project membership. Assignment rules are as follows:

- All Users (All non-registered users) is assigned the Visitor role
- Registered User (a user who has registered with a SourceForge installation) is assigned the Employee role.
- Project member (a registered user who has been added to a project by the project administrator) is assigned the Developer role.
- A registered user who creates a project and therefore becomes the project's administrator is assigned the Project Administrator role.

The project administrator may assign additional roles to users.

The Visitor role has no permissions. The Employee role has access permissions for only Forums and News. The operation permissions for the other pre-defined roles are listed in the table on the following two pages. Y (for yes) in a column indicates that the operation permission is enabled for the role.

Table 4. Operation Permissions for Pre-Defined Roles

Tool	Section in Tool	Operation Permission	Project Admin	Manager	Developer	Tool Access
Project Admin		Project Admin	y			
Project Web Server		PWS File Upload	y			
SCM	Modules	SCM Commit	y	y	y	
		SCM Tag	y	y	y	
		SCM Access	y	y	y	y
		SCM Admin	y			
Project Console	Master Task Group	Project Console Access	y	y	y	y

Tool	Section in Tool	Operation Permission	Project Admin	Manager	Developer	Tool Access
		Project Console Admin	y	y		
		Project Console Delete	y	y		
Task Manager	Master Task Group	Task Manager Access	y	y	y	y
		Task Manager Assigned	y	y	y	
		Task Manager Edit	y	y		
Tracker	Tracker Type	Tracker Access	y	y	y	y
		Tracker Submit	y	y	y	
		Tracker Assigned	y	y	y	
		Tracker Edit	y	y	y	
		Tracker Admin	y			
		Tracker Close Artifact	y			
	Tracker Submitted By	Tracker Access	y	y	y	y
		Tracker Assigned	y	y	y	
		Tracker Edit	y	y	y	
	Tracker Assigned To	Tracker Access	y	y	y	y
		Tracker Edit	y	y	y	
	Tracker Status	Tracker Access	y	y	y	y
		Tracker Edit	y	y	y	
	Tracker Priority	Tracker Edit	y	y	y	
		Tracker Create Delete	y			
Document Manager	Document Category	Document Access	y	y	y	y
		Document Submit	y	y	y	
		Document Lock/Unlock	y	y		
		Document Edit	y	y		
		Document Admin	y	y		
		Document Delete	y	y		
File Publishing	File Package	File Access	y	y	y	y
		File Submit	y			

Tool	Section in Tool	Operation Permission	Project Admin	Manager	Developer	Tool Access
		File Admin	y			
	File Release	File Access	y	y	y	y
		File Submit	y			
		File Admin	y			
	Maturity Level	File Access	y		y	y
		File Submit	y			
		File Admin	y			
		File Delete	y			
Reporting		Statistic Access	y	y	y	y
		Report Access	y	y		
News		News Access	y	y	y	y
		News Submit	y	y	y	
		News Admin	y			
		News Delete	y			
Forums	Forums	Forum Access	y	y	y	y
		Forum Submit	y	y	y	
		Forum Admin	y			
		Forum Delete	y			
Mail	Mailing List	Mail Access	y	y	y	y
		Mail Admin	y			

Operation Permissions

An operation permission defines a particular activity which may be performed on a project resource or object. For example: Access, Submit and Edit in the Tracker Section, if enabled, allows the user to view trackers, submit and edit trackers artifacts. When a role is created, the administrator will enable the tracker operations they want users (who are assigned the role) to perform.

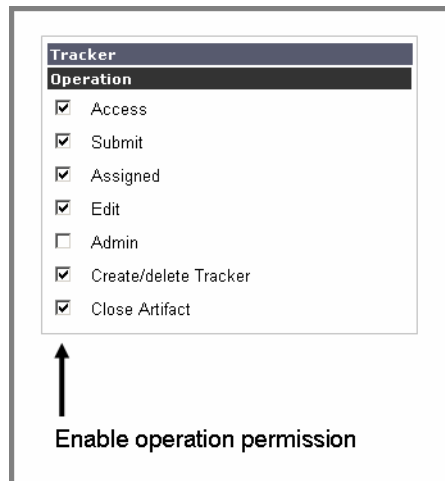


Figure 92. Enable Tracker Operations in a Role

In the pre-defined roles table above (Table 4 on page 168), you will notice that “Tracker Edit” appears five times beneath five categories (Tracker Type/Submitted by/Assigned to/Status/Priority). Yet there is a single checkbox to enable the edit operation. The checkbox shown in Figure 92 enables the operation (in this role) for “all” trackers without restriction. In other words, the role with the Tracker Edit operation enabled as in Figure 92 can edit:

- trackers of any type
- trackers submitted by any project member
- trackers assigned to any project member
- trackers of any status
- trackers of any priority

This “all” default is commonly an acceptable setting. However it is possible to fine tune a role to restrict to which objects the action may be applied.

Project Summary Page > Administration > Access Control > Edit Role (for required role)

*Role Name:

AA_COMPLIANCE_REVIEWER

Role Description:
(Maximum 250 characters)

AA_COMPLIANCE_REVIEWER

Status:

☒ Active

☐ Inactive

Tracker	
Operation	Resource Limitations
<input checked="" type="checkbox"/> Access	No resources selected. Edit resources
<input checked="" type="checkbox"/> Submit	No resources selected. Edit resources
<input checked="" type="checkbox"/> Assigned	No resources selected. Edit resources
<input checked="" type="checkbox"/> Edit	No resources selected. Edit resources
<input type="checkbox"/> Admin	No resources selected. Edit resources
<input checked="" type="checkbox"/> Create/delete Tracker	N/A - no resources available for this action.
<input checked="" type="checkbox"/> Close Artifact	No resources selected. Edit resources

↑

Enable Operation
Default = “All” object/resources
are subject to this operation
(in this case trackers)

↑

Restrict Operation
to specific objects
(in this case trackers)

↑

Click link to
set restrictions

Figure 93. Tracker Operations within a Role

Figure 93 shows the Edit Tracker operations for a role. The check mark against each operation indicates the action is enabled, and the “No resources selected” in the Resource Limitations column indicates the operation applies to all trackers without restriction. (This rule applies to all project resources, such as files and tasks, not just trackers.)

To restrict the objects that an operation may manipulate, click the appropriate Edit Resources link. The Edit resources page displays.

Edit resources - Tracker - Edit
 AA_CALIFORNIA : Project Admin Summary : Role Admin : Edit Role 'AA_COMPLIANCE_REVIEWER'

Tracker type		Tracker Status	
Selected values	Available values	Selected values	Available values
	Add Add all Remove Remove all	Add Add all Remove Remove all	Open Closed

Tracker Submitted by		Tracker Priority	
Selected values	Available values	Selected values	Available values
tstoppard	admin		<None> 1 - Highest 2 3 4 5 - Lowest

Submit Clear Cancel

Restrict Edit operation to trackers submitted only by these users

Click to Submit modifications, then click Submit on Edit Role page

Figure 94. Restrict Edit Tracker Operation Capabilities

The display allows you to restrict the capability of the Edit Tracker operation, for this particular role, and thus the activity of any user assigned this role. The restrictions may be applied in the same five categories:

- Restrict operation to trackers of a specific type
- Restrict operation to trackers submitted by specific project members
- Restrict operation to trackers assigned to specific project members
- Restrict operation to trackers with specific status values
- Restrict operation to trackers of specific priorities

Figure 94 shows that the Edit Operation for this role has been restricted to only those tracker artifacts submitted by the project member “tstoppard.”

To set restrictions, select items from the “Available values” column, and click the Add button. Finally, click the Submit button to save the restrictions.

Summary

A role’s operations can be configured at a high level, permitting the operation to apply to “all” resources of the type it can manipulate - trackers, files, tasks etc. The operation’s capability can also be fine tuned, by selecting precisely which category of resources, the operation may manipulate.

A collection of finely tuned roles can be developed in this way, enabling precise control over how users may interact with project resources.

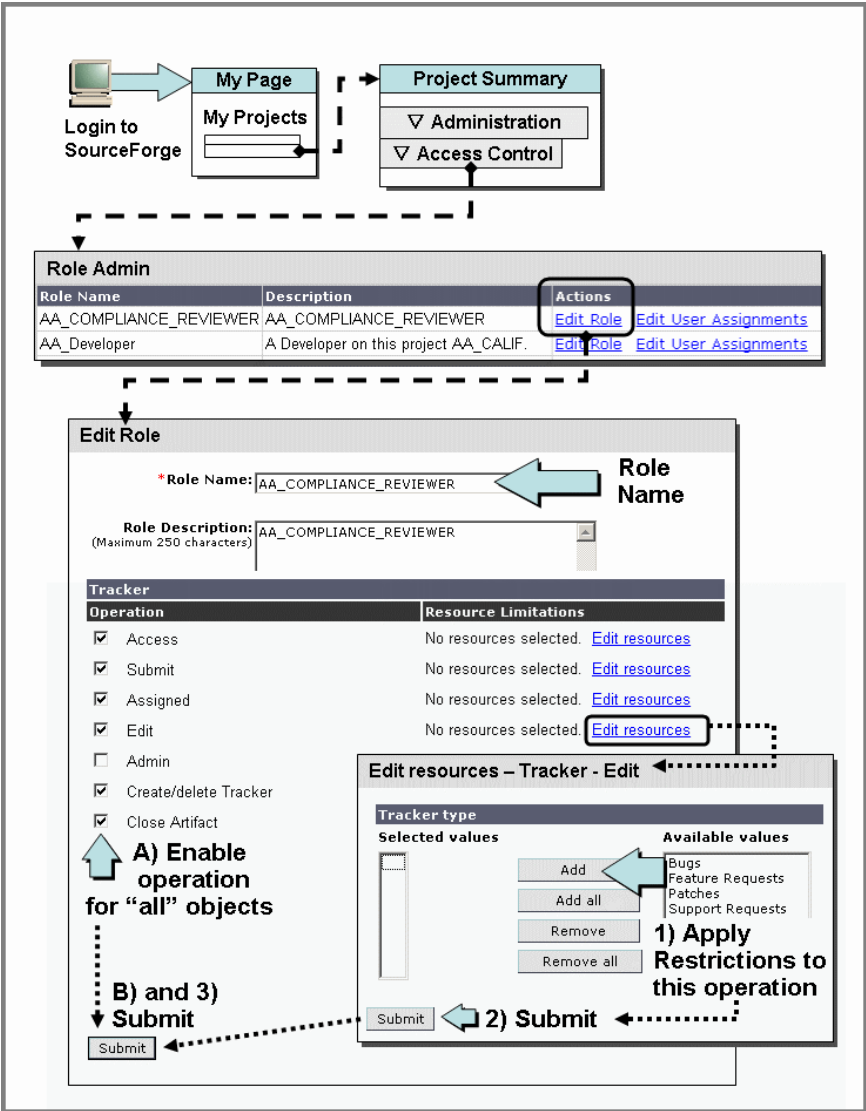


Figure 95. Operation Permissions - Enabling and Restricting

Administering Roles and Users

There are many screens that enable the project administrator to manage roles and users. One screen in particular is useful as it has links to administer roles, users and add new users. This convenient hub screen can be reached as follows:

To reach the role and user administration page:

1. Expand the Admin link in the navigation panel.
2. Expand Access Control

Project Summary Page > Administration > Access Control

Role Admin

AA CALIFORNIA : Project Admin Summary : Role Admin

Role based access control allows project administrators to

[Access Control Frequently Asked Questions \(FAQ\)](#)

[View Assigned Roles for Members](#)

[Modify Role Matrix](#)

Add Users to Your Project

[Add a new User](#)

Add Roles to Your Project

[Copy a role from another project](#)

[Create a new role](#)

Edit Project Roles

Role Name	Description	Actions
AA_COMPLIANCE_REVIEWER	AA_COMPLIANCE_REVIEWER	Edit Role Edit User Assignments
Developer	A Developer on this project	Edit Role Edit User Assignments

User Management

- * **Show Project Members** and their assigned roles
 - Adjust roles for user by clicking their User Id
- * **Add User to the project**

Role Management

- * **Display and modify Matrix of Roles** by users
- * **Copy a Role into the Project**
- * **Create a new Role for this Project**
- * **Alter operations for this Role**
- * **Which users are assigned this Role?**

Figure 96. Role and User Administration page

This enables project administrators to add or removes roles for a particular user.

Role Matrix Page

The role matrix page is accessed from the Role and User Administration page. Click the link labelled: “Modify Role Matrix.” This screen provides an easy to use matrix of users and their roles.

Modify Role Matrix										
AA CALIFORNIA : Project Admin Summary : Role Admin : Modify Role Matrix										
Users	Default	Developer	Employee	Manager	new admin	Project Admin	Tool Access	tracker-tech	tracker0	Visitor
Adam	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chris	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
James	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure 97. Role Matrix page

This page enables the project administrator to easily add or remove roles for a particular user.

Creating Custom Project Roles

A custom project role may be created from scratch or based upon an existing role, using the existing role as a template. The template mechanism is a copy and alter process. To create a custom role from a template, copy the desired role into the project, rename the role and modify the settings as required.

The SourceForge administrator may create roles within the Master Group project. New projects automatically receive all roles from the Master Group project (as well as the Master Group pre-defined role assignment for default user classes. See Chapter 1, Roles, Operations and User Classes.) “Pre-defined roles” are included with every SourceForge installation. The Source Forge Administrator may also choose to create other application wide “SourceForge Custom Roles” which will be available to any project that elects to copy them into their project. Any role created by the project administrator in another project may also be copied in and serve as a template. The role copy capability offers great flexibility by enabling the user to create a collection of roles to be used throughout the system, or throughout a group of projects administered by the same project administrator.

Creating New Roles

You can create roles *only* for projects for which you are an administrator.

To create new roles:

- 1. Expand the Admin menu in the navigation panel.
- 2. Expand Project Admin.
- 3. Expand Access Control.
- 4. Click Create Role.

The Create Role page displays.

Create Role

[AA_CALIFORNIA](#) : [Project Admin Summary](#) : [Role Admin](#) : Create Role

Role based access control allows project administrators to limit internal access based on configurable role assignments. Create a new role below:

[Access Control Frequently Asked Questions \(FAQ\)](#)

***Role Name:**

Role Description:
(Maximum 250 characters)

Set Permissions

Project Admin

Operation	Resource Limitations
<input type="checkbox"/> Project Admin	N/A - no resources available for this action.

Tracker

Operation	Resource Limitations
<input type="checkbox"/> Access	No resources selected. Edit resources
<input type="checkbox"/> Submit	No resources selected. Edit resources
<input type="checkbox"/> Assigned	No resources selected. Edit resources
<input type="checkbox"/> Edit	No resources selected. Edit resources

Figure 98. Create Role page

- 5. On the Create Role page:
 - a. Enter a name for the role in the Role name field.
 - b. Enter a description in the Role Description text box.
 - c. In the Set Permissions section, select the permissions for this role by specifying the areas of SourceForge that a user in this role can access.
 - d. Click Reset to re-enter your specification, if necessary.
 - e. Click Submit to create the role.

Copying Roles

If you wish to use a pre-existing role as a template, you must first copy the role into your project before you can assign the role to a project member.

To copy roles:

- 1. Expand the Admin menu in the navigation panel.
- 2. Expand Project Admin.
- 3. Expand Access Control.
- 4. Click Copy role.

The Copy Roles: Step 1 section displays.

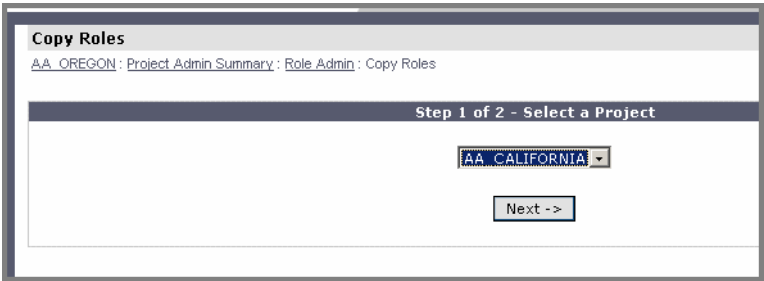


Figure 99. Copy Roles page - step 1

- 5. Select a project from the pull-down menu.
- 6. Click Next.

The Copy Roles: Step 2 section displays.

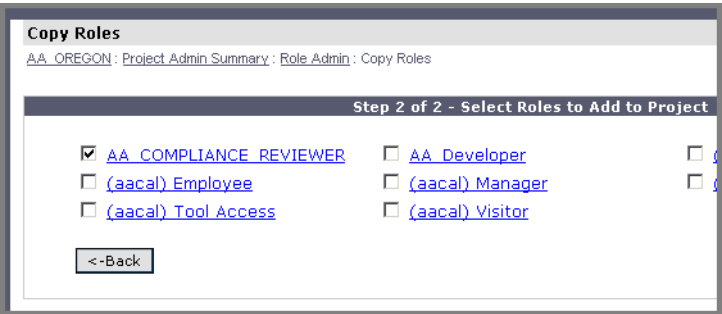


Figure 100. Copy Roles page - step 2

- 7. Select the roles to add to your project.
- 8. Click Finish.

Conflicts in Role Names

If the role names selected for copying conflict with the role names in the target project, they are copied with the name of the source project as their prefix and a numeral as the suffix. For example, if the role name Developer from the source project also exists in the target project, it is copied as *<source project> Developer<numeral>*, where the numeral starts with zero and adds one count for successive copying of the same role. This mechanism avoids role name conflicts. Best practice is to alter name to a meaningful title.

Extended Access Control: Private/Public setting

A number of components in SourceForge can be designated as Public or Private providing an additional level of access control. Public or Private access can be set for the following areas:

- Projects (set by SourceForge Administrators)
- Forums
- Mailing lists
- File Publisher
- Documents

Private forums and private mailing lists allow more precise control than is possible with roles. Private distinctions (for forums and mailing lists) limit access to components to project members only.

For example, if a member of the default user class “registered user” has access to forums but the forum is designated as “Private,” the registered user cannot view the forum if they are not also a project member.

Forum Administration

You can create new forums, delete forum messages, and update forum status.

Adding Discussion Forums

To add a discussion forum:

1. Expand the Admin menu in the navigation panel.
2. Click Forum Admin.

The Forum Administration page displays.

3. Click Add Forum.

The Add Forum page displays.

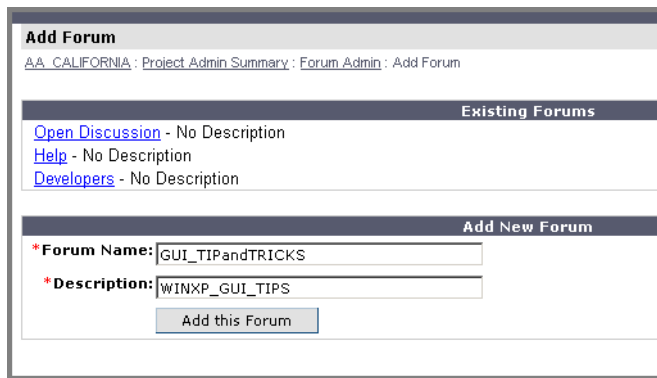


Figure 101. Add Forum page

4. On the Add Forum page:
 - a. Enter the new forum name in the Forum name field.
 - b. Enter a description for the forum in the Description field.
 - c. Select the Public check box if you want to make this forum public.
 - d. Click Add This Forum to submit the new forum information.

Deleting Forum Messages

As a preliminary procedure for deleting a message, you must have the ID of that message.

To obtain a forum message ID:

1. Expand Forums in the navigation panel.
2. Click the desired forum name to view the message thread in that forum.
The <forum name> page displays a list of forum topics with the name of the topic starter, number of replies, and the date and time of the last post for each topic.
3. Click the desired topic to display the message(s).
The forum displays the message page.
4. Click the desired Subject to display the subject page.
The Message section contains the message ID. Make a note of this ID.

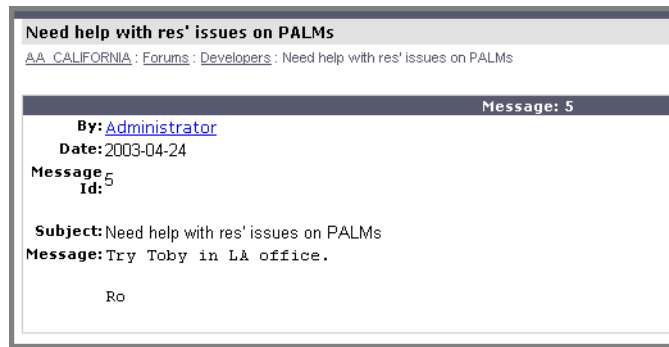


Figure 102. Forum Message ID

To delete a forum message:

1. Expand the Admin menu in the navigation panel.
2. Click Forum Admin.
The Forum Administration page displays.
3. Click Delete Message.
The Delete Message page displays
4. Enter the ID for the message to be deleted in the text field.
5. Click Submit.

Updating Forum Information

To update forum information or change status:

1. Expand the Admin menu in the navigation panel.

2. Click Forum Admin.

The Forum Administration page displays.

3. Click Update Forum Info/Status.

The Update Forum Info/Status page displays.

4. On the Update Forum Info/Status page:

- a. Make changes to the forum details (name, description, and e-mail address for posts), as necessary.
- b. Select Yes or No to indicate whether or not you want to allow anonymous posts for this forum.
- c. Select Yes or No or Deleted to make the forum public, private, or hide from view respectively.
- d. Click Update Info to save your edits.

Mailing Lists Administration

You can create new mailing lists and configure mailing list settings.

Adding Mailing Lists

To add a mailing list:

1. Expand the Admin menu in the navigation panel.
2. Expand Project Admin.
3. Click Mail Admin.

The Mailing List Admin page displays.

Figure 103. Mailing List Admin page

4. On the Mailing List Admin page:
 - a. In the Add New Mailing List section, enter the name for your mailing list in the Mailing List Name field.
 You only need to enter the unique list name portion of the mailing list name. The rest of the name is created automatically based on the project name and the SourceForge mail server information.
 - b. Select Yes to make this list public, or select No to make this list private.
 - c. Select Yes or No to enable or disable e-mail archiving.
 - d. Enter a description for this list in the Description field.
 - e. Click Add This List.

The new mailing list is permanently added to the project and cannot be deleted.

Setting Mailing List Preferences

You can set the status and e-mail archiving properties of a mailing list.

To set mailing list preferences:

- 1.** Expand the Admin menu in the navigation panel.
- 2.** Expand Project Admin.
- 3.** Click Mail Admin.

The Mailing List Admin page displays.

This page displays a description, status, and e-mail archiving property for each mailing list.

- 4.** Modify the description (in the Description field), status (drop-down list: public/private/suspended), and the option to archive email messages (radio button option), as necessary, for each message.
- 5.** Click Update.

You must click the corresponding Update button for each message after any modification.

Managing Mailman

Mailing list support in SourceForge is provided by MailMan, an open source application. Plentiful documentation about MailMan is available on the web (<http://www.list.org>), however some of the more commonly used features and settings are discussed here. You can navigate to the Mailman configuration menu screen by following the route shown in the diagram below.

The settings apply only to the mailing list selected. On the Mailman configuration menu page, the links are organized into two columns:

- Configuration Categories
Controls list characteristics and who may use the mailing list.
- Other Administrative Activities
The most commonly used option is: "Tend to pending administrative requests." This is used by the administrator to either approve or reject posts that require administrator inspection before they are sent to mailing list members.

Configuration Categories

General Options

- "Send monthly password reminders?" Yes/No.
This is typically set to no as members do not wish to be prompted to alter their password each month.
- "Maximum length in Kb of message body"
This controls the size of the message which can be posted. Set to zero for no size limit. Administrators may wish to increase this value from the default.
- "Send mail to poster when their posting is held of approval" Yes/No.
Example: A messages that exceeds the maximum size message body size would require approval. Setting this to yes may solicit enquiries from the senders, and if the message list is open to non-members (see 'Who can post Messages' later) the number of messages awaiting approvals could grow large and notification traffic would increase accordingly.

Membership Management

- A common need is the ability to create a membership list of email addresses in one operation. In the Mass Subscriber section you can enter email addresses, one per line, in the text area labelled: "Enter one address per line." Click Submit Your Changes, to add all the email addresses to the mailing list.

Membership List

All the email addresses added this way are ‘subscribers’ to the mailing list. They will receive all postings, either one email per post, or in one large email each day known as a digest. Being a subscriber does not automatically grant the member posting privileges. Who may post messages is controlled by settings in the Privacy Options section.

Privacy Options

This section enables the administrator to control who may send email (posts) to the subscribers on the members list. It is desirable to control who can send messages in order to prevent unwanted messages or spam. Useful settings are:

- “Must posts be approved by an administrator?” Yes/No.
This enables very strict control over which posted messages are sent to subscribers. If enabled every post must be approved by a list administrator before it is sent to subscribers. This should be set to yes if the mailing list is an administrator moderated list.
- “Restrict posting privilege to list members?: Yes/No.
The combination of this setting and the presence or absence of email addresses in the text area below (“Extra List”) controls who may post messages.

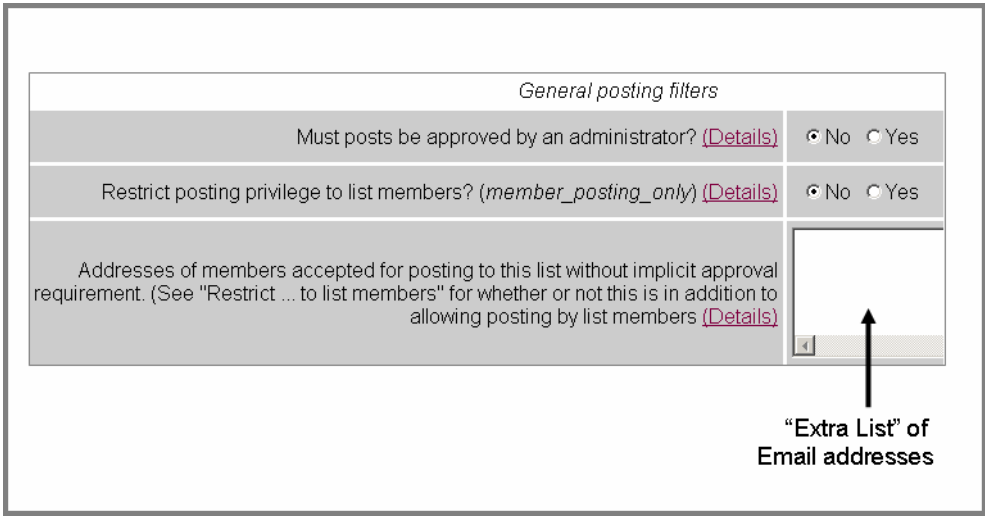


Figure 104. Controlling who can post messages

For explanation purposes, the text area of email addresses is called the “Extra List” because it provides a list of extra email addresses in addition to the member list.

The combination offers four possible ways to control who may post messages. The settings are shown in the diagram below. The four options offer varying degrees of control over who may post to the mailing list.

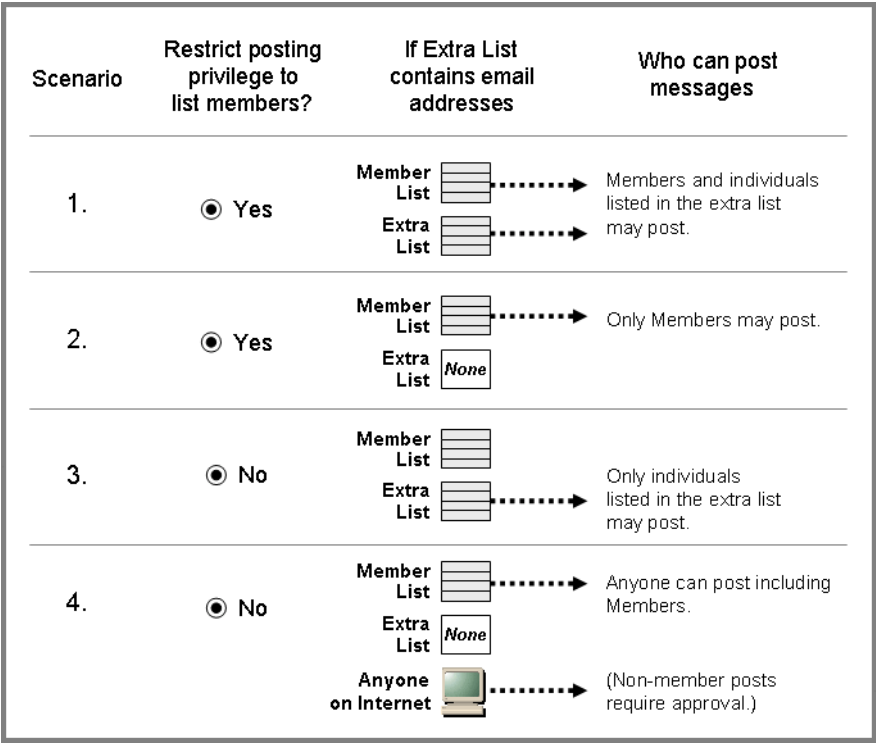


Figure 105. Settings to control who may post messages

- Scenario 1:** All members plus some extra non-subscribers may post.
- Scenario 2:** A tightly controlled environment where only members may post and no one else.
- Scenario 3:** This is the most rigidly controlled environment. There are many subscribers in the member list, however only a select few may post.
- Scenario 4:** This is the least restrictive or “public” configuration. All members may post plus any outsider who has access to the Internet.

Spam Prevention settings

- “Must posts have list named in destination?...” Yes/No.

This is one of a number of spam filters. If set to yes, the system will block any email that arrives where the mailing list address is in the “bcc” field. “bcc” stands for ‘blind carbon-copy’ and is commonly used by spam senders. Prohibiting such messages can reduce spam. Posters must use the “to” or “cc” fields for the mailing list email address.

- “Ceiling on acceptable number of recipients”

When a message is sent to the mailing list email address, the ceiling number limits the numbers of extra recipients to which the message may be sent. A large number of extra recipients is a hint that the message is likely a spam message. Posts that violate this limit will be stored for consideration by the administrator.

Regular-member (non-digest) Options

Subscribers may wish to have postings e-mailed to them as they are posted (every post) or once a day in one large digest email, containing all the posts for that day. Whether this choice is available to subscribers is at the discretion of the administrator.

- “Can subscribers choose to receive email immediately, rather than in batched digest?”
Yes/No.

Set accordingly if you wish this option to be available to subscribers.

Bounce Options

When messages are sent to a subscriber’s email address, the message, for various reasons may be rejected, or “bounced” back to the sender. The reason might be an invalid email address or the message is undeliverable due to a full inbox. You can control what to do with bounced messages, and how many bounces must occur before remedial action is taken.

- “Action when critical or excessive bounces are detected”
 - Do nothing: Simply keep sending messages to this email address. Do not even inform the list administrator.
 - Disable and notify me: Cease sending messages to the email address (enable the “nomail” flag for that subscriber) and send a notification email to the list administrator.
 - Disable and Don’t notify me: Cease sending messages and do not inform the list administrator.
 - Remove and notify me: Remove the email address from the member list, and send a notification email to the list administrator.

Archival Options

Messages posted can be archived for later retrieval. The archive may be designated available to only users in the member list or made available to any user.

- Archive Message? Yes/No.
Set accordingly.
- Is archive file source for public or private archival?
Set public or private accordingly.
Caution: A public archive enables casual visitors to view the postings, which could enable someone to harvest the email addresses for a spam list.

Tending to pending administrative requests

Stored messages that require inspection by the list administrator are accessible through this link. The most common reason is to handle messages that require approval.

The administrator selects a message then executes the desired action:

- Defer the posting, leaving it for a later time.
- Approve the posting and forward it to list members.
- Reject the posting. The original poster will be sent a notification of the rejection along with the explanation that appears in the message box on this screen. You may customize the message as you see fit or leave it empty.
- Discard the message with no notification sent to the poster. This is particularly useful for spam.

News Administration

You can post news items for your project and approve news items submitted by members to be displayed for public view. Note: news items will be posted on the project summary page whenever the page is refreshed. See “Project Summary Page Refresh Rate” on page 305.

Posting News Items

To post a news item:

- 1.** Click Submit under News in the navigation panel.
The Submit page displays.
- 2.** On the Submit page:
 - a. Enter a subject for the news item in the Subject field.
 - b. Enter the details of the news item in the Details text box.
 - c. Click Submit.

Administering Project News

You can edit or delete the news items posted to a project. If you edit a news item that is posted to the SourceForge home page, the item is placed in the pending news items area and must be approved again by a project administrator for publication on the home page.

To edit news details:

1. Expand the Admin link in the navigation panel.
2. Expand Project Admin.
3. Click News Admin.

The News Administration page displays.

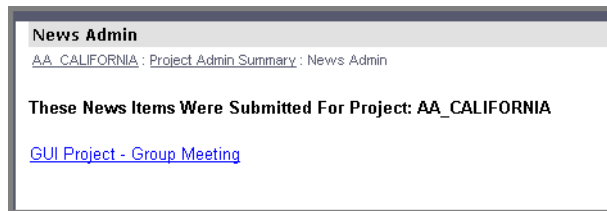


Figure 106. News Administration page

4. Click the desired news item to edit.

The Approve NewsByte page displays.

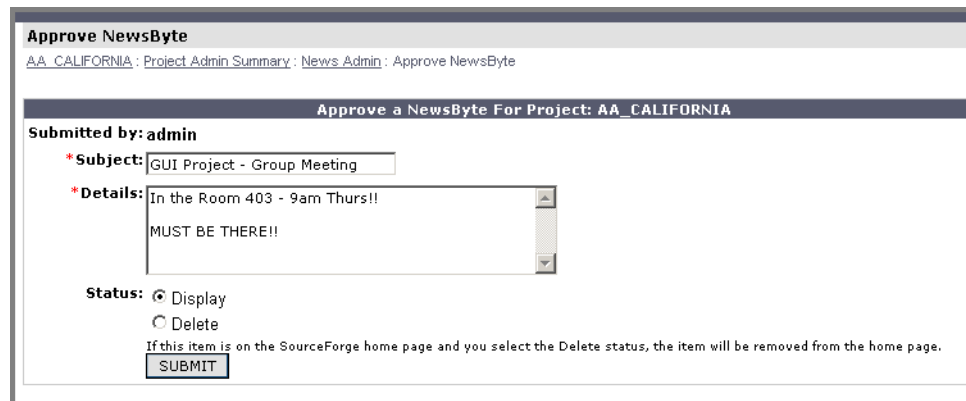


Figure 107. Approve NewsByte page

5. Edit the Subject and Details fields, as necessary.
6. Select a status for the news item.
 “Display” allows the news item to be displayed on the Project Summary page. “Delete” removes the news item.
7. Click Submit.

Tracker Administration

As a project administrator, you may fulfill all the actives of a regular project member as well as create new trackers and customize existing trackers.

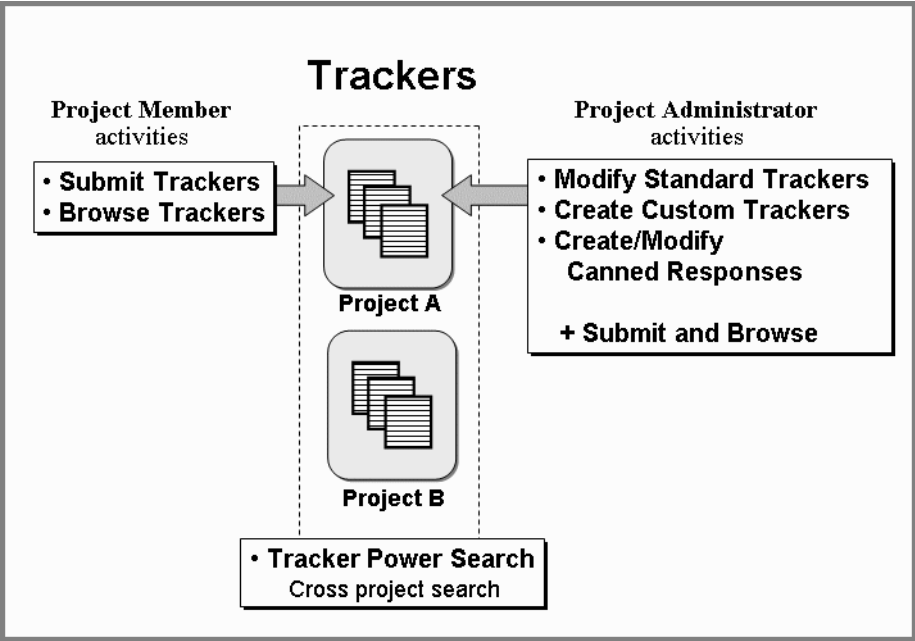


Figure 108. Tracker Activities

Creating New Trackers

In addition to the standard trackers provided with SourceForge, additional custom trackers can be created to track data related to a project.

To create new trackers:

- 1. Expand the Admin menu in the navigation panel.
- 2. Click Tracker Admin.

The Tracker Admin page displays.

Tracker Admin

SUPPLY_CHAIN_PROJECT : Trackers : Tracker Admin

Choose a tracker type and you can set up preferences, categories, projects, and users.

Name	Description
Bugs	Bug Tracking System
Feature Requests	Feature Request Tracking System
Patches	Patch Tracking System
Support Requests	Tech Support Tracking System

Create a new tracker

Track any kind of data. Each tracker can have separate user, group, category, and permission lists. You can move items to other trackers as needed.

Name:

(examples: meeting minutes, test results, RFP Docs)

Description:

Send email on new submission to address:

☒ Send email on all changes

Days till considered overdue:
(0 to disable)

30

Days to automatically set artifacts from Pending to Closed:

14

Task Manager association:

Figure 109. Tracker Admin page

3. On the Tracker Admin page:

- a. Scroll down to the “Create a new tracker” section.
- b. Enter a name and description in the corresponding text fields.
- c. Enter number of days the artifact is considered overdue. After this number of days, the date field in the tracker list becomes bold and an asterisk appears adjacent to the summary.
- d. Enter the number of days artifacts for this tracker should remain in an open or unresolved state before they are marked overdue in the list of artifacts.

This information is important for bug and support type tracker artifacts to make sure that they have been resolved in a timely manner.

- e. Optionally, you can do the following:
 - Enter an email address for a user to receive an email notification of a new tracker artifact. You are limited to one email address.
 - Check “Send email on all changes” to send an email notification to the user specified in the preceding step when any change is made to any tracker artifact.
 - Enter any text message you wish to have appear on the Submit page. This message would include any instructions or guidelines for the user who is submitting the tracker artifact.
 - Enter any text message you wish to have appear on the page listing all the artifacts in this tracker.
- f. Apply an association between the artifact and other SourceForge tool components. Whenever a tracker artifact of this type is submitted it can, or must be, associated with an artifact managed by another SourceForge tool. This ensures that trackers are not randomly or carelessly created, but relate to a known piece of work in the project. For example, a task is created, then a number of trackers are created that represent the work that must be done to accomplish the task. Each tracker, as it is submitted, is “associated” with the task. The tools that may be associated with a tracker are:
 - Other tracker artifact ids.
 - Task Manager. (Associate with a task)
 - Document Manager (Associate with a file)
 - File Publisher (Associate with a file in the release package)
- g. Click Submit.

The Add/Update Tracker User Access Permissions page displays.
- h. Follow the steps for setting up tracker user permissions, described next.

Setting Tracker Access Permissions

At this point you have the ability to add tracker operation permissions to particular roles. If a role already has tracker operations enabled for “all” trackers, then this page can be skipped. The new tracker will be accessible to users with roles whose tracker operations are enabled for “all” trackers. However, if you wish to restrict access and operations for this new tracker, within particular roles, you can enable the operations for specific roles. Select the roles in the multi-select boxes for the operation you wish to enable. For example: To enable the submit operation for the new tracker in the Employee role, select Employee in the “Tracker Submit” box, then click the submit button. See also “Operation Permissions” on page 171.

Define Access for Resource

SUPPLY_CHAIN_PROJECT : Project Admin : Define Access for Resource

Add role access to Tracker type SUPP_CHAIN_MEETGS.

Tracker Access

Developer
Employee
Manager
Project Admin

Tracker Assigned

Developer
Employee
Manager
Project Admin

Figure 110. Add/Update Tracker User Permissions page

Follow the steps in “Creating New Trackers” on page 195.

On the Add/Update Tracker User Permissions page:

- In each text box, specify one or more roles to obtain the associated access permission.
- Click Save.

Modifying Tracker Properties

You may modify the properties of an existing tracker.

To modify properties of an existing tracker:

1. Expand the Admin menu in the navigation panel.
2. Click Tracker Admin.

The Tracker Admin page displays.

3. Click the tracker you wish to modify.

The Admin page for that tracker displays. The following four options are available:

- [Fields Administration](#)
- [Add/Update Canned responses](#).
- [Update the basic tracker preferences](#).
- [Delete the entire tracker](#).

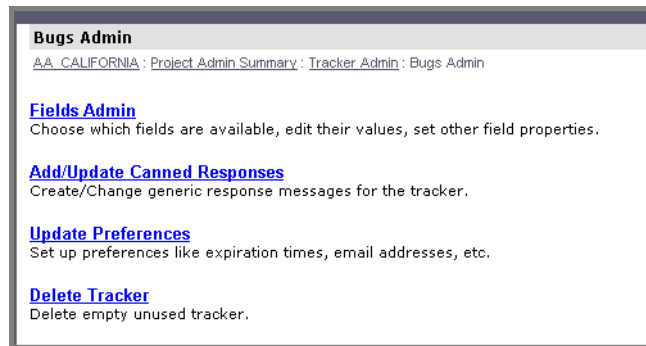


Figure 111. Tracker Administration options

Using these administrative capabilities are discussed later in this section.

Configuring Tracker Fields

The standard trackers included in the SourceForge installation and the custom trackers you create can be configured at any time to meet your individual requirements and those of the projects you administer. You can modify existing tracker fields or add new fields. You can add your own canned responses to tracker artifacts. You can also change tracker preferences such as expiration time and e-mail notification addresses.

Also, you can add a range of custom fields to the tracker.

Each tracker has its own set of pre-defined and enabled fields that you can *not* modify. You can modify other fields and also enable new fields.

To modify tracker fields:

- 1.** Expand the Admin link in the navigation panel.
- 2.** Click Tracker Admin.

The Tracker Admin page displays. The names of trackers are listed in the Name column.

- 3.** Click the name of the tracker to modify.

The Admin page displays.

- 4.** Click Fields Admin.

The tracker's Field Administration page displays.

The Field Administration page has a table listing all the fields available for the tracker. Some of the fields are already enabled for this tracker and some fields are required, as indicated by a check mark in the grey check box. White check boxes indicate the modifiable fields. You can enable any of these modifiable fields or mark them as required, as described in the following steps. You can also add new properties to existing and newly enabled fields. Added properties for a field are displayed near Value List in column four (Type).

Field Administration

SUPPLY_CHAIN_B : Trackers : QA : Admin : Field Administration

Enable or disable optional fields for the tracker. Set required fields. Note: only already enabled fields can be set to required.

Standard Fields

Field	Enabled	Required	Data Type	Value
Project	<input checked="" type="checkbox"/>	n/a	String	
Artifact ID	<input checked="" type="checkbox"/>	n/a	Integer	
Submit Date	<input checked="" type="checkbox"/>	n/a	Timestamp	
Last Modified	<input checked="" type="checkbox"/>	n/a	Timestamp	
Close Date	<input checked="" type="checkbox"/>	n/a	Timestamp	
Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	String	
Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Value List	Configure
Status Class	<input checked="" type="checkbox"/>	n/a	Value List	
Priority	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Range 1-5	
Submitted By	<input checked="" type="checkbox"/>	n/a	User reference	
Assigned To	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Tracker technician	
Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Value List	Configure
Group	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Value List	Configure
Resolution	<input type="checkbox"/>	<input type="checkbox"/>	Value List	Configure

Figure 112. Field Administration page

- 5. To enable a field, select the corresponding check box
- 6. To make a field required, select the corresponding check box.

- 7. To add a new property to a field, click the corresponding Value List button (rendered in blue).

The Edit Field page displays.

Create new values for the 'Category' field below. To add more values, click Update to record your current additions and be presented with additional blank fields.

New value (max 64 chars)	Auto-assign to
Live/Production	Chris
OnSite upgrade	Chris
Patch current	Howa

Update

Reset Changes

Figure 113. Edit Field page

- 8. On the Edit Field page:
 - a. Enter the new property value(s) in the text fields in the New Value panel.
 - b. To auto-assign tracker artifacts to project members, specify a name in the Auto-assign to drop-down list for each value.

This drop-down list is displayed only if the field being edited is Category. The tracker will automatically assign the artifacts to the designated person.
 - c. Click Reset Changes to clear and re-enter your information.
 - d. Click Update to save the entries.

You'll return to the Field Administration main page.
 - e. On the Field Administration main page:
 - f. Click Reset Changes to clear and re-enter your information, or, click Update to save the edits.

Editing Tracker Fields

To edit a tracker field:

- 1. Expand the Admin link in the navigation panel.
- 2. Click Tracker Admin.

The Tracker Administration page displays. The names of trackers are listed under Name.

- 3. Click the name of the tracker to modify.

The Admin page displays.

- 4. Click Fields Admin.

The tracker’s Field Administration page displays.

- 5. Click the “configure” link of the desired field. The Configure Field page displays.

The example below is a Multiple-Select custom field called: CUSTOM_MULTI.

Configure Field: CUSTOM_MULTI

[AA CALIFORNIA](#) : [Project Admin Summary](#) : [Tracker Admin](#) : [BUGS 2 Admin](#) : [Field Administration](#) : [Configure Field: CUSTOM_MULTI](#)

(Note: as custom fields are by definition tracker-local, they, unlike predefined tracker fields, do not inherit any values from PROTO TRACKER.)

Edit local values for the 'CUSTOM_MULTI' field below. Delete or rename values with caution. Deleting a value causes all items with that value to be changed to 'None'. Renaming a value causes all items with the current value to be changed to the new value.

Delete	Value(max 64 chars)
<input type="checkbox"/>	V1
<input type="checkbox"/>	V2
<input type="checkbox"/>	V3

Update

Reset Changes

Create new values for the 'CUSTOM_MULTI' field below. To add more values, click Update to record your current additions and be presented with additional blank fields.

New value(max 64 chars)

Update

Reset Changes

Figure 114. Edit Field page

On this page you may alter current values, delete values or add new values to the list. Click the update button to apply the changes.

Note: 'None' cannot be a valid option when a custom field is marked 'Required'

Creating Custom Tracker Fields

You may add custom fields to a tracker.

- You may have up ten custom fields per tracker.
- Custom fields cannot be used as filter fields in a Tracker PowerSearch.

To add or modify custom tracker fields:

1. Expand the Admin link in the navigation panel.
2. Click Tracker Admin.
3. Select Fields Admin.

The bottom part of the screen is used to define custom fields.

Custom Fields

(number of additional custom fields is limited to 10)

	Field	Enabled	Required	Data Type	Value
<input type="checkbox"/>	QA_Tester_ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	String	Configure

Delete Selected Custom Fields

Field Name: Widget Type:

Text Entry

Create Custom Field

(Custom field's widget type once created, cannot be edited later)

Update

Reset Changes

Figure 115. Add or modify a custom field in a tracker

4. Enter the required information:
 - Field Name
 - The widget type represents the field type, which can be:
 - DropDown list
 - Text Entry (a simple text field)
 - Text Area
 - Multi Select List

You may edit particular characteristics depending upon the widget chosen.

- Text Entry - You may edit the 'Width' and 'Maximum Length'.
 - Text Area - You may edit the 'Columns', 'Rows', and 'Wrap Type'.
 - Drop Down List - You may add new values, edit or delete values.
 - Multiple Select List - You may add new values, edit or delete values. You also may edit the 'Box Height'
5. When you have completed entering the fields, click Update to save the custom field.

Updating Tracker Field Properties

To update Tracker properties:

1. Expand the Admin link in the navigation panel.
2. Click Tracker Admin.

The Tracker Admin page displays. The names of trackers are listed in the Name column.

3. Click the name of the tracker to modify.

The Admin page displays.

4. Click Update Preferences.

The Update Preferences page displays.

Update Preferences
[AA - CALIFORNIA](#) : [Project Admin Summary](#) : [Tracker Admin](#) : [GUI_USAGE_ISSUE Admin](#) : Update Preferences

*Name:

*Description:

Send email on new submission to address: ☐ Send email on all changes

*Days till considered overdue: (0 to disable)

*Days to automatically set artifacts from Pending to Closed:

Task Manager association: ☒ Enable ☐ Required

Document Manager association: ☒ Enable ☐ Required

File Publisher association: ☒ Enable ☐ Required

Free form text for the "Submit" page:

Free form text for the "Browse" page:

Figure 116. Update Preferences page

5. On the Update Preferences page:
 - a. Edit the name in the Name field.
 - b. Edit the description in the Description field.
 - c. Edit any other information on the page, as necessary.
 - d. Click Submit.

Any update to the tracker name is reflected in the Trackers section of the navigation panel. Other updates are reflected on appropriate tracker pages.

Deleting Trackers

A tracker may not be deleted while any artifacts exist in the tracker. To empty a tracker of all artifacts, select each artifact and assign it to a different tracker. You can also use the mass-move function to move multiple artifacts simultaneously.

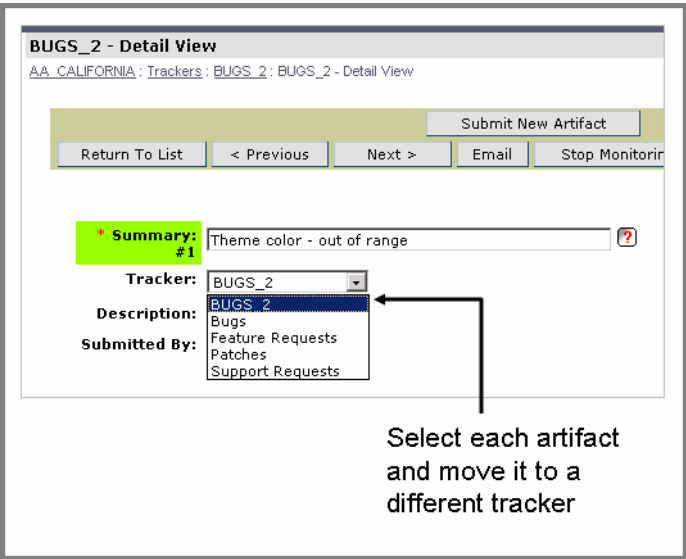


Figure 117. Move Artifact

Once all artifacts have been moved from the tracker, the tracker can be deleted. From the tracker admin page, click Delete Tracker, select the desired tracker, and confirm delete.

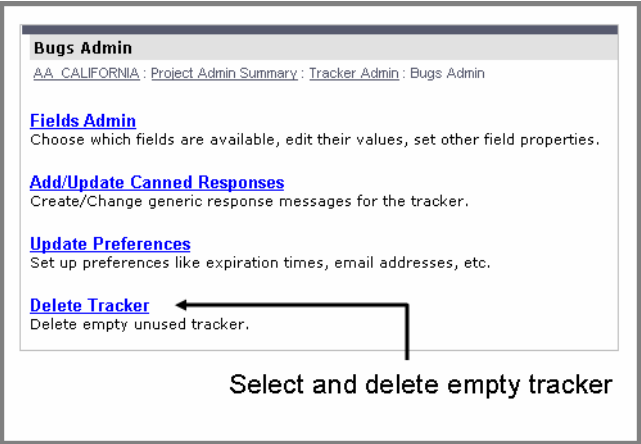


Figure 118. Delete an Empty Tracker

Creating Canned Responses

Canned responses are customized generic messages that are displayed as responses to artifact requests. You can create new canned responses to suit your specific needs.

To create a generic response:

- 1. Expand the Admin link in the navigation panel.
- 2. Click Tracker Admin.

The Tracker Admin page displays. The names of trackers are listed in the Name column.

- 3. Click the name of the desired tracker.
The Admin page displays.

- 4. Click Add/Update Canned Responses.

The Add/Update Canned Responses page displays.

Add/Update Canned Responses

AA. CALIFORNIA : Project Admin Summary : Tracker Admin : GUI_USAGE_ISSUE Admin : Add/Update Canned Responses

Existing Responses:

ID	Title
----	-------

Add Canned Responses To: GUI_USAGE_ISSUE

Creating useful generic messages can save you time when handling common artifact requests.

*Title:

*Message Body:

Figure 119. Add/Update Canned Responses page

- 5. Enter a brief description for your generic response in the Title field.
- 6. Enter your response in the Message Body text box.
- 7. Click Submit.

The response is given an ID and is listed in the Existing Responses section.

This response is available for your use when you respond to an artifact in this tracker from the tracker’s artifact’s detail view page.

Updating Canned Responses

To update a canned response:

1. Expand the Admin link in the navigation panel.

2. Click Tracker Admin.

The Tracker Admin page displays. The names of trackers are listed in the Name section.

3. Click the name of the tracker to modify.

The Admin page displays.

4. Click Add/Update Canned Responses.

The Add/Update Canned Responses page displays.

5. Click the title of the desired response listed in the Existing Responses section.

The Modify Canned Responses In: *<tracker name>* section displays. Modify Canned Responses section

6. Make the necessary changes in the title and/or the message body.

7. Click Submit.

Performing Mass-Updates on Tracker Artifacts

Tracker artifacts can be “mass updated,” that is, a selected field can be modified in multiple artifacts simultaneously. For example, you can set any or all of the browsed tracker artifacts to a priority of “1,” or simultaneously assign any or all of the browsed tracker artifacts to a single project member. You can also mass-move artifacts between trackers, facilitating tracker deletion.

To perform mass updates on tracker artifacts:

- 1. Select the desired tracker from the Trackers menu in the navigation panel.
The tracker displays its artifacts.
- 2. Use the Basic Filter or Advanced Filter, as needed, to display a sub-set of artifacts.
The artifacts are listed in the Results section.
- 3. Select the artifacts to update by selecting the corresponding check boxes.
- 4. Scroll down to the Update Selected section.
- 5. Specify the values for Assigned To, Status, Category, Group, and Priority, as needed.

Update Selected:

Update Selected

Assigned To

Status

Category

Group

<No change>

<No change>

<No change>

<No change>

Priority

<No change>

Update

Figure 120. Tracker fields: mass update

- 6. Click Update.

Tracker Status Field

Status and Status Class for Tracker Reporting and Browsing

Tracker Reporting can be used to report on a collection of tracker artifacts. It is possible to select trackers according to their status class which indicates whether artifacts are either open or closed. The value of a tracker artifact's "status" field, which can be one of many different values, will determine the value of the "status class" field, which can be only either open or closed. It is important therefore to know which default status settings are recognized as open or closed for reporting and browsing purposes.

By default, the following status values are recognized as "Open": Open, Fixed, Complete and Verified.

By default, the following status values are recognized as "Closed": Closed, Deleted and Duplicate.

Custom Status fields

A standard or custom tracker must contain a status field. It is possible to create custom status settings. Any custom status settings must indicate whether it represents Open or Close for reporting and browsing purposes.

To configure the open/close meaning of a status values:

1. Expand the Admin link in the navigation panel.
2. Click Tracker Admin.

The Tracker Admin page displays. The names of trackers are listed in the Name column.

3. Click the name of the desired tracker.

The Admin page displays.

4. Click Field Admin.

The list of fields in the tracker appears.

5. Select the "Configure" link of the Status field.

The Configure Field screen for the Status field is displayed.

- 6. Enter a string value in the New value field, then select either the Open or Close radio button in the Status Class column.

The status field on a tracker can now be set to the custom status just created, and tracker reporting will know whether it represents open or closed.

Configure Field: Status

[AA CALIFORNIA](#) : [Project Admin Summary](#) : [Tracker Admin](#) : [GUI USAGE](#) : [ISSUE Admin](#) : [Field Administration](#) : [Configure Field: Status](#)

Each tracker in the system inherits values defined in the PROTO TRACKER of Master Group. This allows administrators to enforce consistent workflow patterns across all projects in the enterprise. These patterns can be extended to satisfy specific needs using the local (per-tracker) values below. Note that inheritance is dynamic: adding or removing value in PROTO TRACKER propagates immediately across all projects. Current inherited values are presented below:

Value	Status Class
Closed	Closed
Deleted	Closed
Fixed	Open
Open	Open
Pending	Open

Edit local values for the 'Status' field below. Delete or rename values with caution. Deleting a value causes all items with that value to be changed to 'None'. Renaming a value causes all items with the current value to be changed to the new value.

Delete	Value (max 64 chars)	Status Class
	No local values defined for this field.	

Update

Reset Changes

Create new values for the 'Status' field below. To add more values, click Update to record your current additions and be presented with additional blank fields.

New value (max 64 chars)	Status Class
<input type="text"/>	<input checked="" type="radio"/> Open <input type="radio"/> Closed
<input type="text"/>	<input checked="" type="radio"/> Open <input type="radio"/> Closed
<input type="text"/>	<input checked="" type="radio"/> Open <input type="radio"/> Closed
<input type="text"/>	<input checked="" type="radio"/> Open <input type="radio"/> Closed
<input type="text"/>	<input checked="" type="radio"/> Open <input type="radio"/> Closed

Update

Reset Changes

Figure 121. Configure a custom status field for a tracker

Document Manager Administration

This section covers:

- Creating and managing document categories.
- Creating an access control list (ACL) for a document.

Browsing Documents within Document Categories

All documents are stored in a category. Categories are functionally similar to file directories. New categories can be created, deleted, or moved to another location in the hierarchy of categories. You can browse categories and view the list of documents in a category.

To view documents in a category:

1. Expand the Admin menu in the navigation panel.
2. Click Document Manager.
The Document Manager page displays.
3. Select the desired category from the Category list.
4. Click Filter.

The list of files in the specified category is displayed in the lower section of the screen.

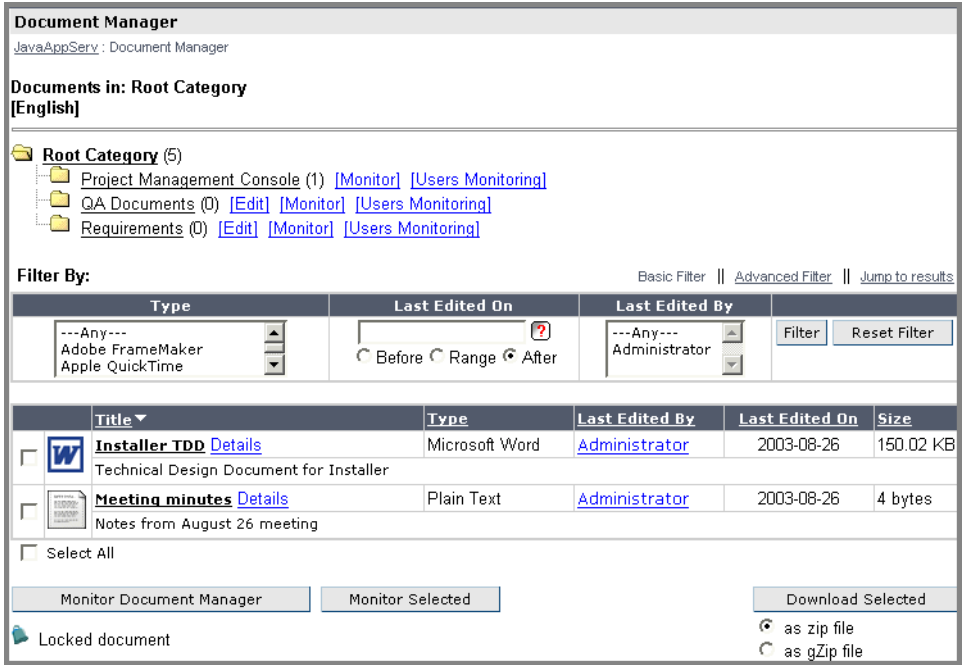


Figure 122. Documents in categories

5. To view or launch the document, click its title.
- To view document details, edit, or manage the document, click Details.
- The Document Details page of the selected document displays.



Figure 123. Document Details page

The name of the document appears at the top of the screen.

Various activities may be carried out upon the document by selecting from the buttons or links on the page.

Managing Document Categories

Categories are functionally similar to file directories. Categories hold documents. They are structured in a hierarchical fashion; the root category is called “Root Category.”

New categories may be created by the user and added beneath an existing category, or the Root Category in much the same way one creates directories in a file system.

To display the Document Manager Administration screen:

- 1. Expand the Admin menu in the navigation panel.
- 2. Click Doc Manager Admin.

The Document Manager Administration page displays.

The screenshot shows the 'Doc Manager Admin' interface. At the top, there is a breadcrumb trail: 'AA N.California Group : Project Admin Summary : Doc Manager Admin'. Below this, there are four distinct sections for managing categories:

- Add Category:** This section includes a text input field for '* Category Name:', a dropdown menu for 'Parent Category:' (currently set to 'Root Category'), and an 'Add Category' button.
- Move Category:** This section includes a dropdown menu for 'Category Name:' (currently set to 'Application Content Manager'), a dropdown menu for 'New Parent Category:' (currently set to 'Root Category'), and a 'Move Category' button.
- Edit Category:** This section includes a dropdown menu for 'Category Name:' (currently set to 'Application Content Manager'), a text input field for 'New Category Name:', and an 'Edit Category' button.
- Delete Category:** This section includes a dropdown menu for 'Category Name:' (currently set to 'Application Content Manager') and a 'Delete Category' button.

Figure 124. Document Manager - Category Management

To add a document category:

- 1. Enter a name in the Category Name field located above the Add Category button.
- 2. In the Parent Category drop-down list, specify a parent category for the new category being added.

To move a document category:

1. Select a category in the Category Name drop-down list located above the Move Category button.

This is the category you are moving.

2. Select a category in the New Parent Category drop-down list.

This is the parent category for the category you're moving.

3. Click Move Category.

To edit (change the name) of a category:

1. Expand the Admin menu in the navigation panel.

2. Click Doc Manager Admin.

The Document Manager Administration page displays.

3. Select a category in the Category Name drop-down list located above the Edit Category button.

This is the category name you are about to edit.

4. Enter the new name for the category in the New Category Name field.

5. Click Edit Category.

To copy a document from one category to another:

1. Expand the Admin menu in the navigation panel.

2. Click Doc Manager Admin.

The Document Manager Administration page displays.

3. Select a document in the Document to Copy drop-down list located above the Copy Document button.

This is the document you are about to copy.

4. Specify a category in the Copy to Category drop-down list.

This is the category into which you are about to copy the document.

5. Click Copy Document.

To delete a document category:

- 1.** Expand the Admin menu in the navigation panel.
- 2.** Click Doc Manager Admin.
The Document Manager Administration page displays.
- 3.** Enter the name for the category to be deleted in the New Category Name field above the Delete Category button
- 4.** Click Delete Category.

To hide a document category:

- 1.** Expand the Project Tools menu in the navigation panel.
- 2.** Click Document Manager. The Document Manager page displays.
- 3.** Choose the category you want to hide and click Edit.
- 4.** Set the status to Hidden using the Status drop-down menu.
- 5.** Click Edit Category.

The category is now hidden. All documents placed in a hidden category are viewable only by Document Manager administrators.

Pre-Defined Categories for SourceForge-generated Documents

A special group of pre-defined categories exists to hold documents generated by tools within SourceForge. For example, tracker attachments documents are created by the tracker tool and are stored in the Tracker Attachments category. These special categories may not be deleted, moved or edited.

Table 5. Pre-Defined categories for internally generated documents

Tool	Category Name
File Publisher	File Publisher Notes & Logs
Mailing list attachments	Mailing List Attachments
Project Management Consoles	Project Management Consoles
	- Imported project plans

Providing Access to Documents

You can protect documents by providing restricted access to project members using the Access Control List.

To add users to the access control list:

1. Click Document Manager in the navigation panel.
The Root Category with its list of sub-categories and individual documents displays.
2. Locate the desired document in these categories.
3. Click the title of the document.
The Document Details page displays.
4. Click Access List.

The Document Manager: Access Control List page displays..

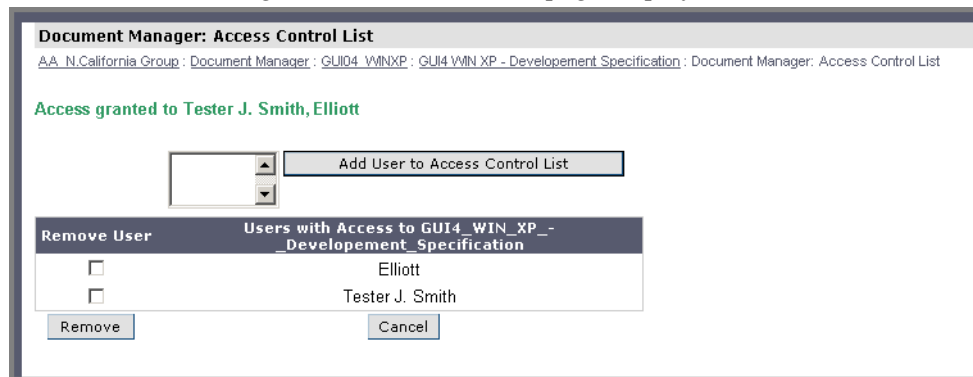


Figure 125. Access Control List

5. Select the name of the user to whom you want to give access to the document.
6. Click Add User to Access Control List.

The user name is added to the access control list

To remove users from the access control list:

1. Follow steps 1-4 described for [To add users to the access control list:](#)
A list of users with access to the current document is displayed..
2. Click Remove next to the name of the user to be removed from the Access Control List.

Locked Documents

An extra layer of access security is provided through the capability to lock a document. A comment may also be attached explaining why the document is locked. If a file has been locked, only project administrators and document editors can unlock it. If there are multiple copies of a document (the same document can exist in any number of categories), all copies of the document are locked. All the translations of the locked document are also locked.

When a file is locked a lock icon appears adjacent to the title.

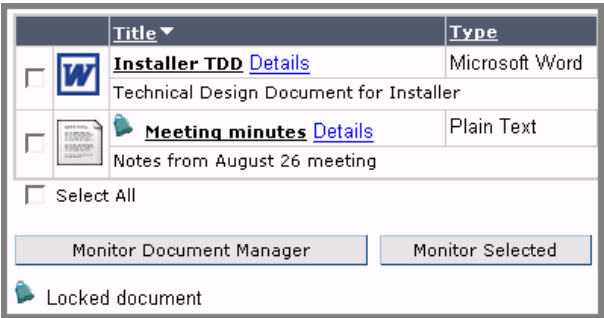


Figure 126. Locked document icon

To unlock a file, users with the appropriate RBAC permissions can either manually unlock the file, or provide a new version of the file and indicate that the new version should be unlocked. Users can also update a document and keep it locked.

To unlock a document:

1. Click the document title
2. Click Edit
3. Uncheck the “Lock This Document” checkbox
4. Click Update Document.

The screenshot shows the 'Edit Document' form for 'GUI ANSI 2 WHITE PAPER'. The form includes fields for Document Title, Description, Administrative Title, Access Type (Member Access), Status (Active), File Type (Plain Text), Version Comment, Make Active (checked), Lock This Document (checked), and Lock Comments. An arrow points to the 'Lock This Document' checkbox with the text 'Lock and Lock comment'.

Figure 127. Unlock a document

Actions allowed on a locked document

- View/Download, Mail, View differences, View history
- Copy a document to a category- the new document becomes locked
- Print (available only for non-binary document types - CSV, DocBook SGML, DocBook XML, HTML, Man Page, Referenced URL, Plain text, and Post Script)
- Add user to the Access Control List for the locked document
- View/Edit the Access Control List

Actions not allowed on a locked document

- Edit, Lock, Change Status
- Move document to a different category

Setting Reminder Time for Locked Documents

If a user has a file locked for a certain amount of time, a reminder email is sent informing the user that the file is still locked. The frequency of the reminder emails is set at the Document Manager Administration level. A copy of the email is also sent to the Project Administrator. The reminder email is re-sent every n hours, where n is the timing set by the Document Manager. Reminder emails are sent indefinitely until the document is unlocked.

To set reminder time for locked documents:

1. Expand the Admin menu in the navigation panel.
2. Click Doc Manager Admin.
The Document Manager Administration page displays.
3. Scroll down to the section with the Set Time button.

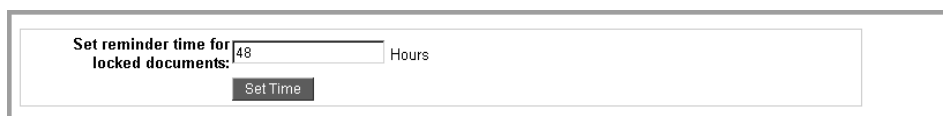
A screenshot of a web form for setting reminder times. The form has a label "Set reminder time for locked documents:" followed by a text input field containing the number "48" and the word "Hours". Below the input field is a button labeled "Set Time". The entire form is enclosed in a light gray border.

Figure 128. Setting time for locked documents

4. Enter the desired number of hours in the Set reminder time for locked documents field.
5. Click Set Time.

Note: There is no way to deactivate these email reminders without unlocking the document.

Maximum Upload File Size

The default maximum file size for upload to the Document Manager is 36MB. If you attempt to upload a file larger than 36MB, the upload will fail. This file size limit is also applicable to attachments to tracker artifacts and tasks, and copies of imported .csv files stored automatically by the Project Management Console.

If you would like to increase the maximum file size for upload to the Document Manager, please contact VA Software Product Support for assistance.

Task Manager Administration

You can add any number of tasks to any project through the project's task group. When creating a task, you can assign the task to a project member or leave it unassigned.

Tasks are created beneath a Master Task Group (MTG). There is one default Master Task Group created for a project. If you wish to create more Master Task Groups, use the Task Manager option in the Project Management tool.

Creating Task Groups

You can add any number of task groups to a project.

To create a task group:

1. Expand the Admin menu in the navigation panel.
2. Click Task Manager Admin.

The Task Manager Administration page displays.

3. Click Add a Task Group.

The Add Task Group page displays.

The screenshot shows the 'Task Manager Admin' page. At the top, there's a header 'Task Manager Admin' and a breadcrumb 'AA_CALIFORNIA : Project Admin Summary : Task Manager Admin'. Below this is a section titled 'Existing Task Groups' containing a table with columns: ID, Task Group Name, Master Task Group Name, and Status. The table lists five task groups with IDs 114, 116, 118, 120, and 121. Below the table is the 'Add Task Group' section. It includes a sub-header 'Add a new task group to the Project/Task Manager. This is different from adding a task to a task group.' followed by a dropdown menu for 'Select the Parent Master Task Group :' with 'AA_CALIFORNIA' selected. There are two required text input fields: '*Task Group Name:' and '*Description:'. At the bottom of this section is a 'SUBMIT' button.

ID	Task Group Name	Master Task Group Name	Status
114	AACAL_GUI_TEMPLATES	AACAL_MTG_GUI	Open
116	AACAL_TG101	AACAL_MTG_GUI	Open
118	AA_TG200	AACAL_MTG_GUI	Open
120	AA_TG300	AA_CALIFORNIA	Open
121	AA_TG400	AA_CALIFORNIA	Open

Add Task Group
Add a new task group to the Project/Task Manager. **This is different from adding a task to a task group.**

Select the Parent Master Task Group :
AA_CALIFORNIA

*Task Group Name:

*Description:

SUBMIT

Figure 129. Add Task Group page

- 4.** On the Add Task Group page:
 - a. Select Yes to specify that this task group can be accessed by all project members.
 - b. Select No to specify that this task group cannot be accessed by all project members.
- 5.** Select the desired task group from the drop-down list.

This is the parent group for the task group you are about to add.
- 6.** Enter a name for the new task group in the New Task Group Name field.
- 7.** Enter a description in the Description field.
- 8.** Click Submit.

The task group is added to the project and its name is displayed in the Task Manager menu in the navigation panel.

Note: As a best practice, it is recommended that you do not create multiple task groups with the same name in a single project. While SourceForge will allow you to do so, you will not be able to distinguish among task groups of the same name without opening each one and checking its contents.

Updating Task Group Status and Other Information

To update task group status and other information:

1. Expand the Admin menu in the navigation panel.
2. Click Task Manager Admin.

The Task Manager Administration page displays.

3. Click Update Task Group Info/Status.

The Update Task Group Info/Status page displays.

Update Task Group Info/Status
AA_CALIFORNIA : Project Admin Summary : Task Manager Admin : Update Task Group Info/Status

Name :

Description :

Status : ☒ Open
☐ Deleted

List of Open Sub Task Groups for AA_TG400

ID	Task Group Name
	None

Figure 130. Update Task Group Info/Status page

4. Make changes to the status and/or title of the desired task group.
5. Click the corresponding Update button.

File Publisher Administration

The file publishing system lets you publish the released versions of your software and various types of project documentation. Published files represent collections of material that are intended for other internal teams, or for release to end-users.

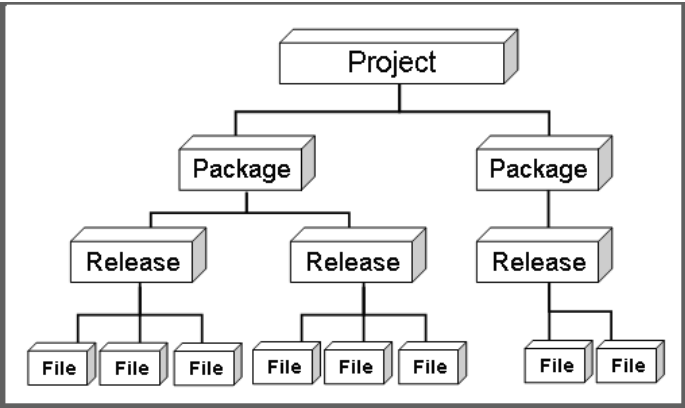









Figure 131. File Publishing structure

You can determine when to release files as well as the audiences who can view your project files and documentation. For example, depending on the status assigned to your file release, you can distribute various iterations of your project files to all SourceForge users within your organization. You can also distribute your files to all users for a specific project, or you can mark your project files as private for targeted distribution.

Released files are shown in the Latest File Releases area on the Project Summary page for each project. The Project Summary page includes a download link for downloading copies of these files.

Package	Release	Date	Download	Notes	Monitor
PK_GUID4_WINXP	GUI_EXCEPTIONS	2003-03-26	Download	 / 	
PK_GUID4_WINXP	REL_GUID4_V12_DOCS	2003-03-26	Download	 / 	
PK_GUID4_WINXP	REL_GUID4_V12	2003-03-26	Download	 / 	

File Releases [Administer](#)

Package Name

Release Name
(Click to view release summary)

View Release Notes

View Change Log

Monitor Release
(on/off switch)

Figure 132. File Release section of Project Summary page

Release Components

A release for a project consists of three elements: package, releases, and files.

Package — grouping of releases for a project. Package naming conventions are discretionary.

Releases — Within a package are releases for that package. Each release is generally a different version of the same set of files. For example, a package containing the files related to an application called `SampleApp` might have three releases: alpha, beta, and gold. Each of these releases would generally contain the same set of files, but each would be progressively more complete. A release may also have a Maturity Tag. See “Maturity Level” on page 232.

Files — A package release contains one or more files. For example, an alpha release of the `SampleApp` application may include the application, the help files, and a `.pdf` file of the user’s guide. The package for this example would be named `SampleApp`, the release name would be Alpha, and the release would include two files: a `zip` archive containing the application and associated files, and a separate `.pdf` file containing the user guide.

You can create new packages and add them to the File Publisher, add releases to existing packages, and edit the status of a package.

Creating New Package

To create a new package:

- 1. Expand the Admin menu in the navigation panel.
- 2. Click File Publisher Admin.
The File Publisher Administration page displays.
- 3. Enter the Package name, status and click the Create button.

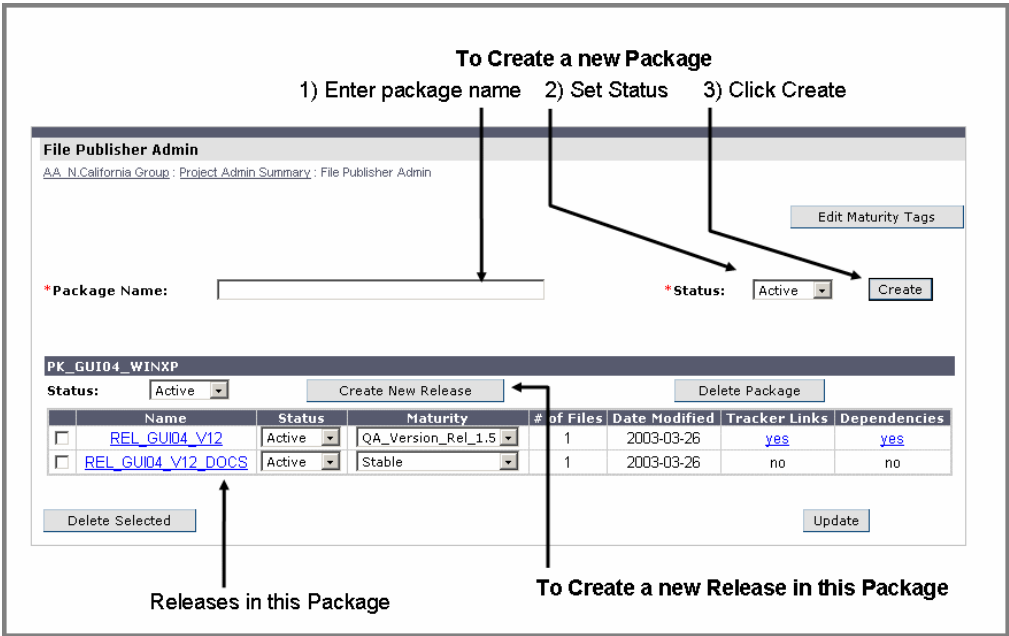


Figure 133. Create Package page

Set the package status:

Active—The package can be viewed and edited by project administrators and downloaded by a project member or a user that has access to project file publisher.

Pending—The package can be viewed and edited by project administrators only, but cannot be downloaded. This status is useful when a package is being assembled and validated prior to its release as an Active package.

After you have created a package, you can create releases for the package. Use the Create New Release button on the File Publisher Admin screen.

File Releases

From the File Administration screen click the Create New Release button to create a new release. A release comprises a group of files. Once you have created the release, you must add at least one file before you can activate the release. A release can also have a number of other settings and relationships to other components in the project.

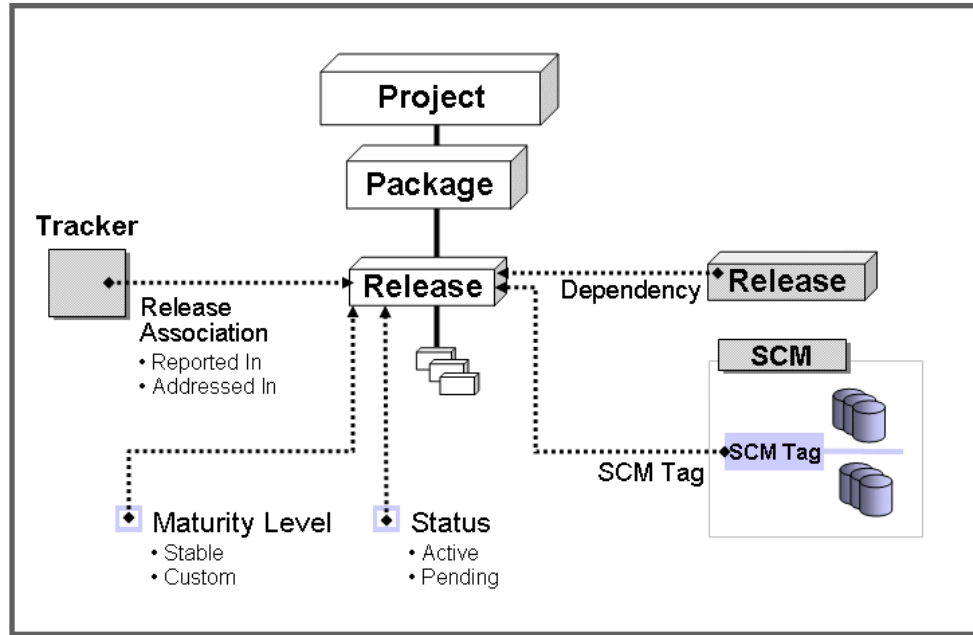


Figure 134. Release relationships and settings

The settings and relationships are as follows:

- **Status:** Indicates whether the release is Active or Pending.
- **Maturity Level:** Indicates the natures of the release. e.g. Daily_QA_Release, For_Documentation_Use_Only. The maturity level may also be used to control user access to releases.
- **Tracker Release Association:** When a tracker artifact is submitted, it may indicate an association with a release. A typical example would be a bug artifact that indicates the release in which the bug was reported or fixed..
- **Dependency:** Other releases in the project may be identified as dependencies. For example, a group of test cases or test programs for the release must be updated and tested before this release can be considered ready for release.
- **SCM Tag:** This is a documentation setting. SCM tools have the concept of a “tag” which can be created to identify a known state of the source code files. The known state can denote a particular release or code fix level.

Creating a New Release

To create a release:

1. Expand the Admin menu in the navigation panel.
2. Click File Publisher Admin.
The File Publisher Administration page displays.
3. Click the Create New Release button beneath the Package separator bar.
The Create New Release screen will appear.
Set the Status, and, if required, the Maturity Level and SCM Tag.
4. Click the Add files button to add files.

The screenshot shows the 'Create New Release' form. At the top, there is a breadcrumb trail: 'AA_N.California Group : Project Admin Summary : File Publisher Admin : Create New Release'. The form has a title bar 'Create New Release'. Below the title bar, there are several input fields and dropdown menus. The first row contains '*Release Name:' followed by a text input field and '*Status:' followed by a dropdown menu set to 'Active'. The second row contains '*Package:' followed by a dropdown menu set to 'PK_GUI04_WINXP' and 'Maturity:' followed by a dropdown menu set to 'Stable'. Below these, there is a 'Monitoring:' checkbox labeled 'Do not mail me updates', which is currently unchecked. The third row contains 'Enter Tag Name:' followed by a text input field, an 'Add SCM Tag' button, and a 'Get Tag Names' link. Below this, there is a section titled 'Dependencies' with a descriptive text: 'If this release is dependent on other releases, add them to the list by browsing to the specific project, package and release.' This section contains three dropdown menus labeled 'Project:', 'Package:', and 'Release:'. The 'Project:' dropdown is set to 'aa-n-cal', the 'Package:' dropdown is set to 'PK_GUI04_WINXP', and the 'Release:' dropdown is set to 'REL_GUI04_V12'. Below these dropdowns is an 'Add Dependencies' button. At the bottom right of the form is an 'Add Files' button.

Figure 135. Create a New Release

5. Using the Browse button, select a file for this release
Then click Add File.
Repeat this process until all files are added.
Before you create the release you can specify the file status setting which determines whether overwriting is allowed for each file.

6. When you are finished, click Create Release.

Name	Release	Status	Overwrite
<input type="checkbox"/> Template_Store_stock	StoreInventory_Rel_001 <new>	Active	Yes

☐ Select All

Figure 136. Create a Release

Note: The default maximum file size for upload to the File Publisher is 100MB. If you attempt to upload a file larger than 100MB, the upload will fail. No error message will be provided and you will be returned to the File Publisher Administration page.

If you would like to increase the maximum file size for upload to the File Publisher, please contact VA Software Product Support for assistance.

Uploading Multiple Files in batch mode

Files may be uploaded into the SourceForge publisher by means of an XML RPC procedure. The XML RPC engine is already available on the SourceForge server for use with the SCM. Role based access permissions are required and the necessary strings will be sent to the procedure as parameters. The procedure will check for the existence of the release, or create the release if it is not present.

Using this script, you cannot upload Release Notes or Change Logs for the release.

Editing Release and adding Release Notes and Change Log

To edit the name and status of a release:

- 1. Expand the Admin menu in the navigation panel.
- 2. Click File Publisher Admin.
The File Publisher Admin page displays.
- 3. Click the name of the desired release.

The Edit Release page displays.

Edit Release

AA N California Group : Project Admin Summary : File Publisher Admin : Edit Release

*Release Name:GUI_EXCEPTIONS

*Status:Active

*Package:PK_GUI04_WINXP

Maturity:QA_Version_Rel_1.5

Add File(s) to release

View Dependencies

Delete Release

	Name	Size	Status	Signature
<input type="checkbox"/>	GUI_EXCEPTIONS	9	Active	056f5ca5dbd6a49717737a6e4ede4f78

Delete Selected

Enter Tag Name:

Add SCM Tag

Get Tag Names

Release Notes:

Change Log:

Update Release

Figure 137. Edit Release page

- 4. Edit the desired fields.
You can also add Release Notes and Change Log information to this release. Information entered in these sections is stored in the Document Manager.
If you need to add files to the release, click Add File(s) to release..
- 5. When you are finished, click Update Release to apply the changes.

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View Access Log

A log is maintained whenever a release is downloaded. You can view the log by clicking the “View Access Log” button.

View Log
[AA: N.California Group](#) : [Project Admin Summary](#) : [File Publisher Admin](#) : [GUI_EXCEPTIONS](#) : View Log

View Log
Release: GUI_EXCEPTIONS
Package: PK_GUI04_WINXP

File Name

User Name

Registered Users (Non Project Members)
Project Members
Non Registered Users

Download Date

Any

Filter

Reset Filter

Results:

File Name	User Name	Download Date	User Agent	Remote I.P.
GUI_EXCEPTIONS	howa	2003-03-27 13:46:50	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1)	198.186.202.146
GUI_EXCEPTIONS	howa	2003-03-29 15:53:02	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1)	198.186.202.146
GUI_EXCEPTIONS	howa	2003-03-27 13:45:27	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1)	198.186.202.146
GUI_EXCEPTIONS	howa	2003-03-27 13:39:35	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1)	198.186.202.146
GUI_EXCEPTIONS	howa	2003-03-27 10:03:46	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1)	198.186.202.146
GUI_EXCEPTIONS	howa	2003-03-27 10:05:31	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1)	198.186.202.146
GUI_EXCEPTIONS	howa	2003-03-27 09:50:09	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1)	198.186.202.146

Figure 138. Release Download screen

Maturity Level

An additional tag may be attached to a release. The project administrator can define maturity levels as required. These are simply text strings. The appropriate level can be attached to the release and will appear on the summary page. These can be useful where many releases are made for a package during the course of development. The maturity level can quickly indicate to a user such things as the level of stability of the release, what level of feature support is in the product.

Accessing Releases via Maturity level

Access to releases is controlled by the permissions in users' roles.

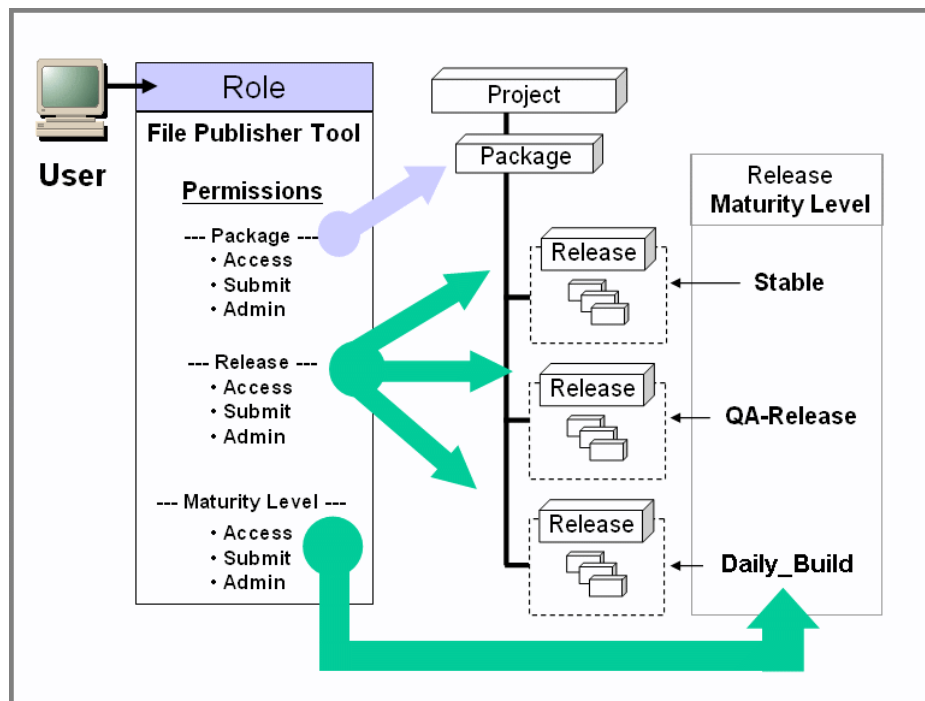


Figure 139. Accessing File Publisher components

Permissions to components managed by the File Publisher are displayed in three sections: package permissions, release permissions, and maturity level permissions. Release and maturity level permissions control access to releases. Where a release is designated by different maturity levels at different times such as the Daily_Build, users can be restricted to access only the release with the maturity levels specified by their roles. If you decide to use maturity level access for releases, ensure that Release Access permissions are not set, thus defeating the maturity level access.

To use Maturity levels:

- Create a Maturity level
- Attach the Maturity level to a release
- Select a role and locate the File Publisher permissions in a Role.
- Configure the role's maturity levels. You may add more than one Maturity level to a role.

To create a maturity level:

1. Expand the Admin menu in the navigation panel.
2. Click File Publisher Admin.

The File Publisher Administration page displays.

3. Click Edit Maturity levels button.

The Maturity Level page displays.

Maturity Levels

MAR25 PROJ1 : Project Admin Summary : File Publisher Admin : Maturity Levels

These labels are used to set the maturity level for File Releases.

Create New Level:

*Label Name:

*Description:

Existing Levels:

	Label Name	Description
<input type="checkbox"/>	Daily_Build	DB
<input type="checkbox"/>	Stable	Stable Level

☐ Select All

Figure 140. Maturity Levels

4. Enter a label and description for the level and click the Add Maturity Level button. Then set the maturity level on a particular release.

- 5. Select File Publisher Admin in the Administration panel.
The File Publisher Admin page displays.

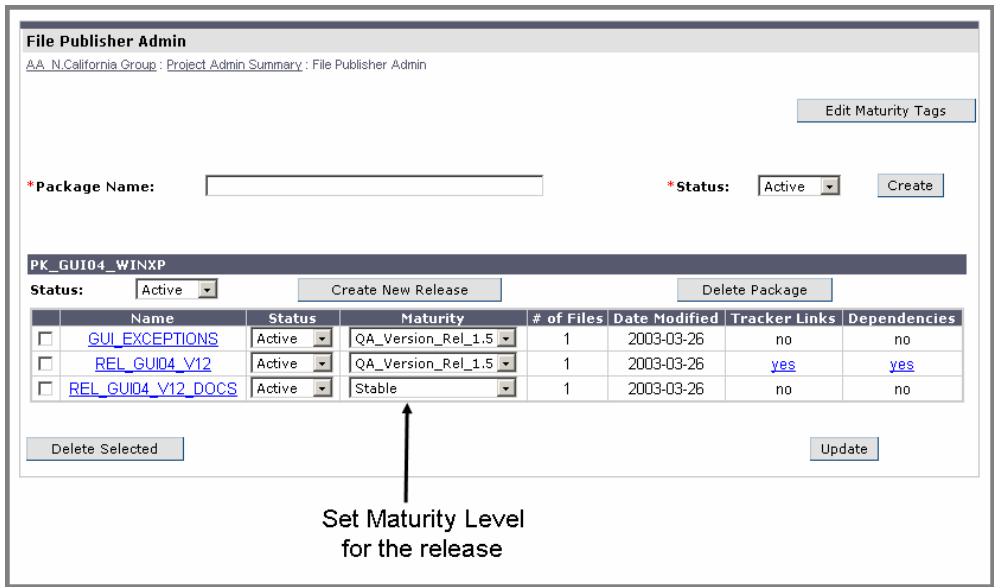


Figure 141. Set Maturity Level for a Release

- 6. Select a release.
In the Maturity column, choose a value from the pull-down.
Then click Update.
- 7. Now select a role and adjust the File Publisher permissions to grant access to a release based on the maturity level rather than through the release access permissions.
- 8. Select Access Control in the Administration panel.
The Role Admin screen displays.

9. Select the Edit Role link for the Role you wish to edit. The Edit Role screen will appear. Scroll down to the File Publisher section.

Role Based Access				
File Package	File Access	File Submit	File Admin	File Delete
mar25p1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Select all the above:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
File Release	File Access	File Submit	File Admin	File Delete
relmar25a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Select all the above:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Maturity Level	File Access	File Submit	File Admin	File Delete
Daily_Build	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Stable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Select all the above:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A

Figure 142. File Permissions section in Role for adding Maturity Levels.

10. Click the Maturity Level link.

The RBAC screen displays.

You may now grant permissions to this role for access to releases with a specific maturity level.

11. Check the required access permissions for the selected maturity level.

12. Click Submit.

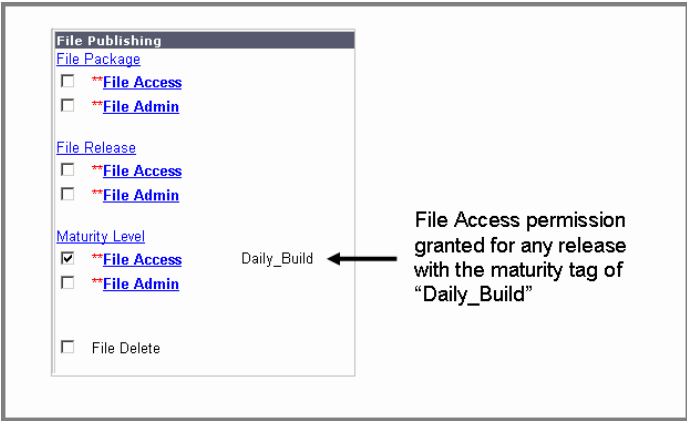


Figure 143. File Release access for release with specific maturity level

File Access permission to releases with the specified maturity level is now granted.

File Publisher and Software Configuration Management (SCM)

The SourceForge file publisher system is a separate system from the software configuration management (SCM) system. Content can be exported from the project’s SCM repository, then packaged and released under the file publisher system. SCM provides a means to enhance your development practices (by storing file history for each file you develop). The file publishing system helps you distribute your files in a ready-to-use format.

Also, when files are added to a particular release, the SCM file tags may also be attached to the release for reference.

File Release Statistics

SourceForge collects statistics on the number of downloads for files released through the file publishing system. These statistics are aggregated daily.

Managing the Tracker-SCM Integration

Associating a repository with a tracker artifact lets you make modifications to code and track the resolution. For example, if a bug report is submitted to a project, you can then modify the code associated with the bug artifact and, when you are finished commit it to the directory tree. With tracker integration the status of the bug tracker artifact can be automatically changed at commit according to your preference. Additionally, you can restrict your commit to require an association with the artifact ID number and you can restrict the commit to require an artifact owner.

SourceForge supports integrated SCM functionality for Rational ClearCase™, CVS and PVCS. CVS (Concurrent Versioning Systems) is the SourceForge default SCM tool. ClearCase, PVCS, or CVS, integrated with SourceForge, provide the following benefits:

- Automatic set up of your project source control infrastructure. This function eliminates the time and administrative overhead costs associated with setting up new source code repositories.
- Increased real-time visibility into the status of project source code. For CVS, SourceForge uses a web-based viewer that allows you to view files, including the revision number, revision author, revision date, and the last log entry.
- Enhanced security and access control to your project files. The SourceForge role- based access control system allows you to define SCM user responsibilities and permission levels.
- Integration with trackers artifacts. Associating an SCM module with a tracker artifact allows a user to make modifications to code and track the resolution. Additionally, the integration allows changes within the SCM package to propagate changes within the tracker. For example, when checking in code, a user may choose to change the status of an artifact to “closed.” This saves time and helps with workflow.
- Effective reporting systems. SourceForge presents a wide array of statistical information related to users and projects. This includes SCM statistics such as commits (updates), check outs, and adds. This information can be viewed by user and by project.

Configuring Your SCM Tool

As part of your SourceForge installation process, you will be asked to specify the SCM tool that you will be using.

⇒ For details on installing SourceForge, refer to the *SourceForge Enterprise Edition 3.4 Installation and System Administration Guide*.

The SCM repository is then created as part of the project registration process. Currently, a user provides a “Project Full Name,” “Project Description,” and “Project Short Name.” The SourceForge administrator reviews the information input on this form. If the project is approved, the appropriate infrastructure is created for the project, including the CVS repository. You must also do this for ClearCase.

For further information on working with ClearCase, consult the product information literature accompanying your ClearCase application.

Configuring a Module

You must create modules and store them in the Software Configuration Management (SCM) system you have selected to use with SourceForge.

⇒ For details on importing modules into CVS, refer to Appendix A.

To configure a SCM module for tracker integration:

1. Expand Admin and Project Admin menus in the navigation panel.

2. Click SCM AdminTracker-SCM.

The SCM Integration Admin page displays a list of modules in your repository.

SCM Integration Admin
[AA_CALIFORNIA](#) · [Project Admin Summary](#) · [SCM Integration Admin](#)

Project:AA_CALIFORNIA
Tracker-SCM Configuration

By enabling the SCM Templates listed below, a text template will be provided to the user when checking code into the SCM repository. This template will prompt the user for a Tracker ID number and, optionally, a change in the status of that ID. The commit message along with a list of all the files that were changed will be added as a follow-up to the Tracker artifact. If a status change was entered, the status of the Tracker artifact will also be updated.

*Note: The user committing to the SCM will have to be a Tracker admin or Editor of a assigned tracker, for the tracker status to be updated. If they do not have these permission, only a comment will be added, no status change will occur.

Module	Engage Commit Logger	Allow Status Change	Default Status Change	Require Tracker ID	Restrict to Tracker Item Owner
Update Template					

Flex Field	Required	Active
No flex fields defined		

Update Flex Fields

Flex Field:
☐ Required
 ☐ Active

Add Flex Field

Figure 144. SCM Integration Admin page

3. Perform the following tasks for the desired module:

- Enable Tracker Integration.
- Enable Allow Status Change.
- Specify a status parameter in the Default Status Change drop-down list.
- Enable the option Require Tracker ID.
- Enable the option Restrict to Tracker Item Owner.
- Enter your notes in the text box.

The notes you enter will be included in the template which will be presented to the user committing code or other data.

4. Click Submit.

Note: If you are using CVS, you must perform a fresh *checkout* of your repository. If you *update* only your local repository, your integration will not work.

Setting up Flex Fields

Once SCM integration is established you may set up flex fields. Flex fields are important because they allow CVS commits to be related to artifacts in external systems where an explicit integration does not exist, or to be annotated using the established standards of your development group.

You can only set up Tracker-SCM integration flex fields when running SourceForge on Oracle using CVS.

To add a new flex field:

1. Enable Tracker-SCM integration.
See “Configuring a Module” on page 238.
2. Expand the Administration menu in the navigation panel.
3. Click SCM Admin.
The SCM Integration Admin page displays.
4. Scroll to the bottom of the page to the Flex Field section.



Flex Field	Required	Active
No flex fields defined		

Update Flex Fields

Flex Field:

☐ Required ☐ Active

Add Flex Field

Figure 145. Flex Field section of SCM Integration Admin page

5. Enter the flex field name in the Flex Field box.
6. Check Active to make the field active.
7. If you want the flex field to be required with all code commits, check Required.
8. Click Add Flex Field.

Whenever you add a new flex field you must update your CVS template by clicking the Update Template button immediately above the Flex Field section of the SCM Integration Admin page. Do a fresh checkout on your local server to refresh the template on the client side; otherwise, the template will not be displayed when developers attempt CVS commits, which may cause developers to omit required fields.

Using the Tracker-SCM Integration

To use tracker-SCM integration:

1. Submit a tracker artifact and note the artifact ID.
2. Check out a new copy of the desired module only if you have not checked out a copy since your last integration.

After you have made changes to the file and performed a commit, your editor should display the integration template.

3. Enter the artifact ID and your log message in the appropriate fields.
4. Save the template and exit.

SCM Module Level Integration

The Tracker-SCM integration for CVS is based on the modules. Each module can have its own Tracker-SCM integration status and template. They come into effect only in the concerned modules. Files at root level cannot have Tracker-SCM integration. This is a CVS limitation that restricts use of templates to modules.

Project Web Server

Project Web Server allows users to upload web pages to SourceForge projects. This enables projects to have their own websites. Users may upload files using a WebDAV-enabled client, provided the user has proper RBAC permissions. Project Web Server may be enabled or disabled across SourceForge or per project.

WebDAV stands for "Web-based Distributed Authoring and Versioning". It is a set of extensions to the HTTP protocol that allows users to edit and manage files on remote web servers. You can learn more about WebDAV at <http://www.webdav.org/>.

To access a project website, either:

- Click the link, "Project Web Server" on the left navigation pane, within a project in SourceForge.
- Click the "Project Web Server ' Browse" link on the project summary page.
- Enter the URL: *https://<server name>/web/<project short name>/index.html*

Uploading pages to Project Web Server

You can upload the files using a WebDAV-enabled client such as DAV Explorer or by establishing remote access to the Project Web Server directory for the project to which you wish to copy HTML files.

Uploading web pages to Project Web Server using DAV Explorer

You must first download and install DAV Explorer. The first steps may be ignored if you already have DAV Explorer installed.

To upload files to the Project Web Server:

1. Download DAV Explorer from the following URL:
http://www.ics.uci.edu/~webdav/
2. Install and run DAV Explorer.
Note: An Install.txt document (available with DAV Explorer) will guide you through the installation.
3. Enter the following URL in the text box that displays below the menu within DAV Explorer.
<Server Name>/upload/<Project Short Name>
Then click the icon to the left of the text box.
4. Enter your user name/password in the pop-up.
This will be authenticated with SourceForge.

5. To upload files, select File > Write File from the menu bar.

Ensure that at least one file is named "*index.html*". This file will be read and displayed by SourceForge when a user accesses Project Web Server.

Uploading web pages to Project Web Server using Windows Explorer

You must first add a Windows 'Network Place' for easy access to Project Web Server.

To add a Windows 'Network Place':

1. Open 'My Network Places' on your desktop or locate and open 'My Network Places' within Windows Explorer.

2. Select 'Add Network Place'

The 'Add Network Place Wizard' displays.

3. Type in the location of Project Web Server in the entry field: 'Type the location of the Network Place'.

Your entry must be in the form:

<Server Name>/upload/<Project Short Name>

For example:

http://XYZCorpServer/upload/Dev_Project

4. Click 'Next'

5. You may be prompted to enter a network password. If you are, enter your id and password, then click 'OK'

6. Enter a name for the Network Place, then click 'Finish'.

A window that shows the contents of the Project Web Server will be displayed. It will contain a text file: *.htaccess* that is used to control access to the Project Web Server. Do not modify this file.

To upload files to Project Web Server:

- ⇒ To upload files to Project Web Server, drag-and-drop or copy-and-paste files into the Network Place corresponding to the Project Web Server.

Ensure that at least one file is named "*index.html*". This file will be read and displayed by SourceForge when a user accesses Project Web Server.

Security

You must disable the RBAC role permission "PWS File Upload" for the roles you do not wish to be able to upload files to the Project Web Server.

Access Problems

The inability to see the "Project Web Server" link may be caused by any of the following reasons:

- The "*index.html*" file was not uploaded.
- The Project Web Server feature has been disabled within the project. You can enable the feature from the Project Administration Summary page by clicking the Edit Project Information link. Ensure the checkbox next to Project Web Server is enabled.
- The Project Web Server feature has been disabled across SourceForge. Administrators may enable the feature from the "Application Access Control" page accessible from the SourceForge Administration page.

Using the Project Management Console

This section provides detailed instructions on managing projects with the SourceForge Project Management Console (PMC). The PMC enables new levels of project management effectiveness, visibility, and control by combining real-time tracking and metrics reporting with SourceForge's rich set of collaborative development tools.

The SourceForge Project Management Console provides managers with real-time visibility into software project status. Visually intuitive charts, graphs, and traffic-light indicators give managers a high-level view of software project status at a glance. Managers can quickly drill down to the details via interactive Gantt charts, audit logs and graphical views of tasks and task dependencies. Potential problems are identified early, so that managers can quickly track and resolve them before they impact schedules and budgets.

With the SourceForge PMC, out-of-date project plans become a thing of the past. Project plans are created within SourceForge, or imported from Microsoft® Project.

Most importantly, because SourceForge automates status updates and project tracking, it frees managers and developers alike from unnecessary meetings and tedious administrative tasks that are prone to error.

With the SourceForge Project Management Console, development teams spend less time reporting their activity and more time being productive.

This section describes how to:

- Import and synchronize project plans from Microsoft Project
- Using native project planning to create and manage task groupings
- Work with task and project views
- Configure workflows and exception management
- View task and Gantt chart reports on project status

Getting Started with the Project Management Console

This section provides information on creating a project and importing or inputting your tasks into the PMC.

Before you Begin

Java Runtime Environment

Before you can view the Gantt chart and Task Dependency browser, you must install the correct Java Runtime Environment (JRE) version.

- For Internet Explorer on Windows systems, you can use JRE v1.3.1 or higher.
- For Internet Explorer on other operating systems and all other browsers, you can use JRE v1.4.1 or higher.

To download the necessary files go to:

<http://java.sun.com/j2se/>

This link will take you to the Java 2 Platform, Standard Edition (J2SE) page of the java.sun.com website. In the table labeled Releases, select the version that you want to download and follow the download instructions.

If you do not have the correct JRE version installed, a pop-up window will request that you download and install the application.

Java Security Warning

The first time you open the PMC, you will see a Java Security Warning with the following message:

"Do you want to accept this certificate .. for the purpose of exchanging encrypted information?"

This message asks if you trust the certificate issued by VA Software. Choose "Grant this session." The warning will not appear on future logins.

Creating a Project in the Project Management Console

To begin working with the Project Management Console, you must first create a project or identify an existing project in SourceForge. The next step is to import or input your tasks into the Project Management Console.

Importing Tasks from Microsoft Project

The Microsoft Project Import wizard allow project managers to quickly leverage the powerful functionality of Microsoft Project within the SourceForge environment. Both new and existing Microsoft Project plans can be imported into SourceForge. The Import Wizard eliminates the need for multiple project management tools and provides a mechanism for updating project plans to reflect real-time project information.

The Import Wizard supports two modes—Quick Import and Advanced Import. Quick Import is most useful in the early stages of project planning. Following the initial import, the project plan can be updated using the Project Management Console tools to complete the task set up.

Advanced Import is recommended for use with completed project plans. Advanced Import provides a flexible environment in which Project Managers can map resources and tasks within SourceForge.

Quick Import

Quick Import allows you to:

- Quickly import all tasks in an existing Microsoft Project plan into the Project Management Console.
- Define import parameters to automatically assign all project tasks to one project member, to the project manager, or to the appropriate project member using the automatic task matching function.
- Edit existing resource matches, add new resource matches, and import matches from XML files.

Advanced Import

Advanced Import also allows you to:

- Review and edit the assignment of tasks to project members during the import.
- View project members' existing workloads before assigning additional tasks.
- Select tasks that you do not want to be imported into the Project Management Console.

Both the Quick and Advanced Import modes maintain a copy of the original Microsoft Project plan in the SourceForge Document Manager.

Importing Tasks with Microsoft Project Quick Import

To import all tasks within an existing Microsoft Project plan:

1. Click on the Project Administration link located in the upper right corner of the Management Console window.

The Project Administration page displays.

2. Under the Import/Export heading, click on the Microsoft Project Import link.

The Import Microsoft Project File page displays.

3. Click on the Browse icon in the Microsoft Project File field to find the name of the existing Microsoft Project file that you would like to import.

The file should be in a .csv format.

(See “Saving Your Microsoft Project as a .csv File” on page 255.)

4. Select the name of the Master Task Group in the name field to specify where the task or tasks should be imported.

If desired, you can create a new Master Task Group by selecting Create a New Master Task Group and entering the name in the text box below.

Master Task Groups provide a high-level task grouping mechanism and contain all tasks from the import.

5. In the How to Assign Users field, choose one of the following matching options:
 - Best Match for Users (see “Quick Import Resource Matching” on page 250.)
 - Assign All Tasks to You
 - Assign All Tasks To [User Name]

6. Click Quick Import.

A summary of the project import displays..

Quick Import JavaAppServ > Project Administration > Import MS Project File > Quick Import					
MS Project Import Summary					
Task Name	Task Type	Assignee	Percent Complete	Start Date	End Date
Requirement Analysis					
Information Flow Mapping	General Task	Jim Martinez	0%	2002-10-01	2002-10-03
Generate High Level Use Cases	General Task	Jim Martinez	0%	2002-10-01	2002-10-03
Identify Utilities Required	General Task	Dave Henry	0%	2002-10-03	2002-10-04
Identify Access Control Requirements	General Task	Administrator	0%	2002-10-02	2002-10-02
Generate Screen Layouts	General Task	Rick Chen	0%	2002-10-04	2002-10-10
<div> <div></div> - Indicates tasks that are imported successfully </div> <div> <div></div> - Indicates tasks that are updated successfully </div> <div> <div></div> - Indicates tasks that had errors </div>					
<div>Exit</div> <div>Rollback</div>					

Figure 146. Quick Import Summary page

To view the imported tasks, refresh the left navigation tree by clicking on the refresh icon at the top of the navigation tree.

A snapshot of the imported Microsoft Project plan is also stored in the Document Manager. The snapshot of the imported Microsoft Project plan is a static view of the plan at the time of import only. It is not automatically updated as project changes are made.

If your .csv file does not import correctly, see “If your .csv file does not import successfully” on page 254.

For considerations when downloading a snapshot, see “Note regarding downloading CSV files from the Document Manager:” on page 254.

Quick Import Resource Matching

To match MS Project resources to SourceForge users:

- 1.** Click on the Project Administration link located in the upper right corner of the Management Console window.
The Project Administration page displays.
- 2.** Under the Import/Export heading, click Import Matches Settings.
The Quick Import Settings-Resource Matches page displays.
- 3.** In the Existing Matches table, the MS Project Resource names that are matched to SourceForge users will display.
- 4.** You have the option to either delete all matches, select all matches, or unselect all matches by clicking one of the icons below the table.

To add a new match:

- 1.** Under the Import/Export heading, click on the Import Matches Settings link.
The Quick Import Settings-Resource Matches page displays.
- 2.** In the Add a New Match section, enter the name of the MS Project Resource.
- 3.** Select the SourceForge user name that you would like to match to the MS Project Resource name.
- 4.** Click on the Create Match icon.

To import matches from an XML file:

- 1.** Under the Import/Export heading, click on the Import Matches Settings link.
The Quick Import Settings-Resource Matches page displays.
- 2.** In the Import New Matches from XML File section, select the Browse icon to find the XML file that you would like to import.
- 3.** Select the Import Mappings Icon to match resources from your XML file to SourceForge matches.
- 4.** To view a sample XML file, select the Download Sample XML File icon.

Importing Tasks with Microsoft Project Advanced Import

To import all tasks within an existing Microsoft Project plan using Advanced Import:

1. Click on the Project Administration link located in the upper right corner of the Management Console window.

The Project Administration page displays.

2. Under the Import/Export heading, click on the Microsoft Project Import link.

The Import Microsoft Project File page displays.

3. Click on the Browse icon in the Microsoft Project File field to find the name of the existing Microsoft Project file that you would like to import.

The file must be in a .csv format.

(See “Saving Your Microsoft Project as a .csv File” on page 255.)

4. Select the name of the Master Task Group in the name field to specify where the task or tasks should be imported.

If desired, you can create a new Master Task Group by selecting Create a New Master Task Group and entering the name in the text box below.

Master Task Groups provide a high-level task grouping mechanism and contain all tasks from the import.

5. In the How to Assign Users field, choose one of the following matching options:

- Best Match for Users (see “Quick Import Resource Matching” on page 250.)
- Assign All Tasks to You
- Assign All Tasks To [User Name]

6. Click Advanced Import.

The Advanced Import Match Users page displays.

Advanced Import : Match Users

JavaAppServ > Project Administration > Import MS Project
File > Advanced Import : Match Users

Step 2: Match the imported resource names to SourceForge user names for task assignment

MS Project Resource	SourceForge Assignee	Modify Assignee	Do Not Import This Resource
Matched Users			
richard	Rick Chen	[Choose Assignee]	
Unmatched Users			
carol	Unmatched	[Choose Assignee]	<input type="checkbox"/>
jenni	Unmatched	[Choose Assignee]	<input type="checkbox"/>
jennifer	Unmatched	[Choose Assignee]	<input type="checkbox"/>
jon	Unmatched	[Choose Assignee]	<input type="checkbox"/>
micheal	Unmatched	[Choose Assignee]	<input type="checkbox"/>
tim	Unmatched	[Choose Assignee]	<input type="checkbox"/>
For Unassigned Tasks		Administrator	

Next

Select All

Unselect All

Figure 147. Advanced Import Match Users page

In the Matched Users table, the first two columns display the mappings between Microsoft Project resources and SourceForge assignees. Unmatched resources display in the Unmatched Users table.

- To change a mapping, click Change Assignee in the Modify Assignee column. You can view the workload of any user by selecting Display Task Workload from the Select Users page.
 - To restrict importation of the particular Microsoft Project resource into the SourceForge project plan, check the Do not import this resource box.
 - To assign unassigned tasks to a particular user, choose a name from the drop-down menu. The drop-down menu contains the names of all project members with the appropriate RBAC permissions.
7. When you have finished assigning project resources, click OK.

The Advanced Import Task Confirmation page

Advanced Import : Task Confirmation [JavaAppServ > Project Administration > Import MS Project](#) [File > Advanced Import : Task Confirmation](#)

Step 3: Select any tasks you do not wish to import

MS Project Task	Assignee	Do Not Import This Task
Matched Tasks		
No Matched Tasks	-	-
Unmatched Tasks		
Information Flow Mapping	Dave Henry	<input type="checkbox"/>
Generate High Level Use Cases	Jim Martinez	<input checked="" type="checkbox"/>
Identify Utilities Required	Jim Martinez	<input checked="" type="checkbox"/>
Identify Access Control Requirements	Administrator	<input type="checkbox"/>
Generate Screen Layouts	Ann Smiths	<input type="checkbox"/>

☐ - Indicates milestone tasks
☐ - Indicates matched tasks
☐ - Indicates unmatched tasks

Figure 148. Advanced Import Task Confirmation page

The Advanced Import Task Confirmation Page allows you to review the tasks and their assignees, then select any task you do not wish to import.

8. When you have finished reviewing tasks, click Submit.

To view the imported tasks, refresh the left navigation tree by clicking on the refresh icon at the top of the navigation tree.

A snapshot of the imported Microsoft Project plan is also stored in the Document Manager. The snapshot of the imported Microsoft Project plan is a static view of the plan at the time of import only. It is not automatically updated as project changes are made.

If your .csv file does not import successfully

If your import is not successful, you may be attempting to import a corrupt or incorrectly saved .csv file. Files can be corrupted when sending via email or in a number of other ways.

Make sure you have saved your file as specified in “Saving Your Microsoft Project as a .csv File” on page 255. You can also check your .csv file by attempting to re-import it into Microsoft Project following the instructions in “Exporting Task Data into Microsoft Project” on page 258.

If you still cannot successfully import your .csv file, please contact VA Software Technical Support.

Note regarding downloading .csv files from the Document Manager:

When a .csv file is uploaded to SourceForge and stored in the Document Manager, some additional HTML is stored with the data to enable the information to be displayed. This extra data affects downloading. If you wish to download a .csv file from Document Manager, ensure that the .csv file is downloaded in zipped format. This ensures that the additional HTML is removed before downloading. Once the download is complete, the unzipped file is ready for use.

Saving Your Microsoft Project as a .csv File

The following steps describe how to create the correct .csv file format for importing your Microsoft Project plan into the Project Management Console.

To create a .csv file:

- 1.** Click File/Save As.
- 2.** Select the .csv file type.
- 3.** Click New Map (If this is the first time you have created a map, otherwise use the map name you created last time.)
- 4.** Name the Import/Export Map
(Suggestion: PMC Import Mappings)
- 5.** Click Tasks on Data to Import/Export.
- 6.** Click Task Mapping.
- 7.** Select Add All.
- 8.** Click Ok.
- 9.** Click Save.

Note: SourceForge Enterprise Edition 3.4 has been tested with Microsoft Project 2000. If you have difficulty saving a .csv file using another version of Microsoft Project, please contact VA Software Product Support.

Exporting Tasks

The Project Task Export Wizard allows Project Managers to quickly export a list of tasks from a Master Task Group to a CSV or XML file. You can select a task type (General, Critical, Milestone) to export as well as individual tasks within the task category.

If you would like to use an exported CSV file to update your original Microsoft Project plan, the Project Task Export Wizard provides a separate option to ensure that the exported CSV file is correctly configured for seamless re-import to MS Project.

Exporting Tasks to CSV or XML

To export tasks to CSV or XML:

(Not for use when re-importing to Microsoft Project)

- 1.** Click on the Project Administration link located in the upper right corner of the Management Console window.
The Project Administration page displays.
- 2.** Under the Import/Export heading, click the Task Export link.
A list of all Master Task Groups in the project displays.
- 3.** Select the Master Task Group from which you would like to export a task or tasks.
- 4.** Select the type of task that you would like to export (General, Critical, or Milestone).
Then click Filter.
A list of selectable tasks displays.
- 5.** Select the task or tasks that you want to export.
Then click Export.
A list of available fields displays.
- 6.** Select the fields that you want to export.
Then click Export CSV or Export XML.

Your file is created and you are prompted to save or open it.

To export tasks to CSV for re-import into Microsoft Project:

- 1.** Click on the Project Administration link located in the upper right corner of the Management Console window.
The Project Administration page displays.
- 2.** Under the Import/Export heading, click the MS Project Export link.
A list of all Master Task Groups in the project displays.
- 3.** Select the Master Task Group from which you would like to export tasks.
Your file is created and you are prompted to save or open it.
- 4.** Save the file using the same file name as the CSV originally imported.

Exporting Task Data into Microsoft Project

At any time, you may wish to synchronize your Microsoft Project plan with updated data from SourceForge. Synchronizing your data allows you to use the advanced management visibility and collaborative development features of the Project Management Console for day to day project management, while retaining the option to use Microsoft Project when needed for more in-depth resource planning.

When exporting task data from the Project Management Console into Microsoft Project, only those fields that were originally imported from Microsoft Project will be synchronized. For example, task status colors and status report updates are native to the Project Management Console and will not be exported into Microsoft Project.

To export task data into Microsoft Project:

1. Export your task data to CSV using MS Project Export.

See “To export tasks to CSV for re-import into Microsoft Project:” on page 257.

2. Open Microsoft Project.
3. Open the Microsoft Project file into which you want to import the task data.

- To update your original Microsoft Project file, open the original file.
- To create a new Microsoft Project file, open a new file.

4. Open the CSV file containing your exported task data.

The Import Mapping page displays.

5. Select one of the following maps:

- If you are updating your original Microsoft Project file, select the map that you created to export the Microsoft Project data to CSV, then click Open.
- If you are creating a new Microsoft Project file, or are updating your original file but do not have the original map, click New Map, then follow the steps below:

a. Select the Tasks radio button.

b. Verify that the delimiter is (,).

c. Select the Task Mapping tab.

d. Click Add All.

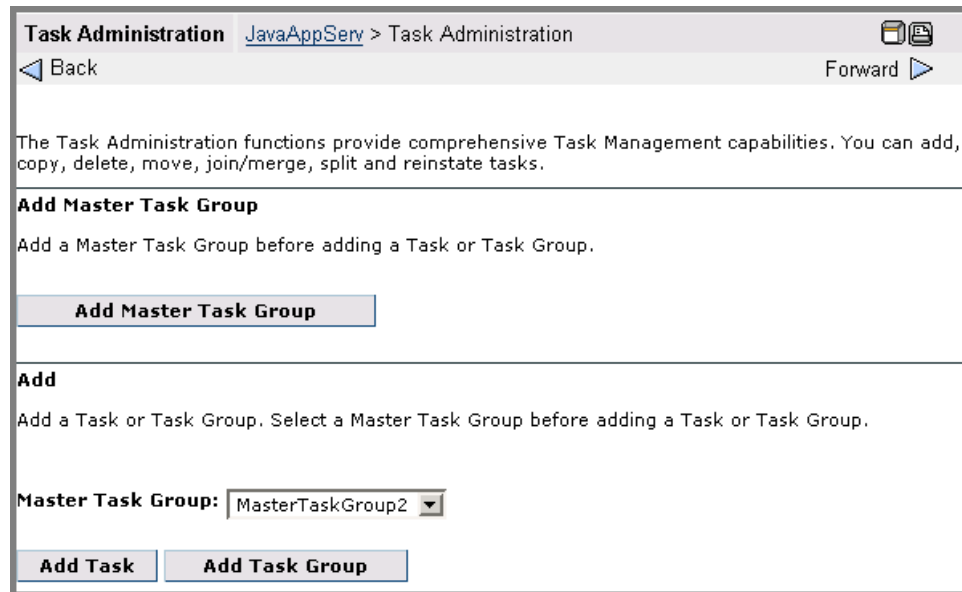
e. In the ‘Method for incorporating imported data’ field, select

- ‘Place into a new project’ to create a new file.
- ‘Merge (by key) into current project’ to update your original file.

f. Click OK

Native Project Planning

If you do have a Microsoft Project plan that you want to import, or prefer to create tasks directly in the PMC, you can use the native project planning capabilities. Native planning within the Project Management Console allows you to build, group, and assign tasks



The screenshot shows the 'Task Administration' page within the 'JavaAppServ' application. The page has a breadcrumb trail 'JavaAppServ > Task Administration' and navigation links for 'Back' and 'Forward'. A descriptive paragraph states: 'The Task Administration functions provide comprehensive Task Management capabilities. You can add, copy, delete, move, join/merge, split and reinstate tasks.' Below this, there are two main sections: 'Add Master Task Group' and 'Add'. The 'Add Master Task Group' section contains a single button labeled 'Add Master Task Group'. The 'Add' section contains a text prompt 'Add a Task or Task Group. Select a Master Task Group before adding a Task or Task Group.' followed by a dropdown menu labeled 'Master Task Group:' with 'MasterTaskGroup2' selected. At the bottom of the 'Add' section are two buttons: 'Add Task' and 'Add Task Group'.

Figure 149. Task Administration page

Creating Master Task Groups

Before you can create tasks, you must first create a master task group. Master task groups provide a high-level grouping mechanism to organize and manage your tasks. Each master task group can be configured and managed separately from the others, allowing multiple managers to manage their tasks according to their own preferences.

To create a master task group:

1. Click the 'Task Administration' link in the upper right hand corner of the main PMC page.
2. Click 'Add Master Task Group'.
3. Fill in the Master Task Group Name and Details.

Then click Create.

Creating Task Groups

After you have created a master task group, you can create task groups to further group and manage your tasks.

To create a task group beneath a master task group:

1. Click the 'Task Administration' link in the upper right hand corner of the main PMC page.
2. Under 'Add', first select the Master Task Group that you want to be the parent of the new task group, and then click 'Add Task Group'.
3. Fill in Task Group Name and Task Group Details

Then click Create.

Note: As a best practice, it is recommended that you do not create multiple task groups with the same name in a single project. While SourceForge will allow you to do so, you will not be able to distinguish among task groups of the same name without opening each one and checking its contents.

Creating Tasks

To create a task:

1. Click the 'Task Administration' link in the upper right hand corner of the main PMC page.
2. Under 'Add', first select the Master Task Group that you want to be the parent of the new task.

Then click 'Add Task'.

The Add New Task page displays.

Add a New Task

JavaAppServ : Task Manager : MasterTaskGroup2 : Add a New Task

Task Group: Requirement Analysis

Task Type: General Task **WBS #:** Will be assigned

Percent Complete: Not Started **Priority:** 5 - Lowest

***Task Name:** (Maximum 50 characters) Customer survey

***Task Details:** (Maximum 4000 characters) Develop and conduct a customer survey to collect requirements input.

Start Date: August 27 2003

End Date: November 20 2003

Assigned To: Dave Henry, Jim Martinez, Rick Chen, Ann Smiths

Dependent On Task: None, 140-Test Scripts, 139-Load Test Plan, 138-Integration Test Plans, 137-Unit Test Plans, 135-Implement Admin Utilities, 134-Implement Main Modules, 133-Write Reusable Components

Hours: 60 (Decimals will be rounded)

Actual Hours: (Decimals will be rounded)

Figure 150. Add New Task page

3. Fill in all required and any optional fields.
4. When you are finished, click Submit.

The task is now created. The person to whom the task is assigned will receive an email notification with the task details.

Task Administration Functions

In addition to creating tasks and task groups, the Task Administration page also allows you to perform the following functions:

Approve Task Date/Status Change Provides a list of all tasks that require an approval for a status or date change. If you are a user who has been selected for Task Status approval, you will be notified by email for each status change. Tasks waiting for approval can be viewed from the Master Task Group for a project or from the Task Group Summary page. The Task Changes Approval List shows the number of tasks waiting for approval and a link is provided to approval page.

For each task you can view the task ID number, the task summary, and the justification for the change. You can accept or reject the changes or request additional information. When requesting additional information, a separate dialog box is used to provide email communication with the task owner. If you reject the task change, you can provide additional information to the task owner regarding the reason for rejection.

For tasks that have an associated milestone, a visual indicator displays when the date change will delay the task beyond the milestone date.

All communications including requests, approvals, and denials are recorded in the task history function.

Move Task/Task Group Allows you to move tasks from one Task Group to another within a Master Task Group and also allows task to be re-ordered in the navigation tree.

Delete Task/Task Group Allows you to delete tasks. If a Task Group has sub-tasks or dependencies, a confirmation will be requested before you can delete the task. Only a Project Administrator or Master Task Group owner can delete a Master Task Group.

Copy Task/ Task Group Allows you to create a new task (or Task Group) from an existing task (or Task Group)

To create a copy of a task:

1. Select the Task Administration link in the upper right corner of the Project Management Console.

The Task Administration page displays.

2. In the Copy section, select the Master Group to which the Task belongs from the Master Group drop-down list.

3. Select the Copy Task Group icon.

The Copy Tasks page displays.

4. Select the Task Group from which you would like to copy a task from.

5. Select the destination Task Group to which you would like to copy the task.

6. Select the task to be copied from the drop-down Task menu.

The task will be copied into the destination Task Group.

7. Select either the Move Up icon or the Move Down icon to place the task.

8. Click Submit.

To create a copy of a task group:

1. Select the Task Administration link in the upper right corner of the Project Management Console.

The Task Administration page displays.

2. In the Copy section, select the Master Group to which the Task Group belongs from the Master Group drop-down list.

3. Select the Copy Task Group icon.

The Copy Task Group page displays.

4. Select the Task Group to copy.

5. Select the destination Task Group.

6. Click Copy.

Split Task Allows you to split existing tasks into multiple tasks or existing tasks to be deleted and grouped into a single task item. You can select a task and enter the number of tasks that you would like the current task split into.

To split a task:

1. Select the Task Administration link in the upper right corner of the Project Management Console.

The Task Administration page displays.

2. Select the Master Task Group from which you would like to split the task.

3. Select the Split Task icon.

The Split Task page displays.

4. Select a Task Group from the drop-down menu.

The tasks display in the drop-down Tasks menu.

5. Select the number of tasks that you would like to split the task into.

6. Click the Split Task icon.

Join/Merge Task/Task Group Enables you to simplify your project by combining individual tasks and task groups.

To join two or more tasks into a single Task Group:

1. Select the Task Administration link in the upper right corner of the Project Management Console.

The Task Administration page displays.

2. Select the Master Task Group from which you would like to join the task.

3. Select the Join Tasks icon.

The Join Tasks page displays.

4. Select the Task Group from which you would like to join the task.

5. Select the target Task Group.

6. Select the Tasks in the original Task Group to move to the target Task Group.

7. When you have selected the tasks that you would like to merge, create a new task name.

8. Click the Join Tasks icon.

To merge Task Groups:

1. Select the Task Administration link in the upper right corner of the Project Management Console.

The Task Administration page displays.

2. Select the Master Task Group from which you would like to merge the Task Group.

3. Select the Merge Task Groups icon.

The Merge Task Groups page displays.

4. Select the source Task Group from the drop-down menu and the destination Task Group.

5. Click the Merge icon.

Re-instate Task Allows you to re-instate deleted tasks.

Working with Tree and Project Summary Views

The PMC displays project data in two primary workspaces: the tree and the summary view.

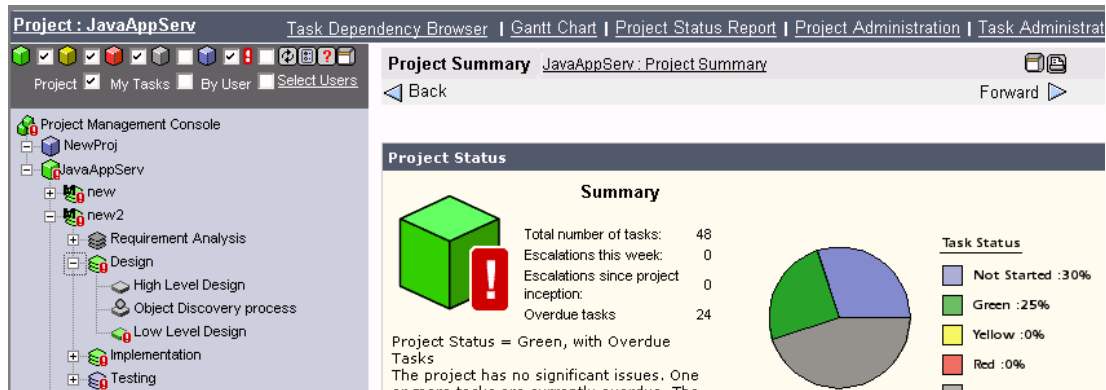


Figure 151. PMC Workspaces: Tree and Summary Views

Working with the Tree View

Once created or imported, project plans are presented within the PMC using an intuitive, hierarchical browser view. The left side of the page displays the project structure in a tree format. This expandable view provides an intuitive summary of all task groups, sub-groups, and assignments.

The status colors assigned to each Task Group, Master Task Group, and Project are “rolled-up” summaries reflecting the status of the tasks and Task Groups below.

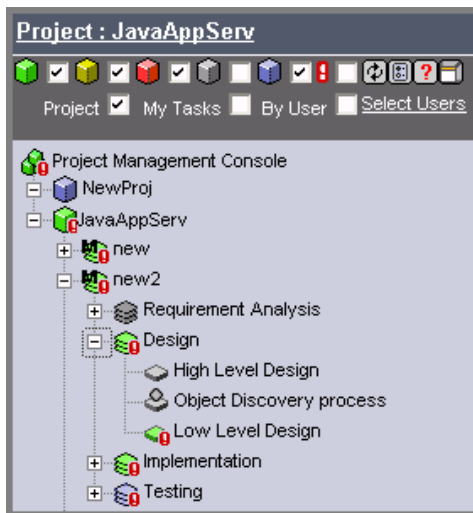


Figure 152. Tree view

Filtering the tree view

You can filter the project tree by checking the desired status colors and user selections at the top of the tree. This will filter the project tree to display only those tasks indicated by the filter.

To filter the tree view:

1. Check the colored boxes to indicate which status colors you want to see.
 - Red, yellow, and green indicate tasks that are currently red, yellow, or green status.
 - Grey indicates tasks that are completed.
 - Blue indicates tasks that are not yet started.
 - The exclamation point indicates tasks that are overdue.

By default, all boxes are checked and tasks of all status colors will display.

2. Choose the desired user selection.
 - Project displays the tree organized by project.
 - My Tasks displays only those tasks assigned to you.

Tasks will be displayed in their correct Project, Master Task Group, Task Group hierarchy.
 - By User displays the tree organized by user.

The tree displays each user in the project at the highest level, followed by Project, Master Task Group, Task Group, and task.

To limit the number of users displayed, click Select Users. You can select the users whose tasks you want to see.

Note: The “rolled-up” status colors of the Task Groups, Master Task Groups, and Project are not recalculated when viewing the tree using the My Tasks or By User selection.

3. When you have made your status and user selections, click the Refresh button to refresh the tree.

The tree displays only those tasks returned by your filter selections.

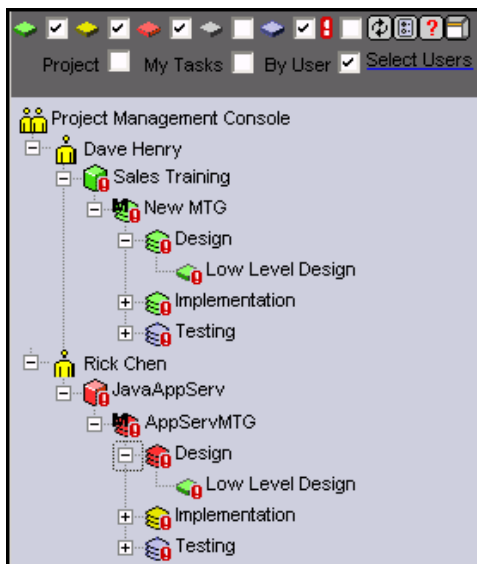


Figure 153. Tree view filtered By User

When you log off, then return to the PMC, your most recent filter settings will be retained.

Working with Summary Views

The Project Management Console provides three different summary views: the Project Summary view, the Master Task Group Summary view, and the Task Group Summary view. The summary view that displays corresponds to the Task Group, Master Task Group, or Project that you select in the tree.

For example, if you select a Master Task Group entitled 'Requirements' in the tree, the summary view displayed will be the 'Requirements' Master Task Group summary.

The selected summary view displays on the right side of the PMC workspace.

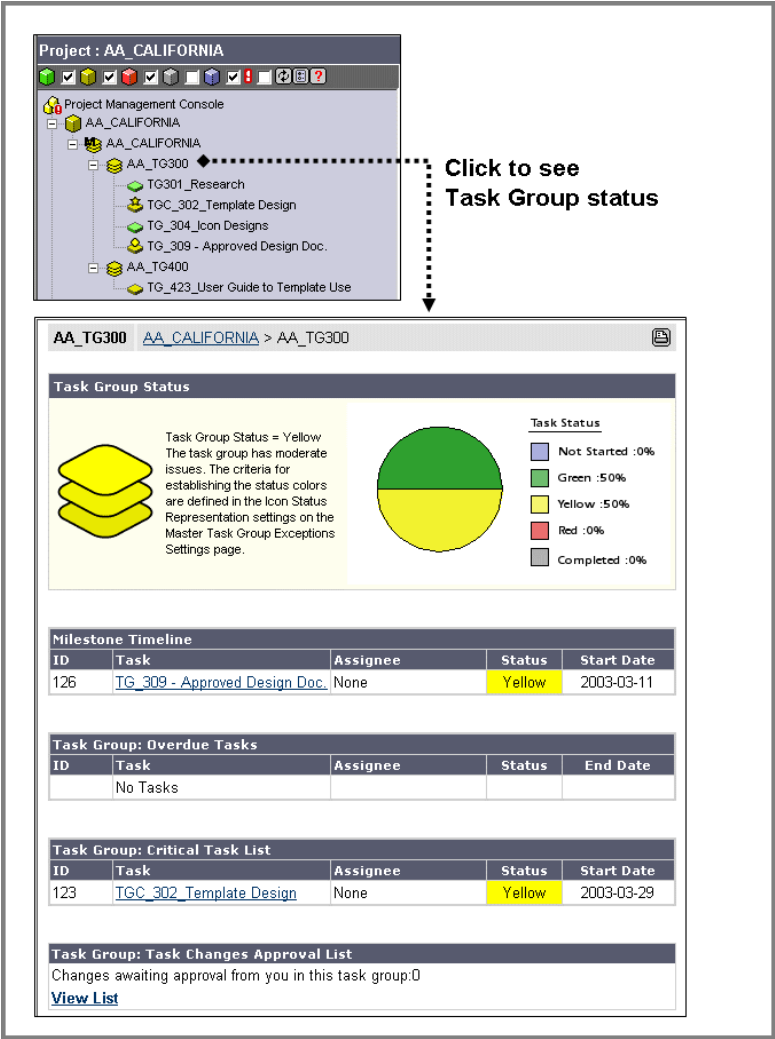


Figure 154. Task Group Summary view

All views provide the following summary information:

- A “traffic light” icon representing the overall status – Red/Yellow/Green
- A pie chart showing an aggregated representation of all the Master Tasks Groups status (Green/Yellow/Red/Not Started/ Completed)
- Task Ageing information for each status
- A date line showing the major project milestones
- A clickable task list showing all items that fit the project managers exception status criteria
- A clickable task list showing all critical task items
- A clickable task list that shows all date / status changes requiring approval
- Links to the “Administer Project Tasks” screen, and links to the “Chart” and Task views
- Links to the reporting to provided that the manager has the proper permissions.
- Ability to set or re-set baseline (Task Group start and end dates for tracking variance.)

You can also view the details of an individual task by selecting it in the tree. The summary section on the right side of the page will display the details of the selected task.

Master Task Group Settings

Master Task Groups provide a high-level task grouping mechanism. Properties are applied at the Master Task Group level, and all task groups and tasks inherit the properties of their parent Master Task Group. This enables a single project to have multiple Master Task Groups, all with different property and exception management settings to suit the needs of the tasks within that group.

Configuring Master Task Group Properties

The Master Task Group Properties page allows you to configure a number of settings that are applied to all activity in the Master Task Group. Each Master Task Group can be configured individually.

FundManager [JavaAppServ](#) > [Project Administration](#) > [Master Task Group Properties](#) > FundManager

Back Forward

***Name :** FundManager

***Master Task Group Details :** Created During MS Project Import. [27, Aug 2003]
(Maximum 4000 characters)

MTG Owner : Administrator

MS Project Plan Name : Project_OnlineFundManager3.csv
Created On : 2003-08-27

Tasks :

- ☒ **Task Lock** Allows only the master task group owner and other PMC administrators to add tasks to the master task group.
- ☐ **Artifact Link Required before task can be completed**
- ☐ **Text entry for status field**
- ☒ **Automatically Number using WBS System**

General : 10 Number of days to keep deleted items

Exception: ☒ Use Exception Monitoring for the Master Task Group

Submit Cancel

Figure 155. Master Task Group Properties page

To configure Master Task Group Properties:

1. Select the Project Administration link in the upper right corner of the Project Management Console.

The Project Administration page displays.

2. Click Master Task Group Properties.

A list of all Master Task Groups in the project displays.

3. Select the desired Master Task Group.

The Master Task Group Properties page displays.

4. Make the desired edits.

5. When you are finished, click Submit.

You can configure the following Master Task Group properties:

Master Task Group Owner

This project member is responsible for managing all task management settings within the Master Task Group. Only the existing Master Task Group owner can modify this field and change it to another Master Task Group owner. There can be only one Master Task Group owner associated with a Master Task Group.

Task Lock

This feature ensures that only users with administrative rights can add tasks to a project. The lock applies to Projects, Master Task Groups, and Task Groups.

Artifact Link Required Before Task Can Be Completed

This feature requires that an artifact link is entered before a task can be closed or marked as 100% complete. Artifacts include documents and Tracker artifacts.

Text Entry for Status field

This feature enables a Project Manager to enforce process control and complete traceability by requiring that a text entry is associated with a task status change. All status changes must include an explanation of why the change is necessary.

The three categories of text entries are:

- **Plan Required**—The project member is required to enter a plan for solving outstanding issues.
- **Issues**—The project member is required to list “show stopper” issues.

Accomplishment—The project member is required to enter how they worked through the issues.

Automatically Number Tasks Using WBS System

This feature ensures that all tasks are numbered using the WBS (Work Breakdown Structure) numbering format. This allows tasks to be referenced directly by their assigned number.

The Project Management Console automatically calculates and assigns the WBS (Work Breakdown Structure) code based on the exact position of the task in the Task hierarchy. The WBS code is unique to a particular task, and only one WBS code per task is allowed.

For example, when a task is given the WBS code of 6.2.1 it indicates that the task is the first task in the second sub-task group of the sixth top-level summary task.

Number of Days to Keep Deleted Items

Allows you to specify the number of days that deleted tasks will be kept. This feature works in conjunction with the Re-instate Deleted Task feature to provide an “Undo” function for tasks.

Exception Monitoring

This feature allows you to apply exception monitoring settings that determine the frequency and conditions for sending notifications, required approvals, and automatically escalating task status. By default, exception monitoring is enabled at the project level. You can disable it, if desired, at the Master Task Group level.

Configuring Master Task Group Exception Settings

The Master Task Group Exception Settings feature allows you to configure workflow rules to manage change and other exceptions.

Change management

The PMC provides managers with the ability to regulate and direct change in an orderly manner through change justification and change approval preferences. When activated, change justification requires any developer altering task status (traffic-light indicator) or project completion date to submit a written explanation for the adjustment. This documentation is linked to the task record as part of the audit trail and history for future reference. Project managers can also require artifact associations, such as requirement references or attached documents, to be submitted when a task is completed.

Change approval provides managers with oversight over all task changes. When activated, this feature holds all proposed task state changes in a centralized queue for management review and approval.

Other exception management

SourceForge also provides exceptions management capabilities that enable managers to automate problem identification and resolution. The PMC supports several configured exception criteria, including:

- Task date changes
- Task state changes
- Task inactivity
- Overdue tasks
- Automatic notification, escalation, and reassignment

On a per-project basis, exception criteria and trigger levels can be specified for the type of task (milestone, critical, general). For example, exception criteria within a group of testing tasks may call for triggers that are set off whenever any critical task changes state from green to yellow or higher.

The PMC provides multiple levels of notification when exception rules trigger. In addition to notification settings, re-assignment workflow rules allow managers to automatically re-assign tasks that meet specific criteria.

Use these settings to determine how often and under what conditions the system will send notifications, require approval, and auto-escalate task status.

Notifications	Auto Escalations	Task Status Rollup
<input type="checkbox"/> Changes to task status	<input type="checkbox"/> Task inactivity	<input type="checkbox"/> Task status rollup
<input type="checkbox"/> Changes to task date	<input type="checkbox"/> Overdue tasks	
<input type="checkbox"/> Task inactivity		
<input type="checkbox"/> Task alerts: early warning		
<input type="checkbox"/> Overdue tasks		

Master Task Group Message Templates
Choose a message template for this master task group to change, which sets of messages will be sent. Messages are defined on the Project Administration > Message Template Management page

Current Master Task Group Message Template in use:

Notifications: Changes to Task Status
Define who is notified and/or sent an approval request when the status of a task is changed by the task owner.

Notification Message:

Approval Message:

Enabled?	Type	Notify	Approval
<input checked="" type="checkbox"/> All			
<input type="checkbox"/>	Milestones	<input type="text" value="Administrator"/> <input type="text" value="Task Assignees"/> <input type="text" value="Task Assigner"/> <input type="button" value="Select Users"/>	<input type="text" value="Administrator"/> <input type="text" value="Task Assigner"/> <input type="text" value="MTG Owner"/> <input type="button" value="Select Users"/>

Figure 156. Master Task Group Exceptions Settings page

To configure Master Task Group Exception Settings:

1. Select the Project Administration link in the upper right corner of the Project Management Console.
The Project Administration page displays.
2. Click Master Task Group Exception Settings.
A list of all Master Task Groups in the project displays.
3. Select the desired Master Task Group.
The Master Task Group Exception Settings page displays.
4. If desired, select a message template for the exception messages to be sent when exceptions are triggered.
5. Select the setting that you want to configure.
The selected setting page displays in the lower section of the page.
6. Make the desired edits.
7. When you are finished, click Submit.

You can configure the following Master Task Group exception settings:

Project Exception Monitoring

By default, when a new Master Task group is created, the project exception monitoring will be set on. This settings enables the use to import a project and, by default, monitoring is on for all tasks imported. Altering the monitoring flag after the import would not cause monitoring to be enabled for task. Use Task Manager to disable individual tasks.

Master Task Group Message Templates

A predefined or custom message can be sent with each notification, approval, auto-escalation, or early warning message. Predefined messages are grouped into three different project management behavioral templates: Corrective, On-Target, and Trusted.

Task Status Notification

This setting defines the list of users to be notified and the type of task (Critical, General or Milestone) when a task owner changes the status of a task. An Approval Required list can also be defined for those tasks requiring approval prior to any status change.

Task Date Changes

This setting defines the list of users to be notified and/or the list of users to whom an Approval Request must be sent to when a task owner changes the date of a task. Task date notification can be triggered based on the user changing the date by a certain number of days, or by the number of times the date is changed.

Task Inactivity Notification

This setting defines the list of users to be notified when there has been no activity associated with a task for specific time period. If a Task Inactivity Notification is sent more than a specified number of times, the task can automatically be reassigned and task status changed. Task Inactivity notification does not begin until the task reaches its start date.

Task Inactivity Escalation

Inactive tasks may have their status altered, and escalated to another user. Escalation and status change is activated after a specified number notifications are sent. The user sets the number after which escalation occurs.

Task Alert Notification: "Early Warning"

This setting defines the list of users to be notified when tasks are approaching an "overdue" status. It provides an early warning mechanism by enabling Project Managers to define the number of days until the task end date, the percentage of task complete, and the notification mailing frequency for each task.

Note: Enter percentages in whole numbers only. Percentages >100% will be rounded down to 100.

Overdue Task Notification

This setting defines the list of users to be notified when tasks are overdue (the current end date in the project is beyond the task end date.) Project Managers can set the mailing frequency of notification, define the escalation behavior, and the applicable status change rules for each overdue task.

Project Icon Status Representation

This setting allows Project Managers to define when icon colors change as visual representations of the project's status. You can control when the Task Group icon changes color in response to changes in the status colors of the tasks and critical tasks within the task group.

For task and critical tasks, you can set the percentage of tasks that must change from the default green status color to either red or yellow to cause their parent Task Group icon to change from the default green. (The percentage is set in the field: % of Sub Tasks Change Status). It is also possible to regulate when the color of the Master Task Group icon is altered by setting a percentage of Task Group icons that must change to either yellow or red, before the Master Task Group icon color is altered. This icon color altering mechanism is referred to as color "rollup" or "escalating" the color.

For example, if a user required the Task Group icon to become yellow when 40% or greater of the General Tasks within a Task group have a status of yellow:

- Check the checkbox next to General Tasks
- Set 40 in the field labeled: % of Sub Tasks Change
- In the Status Change pull-down select "Escalate to Yellow"

Note: Enter percentages in whole numbers only. Percentages >100% will be rounded down to 100.

Creating Task Status Workflows

The Master Task Group Exception Settings page allows you to create convenient workflows for task status changes. This section provides several example workflows.

Example Workflow 1

Task status A has changed. The task will be sent for approval to the Project Manager. An email will be sent to the user whose approval for the change is necessary. Once approved, a notification will be sent to a specified set of users. If rejected, an option to enter the reason is available for the Project Manager and an email is sent out. If the Project Manager is still undecided, they can request more information from the user who initiated the change.

Example Workflow 2

Task B date has changed. The date change is longer than specified. An email will be sent to the user whose approval is sought. Once approved, a notification will be sent to the users specified. If rejected, an option to enter the reason is available for the Project Manager and the an email will be sent. If the Project Manager is still undecided, they can request more information from the user who has initiated the change.

Example Workflow 3

Task B date has changed within the specified limits, but the date has changed several more times beyond the limits. Once approved, a notification will be sent to the users specified. If rejected, an option to enter the reason is available for the Project Manager and the an email will be sent. If the Project Manager is still undecided, they can request more information from the user who has initiated the change.

Example Workflow 4

Task C has been inactive (none of the task fields have been updated) for more than a specified number of days. An email will be sent to specified users. A notification is sent every day until activity occurs for the task. If the notification has been sent more than a specified number of times, the task is auto-escalated to another user and the status changes. An email is also sent to a specified set of users notifying them of the auto-escalation.

Configuring Status Color Values

By default, the PMC provides the following status colors that can be assigned to Tasks and “rolled-up” to Task Groups, Master Task Groups, and Projects:

- Red
- Yellow
- Green
- Grey (completed)
- Blue (not started)
- Overdue

These status colors are displayed everywhere the Task, Task Group, Master Task Group, or Project is represented. In addition, descriptive text associated with each status color is displayed on the Task Group, Master Task Group, and Project Status pages.

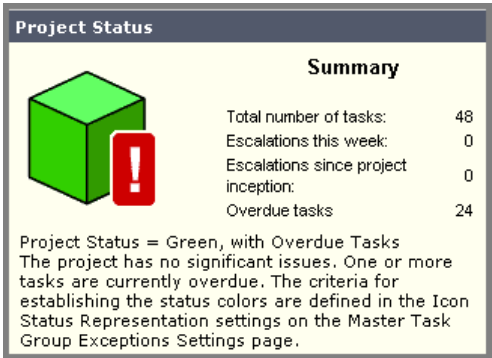


Figure 157. Descriptive text on Project Status page

If desired, you can edit both the text associated the color and the descriptive text for the status pages.

To configure status color descriptions:

1. Select the Project Administration link in the upper right corner of the Project Management Console.

The Project Administration page displays.

2. Click PMC Summary Text Settings.

A list of all Master Task Groups in the project displays.

3. Select the desired Master Task Group.

The Configure PMC Summary Text Settings page displays.

From this page you can configure the definitions of the status colors and edit the descriptive text that appears on the project, master task group, task group and task summary pages.

The Task	
Status	Summary Text
Critical	The task is jeopardizing project completion.
Yellow	The task has moderate issues.
Green	The task has no significant issues.
Overdue	Overdue Task

Next

Figure 158. PMC Summary Text Settings page

4. Enter the following:

- Text for the status colors. For example, you may wish to change 'Red' to 'Critical'.
- Summary text associated with tasks.

You will be prompted to change the text, if desired, for Task Groups, Master Task Groups, and Projects.

5. When you are finished, click Next.

6. If desired, enter summary text for Task Groups, Master Task Groups, and Projects.

7. When you are finished, click Submit.

Your new text will now replace the default text throughout the Master Task Group.

Note: Use care when editing the text for Projects as it will propagate to all Master Task Groups in the project, even those that may be managed by another user.

Task and Project Reporting

The Project Management Console summary reporting tools include the summary reports discussed in “Working with Summary Views” on page 269, and interactive Gantt charts. Summary reports provide a comprehensive visual overview of all individual project tasks including any project delays. Summary reports also provide visual representations of the status of all individual project tasks within a project.

Interactive Gantt Chart View

The interactive Gantt chart view provides another intuitive view of both a project plan's organization and real-time status. Within the PMC, Gantt chart task bars also provide traffic-light indicators showing the status and health of observed entries. This view enables managers to see historical data regarding task health changes as problems are encountered (yellow/red) and resolved (green). You can also click on any task line in the Gantt chart to see the task details.

Gantt charts allow you to select from the following reporting options:

VariancesThis function displays the variance between the current project task dates and the original task dates including start and finish variances and variances against the task baseline.

Task ProgressThis function displays the task progress on the Gantt chart.

To display a Gantt chart view of your entire project:

1. Click on a project icon from the project tree menu.
2. Click on the Gantt chart link to display project information.

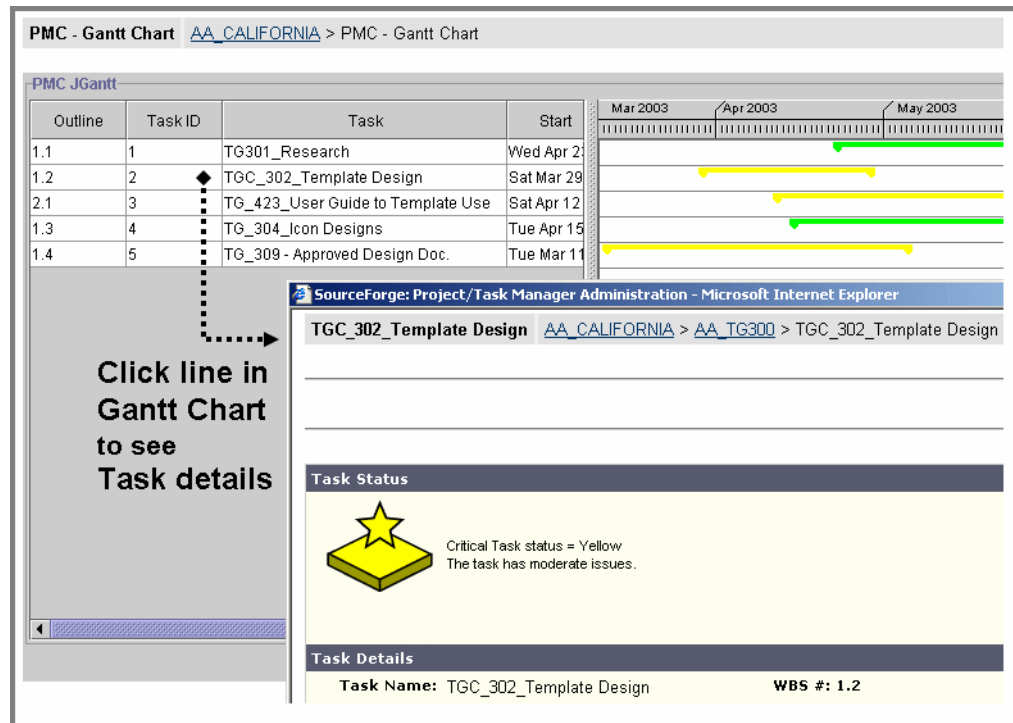


Figure 159. Project Gantt Chart view

Additionally, you can view a Gantt chart view of a Master Task Group or Task Group.

To display a Gantt chart view of a Master Task Group:

- 1.** Click on a project icon from the project tree menu.
- 2.** Click on a Master Task Group icon within the project.
- 3.** Click on the Gantt chart link to display the Master Task Group information.

You can also view a Gantt chart and Task chart view of a Task Group within a Master Task Group.

To display a Task Group within a Master Task Group:

- 1.** Click on a project icon from the project tree menu.
- 2.** Click on a Master Task Group icon within the project.
- 3.** Click on an individual Task Group icon within the selected Master Task Group.

Click on the Gantt chart link to display the Task Group information.

CHAPTER 7

SourceForge Administration

As a SourceForge application administrator, you are responsible for managing and maintaining the SourceForge installation. This chapter covers administration of the SourceForge application. For information on administering the servers on which SourceForge runs, and supporting applications such as the database and SCM system, please see the *SourceForge Enterprise Edition 3.4 Installation and System Administration Guide*.

To begin working with SourceForge, you must log into SourceForge as a SourceForge administrator using the password created during the installation process. This chapter assumes that you are a SourceForge administrator and have a good understanding of the SourceForge resources, user privileges, and user actions described in the previous chapters.

Major Topics:

- “SourceForge Master Group” on page 286
- “Managing Users” on page 289
- “Maintaining Canned Responses” on page 293
- “Managing Projects” on page 296
- “Maintaining the Project Map” on page 302
- “LDAP Authentication” on page 307
- “Gated Community Access” on page 313
- “Managing SourceForge-Wide Mailing” on page 319
- “Managing Application-Wide News” on page 321
- “Monitoring SourceForge-Wide Statistics” on page 322
- “Managing Supported Languages” on page 328
- “Managing SourceForge Administrators” on page 337
- “Role Templating” on page 339
- “Connecting to Multiple SCM Servers” on page 343

SourceForge Master Group

The SourceForge Master Group is the primary workspace for SourceForge Administrators to perform SourceForge-wide administration functions.

Project Templating

The Master Group acts as a template project for all other SourceForge projects that do not select an alternate project template. (See “Project Templates” on page 88.) All of the tool configurations and roles will be copied to each new project using the Master Group as a project template. It also provides five pre-defined roles—Project Administrator, Manager, Developer, Employee, and Visitor—for every project created within SourceForge, whether or not they use the Master Group as a project template.

The Master Group also stores the SourceForge Documents. The SourceForge Documents link is available in the Central Directories and is used to store documents that are accessible to all SourceForge users.



Figure 160. SourceForge Documents link

Note that if you disable the Document Manager in the Master Group, users will no longer have access to any documents posted in SourceForge Documents.

PROTO Tracker

The Master Group PROTO Tracker is the prototype tracker for all trackers in your SourceForge installation. The configuration of the PROTO Tracker is reflected in all project trackers, regardless of whether they use the Master Group as a project template.

Edits made to default tracker fields in the PROTO Tracker will be propagated to all existing trackers and will be reflected in all newly created trackers; however, custom fields added to the PROTO tracker will not be propagated to other trackers

To configure the PROTO Tracker, follow the instructions for configuring any tracker. (See “Tracker Administration” on page 194.

Note: Do not delete the value 'none' from any field in the PROTO tracker. The default value 'none' is a necessary value for all fields with data type Value List. If you delete or rename the value 'none', you will no longer be able to submit tracker artifacts to any tracker in your SourceForge installation.

You will no longer be able to submit tracker artifacts regardless of whether the field is enabled or disabled in any given tracker.

Other SourceForge Administration Projects

Stats Group

Each SourceForge installation has one Stats Group which is used by SourceForge to maintain application-wide statistics.

News Group

Each SourceForge installation has one News Group which is used by SourceForge to maintain application-wide news.

Managing Users

As SourceForge Administrator, you may wish to give other users certain application-wide Administrator permissions. You do this by first adding users to the Master Group and then giving the users access permissions for the Master Group.

For detailed information on adding users to projects and assigning member permissions, refer to “Managing Project Information” on page 156 and “Using Role-Based Access Control (RBAC)” on page 167.

Managing User and Project Registration

SourceForge Administrators can control how users and projects may be registered with SourceForge.

User Registration

There are two ways a user may become a participant, a registered user, in a SourceForge installation:

- By navigating to the URL of the SourceForge installation and clicking Create New Account. The user then enters their account details and submits the request for approval by any SourceForge Administrator. This style is referred to as “Open User Registration.”
- The Source Forge Administrator can disable “Open User Registration.” When open registration is disabled, (referred to a Closed User Registration) only the SourceForge Administrator can create new user accounts. This feature gives full control over user registration to the SourceForge Administrator. “Create New Account” will not appear on the SourceForge home page when open registration is disabled.

To disable open user registration:

- 1.** Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
- 2.** Click Application Access Control.
The Access Control screen appears.
- 3.** Select the required “User Registration Mode” radio button to either enable “Open Registration” or “Close Registration.”

Project Registration

There are two ways a new project may be registered with SourceForge:

- Any registered users may create a new project. The request to register the new project is automatically submitted to a SourceForge Administrator for approval. This style of project registration is referred to as “Open Project Registration.”
- The Source Forge Administrator can disable “Open Project Registration.” When open registration is disabled, (referred to as Closed Project Registration) only the SourceForge Administrator can create new projects. This feature gives full control over project registration to the SourceForge Administrator. When open project registration is disabled, a user attempting to register a new project will be rejected with the message: “Project Registration is disabled.”

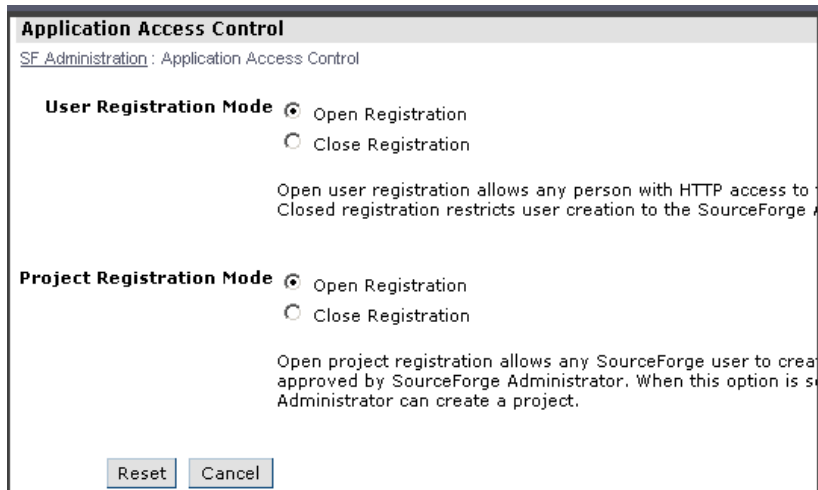


Figure 161. User and Project Registration Settings

To disable open project registration:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click Application Access Control.
The Access Control screen displays.
3. Select the desired “Project Registration Mode” radio button to either enable “Open Registration” or “Close Registration.”

Browsing User Information

SourceForge Administrators can search for users by name, user name, email address, status, project, and period of activity.

To browse a list of users:

1. Click SourceForge Admin in the navigation panel.

The SourceForge Administration page displays.

2. Click Find and Manage Users.

The Find and Manage Users page displays. It gives a count of the total number of SourceForge users and provides the option to search for users by name, e-mail address, status, project, and duration of activity.

Find & Manage Users
 SF Administration : Find & Manage Users

Find Users

By Name, Username or Email:
 By Status:
 By Project:
 By Activity:

Total Active Users: 13
 Total Users: 13

Username ▼	Name	Status	Projects	Last Activity
none	None	Active (A) ▼		
admin	Administrator	Active (A) ▼	AA_CALIFORNIA Master Group News Group Stats Group	0 days
jfrost	Jacklin Frost	Active (A) ▼	AA_CALIFORNIA	1 day

Figure 162. Find and Manage Users page

3. Enter the full name, SourceForge login name, or e-mail address of the user you are searching for in the left-most text field.
4. Specify your search criteria in the By Status, By Project, or By Activity boxes.
5. Click Go.

The list of user(s) matching the search criteria is displayed on the lower section of the page.

If you prefer not to specify a user name or other information but want a list of all users, click All Users instead of Go.

Editing User Information

The Edit User page lets you change the following information about a user:

- Name — Full name of the user
- Status — Active, Pending, Suspended, or Deleted
- Email — The current email address for the user.

To edit user information:

1. On the Find and Manage Users page with a list of users displayed, click the desired User Name.

The Edit User page displays.

SourceForge Admin: Edit User

SF Administration : Find & Manage Users : SourceForge Admin: Edit User

User Details

Name: Jacklin Frost

User Name: jfrost

Status: Active (A)

Email address: jf@no_where.com

Days since last login: 1

Logins last 30 days: 2

Account created: 2003-04-28

☐ Restricted User

By selecting this option, upon logging in, this user will be restricted to projects of which they are a member. The application home page, other projects and shared tools will not be visible to this user. Currently [anonymous access](#) is allowed to SourceForge. Therefore restricted users could gain access by logging in to SourceForge.

Submit

Project Membership

Project Name	Short Name	Open artifacts	Non-closed tasks	Member Since	Operations
AA_CALIFORNIA	aacal	0	0	2003-04-28	Project Admin Member Perms

Figure 163. Edit User page

2. Edit the desired information.
3. Click Submit.

Maintaining Canned Responses

When a project or group registration request is denied, an email message is sent notifying the requestor that the project has been denied. In the e-mail message, you can include canned responses that contain common reasons why projects or groups are denied.

Creating a Canned Response

To create a canned response:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click Manage Canned Responses.

The Create Canned Response page displays.

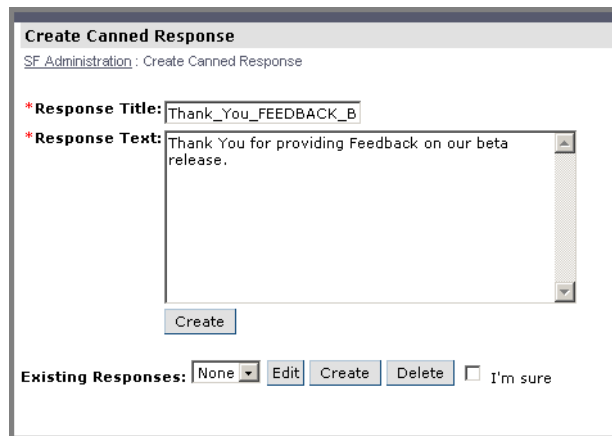


Figure 164. Create Canned Response page

3. Enter the title for the response in the Response Title field.
4. Enter the text for the message in the Response Text field.
5. Click Create.

The title of the canned response is placed on the Existing Responses drop-down list. Canned Responses are available to you when you approve/reject a pending project.

Modifying a Canned Response

You can modify existing canned responses.

To edit a canned response:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click Manage Canned Responses.
The Create Canned Response page displays.
3. Select a response from the Existing Responses drop-down list.
4. Click Edit.

The Edit Canned Response page displays.

Edit Canned Response
SF Administration : Edit Canned Response

Modify Response:

* Response Title:

* Response Text:

Existing Responses: ☐ I'm sure

Figure 165. Editing Canned Responses

5. Make the desired edits to the canned response.
6. Click Modify.
A message confirming your edits displays.

Deleting a Canned Response

You can choose to delete an existing canned response.

To delete a canned response:

- 1.** Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
- 2.** Click Manage Canned Responses.
The Create Canned Response page displays.
- 3.** Select a response from the Existing Responses drop-down list.
- 4.** Select the check box next to I'm sure.
- 5.** Click Delete.
The response is deleted.

Managing Projects

Only a SourceForge Administrator can approve special interest groups (SIGs) and projects. A SourceForge Administrator can also register new projects.

SourceForge Administrators also have the option of enabling automatic project approval for projects using a CVS repository.

Browsing Project Information

You can search for projects alphabetically or by project status as follows:

- Pending - Projects or SIGs submitted by users waiting for approval.
- Incomplete - Projects or groups that are awaiting additional information to be completed before they can be approved.
- Deleted - Projects or groups that have been deleted.

To browse projects:

- 1.** Click SourceForge Admin in the navigation panel.

The SourceForge Administration page displays.

- 2.** Click Find and Manage projects.

The Find and Manage Projects page displays. You can search projects by any of the following criteria: name of the project, short name of the project, status, and activity.

- 3.** Enter the name of the project or the short name of the project in the Name, Short Name field.
- 4.** Specify a status in the By Status drop-down list.
- 5.** Specify a period of activity in the By Activity drop-down list.

6. Click Go.

If you prefer not to specify a project name or other information but want a list of all projects, click All Projects instead of Go.

The following information about every project is displayed:

- Name
- Short Name
- Date Created
- Status
- Number of Users

Find & Manage Projects

SF Administration : Find & Manage Projects

Find Projects

Name, Short Name

By Status

By Activity

None

None

Go

All Projects

Name	Short Name	Date Created	Status	Num
AA_CALIFORNIA	aacal	2003-04-28	Active (A)	2
General Test 1	general1	2003-04-28	Active (A)	1
General Test 2	general2	2003-04-28	Active (A)	1

Figure 166. Find and Manage Projects - result set

Approving New Projects

SourceForge Administrators are responsible for approving all projects or group requests from users before a project or group becomes active. If a project request does not contain all of the required information, you can change the status to incomplete and send a canned response to the user.

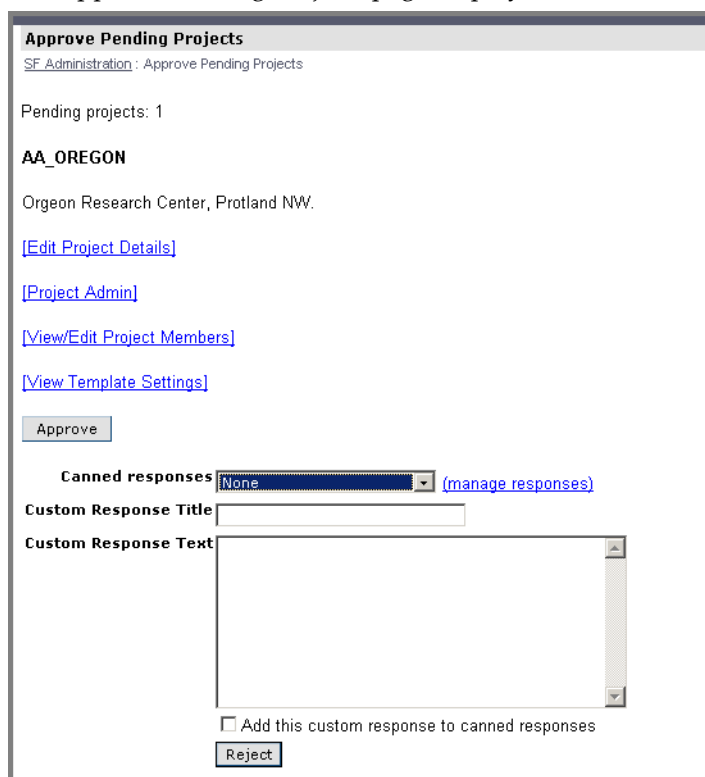
To approve projects:

1. Click SourceForge Admin in the navigation panel.

The SourceForge Administration page displays.

2. Click Approve New Projects.

The Approve Pending Projects page displays.



Approve Pending Projects
SF Administration : Approve Pending Projects

Pending projects: 1

AA_OREGON

Oregon Research Center, Protland NW.

[\[Edit Project Details\]](#)

[\[Project Admin\]](#)

[\[View/Edit Project Members\]](#)

[\[View Template Settings\]](#)

Canned responses: None [\(manage responses\)](#)

Custom Response Title:

Custom Response Text:

☐ Add this custom response to canned responses

Figure 167. Approve Pending Projects page

3. If desired, you can view or modify the settings and details of the project by clicking Edit Project Details.
4. Click “Continue” to approve the project.

An approval notification is sent to the requestor.

Approving a Special Interest Group (SIG)

You can approve a SIG like any other project after specifying that it is of the type SIG.

To approve a SIG:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click Approve New Projects.
The list of groups or projects waiting for approval displays.
3. Click the appropriate Edit Project Details link.
The Edit Project page displays.

SourceForge Admin: Edit Project
 SF Administration : Find & Manage Projects : SourceForge Admin: Edit Project

Project Detail

Project Name: AA_OREGON

Short Name: aaor

Status: Active (A)

Type: Project

SCM: Project

Private: ☐

Number of Users: 2 [Administer Project](#)

Project Created: 2003-04-29

Figure 168. Edit Project page

4. Select SIG from the Type drop-down list.
5. Click Approve Pending Projects Here.
The Approve Pending Projects page displays.
6. Select the Approve icon.
The project requestor receives an e-mail that the SIG is approved.

Rejecting Projects

To reject a project request:

1. Click SourceForge Admin in the navigation panel.

The SourceForge Administration page displays.

2. Click Approve New Projects.

The Approve Pending Projects page displays.

- a. Select a canned response as appropriate from the Canned Responses drop-down list in the project you are rejecting.
- b. If the canned responses are not appropriate, enter a custom response using the fields provided.

3. Click Reject.

The project is removed from the list of pending projects and an e-mail is sent to the requestor stating the reason the project request was denied.

Enabling Automatic CVS Project Approval

Automatic project approval is available for projects selecting CVS repositories as their project repositories. This option is not available for projects selecting ClearCase or PVCS repositories as their project repositories. If your SourceForge installation connects to SCM repositories of multiple types, only those projects requesting CVS repositories can be automatically approved. All other new project requests will be submitted for manual approval by a SourceForge Site Administrator.

To enable automatic CVS project approval:

Note: Edit the following file with care. It is highly recommended that you make a backup before editing this file.

Edit the file `/sourceforge/etc/sfee/local.inc` as follows:

- 1.** Go to the section which reads Automatic Project Approval
- 2.** Change the value of `$ENABLE_AUTOAPPROVE_PROJECTS` to:
 - 1 to enable automatic project approval
 - 0 to disable automatic project approval

The default value is 0 / disabled.

Maintaining the Project Map

The Project Map contains a set of default categories. Each category consists of a short and long category name, and a description.

The default project map categories are:

- Development status
- Environment
- Intended audience
- License
- Natural language
- Operating system
- Programming language
- Topic

You can add additional categories or edit the default categories.

Adding Project Map Categories

You are responsible for adding project map categories in SourceForge.

To add a new category:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click Add to the Project Map in the Project Map section.
The Project Map-Add Node page displays.

SourceForge Admin: Project Map - Edit Category
[SF Administration](#) : SourceForge Admin: Project Map - Edit Category

Edit Project Map Category

Parent Category: 4 - Beta

*** Category Short Name:** guidevxp
No Spaces

*** Category Name:** WINXP GUI
Max. length 80

*** Category Description:** G14 - WINDOWS XP - GUI Front end development
Max. length 255

Figure 169. Project Map - Add Node page

3. Select a parent category from the Parent Category drop-down list.
4. Enter a short name for the category in the Category Short Name field.
This name should be between 3 and 15 characters in lower case, and contain only characters, numbers, and dashes.
5. Enter a full name for the category in the Category Name field.
This is the name that will appear in the Project Map and is limited to 80 characters.
6. Enter a description for the category in the Category Description field.
The description is limited to 255 characters and should provide enough specific information so that a project administrator can assign projects appropriately to this category.
7. Click Save.

Modifying a Project Map Category

You can change the parent, name, or description of an existing category. When a change to a category is made, all the child categories and projects change as well. To move a category from one parent to another, change the parent category.

To modify a category:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click Display Project Map in the Project Map section.
The Project Map displays.
3. Click Edit next to the desired category.
The Project Map-Edit Category page displays.

SourceForge Admin: Project Map - Category List
[SF Administration](#) : SourceForge Admin: Project Map - Category List

Category Added.

[Add to the Project Map](#)

Project Map

- root
 - Development Status [\[Edit\]](#) [\[Delete\]](#) [?](#)
 - 1 - Planning [\[Edit\]](#) [\[Delete\]](#) [?](#)
 - 2 - Pre-Alpha [\[Edit\]](#) [\[Delete\]](#) [?](#)
 - 3 - Alpha [\[Edit\]](#) [\[Delete\]](#) [?](#)
 - 4 - Beta [\[Edit\]](#) [\[Delete\]](#) [?](#)
 - WINXPGUI [\[Edit\]](#) [\[Delete\]](#) [?](#)
 - 5 - Production/Stable [\[Edit\]](#) [\[Delete\]](#) [?](#)

SourceForge Admin: Project Map - Edit Category
[SF Administration](#) : SourceForge Admin: Project Map - Edit Category

Edit Project Map Category

Parent Category:

* Category Short Name:
 No Spaces

* Category Name:
 Max. length 80

* Category Description:
 Max. length 255

Figure 170. Project Map - Edit Category page

4. Edit the category information as desired.
5. Click Update.

Project Summary Page Refresh Rate

The project summary page is refreshed periodically by SourceForge. The refresh updates any data that appears on the project summary page, such as news items or tracker totals. When a user logs in for the first time, the project summary page is built from current data. (Building a project summary page requires accessing large quantities of information, which takes cycles away from supporting active work.) The summary page is then saved for that user. The page will not be rebuilt with fresh data, even if the user logs out and logs in again, until the time period specified has elapsed; the saved version is re-displayed. Data on the summary page, therefore, may not accurately reflect the current project status. For example, new file releases may have been created since the summary page was updated. Information in the tools themselves, however, is always up to date. In the case of the file release example, clicking on the File Publisher link always displays current and accurate data on file releases.

To configure the project summary page refresh rate:

Note: Edit the following file with care. It is highly recommended that you make a backup before editing this file.

Edit the file `/sourceforge/etc/sfee/local.inc` as follows:

1. Go to the section which reads Project Summary Page Caching Frequency (in Hours)
2. Change the value of `$project_caching_frequency` to any whole number representing the number of hours between refreshes.

For example:

- A value of 1 to refresh the page every hour.
- A value of 2 to refresh the page every 2 hours.
- A value of 0 to refresh the page immediately whenever a change occurs.

There is no need to restart SourceForge after configuring this setting.

The setting cannot be changed from the SourceForge Administration pages, but must be altered using an editor, after logging in to SourceForge using a secure shell (ssh) client such as PuTTY or OpenSSH. Secure shell provides a character-based terminal connection to Unix servers.

A editor such as “vi” is recommended, or any editor which recognizes the newline character as the end of line marker.

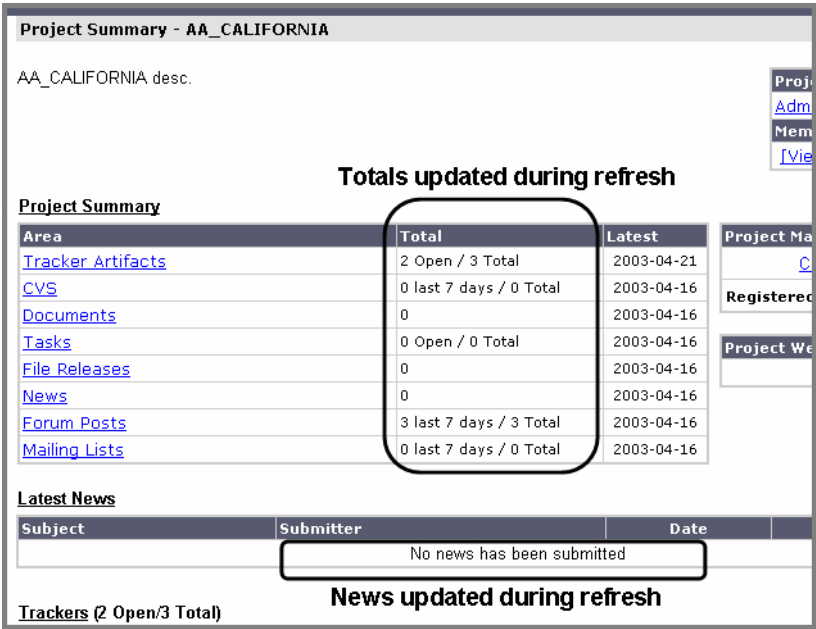


Figure 171. Project Summary data refresh

LDAP Authentication

LDAP integration enables customers to configure SourceForge so that authentication can be made against a client's LDAP directory rather than against the SourceForge database. LDAP authentication may be enabled, or not, after SourceForge has been installed. LDAP integration is configurable at the application level, not project level.

To ease migration for existing customers and for customers who create accounts on SourceForge before turning on LDAP integration, a mapping will occur automatically between LDAP and SourceForge accounts, if the LDAP username matches an existing SourceForge account, that was created prior to LDAP integration being turned on. In cases where the username does not match, or a username has been changed in LDAP, a manual mapping feature will be provided. If LDAP integration is turned on, users must have accounts within the clients LDAP to access SourceForge.

The default for LDAP authentication is off. The SourceForge Administrator must enable the service.

LDAP Support

SourceForge 3.4 supports LDAP version 2 and 3, and the following LDAP servers:

- OpenLDAP 2.0.27 (Linux)
- Netscape Directory Server 6.11 (Unix)
- MS Active Directory (Windows 2000 Advanced Server)

Authentication Process

The authentication work flow is shown in the figure below.

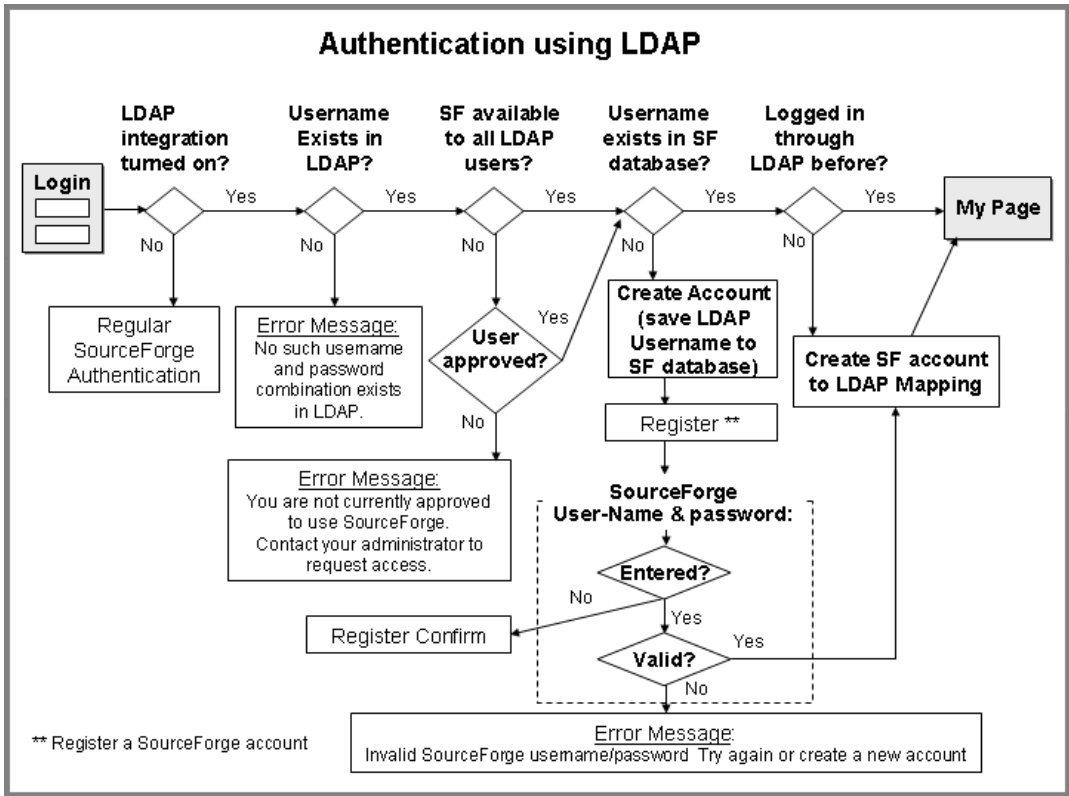


Figure 172. LDAP User Authentication Process

User ID mapping is based on the username (uid in LDAP). If an account is created in SourceForge prior to LDAP integration being activated, a mapping is automatically created to the correct account once a user with the identical username logs in successfully through LDAP.

The sequence is as follows:

1. Username “jsmith” registers on SourceForge.
2. LDAP integration is enabled.
3. Username “jsmith” logs on to SourceForge, providing valid credentials to LDAP.
4. Appropriate mapping is established and “jsmith” is granted access to their original account - the account which was created prior to LDAP integration being enabled.

If no account exists in SourceForge, but exists in LDAP, the user will be prompted to create a SourceForge account. (See Register** in Authentication Using LDAP figure.)

Register a SourceForge account

SourceForge: Register

Already have an account on SourceForge?

Login Name

Password

Submit

Create a new account on SourceForge

Name

Time zone

Email address

Register

No username and password fields display in this section

Create SourceForge account to LDAP Mapping

Registration confirm screen

The diagram illustrates the registration process for a SourceForge account. It is divided into two main sections: 'Already have an account on SourceForge?' and 'Create a new account on SourceForge'. The first section contains fields for 'Login Name' and 'Password', followed by a 'Submit' button. An arrow from the 'Submit' button points to a box labeled 'Create SourceForge account to LDAP Mapping'. The second section contains fields for 'Name', 'Time zone', and 'Email address', followed by a 'Register' button. An arrow from the 'Register' button points to a box labeled 'Registration confirm screen'. A note indicates that 'No username and password fields display in this section'.

Figure 173. Creating a SourceForge Account

Configuring LDAP Authentication

To enable LDAP Authentication:

- 1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
- 2. Click Configure LDAP Configuration.
The Configure LDAP Integration page displays.
- 3. Enter the required data:

Configure LDAP Integration

[SF Administration](#) : Configure LDAP Integration

Use LDAP

Turn this on to use LDAP directory for user authentication instead of the SourceForge database. (User profiles will be stored in the LDAP database, and will match against the LDAP user by uid)

☐ On ☒ Off

LDAP Type

The type of the LDAP Server

Others

LDAP Server

The name (and optionally port) of your LDAP server (eg: ldap.company.com or ldap.company.com:portnumber)

-not set-:389

LDAP Base DN

The Base DN for authenticating users against (eg: "ou=People,o=company")

-not set-

Figure 174. Configuration LDAP Integration page

There are a number of mapping options available:

- Allow all LDAP users to create accounts on SourceForge, or limit the capability to specific uids.
- Map existing SourceForge users to LDAP entries (UserID) that match.
- Manually map an LDAP uid to a SourceForge account.

The screenshot shows the 'LDAP Users' configuration interface. It is divided into three main sections:

- LDAP Users:** Contains two radio buttons. The first is 'Enable all LDAP users to create accounts on SourceForge'. The second, which is selected, is 'Enable only approved users to create accounts on SourceForge'. To the right of these is an 'Add Users' box with the text 'Enter uids comma separated', a text input field, and buttons for 'Add Users' and 'View/Edit approved users'.
- Automatic Mapping:** Contains a paragraph explaining that users can optionally choose to automatically map existing SourceForge users with a matching UserID in the LDAP server. Below this is a checkbox labeled 'Map Existing Users' which is currently unchecked.
- Manual Mapping:** Contains a paragraph explaining that users can manually map an LDAP Uid to an existing SourceForge account. Below this is a form with two input fields: 'LDAP Uid' and 'map to SourceForge Username'. There are buttons for 'Create Mapping' and 'View/Edit current mapping'.

At the bottom of the form is a 'Save Details' button.

Figure 175. LDAP Mapping Options

When you have completed configuring the settings, click Save Details.

User password synchronization

SourceForge LDAP integration optionally supports synchronizing user passwords from a target LDAP server. Enable this option by checking Yes when prompted “Choose whether or not to synchronize LDAP passwords to CVS LDAP” on the Configure LDAP Integration page.

When using this feature with an OpenLDAP server, the UNIX crypt function on the SourceForge server must be compatible with the crypt function on the LDAP server. The crypt function is used to perform one-way password encryption.

If the two systems are running on the same operating system version, it is likely the crypt functions will match and synchronization will succeed. However, if the operating systems differ or if the LDAP system crypt method changed in the past, password synchronization may fail. Please contact VA Software Technical Support for additional information or assistance.

Technical Requirements

The following is a list of restrictions and technical requirements in order to support LDAP authentication.

- Single sign-on is not included, as LDAP does not provide a mechanism for single sign-on.
- When LDAP integration is turned on, it is the sole mechanism by which users are authenticated. Dual LDAP/SourceForge authentication is not supported. This means that if LDAP integration is turned on, users must have accounts in the clients LDAP to access SourceForge.
- No additional fields may be added to user registration.
- No user information (e.g., email address, department, photo, etc.) other than username will be extracted from LDAP for display in SourceForge.
- LDAP integration cannot be used as a license management mechanism.
- LDAP integration is not intended to centralize user management. Users will continue to be managed through SourceForge.
- Any organizational structure that might exist in LDAP will not be used for role assignments.
- Integration with HTTP authentication is not included.
- Users cannot modify their LDAP username and password from within SourceForge.
- SourceForge has an 8-character password limit. When using an external LDAP system for SourceForge authentication, users may have passwords containing greater than 8 characters. In such cases, SourceForge authentication will be successful but CVS login will fail. To prevent this issue, LDAP passwords must be limited to 8 characters.
- Do not create accounts in SourceForge when LDAP integration is enabled. If you enable LDAP integration, the option to set the User Registration Mode to Open or Closed still appears on the Application Access Control screen (accessible from the SourceForge Administration menu). However, users cannot create accounts when LDAP integration is turned on, so setting this option to Open has no effect.

If the User Registration Mode is set to Closed, SourceForge administrators can still create accounts, but must manually map each new account to LDAP. Therefore, creating accounts in SourceForge is not recommended when LDAP integration is enabled.

Gated Community Access

To enable increased security over user access to resources, a SourceForge application may be configured to offer gated community access, also referred to as restricted user access. This option provides a mechanism to restrict users to have access to only projects of which they are a member, i.e. their gated community. Furthermore, gated community users will not even be permitted to see the existence of other projects, such as in the Project List on their My Page. Also, gated community users will not be permitted access to non-project resources such as project maps, snippet library, SourceForge statistic or news.

A gated community user who attempts to access a project of which they are not a member, by entering the URL, will be forbidden access and presented with a 'Page Not Found' screen.

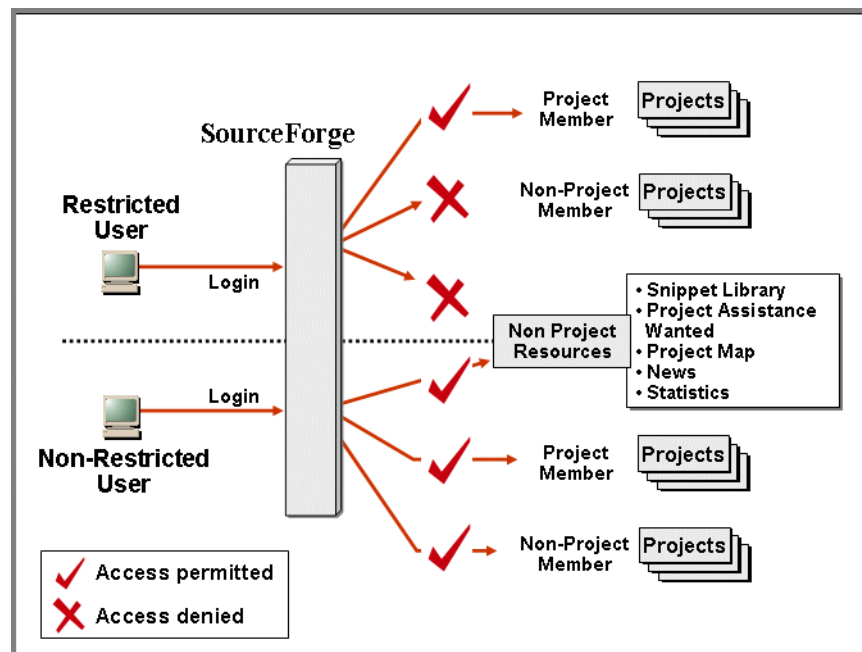


Figure 176. Gated Community or Restricted User Access to SourceForge resources

Gated community user access is a SourceForge application-wide option. This option is especially useful in environments where multiple outside clients, possibly competitors, are accessing and working within the same SourceForge application. In such situations, it will commonly be imperative that each client should have no access to, or even knowledge of, other clients resources.

Configuring SourceForge for Gated Community User Access

SourceForge must be configured appropriately to enable gated community user access.

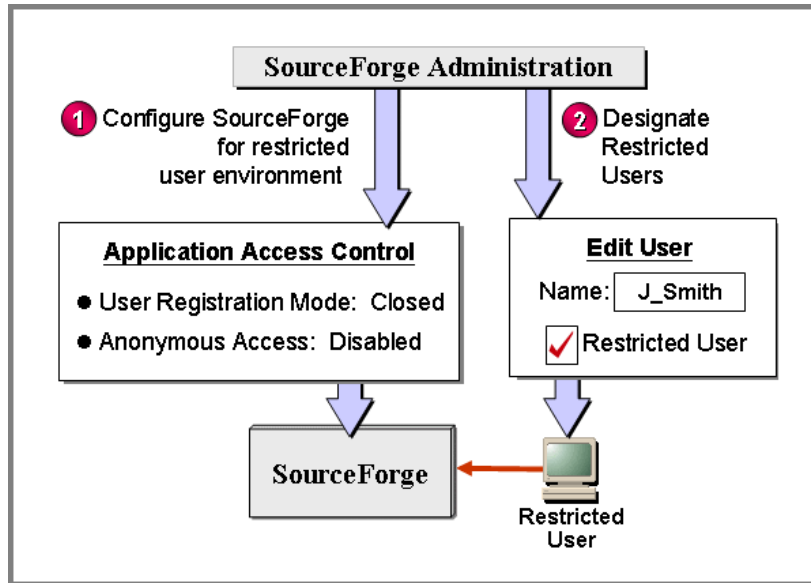


Figure 177. Configuration Settings to enable Gated Community User Access

Two environment wide settings must be configure correctly to enable the option. These are:

- 1. Anonymous Application Access is Disabled**

Anonymous application access allows non-registered users (that is, anyone on the Internet) to gain access to the application home page and the home page of any public project. Disabled anonymous access requires a user account to use SourceForge and restricts user creation to the SourceForge Administrator.

- 2. User Registration Mode must be set to Closed Registration.**

This disables the ability for users to register themselves on SourceForge. With Closed Registration in operation, only SourceForge Administrators can create users.

Configuring Application Access

To configure the application access control settings:

1. Click SourceForge Admin in the navigation panel.

The SourceForge Administration page displays.

2. Click Application Access Control

Then select:

- Anonymous Access Disabled
- User Registration Mode: Closed Registration

3. Click Submit.

Designating Gated Community or Restricted Users

Individual gated community users must be designated as a “restricted user.” Their access to resources is then constrained to only projects of which they are a member.

To designate a user a restricted user:

1. Click SourceForge Admin in the navigation panel.

The SourceForge Administration page displays.

2. Click Find and Manage Users.

On this screen either enter a specific user details, or click All Users to see a list of all registered users.

3. From the list of users, select a user by clicking his or her username.

The Edit User screen displays.

4. On the Edit User screen, check the box labeled Restricted User,

5. Click Submit.

Adding New Document Types

New documents types may be added to, or removed from the system. Examples of a document types are Word files (.doc), PowerPoint files (.ppt), Bitmap files (.bmp), or simple text files (.txt). To add a new document type you must be login in as SourceForge Administrator.

To add a new document type:

1. Expand the Admin menu in the navigation panel.
2. Click SourceForge Admin.
3. Click SF Administration.
4. Click Document Type Admin beneath the SourceForge Utilities section.

The Document Type administration page displays.

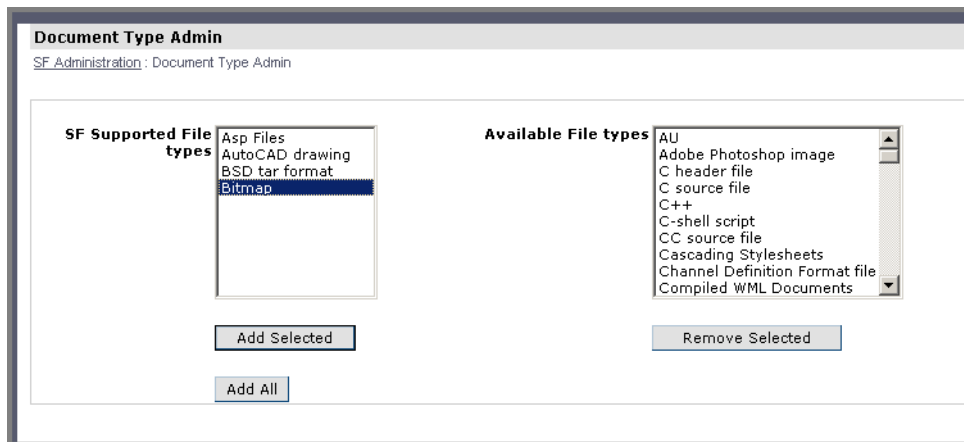


Figure 178. Document Type Administration page

5. To add a file type, select the type from the panel on the left side.

Click Add Selected to add the file type.

To remove a file type, select the type from the right hand panel labelled: Available File types.

Click Remove Selected to remove the file type.

Note: Some file types, such as .txt and .html, are application defaults and cannot be removed. Also file types that are currently in use cannot be removed. File types that cannot be removed are indicated by an asterisk *.

Maintaining Job Categories and Skills

When creating a project assistance wanted listing, the project administrator specifies a job category that describes the basic need (such as tester, administrator, and developers). The SourceForge Administrator can establish or edit these categories at any time.

Adding a Job Category

You are responsible for maintaining job categories. Once a project assistance wanted category is added, it cannot be deleted.

To add a category

1. Expand the SourceForge Admin menu in the navigation panel.
2. Click Project Assistance Admin.

The Project Assistance Admin page displays.

3. Click Add Job Categories.

The Add Job Categories page displays.

Category ID	Name
1	Developer
2	Project Manager
3	System Administrator
4	Technical Writer
18	Architect
100	
101	All-Hands Person
102	No Specific Role

New Category Name:

Figure 179. Add Job Categories page

4. Enter a name for the new category in the New Category Name field.
5. Click Submit.

The category name with an ID is added to the list of Existing Categories.

Adding a Job Skill

You are responsible for maintaining job skills. Once a job skill is added, it cannot be deleted.

To submit a job skill information:

- 1.** Expand the SourceForge Admin menu in the navigation panel.
- 2.** Click Project Assistance Admin.
The Project Assistance Admin page displays.
- 3.** Click Add Job Skills.
The Add Job Skills page displays.
- 4.** Enter a name for the new skill in the New Skill Name field.
- 5.** Click Submit.

Managing SourceForge-Wide Mailing

You can send SourceForge-wide email messages to the following target audiences:

- All project members— Includes all users who are developers on at least one project.
- All project administrators— Includes users who have project administrator permissions on at least one project.
- All users— Includes all registered users regardless of whether they are currently members of a project.

Sending E-mail

To send an application-wide e-mail message:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click Mass Mail SourceForge Users in the SourceForge Utilities section.
The Administrative Mass Mail Engine page displays.

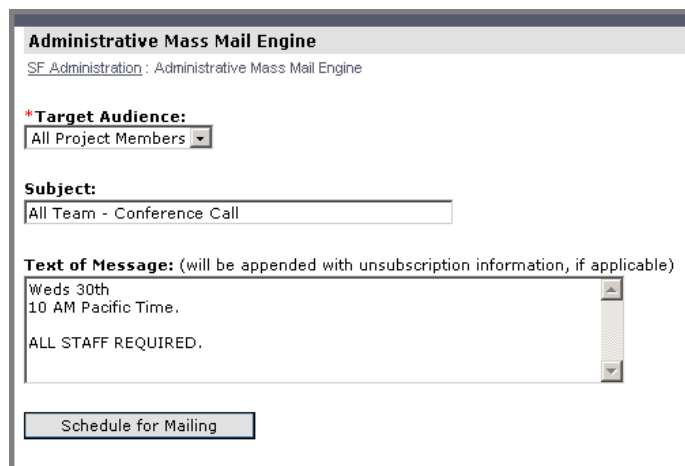
The screenshot shows a web interface titled "Administrative Mass Mail Engine". Below the title is a breadcrumb trail: "SF Administration : Administrative Mass Mail Engine". There are three main sections: 1. "Target Audience:" with a dropdown menu currently set to "All Project Members". 2. "Subject:" with a text input field containing "All Team - Conference Call". 3. "Text of Message: (will be appended with unsubscribe information, if applicable)" with a large text area containing "Weds 30th 10 AM Pacific Time." and "ALL STAFF REQUIRED.". At the bottom is a button labeled "Schedule for Mailing".

Figure 180. Administrative Mass Mail Engine

3. Specify the desired audience in the Target Audience drop-down list.
4. Enter a subject for the message in the Subject field.
5. Enter the text of the message in the Text of Message box.
6. Click Schedule for Mailing to send the mail message.

Note: Mass mail is sent every 45 minutes. This means that if you send two messages successively, the second message is sent 45 minutes after the first one.

Active Deliveries

When you submit an e-mail message for distribution, that mail is scheduled for delivery and included in a delivery queue. This delivery queue is displayed in the section Active Deliveries on the Administrative Mass Mail Engine page. If necessary, you can cancel the e-mail delivery by clicking the “X” in the Cancel column.

Active deliveries

Cancel	ID ▼	Type	Subject	Date	Last User Mailed
[X]	2	DVLPR	All Team - Conference Call	2003-04-29	

Figure 181. Active Deliveries list

Managing Application-Wide News

When a news item for a project is created it is automatically placed in a pending area at the application level. As SourceForge Administrator, you are responsible for reviewing the pending news items for possible placement in the SourceForge-wide news area.

You can also edit the subject and contents of news items before they are distributed.

To approve a news item for inclusion in the SourceForge-wide news:

- 1. Expand the SourceForge Admin menu in the navigation panel.
- 2. Click News Admin.

The SourceForge News Admin page displays.

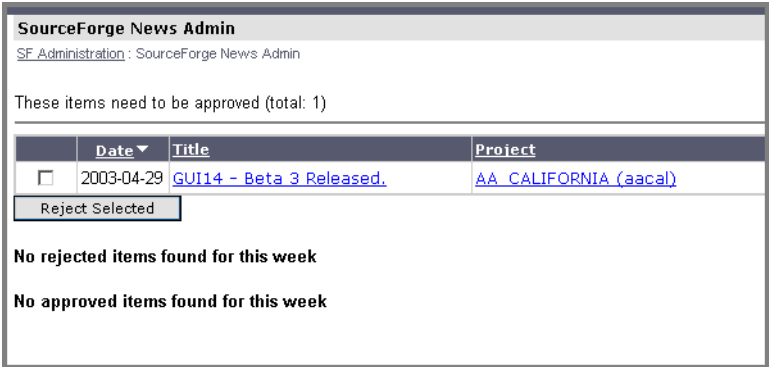


Figure 182. SourceForge News Admin page

- 3. Click the Title link for the pending news item.

The Approve a NewsByte section displays.

- 4. Make changes to the news item, as necessary.
- 5. Click Approve for Front Page.
- 6. Click Submit.

To reject a news item for inclusion in the SourceForge-wide news:

- 1. Expand the SourceForge Admin menu in the navigation panel.
- 2. Click News Admin.

The News Admin page displays.

- 3. Select the check box next to the news item to reject.
- 4. Click Reject Selected.

Monitoring SourceForge-Wide Statistics

You can monitor a number of SourceForge-wide statistics including:

- SourceForge-wide overview statistics
- Project comparison statistics
- SourceForge-wide graphs
- Most recent logins
- Language distribution

To view the application-wide statistics:

- 1.** Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
- 2.** Click SourceForge Statistics in the SourceForge Utilities section.
The SourceForge Site Statistics page displays.

Aggregate Statistics

The Overview Stats link on the SourceForge Site Statistics page connects to the Sitewide Aggregate Statistics section. Here, you can obtain information regarding SourceForge as a whole including:

- Statistics for all time
- Statistics for the last seven days
- Statistics for the past 2 months

The following fields are shown on the Aggregate Statistics page.

Table 6. SourceForge-wide Aggregate Statistics fields

Field	Definition
Current Aggregate Statistics for All Time	
Site Views	Total number of times the pages for this site have been viewed.
Downloads	Total number of files downloaded from this SourceForge site.
Developers	Total number of developers registered as users on this SourceForge site.
Projects	Total number of projects registered on this SourceForge site.
Statistics for the past 7 days	
Day	Specific date for these statistics in DDMMYYYY format.
Site Views	Number of times the pages for this site have been viewed over the past sixties.
Downloads	Total number of files downloaded from this site on this day.
Bugs	Number of bug tracker items open and total for all projects on this day.
Support	Number of support tracker items open and total for all projects on this day.
Patches	Number of patch tracker items open and total for all projects on this day.
Tasks	Number of tasks open and total for all projects on this day.
SCM	Total number of SCM commits and adds for all projects on this day.
Statistics for the past 2 months	
Month	Specific year and month for these statistics in YYYYMM format.
Site Views	Number of times the pages for this site have been viewed over the past three month.
Downloads	Total number of files downloaded from this site on this day.
Bugs	Number of bug tracker items open and total for all projects this month.
Support	Number of support tracker items open and total for all projects this month.
Patches	Number of patch tracker items open and total for all projects this month.
Tasks	Number of tasks open and total for all projects this month.
SCM	Total number of SCM commits and adds for all projects this month.

Project Statistical Comparisons

The Project Stats link on the SourceForge Site Statistics page connects to the Project Statistical Comparisons section.

The screenshot shows the 'Project Statistical Comparisons' page within the SourceForge Site Statistics interface. At the top, there's a header with 'SourceForge Site Statistics' and a breadcrumb 'SF Administration : SourceForge Site Statistics'. Below this is the main title 'Project Statistical Comparisons'. There are three navigation links: 'OVERVIEW STATS', 'PROJECT STATS' (which is active), and 'SITE GRAPHS'. The main content area contains a form with the following elements: a dropdown menu for 'Projects in Project Map Category' set to 'Special Project List'; a text input for 'OR Enter Special Project List' containing '16,21' with a note '(comma separated group_id's)'; a 'Report:' dropdown set to 'Last 30 Days'; a 'View By:' dropdown set to 'site_views'; and a 'Generate Report' button.

Figure 183. Project Statistical Comparisons

From this page, you can generate a report similar to the application-wide overview statistics but on a per-project basis. You can view the statistics for all the projects or you can select a subset of projects using the following parameters:

- Project ID number or Project Map category.
There are two ways to find the ID of a project:
 - a. The project approval notification (sent via e-mail) contains the project ID.
 - b. Clicking on any link under Project Admin in the navigation panel displays the project ID as “group_id=<project_id>” in the browser’s URL/Address field. The project_ID in the diagram below is 21.(See group_id=21 in URL)



Figure 184. Discovering the Project ID

- Results for the last 30 days or over all time.
- The field by which to sort the results for viewing.
The View By drop-down list offers the following options: downloads, site-views, messages, tracker artifacts, tasks, and SCM activities.

Site Graphs

The Site Graphs link on the SourceForge Site Statistics page connects to the Sitewide Statistics Graphs section.

This section lets you display three graphs:

- The number of page views for the last 30 days.
- The number of page views per month for the last twelve months.
- New users and projects on a daily basis.

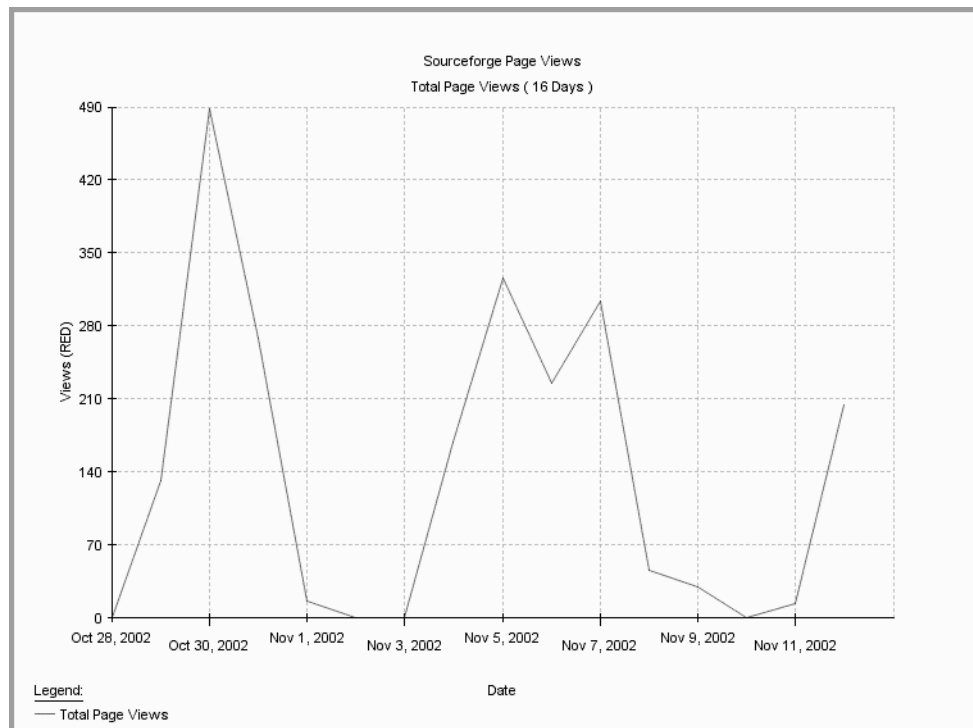


Figure 185. SourceForge Page Views

Most Recent Logins

The Most Recent Logins link on the SourceForge Site Statistics page connects to a page displaying a list of the most recently opened sessions.

The list of most recently opened sessions contains the date, time, user name, and source IP address for the sessions.

Most Recent Logins		
SF Administration : SourceForge Site Statistics : Most Recent Logins		
Most Recent Opened Sessions		
Date ▼	Username	Source IP
2003-04-30	admin	10.6.10.234
2003-04-30	admin	10.6.10.234
2003-04-30	admin	10.6.10.234
2003-04-30	simont	10.6.10.234
2003-04-30	Idenning	10.6.10.234
2003-04-30	Idenning	10.6.10.234
2003-04-30	jfrost	10.6.10.234
2003-04-30	admin	10.6.10.234

Figure 186. Most Recent Logins

Note: The Source IP address for the SourceForge administrator is not displayed.

Language Distribution

The internationalization link (I18N Statistics) on the SourceForge Site Statistics page connects to the I18N (internationalization) Statistics page which displays the number of users for each SourceForge-supported international language. This page shows how the users have set their language preferences.

⇒ For details on setting user preferences, refer to “Account Maintenance” on page 63.

Monitoring the SourceForge Facilities Log

As SourceForge Administrator, you have access to the application-wide facilities log. This log shows all activities on SourceForge for a specific date.

To access the facilities log:

1. Click SourceForge Admin in the navigation panel.

The SourceForge Administration page displays.

2. Click Browse Facilities Log in the SourceForge Utilities section.

The SourceForge Facilities Log page displays a list of all the jobs run for the current day.

SourceForge Facilities Log
SF Administration : SourceForge Facilities Log

Certain errors listed below are the result of the normal operation of SourceForge and do not constitute application failures. Examples include search queries that return no results, failed logins, and attempts to download nonexistent documents and files.

From date (include): 2003-04-29 To date (excl.):

☐ Show reference message ☐ Break reference message by lines

Show

Click on the job name to expand its section. Use "Show reference message" option to get more information.

ID	Time	Depth	Severity	Msg
	2003-04-29 18:04:01			/sourceforge/backend/mbox2forum
	2003-04-29 17:59:01			/sourceforge/backend/mbox2forum
	2003-04-29 17:44:02			/sourceforge/backend/mbox2forum

Figure 187. SourceForge Facilities Log

3. Enter the date for the desired log.
4. Click Show.

Note: Entries in red indicate problematic issues and should be communicated to the system administrator.

The Facilities Log shows the following information sorted by job:

- ID— The job identification number.
Click a message title. The Facilities Log page will display the message details.
- Time— Time the job was run.
- Depth— The hierarchy of the error structure.
- Severity— Displays three levels of severity—error, warning, or fatal error.
- Msg— Status or comment on the job.

Managing Supported Languages

You can configure SourceForge to support a number of international languages using the string translations database.

Adding a Language

To include an international language in SourceForge, you must first add the language to the list of supported languages. The translated versions of the text strings used throughout the application are then added to the string translations database.

⇒ For information on adding string translations, refer to “Adding a String Translation” on page 332.

To add a language to the supported languages list:

- 1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
- 2. Click Add, Delete, or Edit Supported Languages in the SourceForge Utilities section.
The Edit the Supported Languages Table page displays.
- 3. Click Add New.

The Create a new supported language section displays.

Edit the Supported Languages Table

SF Administration : Edit the Supported Languages Table

Create a new supported language

Name:

File Name:

Class Name:

Language Code:

Add New Supported Language

Cancel

[\[add new\]](#)

Supported Languages

Edit	Delete	Language ID	Name	File Name	Class Name	Language C
[edit]	[delete]	1	English	English.class	English	en
[edit]	[delete]	2	Japanese	Japanese.class	Japanese	ja

Figure 188. Adding a new supported language

- 4.** Enter the name of the new language in the Name field.
- 5.** Enter the filename for the new language as *language.class*, where *language* is the name of the language.
- 6.** Enter the name of the language in the Class Name field.
- 7.** Enter the two-character international standard language code for the language in the Language Code field.
- 8.** Click Add New Supported Language.

The new language is added to the list of supported languages.

Editing Language Information

To edit language information:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click Add, Delete, or Edit Supported Languages in the SourceForge Utilities section.
The Edit the Supported Languages Table page displays.
3. Click Edit next to the desired language.
The Modify the supported language section displays,
4. Make changes to the fields as necessary.
5. Click Edit Supported Language.

Removing a Language

You can remove a language from the list of supported languages, if necessary.

To remove a language:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click Add, Delete, or Edit Supported Languages in the SourceForge Utilities section.
The Edit Supported Languages Table page displays.
3. Click Delete next to the language to delete.
The Delete the Supported Language section displays.
4. Click Delete Supported Language.
The language is removed from the list of supported languages throughout the application.

Managing the String Translation Database

The string translations database maintains the definitions of the various text strings throughout SourceForge. Definitions are supplied for each text string in English. The English version of the string is considered the *base* version. When you add a foreign language to the application, you must also add translations of each of the English text strings in the new language.

Each string definition consists of a major key, minor key, and the string value. The major and minor keys define where the string appears in SourceForge. For example, the major key “docman_move” identifies the move function of the Document Manager and the minor key of “submit” is an identifier in the section.

The string value is the text of the string in the appropriate language. For several of the strings, you will also need to insert HTML code for formatting as well as the translated text. For example, Figure 189 shows the `about_blurb` (minor key) of the `about_foundries` (major key) string formatted into two paragraphs using HTML.

The String Translations page lets you browse the text strings by language or by string category (major key).

Manage Strings					
SF Administration : String Admin : Manage Strings					
Strings in account_login					
Edit	Delete	Major Key	Minor Key ▼	HTML	Output
Edit	Delete	account_login	title	SourceForge Login	SourceForge Login
Edit	Delete	account_login	submit	Log In	Log In
Edit	Delete	account_login	stay_sslmode	Stay in SSL mode after login	Stay in SSL mode after login
Edit	Delete	account_login	ssl	SSL?	SSL?
Edit	Delete	account_login	pending_account	Your account is pending email confirmation. You must visit the link sent to you in the email to activate your account. If you need this resent, click below and another confirmation email will be sent to the email address you provided in registration. [Resend Confirmation Email]	Your account is pending email confirmation. You must visit the link sent to you in the email to activate your account. If you need this resent, click below and another confirmation email will be sent to the email address you provided in registration. [Resend Confirmation Email]
Edit	Delete	account_login	password	Password:	Password:
Edit	Delete	account_login	notice_winie	Internet Explorer users need to upgrade to IE 5.01 or higher. Netscape users should be on 4.7 or higher.	Internet Explorer users need to upgrade to IE 5.01 or higher. Netscape users should be on 4.7 or higher.
Edit	Delete	account_login	notice_macie	Internet Explorer on the Macintosh is not supported currently. Use Netscape 4.7 or higher.	Internet Explorer on the Macintosh is not supported currently. Use Netscape 4.7 or higher.
Edit	Delete	account_login	login_name	Login Name:	Login Name:

Figure 189. Manage Strings page

Adding a String Translation

Before you add a new string translation, you need to know the major and minor keys for the English base version of the string so that you can use the same keys for the translated version.

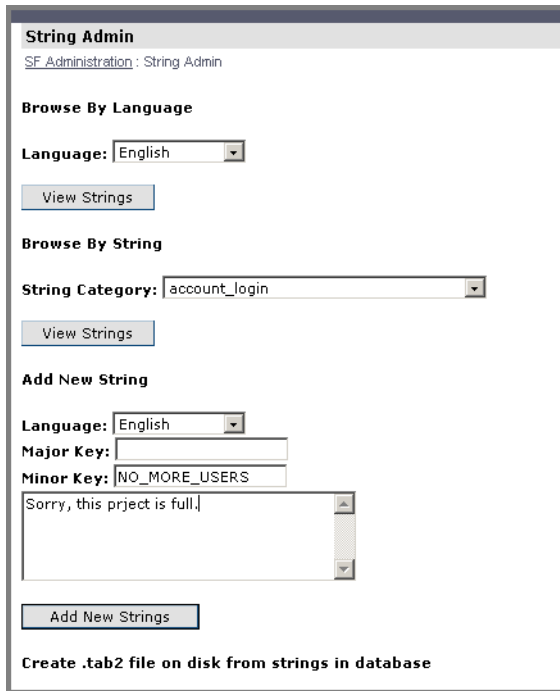
To add a string translation:

1. Click SourceForge Admin in the navigation panel.

The SourceForge Administration page displays

2. Click Add, Delete, or Edit String Translations in the SourceForge Utilities section.

The String Admin page displays.



The screenshot shows the 'String Admin' interface. At the top, it says 'String Admin' and 'SF Administration : String Admin'. There are two main sections: 'Browse By Language' and 'Browse By String'. In 'Browse By Language', the 'Language' dropdown is set to 'English', and there is a 'View Strings' button. In 'Browse By String', the 'String Category' dropdown is set to 'account_login', and there is a 'View Strings' button. Below these is the 'Add New String' section. It has a 'Language' dropdown set to 'English', a 'Major Key' text field, a 'Minor Key' text field containing 'NO_MORE_USERS', and a large text area containing 'Sorry, this project is full.'. At the bottom of this section is an 'Add New Strings' button. At the very bottom of the page, there is a link: 'Create .tab2 file on disk from strings in database'.

Figure 190. String Admin page

3. Select the language for the new string from the Language drop-down list.
4. Enter the major key in the Major Key field.
5. Enter the minor key in the Minor Key field.
6. Enter the translated text for the string (including HTML tags as necessary) in the text box.
7. Click Add New Strings.

Editing String Translations

You can further customize SourceForge by personalizing the text strings throughout the application. You can do this by editing the string translations. You cannot change the major and minor keys.

To edit a string translation:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click Add, Delete, or Edit String Translations in the SourceForge Utilities section.
The String Admin page displays.
3. Use one of the browse methods (Language or String Category) to locate the string to edit.
The Manage Strings page displays the list of strings in the specified category.
4. Click Edit next to the string to modify.
The Edit Strings page displays.

Figure 191. Edit Strings page

The Edit Strings page shows the base (or English) version of the string and the current translated version of the string for the selected language. This page also lists the languages that currently do not have a translation for this string.

5. Select a language from the View String In drop-down list to view the string translation in the selected language.
6. Enter changes to the translation text in the “Update <language> value” text box.
7. Click Update String.

Note: You must recreate the *.tab2* file if you change a string.

Deleting a String Translation

Only a SourceForge Administrator can delete string translations.

Warning: Deleting a text string may seriously affect the usability of your SourceForge application.

To delete a string translation:

- 1.** Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
- 2.** Click Add, Delete, or Edit String Translations in the SourceForge Utilities section.
The String Admin page displays.
- 3.** Use one of the browse methods (Language or String Category) to locate the string to delete.
The Manage Strings page displays the list of strings in the specified category.
- 4.** Click Delete next to the string to delete.
- 5.** Click Yes to confirm the deletion of the string, or navigate back to the String Admin page.
The Yes command removes the specified string from the application for the selected language.

Note: You must run the `.tab2` file if you delete a string.

Managing 404 Page Redirection

If a URL in SourceForge has changed, for example a link to a document or project web page outside of SourceForge, you can provide an automatic redirection to the new URL using the 404 page redirection feature.

Adding a New Redirection

To add a new redirection:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click View or Edit 404 Page Redirection in the SourceForge Utilities section.
The 404 Administration - Redirection List displays.
3. Enter the URL for the page you are redirecting in the New Redirection for field.
4. Click Add New Redirection.

The 404 Administration section displays.

404 Administration
SF Administration : 404 Administration

Note: URLs must be entered as paths relative to the SourceForge server. For example, enter "/projects/test" below to create a new redirection from this URL.

404 Administration

Requested Page: /show_members

Redirecting To: /disallowed

Redirection Description:

Variable Name Mapping:

Enable Redirection ☒

Current Status: Redirection Currently Enabled

[Update Redirection](#)

[View All 404 Redirections](#)

[Create New 404 Redirection](#)

Figure 192. 404 Administration page

5. Enter the target URL in the Redirecting To field.
6. Enter a description for the redirection in the Redirection Description text box.
The description is a text-based explanation for the redirection. It only displays in the 404 Administration page for this redirection.
7. Enter the variable names that need to be mapped to new names in the Variable Name Mapping field.
For example, if you are changing the location of a page that expected a variable called *group_id* to a different page that expects a variable called *project_id*, you would create a redirection with a variable map of *group_id=project_id*.
8. Check Enable Redirection check box to enable the redirection functionality.
9. Click Add Redirection to add the redirection information.

Viewing All 404 Redirections

To view all 404 redirections:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click View or Edit 404 Page Redirection in the SourceForge Utilities section.
The redirection list is displayed.

Managing SourceForge Administrators

SourceForge maintains a list of its administrators. You can provide SourceForge administrative privileges to new users or remove specific users from the list of SourceForge administrators.

You cannot remove yourself from the administrators list.

To provide SourceForge administrative privileges to a user:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click View, Add, Remove people who are SourceForge Admins.
The SourceForge Admin List displays.

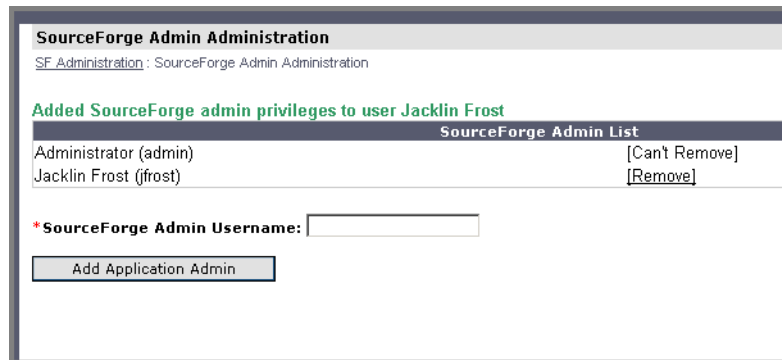


Figure 193. SourceForge Administrators list

3. To provide application administration privileges to a new user:
 - a. Enter the user's SourceForge login name in the SourceForge Admin Username field.
 - b. Click Add Application Admin.

To remove a user from the SourceForge Admin list:

1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
2. Click View, Add, Remove people who are SourceForge Admins.
The SourceForge Admin list is displayed.
3. Click Remove next to the desired user name.

Viewing the Scheduled Tasks Queue

When you schedule reports to be run periodically, the scheduled tasks are queued. You can view the list of scheduled tasks and corresponding log entries.

For details on scheduling reports, refer to “Scheduling Reports” on page 150.

To view the scheduled tasks queue:

- 1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
- 2. Click View the scheduled task queues.

The View the Schedule Queue page displays two lists: scheduled tasks pending execution and tasks scheduled for running.

View the Schedule Queue

SF Administration : View the Schedule Queue

Scheduled Tasks Pending Execution

	Job Description
View Log	RunReport every day after 2003-05-01

Future Tasks

	Job Description	Next Run Time
View Log	RunReport every day after 2003-05-01	2003-05-02

(All times are displayed in the webserver's local timezone.)

Figure 194. Schedule Reports

Role Templating

You can create and add new role templates to the Master Group, in order to make them available for other projects. All new projects automatically receive all template roles from the Master Group project, as well as the Master Group project's role assignment for default user classes.

You can modify the template roles any time. However, any modifications you make to the template roles will display only in newly created projects, not in existing projects. Once a template role is copied into a project, either you or a project administrator can modify that role.

To create a role template:

1. Click SourceForge Admin in the navigation panel.

The SourceForge Administration page displays.

2. Click Role Templating.

The Role Administration page displays.

3. Click the "Create a new role template" link.

The Create role template page displays.

Create Role Template

Master Group : Project Admin Summary : Role Admin : Create Role Template

Role based access control allows project administrators to limit internal access based on configurable role assignments. Create a new role template below:

[Access Control FAQs](#)

***Role Name:**

Role Description:
(Maximum 250 characters)

Set Permissions

Project Administration

Operation	Resource Limitations
<input type="checkbox"/> Project Administration	N/A - no resources available for this operation.

Trackers

Operation	Resource Limitations
<input checked="" type="checkbox"/> Access	No resources selected.
<input checked="" type="checkbox"/> Submit	No resources selected.
<input checked="" type="checkbox"/> Assigned	No resources selected.
<input checked="" type="checkbox"/> Edit	No resources selected.

Figure 195. Create Role Template page

4. On the Create role template page:

- a. Enter a name for the role in the Role name field.
- b. Enter a description in the Role Description text box.
- c. In the Set Permissions section, set permissions for this role by specifying the areas of SourceForge that a user in this role can access.
- d. Click Reset to re-enter your specification, if necessary.
- e. Click Submit to create the role template.

The template you just created is now available to be copied into all forthcoming projects.

SourceForge Error Codes

You can view all the errors codes that the SourceForge system displays when an error occurs. If you see an error message when using SourceForge functionality, this list helps you understand why you received the error.

To view error codes:

- 1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
- 2. Click List of Error Codes and Explanations in the SourceForge Utilities section.
The Error Codes page displays.

SourceForge Error Codes

[SF Administration](#) : SourceForge Error Codes

Introduction

This document describes all error codes used in SourceForge ordered according to their tool or section

Language - Errors		
Error Code	Error Text	Error Description
[LANG-000001] LANG_NOT_LOADED	[en] Language is not loaded	The language was not loaded.
[LANG-000002] LANG_STRLIST_INSERT_FAILED	[en] Failed inserting \$1, \$2 : \$3	Could not insert the major_key, minor_key string to the database.
[LANG-000003] LANG_STRLIST_DELETE_FAILED	[en] Could not clear the table	Could not delete the contents of string_list
[LANG-000004] LANG_EMPTY	[en] Language is empty	No entries for this language.
[LANG-000005] LANG_MSGFMT_CONVERSION_FAILED	[en] msgfmt failed converting .po file to .mo file	Could not convert .po file to .mo file.
[LANG-000006] LANG_CODE_NOT_GIVEN	[en] No language code provided	The language code was not given.
[LANG-000007] LANG_STRLIST_UPDATE_FAILED	[en] Could not update string in database	There was an error in the database while u the string.
[LANG-000009] LANG_STRLIST_ALREADY_EXISTS	[en] A string with that major and minor key is already present	A string already exists in the database for t major_key, minor_key and the language ic
[LANG-000010] LANG_STRING_DELETE_FAILED	[en] Could not delete string from database	There was an error while deleting the string the database.
[LANG-000011] LANG_CANNOT_CREATE_DIR	[en] Cannot create directory	Directory could not be created to store tab: that will be created after running postinstal
[LANG-000012] LANG_CANNOT_OPEN_FILE	[en] Cannot open language file	There was an error opening the tab2 langu which has strings specific to a given index.
[LANG-000013] LANG_CANNOT_WRITE_FILE	[en] Cannot write file	A file for storing strings specific to an index supported language, could not be created

Figure 196. Error Codes

SourceForge Include Variables

You can view all SourceForge Include variables that are stored in the *local.inc* file and configured during the installation process. This information is used primarily by your VA Software Technical Support representative for troubleshooting purposes.

To view SourceForge Include variables:

- 1. Click SourceForge Admin in the navigation panel.
The SourceForge Administration page displays.
- 2. Click SourceForge Include variables in the SourceForge Utilities section.
The SourceForge Include Variables page displays.

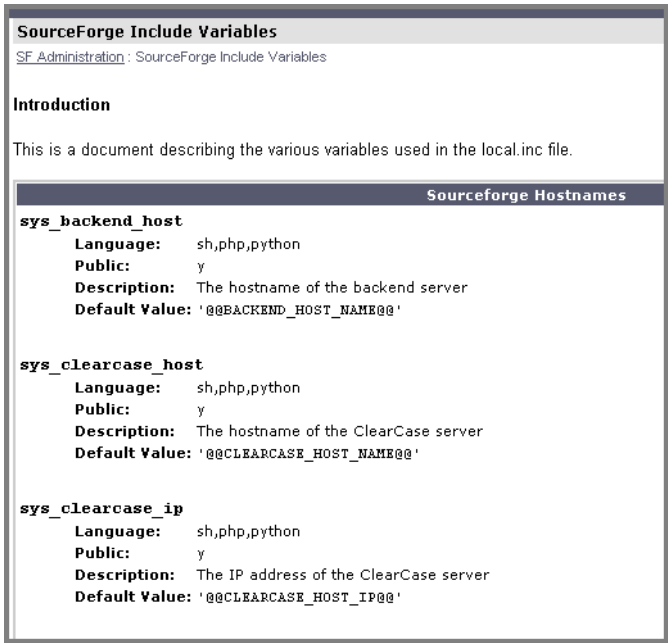


Figure 197. SourceForge Include Variables page

Connecting to Multiple SCM Servers

SourceForge 3.4 allows you to set up multiple SCM servers of the same or different types. For example, you can set up 1 CVS, 2 PVCS, and 3 ClearCase servers (or any desired combination.) This facilitates environments where different organizations use different SCM servers.

Detailed instructions for installing each type of SCM server are provided in the *SourceForge Enterprise Edition 3.4 Installation and System Administration Guide*.

The SourceForge installer allows you to connect your SourceForge installation to either zero or one of each type of SCM server. If you want to connect your SourceForge installation to additional SCM servers, you must connect them manually after installation.

To connect to additional SCM servers:

1. Install the desired SCM servers as instructed in the *SourceForge Enterprise Edition 3.4 Installation and System Administration Guide*.
2. Install SourceForge.
3. Log in to SourceForge as a SourceForge Administrator.
4. Click SourceForge Admin in the navigation panel.

The SourceForge Administration page displays.

5. Click SCM Server Configuration.

The List SCM Servers page displays a list of all SCM servers that have already been connected to SourceForge, either by the installer or manually.

6. Click Add Host.

The Add SCM Server page displays.

Add SCM Server

SF Administration : [List SCM Servers](#) : Add SCM Server

Enter the details of the SCM Server Host below

* Host Name:

* Description:

* IP Address:

* XML RPC Port:

SCM Type:

Add Host Details

Figure 198. Add SCM Server page

7. Enter the required host information for the SCM server that you want to connect to SourceForge.

- 8.** Select the type of SCM server.
- 9.** When you are finished, click Add Host Details.

The SCM server is now connected to your SourceForge installation. New projects can request this SCM server to host their SCM repositories.

Configuring Email Link Display

The display of hyperlinks included in SourceForge email notifications can vary based on the email client being used and the settings chosen by each user. SourceForge offers the following options, set at the application level, to ensure that the hyperlinks included in your email notifications are usable by all of your SourceForge users.

html-text: This option sends email in both HTML and text. URLs are represented as clickable links when viewed using email clients that can process HTML.

This is the default value. It is recommended when

- You are using email clients that can process HTML and correctly display URLs as clickable links, and
- You do not have a strong need to have the full URL displayed.

verbose-html-text: This option also sends email in both HTML and text. URLs are represented as clickable links when viewed in email clients that can process HTML. In addition, URLs are represented in brackets beside the clickable link. This enables users to view or copy the URL if needed.

This option is recommended when

- You are using email clients that can process HTML and correctly display URLs as clickable links, and
- You have a strong need to have the full URL displayed.

text: This option sends email in text format only. URLs are not represented as links, regardless of which email client you are using.

This option should be used when using email clients that cannot process HTML.

To modify the email display settings, you must modify **all of the following** three files:

```
/sourceforge/etc/sfee/local.inc  
/sourceforge/etc/sfee/local.sh  
/sourceforge/etc/scripts/local.ph
```

Note: If you do not edit all three files and set them all to the same value, you may trigger a variety of email displays or encounter errors.

To modify the email display settings:

- ⇒ Change the value of `SEND_HTML_EMAILS` to:
- *html-text* to enable the html-text setting.
 - *verbose-html-text* to enable the verbose-html-text setting.
 - *text* to enable the text setting.

APPENDIX A

Working With CVS

This appendix describes how to use the SourceForge CVS repository.

Major topics:

- “Introducing Concurrent Versions System (CVS)” on page 348
- “Using the CVS Web Browser” on page 349
- “Using the Commit Logger” on page 351
- “Using CVS Command-Line Options” on page 356
- “Using Secure Shell (SSH)” on page 362
- “Using WinCvs” on page 365

Introducing Concurrent Versions System (CVS)

Concurrent Versions System (CVS), an open-source network-transparent program, maintains a record of each change made to the source code and other types of information for a project in the CVS repository. A repository is a directory on a file server where all of your project files (including the changed versions) are stored. Comments about the changes and each version of the various project files are also stored in the repository.

CVS stamps each change with the time it was made and the login name of the person who made the change. This historical meta data can help project members address version control issues such as who has made a given change, when and why the change was made, and what other changes were made at the same time. Additionally, project members and project administrators can browse individual project repositories through the CVS browser to view available code, documents, notes, and other critical project artifacts stored in CVS.

CVS also lets multiple users work concurrently on the same files within a project without the typical file locking problems associated with development projects. Changes to files can be checked into the repository and merged without the danger of overwriting or deletion. CVS automatically notifies users if two sets of changes conflict. The differences must be manually resolved before a new version of the file can be placed in the repository.

For additional information on CVS, visit:

<http://www.cvshome.org>

<http://cvsbook.red-bean.com/cvsbook.html>

Accessing CVS in SourceForge

Each project in SourceForge contains its own automatically generated repository with a separate CVSROOT directory, logs, and history files. You can view your project's CVS repository through the CVS browser or a number of CVS clients including Win CVS. CVS commands are executed using standard CVS client tools. The CVS browser allows read-only access to CVS repositories.

Users with commit privileges must use Secure Shell (SSH) to access their project's source control system. SSH is a secure mechanism for connecting to your company's SourceForge server. It provides a secure connection that is encrypted to prevent third party interception.

Using the CVS Web Browser

The CVS web browser lets you browse the contents of your project's CVS repository. You can view files, revision number, revision author, revision date, and the last log entry for the file.

If your SourceForge installation has Tracker SCM integration enabled, you may wish to browse additional information about code commits using the commit logger.

Note: You cannot perform CVS commands from the CVS browser page.

File	Rev	Author	Date	Last Log
Parent Directory				
src/				
build.bat	1.1	mjames	4 months	Initial import of AppServer
build.sh	1.11	mthompson	5 weeks	Tracker: 61 64 Made Changes
build.xml	1.1	mjames	4 months	Initial import of AppServer

Figure 199. The CVS browser

To view or download files:

1. Click CVS in the navigation panel.

The CVS web browser displays.

2. Click the name or icon of the directory where your file is stored.

All the files and sub-directories in the selected directory display.

3. Drill down the directories until you locate the desired file.

4. Click the file name or icon.

The CVS browser displays a list of all the versions available for that file. Each version is listed in a separate section with log information. You can view or download your files from this location.

5. To view a file, click the file's version number or the View link in that section.

6. To download a file, click Download in that section.

To view the differences between any two files:

- 1.** Click CVS in the navigation panel.

The CVS web browser displays.

- 2.** Click the name or icon of the directory where your file is stored.

All the files and sub-directories in the selected directory display.

- 3.** Drill down the directories until you locate the desired file.

- 4.** Click the file name or icon.

- 5.** On the page displaying file information:

- a. Specify the two versions for viewing differences in the drop-down boxes.
- b. Specify the format to display the differences in the Type drop-down box.
- c. Click Get Diffs.

The differences between the specified versions are displayed in the specified format.

Using the Commit Logger

The commit logger provides a simple interface for finding and viewing the details of all code commits made to a project's SCM repository when Tracker-SCM integration is enabled. Whenever commits are made with the Tracker-SCM integration enabled, the commit information such as file path, version, associated tracker artifact IDs, associated documents, and flex fields, are stored. This information can then be browsed using the commit logger.

The commit logger is available when running SourceForge on Oracle using CVS.

Before using the commit logger, you must first enable Tracker-SCM integration. See "Managing the Tracker-SCM Integration" on page 237.

Viewing Code Commits

To find and view a code commit:

1. Click Commit Logger in the navigation panel.
The commit logger displays.
2. Use the filter to locate the commit or group of commits that you want to view.

You can filter by any combination of the following fields:

- Filename (or substring)
- Flexfields, if used
- Module
- Name of submitter
- Submission date range

Summary information for each commit returned by the filter displays.

Logger

JavaAppServ:CVS:Logger

Filename / Substring	Flexfield	Module	Name	Date (YYYY-MM-DD)
<input type="text"/>	<div>Any</div> <div><input type="text"/></div>	3rd-party	Any	2003-08-05 <div><input type="radio"/> Before <input type="radio"/> Range <input checked="" type="radio"/> After</div>

Reset Filter

Commit Logger

Commit Id	Name	Commit Message	Date
14746	Dave Henry	Tracker ID's are required to commit. Tracker:39 Status: Open[] Closed[] Pending[] Release:VAKK 3.3 Comments:Applied the patch to set the charset for Japanese encoding to Mailman 2.1.2	2003-08-12

Figure 200. Commit logger summary page

3. Click Commit Id to view the details of a commit, including:

- The committed files
- Any tracker artifact associations
- Any document associations
- Any flex field associations

Document Association

No documents associated

Files involved in commit

Filename	Post-Commit version
/3rd-party/common/mailman_patch4.sh	1.1.2.1
/3rd-party/common/patches/internal/mailman-2.1.2-jcharset.diff	1.1.2.1
/3rd-party/common/tarballs/mailman-2.1.2.tgz	1.1.2.2

Artifact Associations

Priority	ID/Summary	Assigned To	Status	Category
SourceForge 3.X [sf-engine] - Feature Requests				
4	39: More internationalization	Rick Chen	Open	Other

Flexfield

No flexfields associated

Figure 201. Commit logger details page

Clicking the name of any file takes you to the CVS web browser. The CVS web browser displays a list of all the versions available for each file. Each version is listed in a separate section with log information. You can view or download your files from this location or generate diffs between file versions.

Accumulating Commit Results

In addition to viewing the details associated with individual code commits, the commit logger allows you to accumulate data associated with sequential commits. This allows you to monitor repository changes over longer periods of time and view summary information about the selected range of commits.

To accumulate commit results:

1. Click Commit Logger in the navigation panel.

The commit logger displays.

2. Scroll to the bottom of the page to the Accumulate Commits section.

The screenshot shows the 'Accumulate Commits' section of a web interface. It contains two distinct forms for accumulating commit data.

The first form is for accumulation by commit ID. It has two text input fields: 'Accumulate From Commit id' and 'To Commit id'. To the right of these fields is a button labeled 'Accumulate'. Below the input fields, a note reads: '(To accumulate from a commit to the latest, leave the To Id blank. To accumulate from the first commit Id, leave From Id blank)'. The 'To Commit id' field is currently empty.

The second form is for accumulation by date range. It has two sets of date pickers. The first set is labeled 'Accumulate From' and the second is labeled 'To'. Each date picker consists of three dropdown menus for 'Month', 'Day', and 'Year', separated by slashes. To the right of the 'To' date picker is a button labeled 'Accumulate'. Below the date pickers, a note reads: '(Accumulating a date range will accumulate from the lowest Commit ID in the From date to the highest Commit Id in the To Date)'. The 'From' date is currently set to 'Month / Day / Year'.

Figure 202. Accumulate Commits section of commit logger

3. There are two ways to accumulate commits: by commit id or by date range.
 - To accumulate commits by commit id, enter a first and last commit id, then click Accumulate.
To accumulate from a specific commit to the most recent commit, leave the To Commit id field blank.
To accumulate from the first commit to a specific commit, leave the From Commit id field blank
 - To accumulate commits by date range, enter a start and end date, then click Accumulate.

Accumulated summary information for all results displays.

Accumulate Results		
JavaAppServ : CVS : Logger : Accumulate Results		
Commit ID Range	14848 (2003-08-14) through 14967 (2003-08-17)	
Commit IDs	14848 14849 14850 14851 14852 14853 14854 14855 14856 14857 14858 14859 14860 14861 14862 14863 14864 14865 14866 14867 14868 14870 14871 14873 14874 14875 14876 14877 14903 14923 14943 14963 14964 14965 14966 14967	
		Total:36
Commit Details Tracker Artifacts Flex Field Values Associated Documents Files Modified		
Filepath	Pre-Commit version	Post-Commit version
/build/scripts/makesf.sh	1.49.2.2	1.49.2.2.1 [diff]
/db_schema/data_loader/data/error_codes.js	1.1.2.1.2.31	1.1.2.1.2.32 [diff]

Figure 203. Accumulated results

4. From this page you can view the following information:

- **Commit Details:** Provides the same detail as that returned by the basic commit logger filter.
- **Tracker Artifacts:** Provides a list of all tracker artifacts associated with all accumulated commits.
- **Flex Field Values:** Provides a list of all flex field data associated with all accumulated commits.
- **Associated Documents:** Provides a list of all documents associated with all accumulated commits.
- **Files Modified:** Provides a list of all files modified by all accumulated commits.

Using CVS Command-Line Options

You must have permission to access SourceForge CVS as “Developer.”

⇒ For details on access permissions, refer to “Using Role-Based Access Control (RBAC)” on page 167.

After successfully logging into CVS server, you can perform several tasks including the following:

- Create modules
- Import modules
- Check out modules
- Update files
- Commit files (check in files permanently)
- Add new files
- Creating documents
- Remove files
- Rename files

Creating a Repository

SourceForge provides one automatically generated repository for each new project that you create. The repository contains a separate CVS ROOT (base directory and one module) with log and history files.

Creating Modules

When you open a project, you must first create a CVS module. Modules consist of files and directories that are tracked by CVS.

To create a module inside the repository based on the files in the current working directory enter the following command in your client window:

```
export CVS_RSH=ssh
cvs -z9 d:ext:<username>@<cvs server>:</cvsroot/project name> import
<module name> <vendortag> <releasetag>
```

Importing Modules

Import the source code from your current project to the repository using the CVS import command. The first import command initializes the CVS repository to store the files and directories.

Checking Out Modules

In order to benefit from the CVS revision tracking features, you must remove the local copy of the work tree and perform a CVS checkout. You now have a working copy of the project module.

To check out a working copy of a module, enter the following command in your client window:

```
export CVS_RSH=ssh
cvs -d:ext:<username>@<cvsserver>:<cvssroot> co <module>
```

Updating Files

Before changes are committed, you must run the CVS update command. This command incorporates changes made by other developers into their working directory and ensures that the source is in sync. If two developers have modified the same file, CVS merges their changes.

To update the working copy of your file, enter the following command in your client window:

```
export CVS_RSH=ssh
cvs up
```

Specific Time or Version Update

The CVS up command can accept multiple timeframes or version numbers. For example, if you enter the command `cvs up -j "2 hours ago"`, your working copy will revert to the state of the module as it was two hours ago.

To update a file to reflect its state at a particular time or version number, enter the following command:

```
export CVS_RSH=ssh
cvs up -j <date string or version number>
```

Merging Files

To merge a file use the update command:

```
export CVS_RSH=ssh
cvs up -j<current version> -j<version to revert to><filename>
```

This generates a patch, or diff, that can take you from the former version to the later version of a file. By placing them in reverse order you may take a file back in time without reverting the version number. Remember, reverting changes is not a substitute for developer communication.

Changing and Committing Files

Each time you make a change to a file you must do a CVS commit. This compares the local working copy of the module to the one stored in the CVS repository. If they differ the local CVS program packages a list of changes as a patch file and sends it to the CVS repository server. The server keeps the original module from the import along with all of the patches that have been checked in. When you perform a checkout, the CVS server compiles the relevant patches and the original import files into a working copy of the module and sends it to you.

To make a change to one of the files and do a ci or commit (also called “check in”), enter the following command in your client window:

```
cvcs ci
```

Once CVS has created a working directory tree, you can edit, compile, and test the files it contains just as you would any standard type of file.

Adding New Files

To add a file to a project, create the file and then use the `cvcs add` command to mark it for addition. The file will be added to the repository when you execute the `cvcs commit` command.

To add a file to the repository enter the following command in your client window:

```
cvcs add <filename>
```

Adding Binary Files to the Repository

If you are adding binary files (images, MS Word documents, etc.) use the following command.

```
cvcs -kb add <filename>
```

You must first add a directory before you add the contents of each module within the directory.

If you delete a file and then run `cvcs update`, CVS recreates the file with its last recorded contents and flags it with a “U” character as if it were an update. This means that if you want to undo the changes you have made to a file in your working directory, you can simply delete the files and then let `cvcs update` recreate them.

Creating Documents for Tracker-SCM Integration

When Tracker-SCM integration is enabled, the commit logger is also enabled. The commit logger tracks commit data and allows you to associate documents with a commit. Text documents are the only file type that may be created by this process.

You can create text documents by enclosing bookending text between the delimiter `-@-`. This is the syntax of creating a document for SCM integration:

```
-@-
unique_nospaces_title
[ document content ]
[ document content ]
-@-
```

- `-@-` is the delimiter
- The line following the lead delimiter(`unique_nospaces_title`) will be the title of the text document that is created; this must be unique and without spaces or it will cause the commit to fail
- Lines following the first line `[document content]` will be the content of the text document.

Multiple documents can be generated during a single commit. These documents can be browsed in Document Manager>SCM Integration.

Removing Files

To remove a file, use the following command:

```
cv$ remove <filename>
```

Removed files remain in the repository in case someone wants to check out an older version of the whole tree.

Committing a file marked with `cv$ rm` does not destroy the file's history. It simply adds a new revision, which is marked as "non-existent." The repository still has records of the file's prior contents, and can recall them as needed, for example, by `cv$ diff` or `cv$ log`.

Renaming Files

There are several strategies for renaming files. The simplest is to rename the file in your working directory and run `cv$ rm` on the old name and `cv$ add` on the new name. The disadvantage of this approach is that the log entries for the old file's content do not carry over to the new file.

Tags

Use the tag command to name a file revision, providing a snapshot of the repository:

```
cvs tag <name of tag>
```

Branching is useful if you want to continue development on the main trunk while you are working on repairing a bug. Later you can merge the changes from the branch back to the main development trunk. To create a branch point or “sticky” tag:

```
cvs tag -b <name of tag>
```

Sticky tags indicate which branch you are working on. They will remain in your working files until you delete them using the cvs update -A command. It is a good idea to determine a naming convention for tags on your project to maintain consistency.

Merging Changes

When you perform a CVS check in, your local working copy of the module is compared with the one stored in the CVS repository. If they differ the local CVS program packages a list of changes similar to a patch file and sends it to the repository server.

CVS Patches

Output from a CVS diff (which compares different revisions of files) is usually referred to as a patch. A patch contains enough information for a program to apply the changes it describes to an unmodified text file. The server keeps the original module from the import along with all the patches that have been checked in. When you perform a checkout the CVS server compiles the relevant patches and the original import files into a working copy of the module and sends it to you. CVS stores data as a collection of files plus a set of patches on each file. This allows you to view any particular revision of a file at any time.

CVS Conflict Resolution

When two developers make changes in the same section of a file then try to check them in, CVS has no way of knowing which version is correct. To resolve this conflict CVS requires that every set of changes sent in are made against the most recent version in the repository.

For example, if two developers check out the same module from their SourceForge repository and, after making changes, try to check the module in, CVS will only accept changes that were checked in first. The first developer's CVS client generates a patch to the module that is attached to the end of the list of patches in the repository. The second developer is prevented by CVS from checking in their version of the module because a newer update is already in the repository.

The second developer must perform a CVS update to sync their working copy of the project files with the latest data. If the developer's changes are in different areas of the files, the update will be smooth. The second developer submits their patch. However if they both worked on the same pieces of code the second developer must manually resolve the conflicts. The second developer's CVS update marks the places in the file where conflicts occur, providing the output from both developers' files.

Once the conflicts are resolved the second developer can check in their changes. The second developer's changes will be placed in the repository as a patch following the first developer's modifications.

Using Secure Shell (SSH)

Secure shell (SSH) is a tool for secure remote login over insecure networks. It provides an encrypted terminal session with strong authentication of both the server and the client, using public-key cryptography.

SSH features include:

- A variety of user authentication methods tunneling arbitrary TCP connections through the SSH session, protecting insecure protocols such as IMAP and allowing secure passage through firewalls.
- Automatic forwarding of X-Windows connections
- Support for external authentication methods, including Kerberos and SecurID
- Secure file transfers

This section describes how to prepare SSH for working with SourceForge.

Note: The instructions in this section are only applicable to Windows installations.

Installing Secure Shell (SSH)

Almost any command line version of SSH will work with WinCVS, but they all work slightly differently. The recommended version, which also works perfectly right out of the box, is available at: <http://sourceforge.net/projects/sfsetup>

To install SSH:

1. Download the SSH zip file from <http://www.sourceforge.net/projects/sfsetup>.
2. Extract the contents of the zip file into a directory, for example, *sf-ssh*, on a local drive, for example, C.
3. Note down the path (C:*sf-ssh*) to the SSH installation directory.

Setting Up the Environment for SSH

You need to set up three environment variables: HOME, CVS_RSH, and CVS_EDITOR.

To set up the environment for SSH:

1. Set a HOME environment variable where the *.ssh* directory can be created.
For example, C:*sf-ssh*
2. Set a CVS_RSH environment variable to the full path to *ssh.exe*.
For example, C:*sf-ssh**ssh.exe*.
3. Set a CVS_EDITOR environment variable to your text editor, or *notepad.exe* in case you use the command-line version of cvs.
For example, *notepad.exe*.

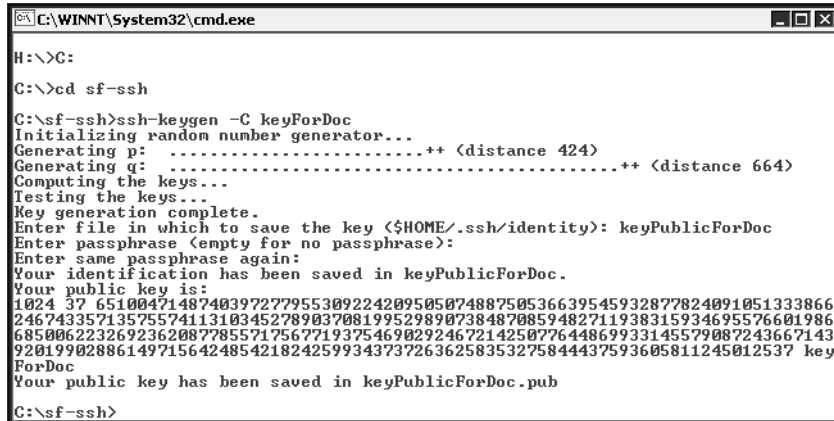
Generating Public SSH Keys

You can create SSH public keys and store them in SourceForge. Later on, you can edit the SSH keys.

To generate public SSH keys:

1. Launch a command-line window.
2. Navigate (or, CD) to your SSH installation directory.
3. Type the following command:
`ssh-keygen -C <your comment>`
4. When prompted, enter the name of the file to store the key.
5. Skip passphrase.

The generated key is stored in the `<filename>.pub` file in the SSH installation directory, where `<filename>` is the name of the file you entered.



```

C:\WINNT\System32\cmd.exe
H:\>C:
C:\>cd sf-ssh
C:\sf-ssh>ssh-keygen -C keyForDoc
Initializing random number generator...
Generating p: .....++ <distance 424>
Generating q: .....++ <distance 664>
Computing the keys...
Testing the keys...
Key generation complete.
Enter file in which to save the key (<$HOME/.ssh/identity>): keyPublicForDoc
Enter passphrase (empty for no passphrase):
Enter same passphrase again:
Your identification has been saved in keyPublicForDoc.
Your public key is:
1024 37 651004714874039727795530922420950507488750536639545932877824091051333866
24674335713575574113103452789037081995298907384870859482711938315934695576601986
68500622326923620877855717567719375469029246721425077644869933145579087243667143
9201990288614971564248542182425993437372636258353275844437593605811245012537 key
ForDoc
Your public key has been saved in keyPublicForDoc.pub
C:\sf-ssh>

```

Figure 204. Generating SSH Public Keys

Storing SSH Keys In SourceForge

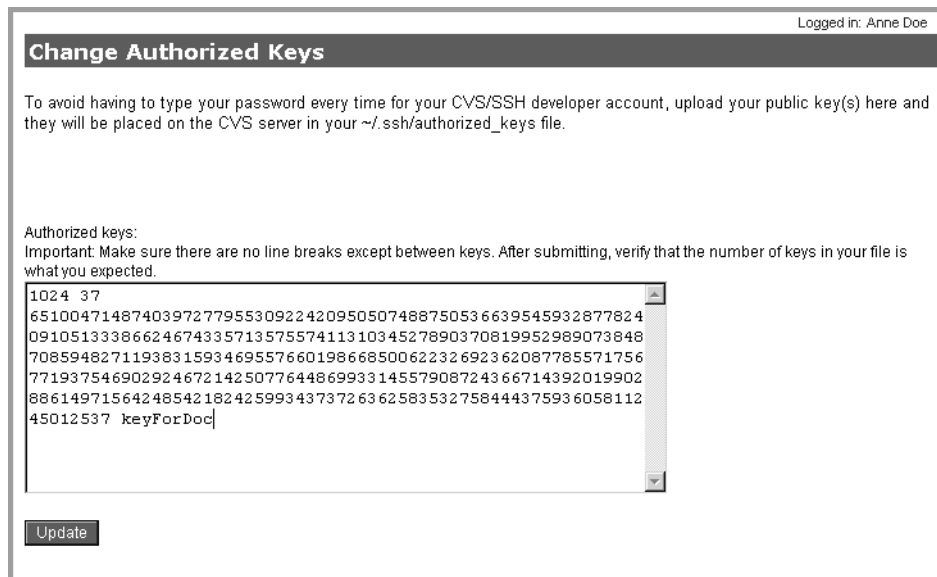
You can store public SSH keys in SourceForge for quick access to the software configuration management system (SCM).

To store SSH keys in SourceForge:

1. Make sure you are logged into SourceForge.
2. Click Account in the navigation panel.
3. Scroll down to the Shell Account Information section.
4. Click on Edit Keys.

The Change Authorized Keys page displays.

5. Copy the public key from the `.pub` file in your SSH installation directory.
6. On the Change Authorized Keys page:
 - a. Paste your public key in the text box.
 - b. Click Update.



Logged in: Anne Doe

Change Authorized Keys

To avoid having to type your password every time for your CVS/SSH developer account, upload your public key(s) here and they will be placed on the CVS server in your `~/ssh/authorized_keys` file.

Authorized keys:
Important: Make sure there are no line breaks except between keys. After submitting, verify that the number of keys in your file is what you expected.

```
1024 37
651004714874039727795530922420950507488750536639545932877824
091051333866246743357135755741131034527890370819952989073848
708594827119383159346955766019866850062232692362087785571756
771937546902924672142507764486993314557908724366714392019902
886149715642485421824259934373726362583532758444375936058112
45012537 keyForDoc|
```

Update

Figure 205. Storing Public SSH Keys in SourceForge

Using WinCvs

WinCvs is a graphical user interface (GUI) that provides an alternative to CVS on-line command functionality.

Pre-requisites for Running WinCvs

You need to perform the following tasks before starting to install WinCvs:

- Install Python on your machine.
Optional. Install only if you want to use advanced WinCvs features, such as creating macros.
- Install Secure Shell (SSH) on your machine.
- Set the environment variables.
- Create public SSH keys.

- Optionally, install a Text Editor of your choice.

You can use Notepad. You can also point to DreamWeaver or Visual Studio, if you have them on your machine.

- Set your local work area before running WinCvs.

Create a folder that you will use as the root of your work area.

You can manage multiple work areas with WinCvs but it will make these instructions easier if you create your root folder first.

- Note down the path to your SourceForge project's CVS repository.

Installing Python

Installing Python is optional. However, it is straightforward.

To install Python:

1. Download the latest version of Python installer (*Python<version>.exe*) from <http://www.python.org>.
2. Run the Python executable and follow the on-screen instructions to complete the installation.

The Python installer walks you through six major screens: Select Destination Directory, Backup Replaced Files, Select Components (with Advanced Options), Select Start Menu Group, Ready to Install, Installation Completed.

Installing and Configuring WinCvs

This section describes the installation and configuration procedures for WinCvs.

1. Install WinCvs

- a. Obtain the latest stable release of WinCvs from <http://www.wincvs.org>
- b. Obtain the built-in command line interface Tcl/Tk 8.1.1 from <http://www.scripts.com>
- c. Unzip the downloaded zip file to your favorite temporary folder.
- d. Locate and run the setup program (*Setup.exe*).
- e. Install the software to the folder *Program Files\GNU\WinCvs 1.3* on a local drive (preferably C:).

WinCvs will add itself to your desktop start menu.

- f. To install Tck/Tk, run the file tcl811.exe downloaded from *scripts.com*. Install to the default installation folder.

2. Launch WinCvs (*Start > Programs > GNU > WinCvs 1.3 > WinCvs*)

The WinCvs Preferences window displays.

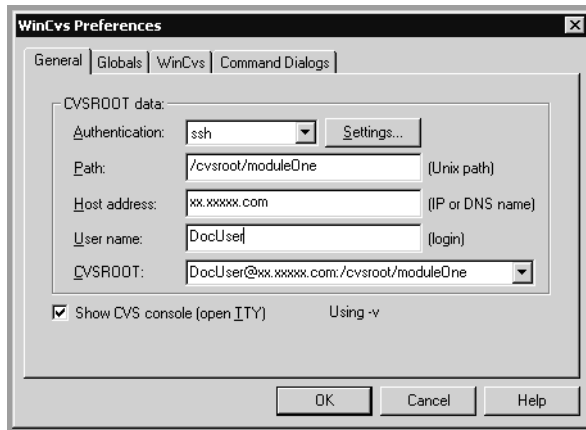


Figure 206. WinCvs Preferences

Setting WinCvs Preferences

There are four preference panels in WinCvs: General, Globals, WinCvs, Command Dialogs.

⇒ Select the General tab, if it is not already selected. See Figure 206 on page 366.

General

This section lets you set the CVSROOT information.

1. Set the Authentication field to SSH.

2. Click Settings....

In the ssh options window:

a. Select If ssh is not in the PATH.

b. Enter the full path to *ssh.exe* in the next field.

For example, *C:\sf-ssh\ssh.exe*.

c. Select Additional ssh options, and enter *-v* in the next field.

d. Click OK.

The General section displays again.

3. Enter the path to the CVS directory of your SourceForge project.

For example, */cvsroot/myproject*.

4. Enter the IP address or the domain name (for example, *cvs.sfdemo.com*) of your SourceForge CVS host in the Host address field.

5. In the User name field, enter the username you normally use to log into the SourceForge CVS host.

The CVSROOT is automatically set now.

6. Make sure that the CVSROOT is set to:

<user name>@<sourceforge CVS host>:/cvsroot/<project name>

You can find the *<sourceforge CVS host>* and *<project name>* on the CVS page of your project.

7. Optionally, select Show CVS console.

Globals

This section lets you specify miscellaneous settings.

1. Select the Globals tab.
2. Check the following check box options:
 - Supply control when adding files
 - Quiet mode
 - TCP/IP compression selection - 9
 - Dirty files support

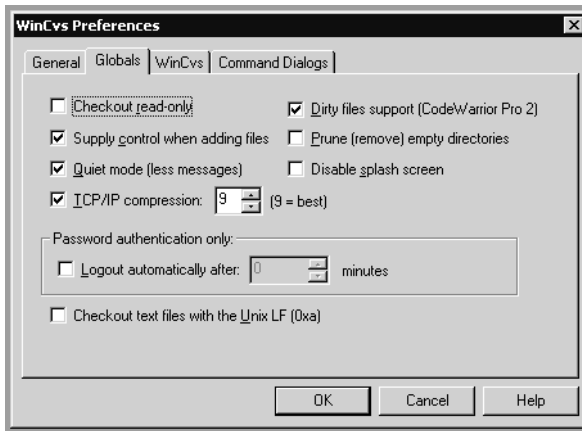


Figure 207. WinCvs: Globals Settings

WinCvs

This section lets you specify the path to SSH and the text editor.

1. Select the WinCvs tab.
2. Enter the path to your SSH installation directory.
For example, `C:\sf-ssh`
3. Specify the program to open files.
4. Specify the graphical “diff” program to use.
5. Specify the text editor to use.

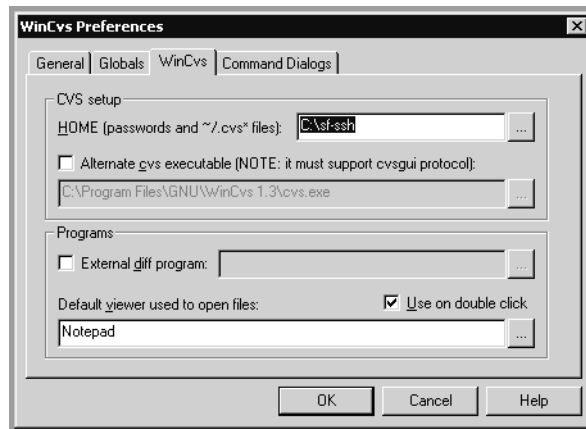


Figure 208. WinCvs: WinCvs Settings

Command Dialogs

This section lets you specify the display dialogs to skip. Follow the instructions on the screen.

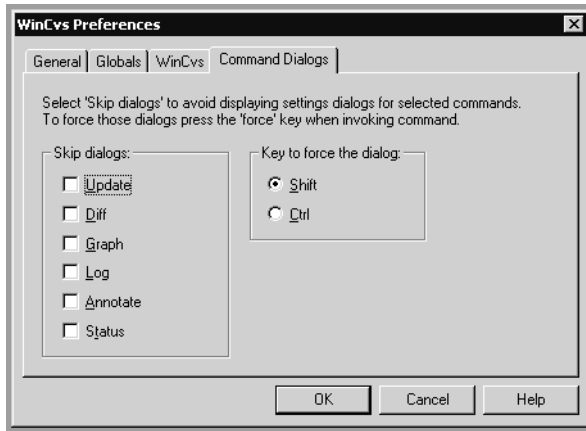


Figure 209. WinCvs: Command Dialogs Settings

Importing a Module

Make sure that you have a module in the root folder of your local work area ready to be imported.

To import a module:

1. On the WinCvs window, using the Modules or Explore tab on the bottom of the left panel, select the module you want to import into CVS.

The contents of the module display in the right panel.

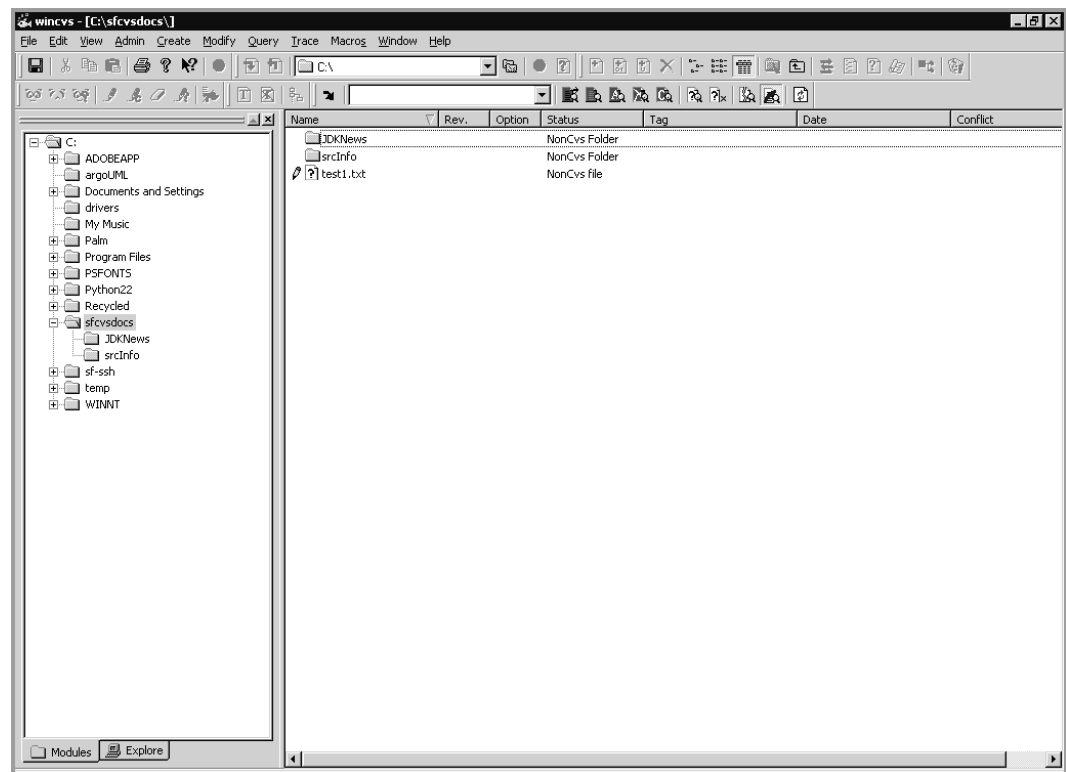


Figure 210. WinCvs: Importing a Module

2. Select Create > Import module from selection....

The Import Filter window displays prompting you to fix any errors. Fix the errors, if any by clicking the entry name and modifying the entry state.

3. Click Continue.

The Import Settings panel displays with four tabs: Import settings, Import options, General, and Globals.

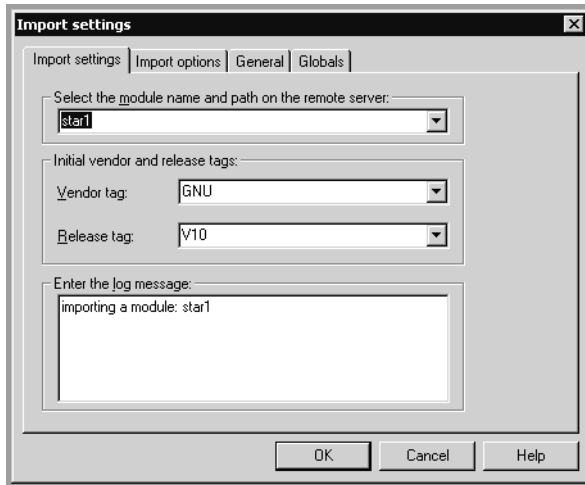


Figure 211. WinCvs: Import Settings

4. Make sure that the settings are accurate in all the sections.

5. Click OK.

The command-line window appears for your password.

6. Enter your password to access the CVS host, and press Enter.

7. Verify that the module is added to the CVS repository of your SourceForge project.

Checking Out a Module

Make sure that:

- You have a module in the CVS repository ready to be checked out.
- No module with the same name as the one you're trying to check out exists in your local work area.

To check out a module:

1. On WinCvs window, Select Create > Checkout module.

The Checkout settings window displays.

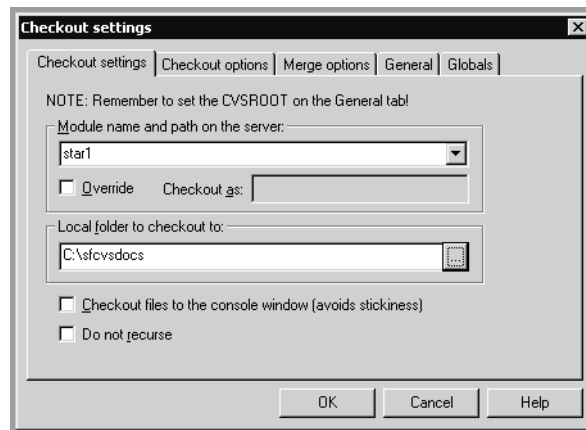


Figure 212. WinCvs: Checkout Settings

2. Select the Checkout settings tab, if it is not already selected.
3. In the Module name and path on the server field, enter the module name to check out.
You don't need to enter the "path on the server" since it's given in the General section.
4. Click the "..." button and locate your working directory, which you created as the root of your work area.
5. Make sure that the settings in the General and Globals sections are the same as you did using the WinCvs Preferences window.
6. Click OK.
The command-line window appears for your password.
7. Enter your password to access the CVS host, and press Enter.

Adding New Files

To add a new file to the repository:

- 1.** Create the file within the desired module in your work area.
The file displays on the WinCvs window marked as a non.CVS file.
- 2.** On the WinCvs window, select the file to be added to the repository.
- 3.** Select Modify > Add selection.
The command-line window appears for your password.
- 4.** Enter your password to access the CVS host, and press Enter.
WinCvs displays a message saying that you need to use the cvs commit command to add the file permanently to the repository.
- 5.** Select Admin > Command Line....
The Command line settings window displays.
- 6.** Enter "commit" next to the automatically displayed "cvs."
- 7.** Using the browse ("...") button, specify the local folder where the commit command has to be executed.
- 8.** Click OK.
The command-line window appears for your password.
- 9.** Enter your password to access the CVS host, and press Enter.
The CVS log file displays the information on modified files and added files.
- 10.** Add your log entry, save, and close the file.
The file is added permanently to the repository.

Removing Files

To remove files from the repository:

1. On the WinCvs window, select the file to be removed from the repository.

2. Select Modify > Remove.

The command-line window appears for your password.

3. Enter your password to access the CVS host, and press Enter.

WinCvs displays a message saying that you need to use the `cvs commit` command to remove the file permanently from the repository.

4. Select Admin > Command Line....

The Command line settings window displays.

5. Enter "commit" next to the automatically displayed "cvs."

6. Using the browse ("...") button, specify the local folder where the commit command has to be executed.

7. Click OK.

The command-line window appears for your password.

8. Enter your password to access the CVS host, and press Enter.

The CVS log file displays the information on modified files and added files.

9. Add your log entry, save, and close the file.

10. The file is removed permanently from the repository.

Updating Files

To update the repository with modified files:

- 1.** Modify the desired file.
 - a. You can modify the file in your local work area.
 - b. Or, you can locate the desired file from WinCvs window and double click to open it and modify.

On the WinCvs window, the panel on the right displays the modified file with the status "Mod.File."
- 2.** Select Modify > Update selection....

The Update settings window displays.
- 3.** Make sure that the settings are accurate.
- 4.** Click OK.

The command-line window appears for your password.
- 5.** Enter your password to access the CVS host, and press Enter.

Creating a Branch

To create a branch:

- 1.** On the WinCvs window, select Create > Create a Branch....

The Create branch settings window displays.
- 2.** Select the RTag tab.
- 3.** Specify the module to fork.
- 4.** Enter a new branch name, starting with a letter.

For example, v2.

APPENDIX B

Supported Binary Documents

This appendix lists the types of binary documents supported in SourceForge.

The types of documents supported by the Document Manager depend on an Oracle database being installed and configured as your SourceForge repository.

Document Types and Formats:

- “Word Processing - Generic” on page 378
- “Word Processing - DOS” on page 379
- “Word Processing - International” on page 380
- “Word Processing - Windows” on page 380
- “Word Processing - Macintosh” on page 381
- “Spreadsheet Formats” on page 381
- “Database Formats” on page 382
- “Display Formats” on page 383
- “Presentation Formats” on page 383
- “Standard Graphic Formats” on page 384
- “Other File Formats” on page 385

Oracle 9i

The following table lists all of the document formats that Oracle Text supports for filtering. Document filtering is used for indexing, DML, and for converting documents to HTML with the CTX_DOC package.

This list does not represent the complete list of formats that Oracle is able to process. The external filter framework enables Oracle to process any document format, provided an external filter exists which can filter all the formats to plain text.

Word Processing - Generic

Table 7. Word Processing - Generic

Format	Version
ASCII Text (7 &8 bit versions)	All versions
ANSI Text (7 & 8 bit)	All versions
Unicode Text	All versions
HTML	Versions through 3.0
IBM Revisable Form Text	All versions
IBM FFT	All versions
Microsoft Rich Text Format (RTF)	All versions

Word Processing - DOS

Table 8. Word Processing - DOS

Format	Version
DEC WPS Plus	Versions through 4.1
DisplayWrite 2 & 3 (TXT)	All versions
DisplayWrite 4 & 5	Versions through Release 2.0
Enable	Versions 3.0, 4.0 and 4.5
First Choice	Versions through 3.0
Framework	Version 3.0
IBM Writing Assistant	Version 1.01
Lotus Manuscript	Versions through 2.0
MASS11	Versions through 8.0
Microsoft Word	Versions through 6.0
Microsoft Works	Versions through 2.0
MultiMate	Versions through 4.0
Navy DIF	All versions
Nota Bene	Version 3.0
Office Writer	Version 4.0 to 6.0
PC-File Letter	Versions through 5.0
PC-File+ Letter	Versions through 3.0
PFS:Write	Versions A, B, and C
Professional Write	Versions through 2.1
Q&A	Version 2.0
Samna Word	Versions through Samna Word IV+
SmartWare II	Version 1.02
Sprint	Versions through 1.0
Total Word	Version 1.2
Volkswriter 3 & 4	Versions through 1.0
Wang PC (IWP)	Versions through 2.6
WordMARC	Versions through Composer Plus
WordPerfect	Versions through 7.0
WordStar	Versions through 7.0
WordStar 2000	Versions through 3.0
XyWrite	Versions through III Plus

Word Processing - International

Table 9. Word Processing - International

Format	Version
Ichitaro	Version 5, 6, 8, 9, and 10

Word Processing - Windows

Table 10. Word Processing - Windows

Format	Version
AMI/AMI Professional	Versions through 3.1
Corel WordPerfect for Windows	Versions through 9.0
JustWrite	Versions through 3.0
Legacy	Versions through 1.1
Lotus WordPro (NT on Intel only)	SmartSuite 96, 97 and Millennium
Lotus WordPro (all supported platforms except NT on Intel)	SmartSuite 97 and Millennium (Text only)
Microsoft Windows Works	Versions through 4.0
Microsoft Windows Write	Versions through 3.0
Microsoft Word 97	Word 97
Microsoft Word 2000	Word 2000
Microsoft Word for Windows	Versions through 7.0
Microsoft WordPad	All versions
Novell Perfect Works	Version 2.0
Novell WordPerfect for Windows	Versions through 7.0
Professional Write Plus	Version 1.0
Q&A Write for Windows	Version 3.0
WordStar for Windows	Version 1.0

Word Processing - Macintosh

Table 11. Word Processing - Macintosh

Format	Version
Microsoft Word	Versions 4.0 through 6.0
Microsoft Word 98	Word 98
WordPerfect	Versions 1.02 through 3.
Microsoft Works (Mac)	Versions through 2.0
MacWrite II	Version 1.1

Spreadsheet Formats

Table 12. Spreadsheet Formats

Format	Version
Enable	Versions 3.0, 4.0 and 4.5
First Choice	Versions through 3.0
Framework	Version 3.0
Lotus 1-2-3 (DOS & Windows)	Versions through 5.0
Lotus 1-2-3 for SmartSuite 97Lotus 1-2-3 for SmartSuite 97	SmartSuite 97 and Millennium
Lotus 1-2-3 Charts (DOS & Windows)	Versions through 5.0
Lotus 1-2-3 (OS/2)	Versions through 2.0
Lotus 1-2-3 Charts (OS/2)	Versions through 2.0
Lotus Symphony	Versions 1.0,1.1 and 2.0
Microsoft Excel 97	Microsoft Excel 97
Microsoft Excel 2000	Excel 2000
Microsoft Excel Windows	Versions 2.2 through 7.0
Microsoft Excel Macintosh	Versions 3.0 - 4.0 and 98
Microsoft Excel Charts	Versions 2.x - 7.0
Microsoft Multiplan	Version 4.0
Microsoft Windows Works	Versions through 4.0
Microsoft Works (DOS)	Versions through 2.0
Microsoft Works (Mac)	Versions through 2.0
Mosaic Twin	Version 2.5
Novell Perfect Works	Version 2.0
QuattroPro for DOS	Versions through 5.0

Table 12. Spreadsheet Formats

Format	Version
QuttroPro for Windows	Versions through 9.0
PFS:Professional Plan	Version 1.0
SuperCalc 5	Version 4.0
SmartWare II	Version 1.02
VP Planner 3D	Version 1.0

Database Formats

Table 13. Database Formats

Format	Version
Access	Versions through 2.0
dBASE	Versions through 5.0
DataEase	Version 4.x
dBXL	Version 1.3
Enable	Versions 3.0, 4.0 and 4.5
First Choice	Versions through 3.0
FoxBase	Version 2.1
Framework	Version 3.0
Microsoft Windows Works	Versions through 4.0
Microsoft Works (DOS)	Versions through 2.0
Microsoft Works (Mac)	Versions through 2.0
Paradox (DOS)	Versions through 4.0
Paradox (Windows)	Versions through 1.0
Personal R:BASE	Version 1.0
R:BASE 5000	Versions through 3.1
R:BASE System V	Version 1.0
Reflex	Version 2.0
Q & A	Versions through 2.0
SmartWare II	Version 1.02

Display Formats

Table 14. Display Formats

Format	Version
PDF - Portable Document Format	Versions 1.0, 1.1, 1.2, and 1.3 including Japanese PDF.

Presentation Formats

Table 15. Presentation Formats

Format	Version
Corel Presentations	Versions 8.0 and 9.0
Novell Presentations	Versions 3.0 and 7.0
Harvard Graphics for DOS	Versions 2.x & 3.x
Harvard Graphics Presentation	Windows versions
Freelance 96 for Windows 95	Freelance 96
Freelance for Windows 95	SmartSuite 97 and Millennium
Freelance for Windows	Freelance for Windows
Freelance for OS/2	Versions through 2.0
Microsoft PowerPoint for Windows	Versions through 7.0
Microsoft PowerPoint 97	PowerPoint 97
Microsoft PowerPoint 2000	PowerPoint 2000
Microsoft PowerPoint for Macintosh	Version 4.0 and 98

Standard Graphic Formats

The following table lists the graphic formats that the Oracle filter recognizes. This means that indexing a text column that contains any of these formats produces no error. As such, it is safe for the column to contain any of these formats.

The Oracle filter cannot extract textual information from graphics.

Table 16. Standard Graphic Formats

Format	Version
Binary Group 3 Fax	All versions
BMP (including RLE, ICO, CUR & OS/2 DIB)	Windows
CDR (if TIFF image is embedded in it)	Corel Draw version 2.0 - 9.0
CGM - Computer Graphics Metafile	ANSI, CALS, NIST, Version 3.0
DCX (multi-page PCX)	Microsoft Fax
DRW - Micrografx Designer	Version 3.1
DRW - Micrografx Draw	Version 4.0
DXF (Binary and ASCII) AutoCAD Drawing Interchange Format	Versions through 13
EMF	Windows Enhanced Metafile
EPS - Encapsulated PostScript	If TIFF image is embedded in it
FPX - Kodak Flash Pix	No specific version
GIF - Graphics Interchange Format	Compuserve
GP4 - Group 4 CALS format	Types I and II
HPGL - Hewlett Packard Graphics Language	Version 2.0
IMG - GEM Paint	No specific version
JPEG	All versions including progressive JPEG
PBM - Portable Bitmap	No specific version
PCD - Kodak Photo CD	Version 1
PCX	PC Paintbrush
Perfect Works (Draw)	Novell version 2.0
PGM - Portable Graymap	No specific version
PIC	Lotus
PICT1 & PICT2 (Raster)	Macintosh Standard
PNG - Portable Network Graphics Internet Format	Version 1.0
PNTG	MacPaint
PPM - Portable Pixmap	No specific version
PSP - Paintshop Pro (NT on Intel only)	Versions 5.0 and 5.0.1

Table 16. Standard Graphic Formats

Format	Version
SDW	Ami Draw
Snapshot (Lotus)	All versions
SRS - Sun Raster File Format	No specific version
Targa	Truevision
TIFF	Versions through 6
TIFF CCITT Group 3 & 4	Fax Systems
Visio	Visio 4 (Page Preview only), 5, 2000
WBMP	WAP graphics standard
WMF	Windows Metafile
WordPerfect Graphics [WPG and WPG2]	Versions through 2.0
XBM - X-Windows Bitmap	x10 compatible
XPM - X-Windows Pixmap	x10 compatible
XPM - X-Windows Dump	x10 compatible

Other File Formats

Table 17. Miscellaneous File Formats

Format	Version
Executable (EXE, DLL)	No specific version
Executable for Windows NT	No specific version
Microsoft Project	Project 98 (Text only)
MSG	Microsoft Outlook mail format (Text only)
rd Electronic Business Card	No specific version

IBM WebSphere Studio Integration

This appendix contains information about SourceForge integration with IBM WebSphere Studio Application Developer v 5.0, referred to as WSAD v 5.0. The SourceForge integration also supports WSAD v 4.02. The instructions in this section are applicable to both versions unless stated otherwise.

Major Topics:

- “Installing the WSAD Plugin” on page 389
- “Connecting to SourceForge” on page 390
 - “Setting up the Default Values” on page 390
 - “Enabling SourceForge Main Menu” on page 391
 - “Logging In” on page 391
 - “Enabling SourceForge Navigation and Tracker views” on page 392
 - “Accessing SourceForge Search” on page 393

The primary goal of the integration is to deliver relevant information contained within SourceForge, and provide access to SourceForge capabilities from within WebSphere Studio.

The following areas of SourceForge are accessible to developers using WebSphere Studio:

- User information page (“My Page”)
- Project home page
- Assigned Tracker items
- Notification of monitored events in SourceForge (especially Tracker events such as bugs and feature enhancement requests)
- Direct access to SourceForge advanced search
- Navigation to other SourceForge data

Preparing the Client

As a pre-requisite, make sure that you have the following software installed and running on your machine:

1. Ant
2. JDK1.3
3. Websphere Studio Application Developer v 4.02 or 5.0

Note: 512 MB of RAM is recommended for client machines.

Installing the WSAD Plugin

To install the WSAD plugin:

1. Download the plugin from your SourceForge installation as follows:
 - Click on Central Directories > SourceForge Documents on the left menu.
 - The WSAD plugins for 4.02 and 5.0 will be available under the 'VA Software Preview Materials' category.
 - Download as .tar.gz
2. Copy the plugin(*wsad4plugin.tar.gz* or *wsad5plugin.tar.gz*) to the client machine where WSAD resides.
3. Unzip the file into a temp dir.

The file contents are unzipped into a directory called com.vasoftware.sourceforge
4. Copy the directory "com.vasoftware.sourceforge" into the WSAD plugins directory.
5. Restart WSAD.

Connecting to SourceForge

This section describes how to enable SourceForge support from within Websphere Studio Application Developer v 4.02 or 5.0.

Setting up the Default Values

Before you can start using the system you must set the default values for SourceForge URL and session timeout parameters.

To set default values:

1. Click the Window option on the main tool bar.

The option named Preferences appears.

2. Click Preferences to open the Websphere preferences page.

An entry labeled SourceForge Preferences displays in the left section on the preferences page.

3. Click SourceForge Preferences.

The SourceForge Preferences page opens in the right section of the preferences page. Here you must provide certain mandatory and optional information regarding your preferences.

- a. SourceForge URL

Enter the URL of the SourceForge server which you wish to connect.

Note that this SourceForge server should have been compiled with the option `ide` during the build. The URL entered should not contain the protocol. For example, if you use the url `https://xxx.domain.com` to connect to SourceForge through a browser, then on the preference page enter `xxx.domain.com` (without the protocol) in the SourceForge URL section.

- b. Session Timeout

Enter a numeric value if you want session timeouts to take place.

Configure other options as desired.

Enabling SourceForge Main Menu

To enable the SourceForge main menu:

- 1.** Click the Perspective Menu on the menu bar.
- 2.** Select Customize... .
A dialog opens with a list of 4 options.
- 3.** Click Others to view a list of entries, each one associated with a check box.
 - a. Locate the entry SourceForge Menu with a check box associated with it.
 - b. Select the check box.
- 4.** Click OK.

This command adds SourceForge as one of the menu options on the menu bar.

Logging In

To log into SourceForge:

- 1.** Click SourceForge on the menu bar.
- 2.** Click Connect.
The SourceForge Login window appears.
- 3.** Enter your SourceForge login name in the Username field.
- 4.** Enter your SourceForge password in the Password field.
- 5.** Click OK.

Enabling SourceForge Navigation and Tracker views

To enable the SourceForge Navigation and Tracker views:

1. Click Perspective on the menu bar.

2. Select Show View.

A list of menu options is displayed.

3. Select the Others....

A dialog box opens showing a list of categories available.

4. Scroll down the list and locate an entry named SF Category.

5. Click the + symbol to expand the category.

You will find two entries in this category: SourceForge Navigator View and SourceForge Tracker View.

6. Select the desired entry and click the OK button to enable the view.

You can only enable one view at a time. To enable the other view, you have to repeat the preceding 5 steps and enable that view.

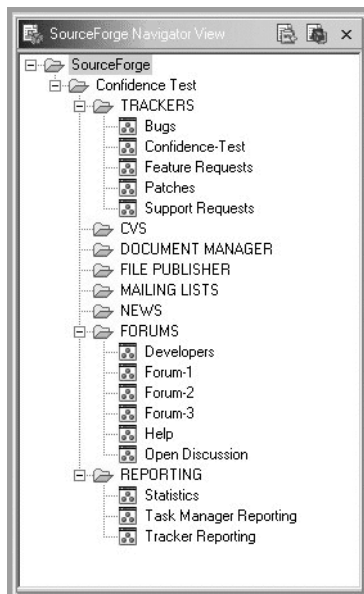


Figure 213. SourceForge Navigator View

Accessing SourceForge Search

SourceForge search facility can be accessed via a tab within the main search option.

To view the SourceForge search:

1. Click Edit.

A drop down list displays.

- a. Click Search to open the Websphere search page.

SourceForge Search is available as the second option.

- b. Alternatively, you can view the search page by pressing `Ctrl+H` on the keyboard.

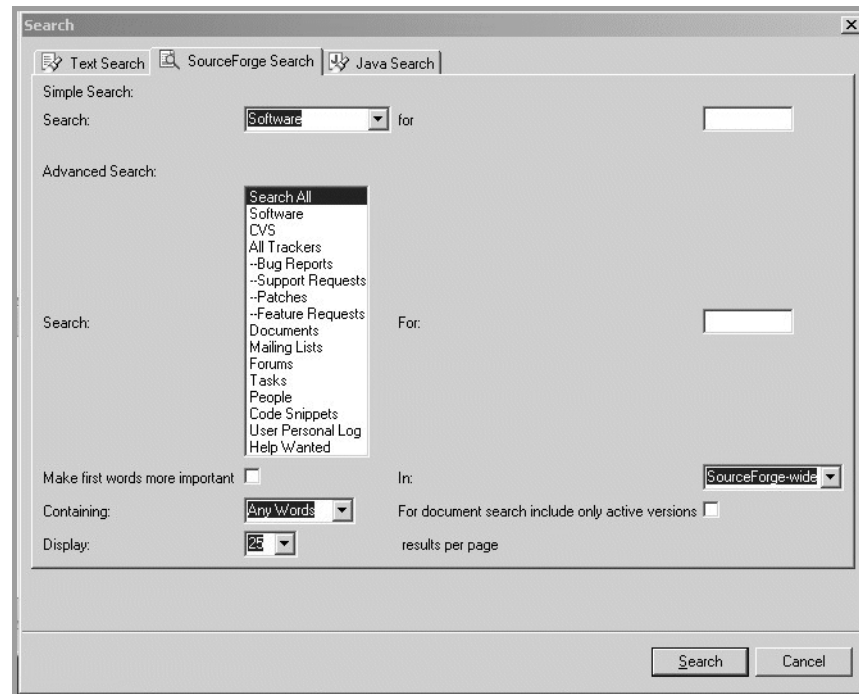


Figure 214. SourceForge Search

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