SourceForge Enterprise Edition 4.3
Getting Started Guide
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About This Book

This Getting Started Guide provides an introduction to SourceForge® Enterprise Edition 4.3. It is intended for new users and those who are evaluating SourceForge.

About SourceForge

SourceForge Enterprise Edition is a secure, centralized application for optimizing and managing distributed development. SourceForge delivers a collaborative development environment that unifies disconnected teams and tools, helping to foster collaboration and innovation while improving project efficiency. And unlike loosely integrated point products, only SourceForge offers the ability to access centralized development assets in any way you wish, whether in the native Web interface, from your Windows® desktop, from your IDE, or from a Microsoft® Office application.

The following table lists the key capabilities of SourceForge.

<table>
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<th>Centralized Repository</th>
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<tr>
<td></td>
<td>• Secure, behind-the-firewall operation</td>
<td>• Track and manage feature requests, defects, change requests, issues, and more, and automatically notify stakeholders of changes</td>
<td>• Manage project plans and deliverables, personalized task “to-do” lists, etc.</td>
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<tr>
<td></td>
<td>• Pervasive search capability</td>
<td>• Integration with leading Software Configuration Management (SCM) systems</td>
<td>• Full Microsoft® Project integration supports bi-directional task synchronization and updates</td>
</tr>
</tbody>
</table>

The following table lists the key capabilities of SourceForge.
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
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<tr>
<td><strong>File Release System</strong></td>
<td>• Post and manage approved file release packages</td>
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<td></td>
<td>• Integrates easily with existing build tools for automated creation of file releases</td>
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<tr>
<td></td>
<td>• Fine-grained access controls and download statistics</td>
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<td><strong>Document Manager</strong></td>
<td>• File repository for design or architecture documents, requirements documents, project plans, test plans, etc.</td>
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<td></td>
<td>• Full document versioning, automated document review and approval</td>
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<tr>
<td></td>
<td>• Microsoft Office Add-in enables saving of documents to SourceForge directly from Office applications</td>
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<tr>
<td><strong>Discussion Forums, Mailing Lists, Project News</strong></td>
<td>• Provides structured, traceable, and searchable project communication</td>
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<td></td>
<td>• Control public as well as private discussion forums and mailing lists, and submit posts via email</td>
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<tr>
<td><strong>Wiki</strong></td>
<td>• Create Wiki pages and customized project home pages for more effective communication and capture of IP</td>
</tr>
<tr>
<td></td>
<td>• Integration with SourceForge capabilities simplifies administration and content management by applying SourceForge permissions, associations, search, monitoring, and other capabilities</td>
</tr>
<tr>
<td><strong>SourceForge Explorer</strong></td>
<td>• .NET client application that allows SourceForge-held data to be accessed via Windows®</td>
</tr>
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<td></td>
<td>• Enables you to select, hide, and reorder columns and fields; create desktop shortcuts to SourceForge assets and launch artifact source applications (such as Microsoft® Word or PowerPoint®) from the Explorer interface</td>
</tr>
<tr>
<td></td>
<td>• Leverage the familiar “drag and drop” method to quickly and simply move single assets, groups of assets, or entire files into the SourceForge repository</td>
</tr>
<tr>
<td><strong>Access Controls</strong></td>
<td>• Secure, role-based access controls govern access permissions at the application, project, and tool levels</td>
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<tr>
<td></td>
<td>• Validate users against existing LDAP systems, for improved access control for administrators and single sign-on for users</td>
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<td>Section</td>
<td>Description</td>
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| **Global Development Dashboard™ and Reporting**   | • Real-time status rollups and color-coded indicators, plus comprehensive drill-down into project status and issues  
• Export data via XML, CSV, or tab-delimited formats to external applications such as Crystal Reports |
| **Source Code Management**                        | • Tight integrations with leading SCM solutions including Web-based remote access, repository creation and user administration; a growing list includes CVS, Subversion, and Perforce®  
• SCM adapter allows simple integrations with virtually any SCM tool, to allow associations of code in repository to SourceForge assets |
| **Automated Monitoring and Notifications**        | • Detailed audit logs of all artifact changes / history  
• Create associations across all areas of the application - across projects, tools, activities and individual artifacts |
| **SourceForge Collaborative Development Process™** | • Proven best practices for software development using SourceForge Enterprise Edition |
| **Interoperability and Extensibility**            | • Integrations with Microsoft® Office and Project, CVS, Subversion, Perforce, Black Duck protexIP™, and IBM® WebSphere® Studio Application Developer  
• Open SOAP XML web services API and complementary SDK enable additional integrations |
**Additional documentation resources**

For instructions on installing, configuring, and administering SourceForge, see the following documentation:

- *SourceForge Enterprise Edition 4.3 Installation and Administration Guide*

For more comprehensive instructions on using the advanced features of SourceForge, see the following documentation:

- *SourceForge Enterprise Edition 4.3 User Guide*
- *SourceForge Enterprise Edition 4.3 Release Notes*
- *SourceForge Explorer 2.0 User Guide*

You can also access the context-sensitive Help system by clicking the icon in the top right corner of any SourceForge page. You will be taken to the Help topic most appropriate to your current page. You can then navigate to other Help topics as needed.
Contacting technical support

VA Software is committed to helping you get the most from your software development investments. Customer Support can be accessed via phone, e-mail, and the web. Customer Support also maintains an interactive online Knowledge Base to provide answers to commonly asked questions as well as specific "how-to" procedures for common issues. VA Software also offers interactive product training and Professional Services for consulting and for customizing SourceForge to meet your unique requirements.

VA Software offers multiple levels of support coverage to keep your teams and your SourceForge platform running smoothly. In addition to our standard 8x5 (Pacific Time) support, we can also provide extended hours coverage for critical issues.

To learn more about Customer Support

Complete our inquiry form at http://vasoftware.com/products/request_info.php or contact VA Software toll-free at:

<table>
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<tr>
<th>In the United States</th>
<th>1-877-825-4689</th>
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<tbody>
<tr>
<td>Outside the United States</td>
<td>+1-510-687-7000</td>
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To access the Knowledge Base

The VA Software Knowledge Base is available at no charge to all SourceForge users.

https://kb.vasoftware.com/

To access email support

Email support is available for customers with current maintenance plans.

support-sf@vasoftware.com

To arrange for training

To arrange an onsite or online training course, contact your VA Software account representative.
Welcome to SourceForge Enterprise Edition 4.3! This Getting Started Guide is for new users. It covers the basics of creating an account, navigating in SourceForge, finding and joining projects, and getting help.

This chapter covers the following topics:

- “Creating an account” on page 8
- “Logging in and out of SourceForge” on page 11
- “Navigating in SourceForge” on page 12
- “Searching in SourceForge” on page 18
- “Finding and joining a project” on page 20
- “Creating a project” on page 22
- “Resetting a lost password” on page 24
Creating an account

You must have a SourceForge account before you can join and participate in projects. Users without SourceForge accounts can access a limited amount of SourceForge data, but a user name and password are required for most activities.

Account creation for your organization's SourceForge installation is handled in one of the following two ways:

- SourceForge supports authentication through corporate LDAP directories. If your organization's SourceForge installation authenticates through a corporate LDAP directory, you will log in to SourceForge using your LDAP user name and password.
- If not, you will need to create your own user name and password to log in to SourceForge.

You can tell whether or not your organization's SourceForge installation authenticates through an LDAP directory by looking at the New Users section of the SourceForge home page.

**Figure 1.** New Users section with LDAP authentication.

```
New Users
To create an account, log in with your corporate user name and password.
```

**Figure 2.** New Users section without LDAP authentication.

```
New Users
Create an Account

Once your email address is confirmed, your SourceForge account will become active.
```
To create a new account with LDAP authentication

1. In the Log In to SourceForge section of the SourceForge home page, enter your corporate LDAP user name and password.

   Your user name and password are most likely the user name and password with which you log in to your corporate network.

2. Click Log In.

   The Create SourceForge Account page is displayed.

3. Re-enter your LDAP password.

4. Enter your full name and email address.

   When you are finished, click Create.

   SourceForge displays a success message telling you to check your email to activate your account.

5. Check your email at the email address that you provided.

   Follow the link in the email to the Log In page.

6. Enter your user name and password.

   Then click Log In.

   Your SourceForge account is now activated.
To create a new account without LDAP authentication

1. Click Create an Account in the New Users section of the SourceForge home page.

2. The Create User page is displayed.

![Create User](image)

**Figure 5.** Create New SourceForge Account page

3. Enter a user name for your account.
   
   Your user name must be between 1 and 15 characters long, can contain only alpha-numeric characters without spaces, and must contain at least one letter. The first character must be a letter.

4. Fill in the rest of the fields as indicated.
   
   Required fields are indicated by a red asterisk*. When you are finished, click Create.
   
   SourceForge displays a success message telling you to check your email to activate your account.

5. Check your email at the email address that you provided.
   
   Follow the link in the email to the Log In page.

6. Enter your user name and password.
   
   Then click Log In.

Your SourceForge account is now activated.
Logging in and out of SourceForge

Each time you access SourceForge, you must log in. Logging in grants you access to your projects, your personal information such as preferences and other user settings, and other SourceForge data that is limited to logged in, or authenticated, users.

You must have a valid user name and password to log in. If you do not have a user name and password, see “Creating an account” on page 8.

To log in to SourceForge

1. Follow the URL to your organization’s SourceForge installation.
2. Enter your user name and password in the Log In section of the SourceForge home page.

Upon successful log in, you are taken to your My Page.

You are not able to log in if your account is pending. Your account is pending if you have created a new account but have not yet verified your email address. If your account is pending, you see a message telling you to check your email to activate your account.

If you have lost or forgotten your password, see “Resetting a lost password” on page 24.
Navigating in SourceForge

The SourceForge interface consists primarily of a series of navigation bars and a workspace. You can select from four navigation bars, depending on which activities you are performing. The options in the navigation bar govern which activities you can perform in the workspace.

In addition to the workspace, you can also access a variety of summary information on the SourceForge home page, the project home page, and your personal My Page. This section provides an overview of how to navigate in SourceForge.

SourceForge home page

After following the URL to your organization’s SourceForge installation, you are taken to the SourceForge home page. The SourceForge home page provides summary information about all of the projects and activities in SourceForge. You can also log in to SourceForge from the SourceForge home page.

Figure 7. SourceForge home page

The following information is displayed on the SourceForge home page:

- **SourceForge navigation bar** - The SourceForge navigation bar is displayed at the top of all SourceForge pages. Before you log in, the SourceForge navigation bar offers only the Home, Projects, and Search options. To display the full SourceForge navigation bar, you must log in.
• **Log In to SourceForge** - The Log In to SourceForge section enables registered users to log in or to retrieve a lost password. New users can also click Create an Account to request a SourceForge account.

• **Most Active Projects** - The Most Active Projects section displays summary information and links to the five most active projects in SourceForge. Project activity is calculated based on actions performed in each project, such as creating, editing, or downloading items.

• **Quick Links** - The Quick Links section provides links to instructional documentation.

• **SourceForge News** - The SourceForge News section displays the most recent news from SourceForge projects.

• **SourceForge Activity** - Statistics about the numbers of SourceForge users and registered projects are displayed in graphical format.

You do not need a user name and password to access the SourceForge home page. You will see information from only the projects that you are allowed to view, based on your user type and each project’s access settings.
Navigating in SourceForge

My Page

After logging in to SourceForge, you are taken to your My Page. Your My Page is a personal workspace where you can manage your personal information, your preferences, and your assigned activities.

The following items are displayed on your My Page:

- **SourceForge navigation bar** - After logging in to SourceForge, the full SourceForge navigation bar is displayed at the top of the page. Whenever you are logged in, the SourceForge navigation bar is displayed on all pages in SourceForge. From the SourceForge navigation bar, you can do the following:
  - Click Home to return to the SourceForge home page.
  - Click My Workspace to return to your My Page and to access your personal navigation bar.
  - Click Projects to access the projects of which you are a member, or to browse for other projects.
  - Click Search to search for data in SourceForge.

Figure 8. My Page

The following items are displayed on your My Page:

- **SourceForge navigation bar** - After logging in to SourceForge, the full SourceForge navigation bar is displayed at the top of the page. Whenever you are logged in, the SourceForge navigation bar is displayed on all pages in SourceForge. From the SourceForge navigation bar, you can do the following:
  - Click Home to return to the SourceForge home page.
  - Click My Workspace to return to your My Page and to access your personal navigation bar.
  - Click Projects to access the projects of which you are a member, or to browse for other projects.
  - Click Search to search for data in SourceForge.
If you are a SourceForge administrator, you can also click Admin to access administrative functions. If you are not a SourceForge administrator, the Admin link is not displayed.

- **Personal navigation bar** - After accessing your My Page, either by logging in or by clicking My Workspace in the SourceForge navigation bar, your personal navigation bar is displayed.

  From your personal navigation bar, you can do the following:
  
  - Click Dashboard to view your SourceForge Global Development Dashboard™/Project Dashboard.
    
    You can access the Project Dashboard only if you have the appropriate permissions.
  
  - Click Projects to create a new project or to manage your project membership.
  
  - Click Monitoring to view your monitored items or to manage your monitoring preferences.
  
  - Click My Settings to manage your user account, including changing your password and managing your SSH authorization keys.
  
  - Click My Page to return to your My Page.

- **My Recent Projects** - Your My Recent Projects list displays a list of your most recently accessed projects. Click the name of a project to go to the project home page.

- **My Recent History** - Your My Recent History list displays a list of the items that you have most recently created or edited. Click the name of an item to go to its details page.

- **My Items** - Your My Page workspace provides consolidated views of all of your SourceForge items. All items that are assigned to you, were created by you, or are awaiting your approval are displayed. Items are displayed from all projects of which you are a member.

  From your My Page workspace, you can do the following:
  
  - Click Items Assigned to Me to view all of the open tasks, tracker artifacts, and document reviews currently assigned to you.
  
  - Click Items Created by Me to view all of the tasks, tracker artifacts, and document reviews that you have created.
  
  - Click News to view recent news from all projects of which you are a member.

If you are an application or project administrator in one or more SourceForge projects, you can also click Items Awaiting My Approval to view a list of all requests for task changes, requests to join projects, and requests to leave projects. Click the title of an item to go to the item’s approve request page.
**Navigating in SourceForge**

### Project home page

After choosing a project from your Projects menu, or after clicking the title of a project from your My Projects page, your My Page, or other location in SourceForge, you are taken to the project home page.

The project home page provides summary information about the project. You can also request to join or leave a project from the project home page.

**Figure 9.** Project home page

- **SourceForge navigation bar** - Whenever you are logged in, the SourceForge navigation bar is displayed on all pages in SourceForge.
  - Click Home to return to the SourceForge home page.
  - Click My Workspace to return to your My Page and to access your personal navigation bar.
  - Click Projects to access your projects or to browse for other projects.
  - Click Search to search for data in SourceForge.

If you are a SourceForge administrator, you can also click Admin to access administrative functions. If you are not a SourceForge administrator, the Admin link is not displayed.
• **Project navigation bar** - After entering a project, the project navigation bar displays. The project navigation bar provides you with access to all project applications.

  Click the title of any application to go to the application's main page.

• **Project Home** - The Project Home section displays the project description, the date of project creation, and a button to request to join the project.

• **Project Members** - The Project Members section displays the number of project members and the list of project administrators.

• **Project News** - Project news displays at the bottom of the project home page.

  **Note** - News is the only project application that is accessed and administered from the project home page. Click Create to post a news item. Click Delete to delete a news item.

• **Project Statistics** - Recent statistics for tasks, trackers, documents, and file releases are displayed in graphical format. For each graph, you can click Enlarge Graph to display an expanded view of the graph in a separate window. From the expanded view, you can modify the parameters used to generate the graph, then click update to generate a new, custom graph.

  Changes made to the graph in the expanded view are not saved or reflected in the graph on the project home page.

• **Black Duck Analysis** - For projects that have the SourceForge Black Duck protexIP integration enabled, summary data about the most recent Black Duck protexIP analysis is displayed on the SourceForge project home page.

### SourceForge administration navigation

If you are a SourceForge administrator, you can click Admin in the SourceForge navigation bar to access administrative functions. After clicking Admin, the SourceForge administration navigation bar is displayed.

![SourceForge administration navigation bar](sourceforge_admin_navigation.png)

**Figure 10.** SourceForge administration navigation bar

See the *SourceForge Enterprise Edition 4.3 User Guide* for details on performing SourceForge administration tasks.
Searching in SourceForge

To use the Quick Jump option, choose Quick Jump from the Search menu.

You can enter an item’s unique identifier or select it from your history.

Unique identifiers are SourceForge item IDs. They are always three or four letters followed by four or more numbers, such as task1029 or artf10011. Unique identifiers are case-sensitive.

Searching in SourceForge

The search function allows you to search for items throughout SourceForge. You can limit your search in a number of ways to assist you in locating items. You can also Quick Jump to go directly to an item using its unique identifier.

The search function searches all SourceForge applications except integrated SCM repositories. You can search text-based file attachments and text comments. You can also search binary document attachments such as Microsoft® Word, Microsoft® Excel, and Adobe® Acrobat® files.

See the SourceForge Enterprise Edition 4.3 User Guide for the following:

- A list of all searchable binary file types.
- Detailed instructions on restricting your search.

If you want to search for items containing one or more keywords, use the Search option from the Search menu. If you know an item’s unique identifier and want to jump directly to it, use the Quick Jump option.

To search by keyword

1. Log in to SourceForge.

   If you are not logged in, you can search only projects and items that have been designated public.

2. In the SourceForge navigation bar, choose Search from the Search menu.

   You can initiate a search from any page in SourceForge.

   The Search Criteria page is displayed.

3. Enter the keywords for the search.

   See the SourceForge Enterprise Edition 4.3 User Guide for wildcards and other ways to restrict your search.

4. Specify whether you want to search tracker artifact attachments.

5. Specify whether you want to search comments.

   Comments include tracker artifact comments and task comments.

6. Select the areas of SourceForge in which you want to search.

   - **Projects** - Projects searches all project applications and metadata such as project description. However, project URL names are not included in search results.
   - **Users** - Users searches all user details.
   - **Applications** - The In menu allows you to specify the applications in which you want to search.
7. Select the projects in which you want to search.
   - **All Projects** - All Projects searches all projects of which you are a member.
   - **Specific projects** - The In Projects menu allows you to specify the projects in which you want to search.

8. For documents, specify whether you want to search all document versions or only active document versions.
   Searching only active document versions allows you to eliminate search results for outdated documents.

When you are finished, click Search.

The Search Results page is displayed.

Your search results are displayed organized by SourceForge application. Only items that your project membership and permissions allow you to see are displayed. A search score is displayed that indicates the relevance of each result to your search criteria.

To view an item, click its title.

To revise your search criteria, expand the + next to the search criteria. Make the desired changes, then click Search. The search results matching the new criteria are displayed.
Finding and joining a project

SourceForge data is organized into projects. A project is a workspace where project members can use each of the SourceForge applications to collaborate and to create, store, and share project data.

Any registered SourceForge user can create a project, subject to approval by a SourceForge administrator. After a new project is approved, the project creator can then configure project applications, add project members, and create and assign roles to govern specific access permissions for each user.

Any registered SourceForge user can also request membership in any SourceForge project. All requests to join projects are submitted to the project’s administrators for approval.

To find and join a project

1. Log in to SourceForge.
   
   Your My Page is displayed.

2. Click Projects in your personal navigation bar.
   
   The list of projects of which you are a member is displayed.

3. Click the All Projects tab.
   
   The list of all SourceForge projects is displayed.

4. Select the project that you want to join by checking the radio button.
   
   Then click Request Membership.
Finding and joining a project

The Request Project Membership page is displayed.

![Request Project Membership](image)

**Figure 13. Request Project Membership page**

5. Enter any comments that you want to send with your request.
   Then click Submit.

Your request is now submitted to the project administrator for approval. You will receive an email notification when your request is either approved or denied.

You can also request project membership from the project home page. Each project home page has a Join this Project link. To request project membership, click Join this Project. You are taken to the Request Project Membership page described in Step 4 above.
Creating a project

SourceForge data is organized into projects. A project is a workspace where project members can use each of the SourceForge applications to collaborate and to create, store, and share project data.

How you choose to organize your SourceForge projects is up to you and your organization. You might choose to create one large, centralized SourceForge project in which to manage all of your organization's development work. Or you might choose instead to create a number of smaller projects for each team or sub-project.

Any registered SourceForge user can create a project, subject to approval by a SourceForge administrator.

**To create a new project**

1. Log in to SourceForge.

   Your My Page is displayed.

2. Click Projects in your personal navigation bar.

   The list of projects of which you are a member is displayed.

   ![My Projects page](image)

   **Figure 14.** My Projects page
3. Click Create Project.

The Create Project page is displayed.

4. Enter a name for the project.

   This is the name that will appear in all project lists and on the project home page.

5. (Optional) Enter a URL name for the project.

   This is a name that will appear in the project's URL.

6. Enter a description for the project.

7. Select a project template.

   A project template is used to pre-populate new projects with the structure and configuration of an existing project. If you do not want to use a project template, choose <None>.

   When you are finished, click Create.

The project is now submitted to the SourceForge administrator for approval. You will receive an email notification when the SourceForge administrator approves your project. When your project is approved, you are assigned the Founder Project Admin role and made a project administrator. You can access the project from your My Projects page or from the Projects menu in your SourceForge navigation bar.

If your project is rejected, you will receive an email notification.

For more information on project templates and project administration, see the SourceForge Enterprise Edition 4.3 User Guide.
**Resetting a lost password**

If you lose or forget your password, you can reset it and create a new one. SourceForge will verify your user name and email address before allowing you to reset your password.

**Note** - You cannot reset your SourceForge password if your organization’s SourceForge installation authenticates against an LDAP directory. You must reset your password in your corporate LDAP system. When you change your password in your corporate LDAP system, it is changed automatically in SourceForge.

**To reset your password**

1. Follow the URL to your organization’s SourceForge installation.

2. Click Forgot Your Password? in the Log In to SourceForge section of the SourceForge home page.

   The Account Password Retrieval page is displayed.

   ![Account Password Retrieval page](image)

   **Figure 16.** Account Password Retrieval page

3. Enter the user name associated with your SourceForge account.

   Then click Send Email.

   SourceForge sends an email to confirm your email address.

4. Check your email and click the link provided to reset your password.

   You are taken to the Reset Password page.

   ![Reset Password page](image)

   **Figure 17.** Reset Password page

5. Enter and confirm a new password.

   Then click Reset Password.

   You are taken to a log in page to log in with your new password.

If you have access to an SCM server, your SCM password is reset automatically when you reset your SourceForge password.
CHAPTER 2
Working with SourceForge

SourceForge provides an integrated suite of project management, change management and collaboration tools for optimizing and managing distributed development. This chapter provides instructions on working with each of the SourceForge tools, or applications.

This chapter provides instructions for the following SourceForge applications:

- “Trackers” on page 26
- “Documents” on page 32
- “Tasks” on page 38
- “Source Code” on page 42
- “Discussions” on page 48
- “File Releases” on page 52
- “Reports” on page 56
- “Wiki” on page 59
- “Monitoring” on page 65
- “Associations” on page 67
- “Microsoft Integrations” on page 70
- “Project and SourceForge Administration” on page 77
Trackers

The SourceForge issue tracking system enables development teams to track and manage issues such as product defects, feature requirements, and support requests.

In each SourceForge project, you can create any number of trackers based on the types of data that you want to track. For each tracker, you can define values for status, category, and other default fields. You can also create your own user-defined fields to capture additional data that is specific to your project or organization.

Individual tracker entries are referred to as tracker artifacts. The role-based access control system enables you to control which project members are allowed to view, create, and edit tracker artifacts.
Creating a tracker artifact

Individual tracker entries are referred to as tracker artifacts. Tracker artifacts are used to report and track bugs, feature requests, support requests, and any other type of issue where ownership, status, and activity must be managed.

To create a tracker artifact

1. Click Tracker in the project navigation bar.

   The Tracker Summary page is displayed.

   ![Tracker Summary page]

2. Click the title of the tracker in which you want to create the artifact.

   The artifact list view is displayed.

3. Click Submit New Artifact.
The Submit Artifact page is displayed.

**Figure 19. Submit Artifact page**

**Note** - The fields on your Submit Artifact page can vary based on your administrator’s selection of required, optional, and user-defined fields.

4. Enter a title and description for the artifact.
   Title and description are always required fields.

5. Complete all other required fields identified by red asterisks*.
   Optionally, complete any other fields not identified by asterisks.

Default fields include:
- Group, Status, Category, and Customer
  Values for these fields are defined by your administrator.
- Priority
  Priority values range from 1 (highest) to 5 (lowest)
• Reported in Release
  If the artifact represents a bug or other issue that was discovered in a file release, for example a bug in a product release, choose the release from the drop-down list.
• Estimated Hours
  Enter the estimated number of hours required to complete the activity described in the artifact.

6. Assign the artifact to a project member.
   Your administrator might choose to configure the tracker to automatically assign artifacts to individuals based on artifact criteria.
   • To automatically assign artifacts, do not choose a name from the Assigned To drop-down list. The default value is None.
   • To specify the person to whom the artifact should be assigned, choose a name from the Assigned To drop-down list.

7. Optionally, add file attachments.
   Click Browse to browse for the file.

8. When you are finished:
   • Click Save to save the artifact and return to the artifact list view.
   • Click Save and View to save the artifact and display the artifact details.
Edited a tracker artifact

At any time after a tracker artifact is created, users with the appropriate permissions can edit it. Generally, the project member to whom the tracker artifact is assigned will edit it to update the status, for example from Open to Fixed, or to add a comment regarding work completed or additional information required. However, any project member with the appropriate permissions can add comments to the tracker artifact.

Managers might also edit a tracker artifact to change its priority, to return it to the submitter for additional clarification, or to assign it to a project member for resolution or action. Tracker artifact names and descriptions are generally not changed, except to correct invalid information.

**To edit a tracker artifact**

1. Click Tracker in the project navigation bar.
   The list of project trackers is displayed.
2. Find the tracker artifact that you want to edit.
   Use the filter if needed to find the desired artifact.
3. Click the artifact title.
   The Artifact Details page is displayed.
   The Artifact Details page is divided into three sections; the upper section for the artifact details, the middle section for all other fields, and the lower section for the artifact comments.
4. To edit the artifact title or description, click Edit.
   The Edit Artifact Details page is displayed.

![Figure 20. Edit Artifact Details page](image)
5. Make the desired changes.
   Then click Save.
   Your changes are saved and you are returned to the Artifact Details page.

6. To edit all other fields, make the desired changes in the lower section of the page.
   Editable fields are displayed on the Status / Comments tab.
   When you are finished, click Update.

All updates to the artifact are recorded in the Comments section of the Status / Comments tab.
Documents

The SourceForge document management system provides project members with a centralized repository for creating, storing, and managing project documents. You can create text documents within SourceForge, or upload binary documents from your file system.

The document management system enables you to submit documents for review by other project members and actively manage the document review cycle to completion. SourceForge maintains a complete history of all review responses, providing proof of document approvals for future reference.

The role-based access control permissions system enables you to control which project members are allowed to view, create, and edit documents.
Creating a document

You can create a document either by uploading a file or by entering the text directly into SourceForge. When creating a document, you can also identify the document status.

SourceForge automatically detects the file extension for many common file types. For a list of recognized file types, see the SourceForge Enterprise Edition 4.3 User Guide.

To create a document

1. Click Documents in the project navigation bar.
   The root folder document list is displayed.

2. Using the document tree, navigate to the folder in which you want to create the document.
   You can create a document in the root document folder or any other document folder.

3. Click Create.
   The Create Document page is displayed.

   ![Create Document page](image)

   **Figure 21.** Create Document page

4. Enter a name and description for the document.
5. Identify the document status.
   • **Draft** - Indicates that the document is in draft form and is not yet completed.
   • **Final** - Indicates that the document is in final form.

6. If you want to lock the document to prevent others from editing it, check Lock Document.

7. Select the document creation method.
   • Check Upload From File to upload a document.
     Click Browse to browse to the desired file.
   • Check Create Online to enter the content as text.
     A Text field is displayed to allow for text entry.

8. If desired, enter any version comments associated with the specific document version.

9. When you are finished:
   • Click Save to save the document and return to the document list view.
   • Click Save and View Document to save the document and display the document details.
Editing a document

Any project member with the Document Edit permission can edit or update a document. SourceForge automatically maintains the version history of each document, including the person who posted each version, its status, and any version comments.

You can also copy a document or move it from one document folder to another.

To edit a document

1. Click Documents in the project navigation bar.
   The root folder document list is displayed.

2. Using the document tree, navigate to the folder containing the document that you want to edit.

3. Select the document that you want to edit by clicking the document name.
   The Document Details page is displayed.

4. Click Edit/Update.
   The Edit Document page is displayed.

5. Update the document as desired.
   - Update the name or description by entering new text in the appropriate field.
   - Change the status value if desired.
   - If you want to lock the document to prevent others from editing it, check Lock Document.
   - Update a binary document by checking Upload From File, then browsing for the updated file.
   - Update a text document by checking Create Online, then editing the document text.

6. Optionally, enter a version comment to describe the changes made.
   When you are finished, click Save.

The document is now updated.
Starting a document review

The document management system enables you to submit documents for review by other project members and actively manage the document review cycle to completion. SourceForge maintains a complete history of all review responses, providing proof of document approvals for future reference.

At any time after a document is created in SourceForge, you can start a document review. When starting a review, you are asked to select required and optional reviewers, set a due date for the review, and enter any message text that you want included in the email that will be sent to reviewers. If you want to add your own comments to a review, add yourself as a reviewer.

Before starting a document review, you must create the document in SourceForge. See “Creating a document” on page 33.

For additional information on document reviews, see the SourceForge Enterprise Edition 4.3 User Guide.

To start a document review

1. Click Documents in the project navigation bar.
   The root folder document list is displayed.
2. Using the document tree, navigate to the folder containing the desired document.
3. Click the title of the document.
   The Document Details page is displayed.
4. Click the Review tab.
   A list of all open and closed reviews is displayed.

   Note - You cannot start a new review while another review is open on the same document.

5. Click Start a Review.
   The Start a Review button is displayed only when the document has no open reviews.
The Start a Review Cycle page is displayed.

![Start a Review Cycle page](image)

**Figure 22.** Start a Review Cycle page

6. Enter a name for the review.

7. Enter a due date for reviews.
   
   Click the ⏱ icon to select dates from a calendar.

8. Select the required and optional reviewers.
   
   Click the Ⓜ icon to display a list of project members with permission to access documents.

9. Enter any message text that you want included in the email that will be sent to reviewers.

10. Select whether you want the document sent as an attachment to the email.
    
    The URL to the document is included in the email regardless of whether the document is attached.
    
    When you are finished, click Save.

The document is now submitted for review. All reviewers receive an email with the details of the review, any message text that you entered, and a link to the Review Details page where they can download the document and post review responses.

The document status is changed to Review and remains so until the review is closed.

Documents are due at 12:00AM midnight on the date selected.

Therefore, you might wish to add an extra day to your review.

For example, if you want all document reviews to be completed by end-of-day Tuesday, select Wednesday as the review end date.
Tasks

SourceForge provides a comprehensive task management system to help you actively manage your project plans. You can create tasks directly in SourceForge, or automatically generate all of your project tasks from project plans developed in Microsoft Project.

Project members can view their assigned tasks from their My Pages, and enter status updates on all tasks using a simple interface.

Project managers can configure a variety of task exception handling criteria to provide high visibility into task status and to enforce task workflow rules. Task exception handling criteria include automatic overdue task notices and change request approval.
Creating a task

There are two ways to create a task. You can create a task manually by entering data directly into SourceForge. You can also synchronize a task list with a Microsoft Project file, automating much of the task creation process and allowing you to create a large number of tasks quickly.

To create a task in SourceForge

1. Click Tasks in the project navigation bar.
   The Task Summary page is displayed.
2. Using the task tree, navigate to the task folder in which you want to create the task.
3. Click the title of the task folder.
   The list of tasks in the task folder is displayed.
4. Click Create.
   The Create Task page is displayed.

![Create Task page](image)

Figure 23. Create Task page

5. Enter a name and description for the task.
6. Assign the task a priority between 1 (highest) to 5 (lowest).
7. Assign the task to an individual.
   Click the icon to display a list of project members to whom you can assign the task.

For more information on creating tasks in SourceForge by synchronizing with Microsoft Project, see the SourceForge Enterprise Edition 4.3 User Guide.
8. Assign the task a status.
   - Not Started
   - Good
   - Warning
   - Alert
   - Complete

9. Assign the task a start and end date.
   Click the icon to select dates from a calendar.

10. Optionally, enter the estimated hours needed to complete the task in the Estimated Hours field.

11. Specify whether the task is based on a 5-day or 7-day calendar.
    5-day calendars count only Monday through Friday as work days. 7-day calendars also count Saturday and Sunday.
    The calendar that you select determines whether you can assign a start or end date on a weekend. It is also applicable when working with task dependencies. For additional information, see the SourceForge Enterprise Edition 4.3 User Guide.

12. When you are finished:
    - Click Save and View Task to save the task and view the task details page.
    - Click Save to save the task and return to the task list.
Updating task status

If you are assigned a task, you must periodically update its status. You can provide task status reports for all of your assigned tasks from a single page. The frequency of required task status updates is determined by each project's administrator. You might receive warning messages if you do not provide timely task status updates.

To enter your task status report

1. Click Tasks in the project navigation bar. The Task Summary page is displayed.
2. Click the My Task Progress tab.

Your My Task Progress page displays a list of all tasks assigned to you.

3. Enter your task status updates in the Accomplished, Planned, and Issues fields.
   - **Accomplished** - Use this field to enter any accomplishments since your last update.
   - **Planned** - Use this field to enter your planned work on the task.
   - **Issues** - Use this field to report any issues with the task.

4. If applicable, change the task status.

   Project administrators can require approval for changes to task status. If change approval is required, you are notified when you submit your status report.

5. When you are finished:
   - Click Save Page to finish and save your changes.
   - If your tasks cover more than one page, click Save Page and View Next to proceed to the next page.
Source Code

SourceForge is fully integrated with your CVS, Subversion, or Perforce® code repository.

From within SourceForge, project members can browse the contents of a project’s SCM repositories, and view detailed information about code commits, changed files, and associations with other SourceForge items.

SourceForge provides view access to your code repositories and integration with other SourceForge applications, but it does not replace your SCM tool.

- For additional information on working with CVS, see the following URL: http://www.cvshome.org/docs/manual/
- For additional information on working with Subversion, see the following URL: http://svnbook.red-bean.com/
- For additional information on working with Perforce, see the following URL: http://www.perforce.com/perforce/technical.html
Viewing code commits

SourceForge is fully integrated with your CVS, Subversion, or Perforce code repository. From within SourceForge, you can browse a list of code commits made to each repository. For each code commit, you can view the list of files that were checked in, the version history of each file, and any associations that were created to other SourceForge items such as tracker artifacts or tasks.

To view code commits

1. Click Source Code in the project navigation bar.
   The list of project repositories is displayed.
2. Select the repository in which you want to view code commits by checking the radio button.
   Then click View Commits.

The Repository Details page is displayed.

<table>
<thead>
<tr>
<th>Repository Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repository Name:</td>
</tr>
<tr>
<td>Description:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>CVS:</td>
</tr>
<tr>
<td>Command:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Server:</td>
</tr>
<tr>
<td>Server Id:</td>
</tr>
<tr>
<td>Repository Path:</td>
</tr>
</tbody>
</table>

Figure 25. Repository Details page

The Commits section of the Repository Details page lists all of the code commits in the repository. By default, it shows the commits made over the preceding 7 days. For each code commit, you can see:

- The code commit name.
- The name of the developer who made the code commit.
- Any code commit message entered by the developer.
- The date on which the code commit was made.
3. If you want to filter the list of code commits, click the filter icon to activate the filter. Filter menus are displayed at the top of each column. You can filter by commit name, committed by, and code commit date ranges. Enter the filter criteria, then click Apply Filter.

4. To view the details of a commit, click its title. The Commit Details page is displayed.

![Figure 26. Commit Details page](image)
The Files section of the Commit Details page lists all files that were checked in with the code commit, including the version number of each file and the last operation that was performed, such as modified, deleted, moved, copied, or added.

- To view the file information, click the file name.
- To view the latest version of the file, click the file version.

5. To view any associations that were created to other SourceForge items, click the Associations tab. The list of existing associations is displayed.

![Figure 27. Associations section of Commit Details page](image)
Viewing code in a CVS or Subversion repository

SourceForge provides web interfaces for browsing your CVS or Subversion code repositories. From these web interfaces, you can view the contents of each file in a repository, plus additional information about each file such as revision history, comments, date and time of submission, and branch and tag information. You can also view differences, or diffs, between any two files.

SourceForge does not provide a web interface for browsing Perforce repositories.

**To view code in a CVS or Subversion repository**

1. Click Source Code in the project navigation bar.
   The list of project repositories is displayed.

2. Select the repository in which you want to view code by checking the radio button.
   Then click Browse Repository.
   The Code Repository Browser is displayed.

   ![Code Repository Browser](image)
   **Figure 28.** Code Repository Browser
   
   For each file, the revision number, time since check in, author, and last log entry are displayed.
   To show only files in a specific branch or with a specific tag, choose a value from the Show only files with tag menu.

3. To view a file, or to view the diffs between two files, click the file name.
   The file view is displayed.
   To view only files in a specific branch, choose a value from the View only Branch menu, then click View Branch.
   To sort the files by commit date or revision number, choose a value from the Sort log by menu, then click Sort.

4. To view a specific version of the file, click download.
   To view the annotated file, click annotate.
5. To view the differences between two files, you can either:
   - Click [select for diffs] next to each of the two files that you want to compare.
   - Enter the file revision numbers in the Diffs between boxes at the bottom of
     the page.

Choose a type of diff display from the Type of Diff drop-down menu.
Then click Get Diffs.
The differences between the two files are displayed.
Checking code into the SCM repository

From within SourceForge, project members can browse the contents of a project’s SCM repositories, and view detailed information about code commits, changed files, and associations with other SourceForge items. However, SourceForge is not intended to replace your SCM tool, and code must be checked in using either CVS, Subversion, or Perforce.
Discussions

SourceForge discussions provide workspaces where project members can discuss project-related topics. Discussion methods include discussion forums, mailing lists, and project news.

Discussion forums and mailing lists are closely integrated. Forum administrators can choose to enable a mailing list for each project forum. A mailing list extends the discussion forum functionality to allow project members to post messages to the forum using email.

Project members can also submit news items that are displayed on the project home page.

SourceForge archives all news items, forum posts, and mailing list communications. By using the SourceForge discussion applications, you can create a comprehensive archive of all project communications.
Creating a forum topic

A forum can have any number of topics. Topics start a message thread to which other users can reply. Create a new forum topic to begin discussion of a new subject.

To create a forum topic
1. Click Discussions in the project navigation bar.
   The Forum Summary page is displayed.
2. Click the title of the forum in which you want to create a topic.
   The Topic Summary page is displayed.
3. Click Create.
   The Create a Topic page is displayed.

4. Enter a description of the topic in the Subject field.
5. Enter the message text in the Message field.
   After the topic is created, other users can reply to this message.
6. (Optional) If you want to add an attachment to the topic, click Browse to select the file.
   When you are finished, click Save.

The forum topic is created.
Posting a reply to a forum message

You can post a message in any topic in any forum to which you have access. You can also post a message in reply to the topic starter’s original message or to another user’s follow-up message.

If you want to create a new topic, see “Creating a forum topic” on page 49.

To post a reply to a forum message

1. Click Discussions in the project navigation bar.

   The Forum Summary page is displayed.

2. Navigate to the forum topic in which you want to post a message.

3. In the section containing the message to which you want to respond, do one of the following:

   - Click Quote to quote the original message in your response message.
     The Post a Reply page is displayed with the original message quoted.

   - Click Reply to omit the original message from your response message.
     The Post a Reply page is displayed without the original message.

4. Enter the message text.

5. (Optional) If you want to add an attachment to the message, click Browse to select the file.

   When you are finished, click Save.

The forum message is now posted. Other project members can reply to it using the same process.
Communicating with mailing lists

Discussion forums and mailing lists are closely integrated. Forum administrators can choose to enable a mailing list for each project forum. If a mailing list is enabled, project members can do the following:

- Subscribe to the mailing list by monitoring the forum.
- Create a forum topic by sending an email to the forum.
- Create a reply to a forum post by replying to an email notification.

**To subscribe to a mailing list**

Monitor the associated discussion forum.

All mailing list communications are posted to the forum, and are fully archived and threaded.

See “Monitoring” on page 65.

**To create a forum post using email**

Send an email message to the forum.

You can also reply to an existing post by replying to the email notification.

The email address for the forum is displayed on the Topic Summary page. If a mailing list is not enabled, you will not see an email address on the Topic Summary page.

**To create a forum topic using email**

Send an email message to the email address listed on the Topic Summary page.

Fields are mapped as shown in the following table.

<table>
<thead>
<tr>
<th>Email Field</th>
<th>Forum Topic Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>To</td>
<td>Forum email address</td>
</tr>
<tr>
<td>Subject</td>
<td>Title of forum topic</td>
</tr>
<tr>
<td>Body</td>
<td>Text of forum topic</td>
</tr>
<tr>
<td>Attachments</td>
<td>Attachments</td>
</tr>
</tbody>
</table>

**To reply to an existing forum post using email**

Reply to the email notification containing the forum post.

Your reply is posted to the discussion thread.
**File Releases**

The SourceForge file release system enables users to publish files and groups of files to selected audiences.

The file release system is organized in a hierarchical structure of *packages, releases,* and *files*. A package is a folder into which you can publish multiple related releases. A release is a group of one or more files that are published as a unit.

Each release can also have a *maturity level* attribute to describe its state of maturity. Maturity levels are predefined and include development build, alpha, beta, and general availability.

Using role-based access control, administrators can control which project members can access each package or release.
Creating a package

Before you can create releases and post individual files, you must create a package. A package is a folder into which one or more related releases are published.

For example, you might create a package to represent a product deliverable or major component. You can then create releases within the package for product builds or other groups of files.

To create a package

1. Click Releases in the project navigation bar.

   The Package Summary page is displayed.

   **Figure 31.** Package Summary page

2. Click Create.

   The Create Package page is displayed.

   **Create Package**

   **Package Name:** Product Installer

   **Description:** Daily installer builds.

3. Enter a title and description for the package.

   Then click Save.

   The package is created.
Creating a release

After you have created a package, you can create a release. A release is a group of one or more files that are published as a unit.

To create a release
1. Click Releases in the project navigation bar.
   The Package Summary page is displayed.
2. Click the title of the package in which you want to create the release.
   The Package Details page is displayed.
3. Click Add.
   The Create Release page is displayed.

   ![Create Release page]

   **Figure 32.** Create Release page

   4. Enter a name and description for the release.
   5. Set the status value for the release.
      - **Pending** - Releases with pending status are visible only to project and file release administrators. Use pending status when you have created a release but have not yet finished adding files.
      - **Active** - Releases with active status are visible to all users according to their permissions.
   6. Set the maturity value for the release.
      Maturity levels are predefined and include development build, alpha, beta, and general availability.
      When you are finished, click Save.
      The release is created and you can begin adding files.
Adding files to a release

After you have created a release, you can add one or more files. All files in a release are published as a unit. Project members can download the entire release in a single .zip file, or download only selected files.

To add files to a release

1. Click Releases in the project navigation bar.
   The Package Summary page is displayed.
2. Click the title of the package containing the release.
   The Package Details page is displayed.
3. Click the title of the release.
   The Release Details page is displayed.
4. Click Add.
   The Add File page is displayed.

![Figure 33. Add File page](image)

5. Browse to the desired file, then click Save.
   The file is added and you are returned to the Release Details page.
6. Repeat steps 4 and 5 until all files are added.

After you have added your files, you might wish to change the status of the release from pending to active. This will allow users with appropriate permissions to access the release. You can also change the maturity level if needed.

To change the status or maturity level of a release, click Edit on the Release Details page.
Reports

SourceForge enables users to generate a variety of reports on project contents and activities.

Reports are highly configurable and can report on data from trackers and tasks. Task reports can report on data in a single project or across multiple projects. Tracker reports can report on data in a single tracker or across multiple trackers in a project.

Project members can define report templates that are saved for future re-use by other project members. Saved report templates can be modified by each user for customized output. After running a report, you can export the report data into a .CSV, .XML, or tab-delimited file.
Running a report

To run a report, you must first define the report criteria and save it in a report template. After saving the report template, you can then run the report at any time with a single click. Other project members with the necessary permissions can also use the report template.

If desired, you can modify the report criteria each time you use the report template. For example, you might want to run the same report each week, using all of the same report criteria except the start and end dates.

To run a report and save a report template

1. Click Reports in the project navigation bar.
   The List Reports page displays a list of existing report templates.

   Figure 34. List Reports page

2. From the drop-down menu, choose a type of report template.
   Available report types are:
   - Task Report - Reports on the numbers of tasks assigned to each user.
   - Tracker Report - Reports on the numbers of artifacts submitted to selected project trackers.

   Then click New.
   The Task or Tracker Report Criteria page is displayed.

3. Select your desired report criteria.
   The fields on the Report Criteria page differ for each report type.
   When you are finished, click Generate Report.
The Report Summary tab displays your results in graphical format.

![Task Status Counts for Jim Martinez and Cameron Wu](image)

**Figure 35.** Report Summary page

The Report Details tab displays your results in tabular format.

<table>
<thead>
<tr>
<th>Siebel Enterprise Integration Project</th>
<th>Task ID</th>
<th>Task Name</th>
<th>Task Group</th>
<th>Priority</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete:</td>
<td>task1039</td>
<td>Write Installer PRD</td>
<td>Release Planning</td>
<td>3-High</td>
<td>Bob Jones</td>
</tr>
<tr>
<td>Complete:</td>
<td>task1001</td>
<td>Develop PRD from Siebel Integration Demo</td>
<td>Product Management</td>
<td>3-Highest</td>
<td>Cameron Wu</td>
</tr>
</tbody>
</table>

**Figure 36.** Report Details page

The template is also saved for future reuse. After you have saved a report template, you can run the report at any time by clicking on the title. The report data is regenerated each time the report is run.
Wiki

The SourceForge Wiki allows you to create an unlimited number of Wiki pages in each SourceForge project.

Wikis provide a tool for managing unstructured, linkable content. Wiki content is a combination of plain text, markup for font elements such as bold or italics, headers, bulleted and numbered lists, and linked content.

The SourceForge Wiki provides a new linking mechanism that allows you to create links between SourceForge items on a Wiki page or in any text field in any SourceForge tool. You can create links by entering the item id into the Wiki page or other text field. No additional Wiki syntax is required.

You can also replace the statistics graphs on the project home page with a Wiki page and replace the SourceForge project home page logo with your own graphic. For additional information, see the SourceForge Enterprise Edition 4.3 User Guide.
Starting a Wiki

Every SourceForge project starts with a blank Wiki. You do not need to create a Wiki before you can begin adding content. After a Wiki is started, any user with the appropriate permissions can add or edit content; however, you cannot delete all of the content to start over with a new, blank Wiki.

To start a Wiki

1. Click Wiki in the project navigation bar.
   The Wiki home page is displayed.

2. Click Edit.
   The Editing Home page is displayed.

3. Begin entering your Wiki text.
   Wiki content is a combination of plain text, markup for font elements such as bold or italics, headers, bulleted and numbered lists, and linked content.

Figure 37. Editing Home page
You can customize your Wiki entry by following any of these optional steps:

- Use the buttons at the top of the text area to add Wiki markup to your text. You can also enter Wiki syntax directly into the text area.
  For an explanation of the buttons and a Wiki syntax reference, click Syntax Reference or see “Wiki syntax” on page 62.
- To insert a link to another SourceForge item, enter the item id. You do not need additional Wiki syntax to create the link.
- To change the size of the display window, choose a value from the Field Height drop-down menu.
- To add an attachment, click Add Attachment, then browse for the desired file.
- To add a version comment, enter a comment in the Version Comment field.

4. When you are finished:

- Click Preview Changes to preview how your Wiki content will look. You can make further edits from the Previewing Home page before saving your changes.
- Click Update to save your changes.

Your Wiki is now started.
Wiki syntax

This section explains the use of the buttons on the Wiki Edit page. It also provides a Wiki syntax reference for entering Wiki syntax directly into your Wiki content.

Wiki buttons

<table>
<thead>
<tr>
<th>Wiki button</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Creates bold text.</td>
</tr>
<tr>
<td>I</td>
<td>Creates italic text.</td>
</tr>
<tr>
<td>AB</td>
<td>Creates a link to a new Wiki page.</td>
</tr>
<tr>
<td></td>
<td>Creates a bulleted list.</td>
</tr>
<tr>
<td></td>
<td>Creates a numbered list.</td>
</tr>
<tr>
<td></td>
<td>Creates a horizontal rule.</td>
</tr>
<tr>
<td>H</td>
<td>Creates a level 1 (large) header.</td>
</tr>
<tr>
<td>h</td>
<td>Creates a level 2 (medium) header.</td>
</tr>
</tbody>
</table>
Wiki syntax

<table>
<thead>
<tr>
<th>Wiki syntax</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>----</td>
<td>Creates a horizontal rule.</td>
</tr>
<tr>
<td>\</td>
<td>Creates a line break.</td>
</tr>
<tr>
<td>[link]</td>
<td>Creates a link to a new Wiki page called &quot;link.&quot; If the link is a complete URL, a link to the URL is created. If the link points to a .gif, .jpg, or .png image, the image is rendered directly in the page.</td>
</tr>
<tr>
<td>[title</td>
<td>link]</td>
</tr>
<tr>
<td>~TestText</td>
<td>Disables link creation for a CamelCase word.</td>
</tr>
<tr>
<td>[[[link]]</td>
<td>Creates the text &quot;[link].&quot;</td>
</tr>
<tr>
<td>!!!text</td>
<td>Creates a level 1 (large) header.</td>
</tr>
<tr>
<td>!!text</td>
<td>Creates a level 2 (medium) header.</td>
</tr>
<tr>
<td>!text</td>
<td>Creates a level 3 (small) header.</td>
</tr>
<tr>
<td>&quot;text&quot;*2</td>
<td>Creates italic text.</td>
</tr>
<tr>
<td><em>text</em></td>
<td>Creates bold text.</td>
</tr>
<tr>
<td>{{{text}}}</td>
<td>Creates monospaced text.</td>
</tr>
<tr>
<td>*text</td>
<td>Creates a bulleted list item.</td>
</tr>
<tr>
<td>#text</td>
<td>Creates a numbered list item.</td>
</tr>
<tr>
<td>;term:ex</td>
<td>Creates a definition for the word &quot;term&quot; with the explanation &quot;ex.&quot;</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>col1</td>
<td>col2</td>
</tr>
<tr>
<td>{{{{text}}}}</td>
<td>Creates pre-formatted text.</td>
</tr>
</tbody>
</table>

1CamelCase words are two or more uppercase words with no spaces. By default, a CamelCase word automatically creates a link to a new Wiki page.

2Use two single quotes.

Additional Wiki syntax

- `%%( font-size: 150%; color: red; )Hello, world!%%` Defines a CSS style command.
• Enter a blank line to start a new paragraph.
Monitoring

Monitoring an item provides you with email notifications whenever a change is made to the item. You can monitor individual items, the contents of selected folders, or all items within an application or project. You can configure the frequency of email notifications from your personal Monitoring page.

You do not receive monitoring notifications for changes that you make to a monitored item.

When you are monitoring an item, the 📨 icon is displayed in the item list view, so that you can identify easily the items you are monitoring.

**To monitor an item**

1. Navigate to the item that you want to begin monitoring.
2. Select the item or items that you want to begin monitoring by checking the boxes.
3. Mouse over the Monitor down arrow, then choose Monitor Selected.

You are now monitoring all selected items. The 📨 icon is displayed in the item list view and the monitored items appear in the monitored items list on your personal Monitoring page.

**To stop monitoring an item**

To stop monitoring a document, select it by checking the box. Then mouse over the Monitor down arrow and choose Stop Monitoring Selected.

You can also stop monitoring any item from the monitored items list on your personal Monitoring page.
To monitor a folder

1. Navigate to the folder that you want to begin monitoring.

2. Mouseover the Monitor down arrow, then choose Monitor Current Folder.

You are now monitoring the folder. The ⭐ icon is displayed in the top row of the list view, and the monitored folder appears in the monitored items list on your personal Monitoring page.

For information on monitoring entire applications or projects, see the SourceForge Enterprise Edition 4.3 User Guide.

You can also launch the Profile Manager from the Profile Selection window.

![Figure 40. Monitor Current Folder option](image-url)
Associations

The SourceForge associations system allows you to create associations between any two or more SourceForge items such as documents, tasks, tracker artifacts, file releases, or code commits. Creating associations between items enables you to define relationships, track dependencies, and enforce workflow rules.

Some example uses for associations include:

- Associating a requirements document with supporting feature requests or bugs in the tracker.
- Associating a document with the task that requires it as a deliverable.
- Associating tracker artifacts such as bugs and feature requests with the file releases in which the artifacts are discovered and addressed.
- Associating code commits with the tracker artifacts that they address, such as bugs.

After you create an association, it is visible on the Associations tab of each associated item.

**To create an association**

1. Navigate to the item to which you want to add an association.
2. From the item’s Details page, click the Associations tab.
   
   The list of existing associations is displayed.

   ![Associations page](image)

   **Figure 41.** Associations page

3. Click Add.
The Add Association Wizard window is displayed.

![Add Association Wizard](image)

**Figure 42.** Add Association Wizard window

4. By checking the radio button, choose a method to identify the items with which you want to associate the artifact:
   - **Enter Item ID** - If you know the item’s ID, you can enter it directly.
   - **Add From History** - The History is a list of items that you have submitted or edited. The History can contain items of any item type.

Then click Next.

The Add Association comments window is displayed.

![Add Association comments](image)

**Figure 43.** Add Association comments window

5. Enter any comments describing the association.
   - Click Finish and Add Another to add additional associations.
   - Click Finish to return to the item’s Details page.
To create associations with a code commit

When making a code commit, add the associate command as follows:

[[item id]]

- The item id is the SourceForge item ID, such as the tracker artifact ID or task ID.
- To associate a commit with multiple SourceForge items, separate the item ids with commas.

All associations are displayed in the Associations section of the Commit Details page.

<table>
<thead>
<tr>
<th>Scm Files</th>
<th>Associations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Data</td>
<td>Association</td>
</tr>
<tr>
<td>11/05/2003</td>
<td>task1001: Develop PRD from Siebel Integration Doc.</td>
</tr>
<tr>
<td>12/05/2003</td>
<td>artf1001: MRD requires cost breakdown</td>
</tr>
<tr>
<td>11/05/2003</td>
<td>artf1001: Mainframe App connector not available yet</td>
</tr>
</tbody>
</table>

Figure 44. Associations section of Commit Details page

The Comment section lists the comments made with each commit.

Note - SourceForge item IDs are always three or four letters followed by four or more numbers, such as task1029 or artf10011. You will receive an error if you enter comments using this syntax enclosed by square brackets. Use this syntax only for commit associations.
Microsoft Integrations


This section provides an overview of these integrations. For additional information, see the SourceForge Enterprise Edition 4.3 User Guide.

**SourceForge Task Manager Add-in for Microsoft Project**

The SourceForge Task Manager Add-in for Microsoft Project allows you to synchronize project plans between Microsoft Project and SourceForge.

By creating detailed project plans in Microsoft Project, you can take advantage of the advanced project planning features of Microsoft Project, including detailed cost and effort projections. After your project plan is completed, you can log in to SourceForge from within Microsoft Project and synchronize the task data from your project plan with a SourceForge task folder.

Once your task data is synchronized with SourceForge, you can then execute your project tasks using the advanced status reporting capabilities, task exception management, and project visibility tools that SourceForge provides.

At any time, you can re-synchronize any changes made to task data in either SourceForge or Microsoft Project.

**SourceForge Document Manager Add-in for Microsoft Office**

The SourceForge Document Manager Add-in for Microsoft Office allows you to save Microsoft Office documents—Word, Excel, Project, and PowerPoint—directly into SourceForge. You can also open these documents directly from SourceForge, then update them in SourceForge if you make edits that you want to save.
SourceForge Explorer

SourceForge Explorer is a native Microsoft Windows .NET application that allows users to browse and edit the contents of their SourceForge projects in a manner familiar to Windows users. With SourceForge Explorer, you can manipulate SourceForge items in ways that are common to Windows interfaces, but that are not possible using the SourceForge web interface. Some examples are right-clicking for a list of available actions, and using drag & drop to move items and folders.

SourceForge Explorer is a companion application to SourceForge Enterprise Edition 4.3. You must install it separately. For installation instructions, see the SourceForge Enterprise Edition 4.3 User Guide or the SourceForge Explorer 2.0 User Guide.
Logging in to SourceForge Explorer

SourceForge Explorer allows you to create multiple profiles containing your login information and connection settings. You may wish to create different profiles to run multiple instances of SourceForge Explorer simultaneously, or if you use different SSL or proxy settings when connecting to SourceForge Explorer from a remote office.

The first time you log into SourceForge Explorer, you will be prompted to create your default profile. You then can add additional profiles if needed.

To create your default profile

1. Launch SourceForge Explorer.
   The Profile Manager window is displayed.

2. Click Add.
   The Create Profile window is displayed.

3. Enter the following information:
   - Account Name - A name for your profile.
   - Logon Information - Your SourceForge user name and password.
   - Server Information - The server address of your organization's SourceForge installation.

   Do not enter the http:// or https:// before the server name.

   For more detailed connection settings, click More Settings..

Figure 45. Create Profile window
When you are finished, click OK.
You are returned to the Profile Manager window.
Click Cancel.

SourceForge Explorer is launched.

If you do not create any additional profiles, SourceForge Explorer will connect to SourceForge using this profile in the future.

**To create additional profiles**

1. Launch SourceForge Explorer.
2. From the Tools menu, choose Profile Manager.

The Profile Manager window is displayed.

**Figure 46. Profile Manager window**

3. Click Add.

The Create Profile window is displayed.
4. Fill in the required information for the new profile.

When you are finished, click OK.

Your new profile is now created. Each time you log in to SourceForge Explorer, you are prompted to choose one of your profiles. To make a selected profile display first in the profile selection drop-down menu, set it as the default profile.
Browsing with SourceForge Explorer

SourceForge Explorer provides a Windows-like interface that allows users to browse and edit the contents of their SourceForge projects in a manner familiar to Windows users. You can browse the documents, tasks, tracker artifacts, and file releases in all projects in which you have the appropriate permissions. You can also browse the items on your My Page.

With SourceForge Explorer, you can manipulate items in ways that are common to Windows interfaces, but that are not possible using the SourceForge web interface. You can do the following:

- Right-click an item for a list of available actions.
- Drag-and-drop to move items.
- Drag column borders to resize.

With SourceForge Explorer, browsing SourceForge project data is similar to browsing a Windows file manager.

To browse project data

1. Log in to SourceForge Explorer.
   
   See “Logging in to SourceForge Explorer” on page 72.

   SourceForge Explorer is launched.

   ![SourceForge Explorer](image)

   **Figure 47.** SourceForge Explorer
SourceForge Explorer

The left pane displays all of the SourceForge projects to which you have access. Click the name of a project to navigate through its document folders, file release packages, task folders, and trackers.

The right pane displays the contents of the folder selected in the left pane. The right pane also provides a toolbar that allows you to configure the column display and to create and manage filters.

The application toolbar at the top displays shortcut icons for the actions that you can perform on the selected item or folder, such as Create, Edit, and Open in SourceForge. This bar displays the same list of actions that you see when right-clicking an item or folder.

**Available actions**

To view an item, double-click it.

- For documents, the document is launched in its native application.
- For all other items and folders, SourceForge is launched and the item’s details page is displayed.

For a list of available actions, right-click an item or folder. For most items, the available actions are:

- **Open in SourceForge**
  Launches SourceForge and displays the item’s details page.

- **Create Shortcut on Desktop**
  Places a shortcut to the item on your desktop.

- **Refresh**
  Synchronizes any changes made to the item in SourceForge.

- **Rename**
  Allows you to rename the item.

- **Create Association**
  Allows you to create associations with other SourceForge items.

- **Update Field**
  Allows you to edit the values of selected fields.
Other actions are available only for specific types of items.

<table>
<thead>
<tr>
<th>Action</th>
<th>Types of item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Document</td>
<td>Documents only</td>
<td>Allows you to browse your file system and select a new version of a document to upload to SourceForge.</td>
</tr>
<tr>
<td>New Document</td>
<td>Document folders only</td>
<td>Allows you to browse your file system and select a document to upload to SourceForge.</td>
</tr>
<tr>
<td>Create [Package / Release / Task]</td>
<td>Folders only</td>
<td>Launches SourceForge and displays the create item page.</td>
</tr>
<tr>
<td>Create [Task / Document] Folder</td>
<td>Task and document folders only</td>
<td>Displays the Create Folder window.</td>
</tr>
<tr>
<td>Add File</td>
<td>File releases only</td>
<td>Allows you to browse your file system and select a file to add to the release.</td>
</tr>
</tbody>
</table>

For additional information about working with SourceForge items using SourceForge Explorer, see the *SourceForge Enterprise Edition 4.3 User Guide* or the *SourceForge Explorer 2.0 User Guide*. 
Project and SourceForge Administration

For additional instructions on the following topics, see the SourceForge Enterprise Edition 4.3 User Guide:

- Creating and configuring trackers
- Managing task exceptions and workflow
- Administering documents, discussion forums, news, and file releases
- Working with the Microsoft integration add-ins
- Working with the IBM WebSphere Studio Application Developer add-in
- Working with SourceForge Explorer
- Project administration
- Role-based access control
- Linked applications
- SCM integration
- User management
- LDAP authentication
- Administering Black Duck protexIP™ integration
Account
You must have a SourceForge account before you can join and participate in projects. Once you have successfully registered for an account, you will be given a user name and password to log in to SourceForge.

Application
Applications are the functional areas of SourceForge such as the Tracker, Task Manager, and Document Manager. All areas shown in the project navigation bar are applications.

Application administrator
An application administrator, also called a tool administrator, is a project member with an Application Admin permission, such as Tracker Admin or Task Admin. An application administrator is responsible for application administration functions such as creating custom fields and creating or deleting folders.

Association
An association is a bi-directional relationship between any two SourceForge items.

Diffs
Diffs, or differences, are the differences between any two files in an SCM repository.

Founder Project Admin
Founder Project Admin is a special role assigned to a project’s creator. It gives the project creator all project and application administration permissions for the project. The Founder Project Admin role cannot be assigned to other project members.

Gated community
Gated community projects can be accessed by project members and by unrestricted users.

LDAP
An LDAP directory manages login information for groups of users in an organization. Your LDAP user name and password are most likely the user name and password with which you log in to your corporate network.
Managed SCM
A managed SCM server is one that is fully managed by SourceForge. SourceForge creates the repositories, adds and removes users, and enables or disables user access to the repositories.

Maturity level
Maturity levels are attributes used to describe a file release. Maturity levels are predefined and include development build, alpha, beta, and general availability.

Package
A package is a folder into which you can publish multiple related file releases.

Permission
Permissions are the activities that users can perform within a given application. Generally, the permissions available for each tool and resource are access, create, edit, and administer.

Personal navigation bar
The personal navigation bar displays when you click My Workspace. It contains a link for each of your personal lists or account management functions such as Dashboard, projects, and monitoring.

Private project
Private projects can only be accessed by project members.

Project
All data in SourceForge is organized into projects. A project is a workspace where project members can use each of the SourceForge applications to collaborate and to create, store, and share project data.

Project administrator
A project administrator is a project member with the Project Admin permission. A project administrator is responsible for managing a project’s users and roles. A project administrator by default does not have application administration permissions. Application administration permissions must be assigned separately.

Project navigation bar
The project navigation bar displays whenever you are within a project. It contains a link for each project application such as Tasks, Tracker, and Documents.

Public project
Public projects can be accessed by all users.

Release
A release, also referred to as a file release, is a group of one or more files that are published as a unit, such as a software product release.

Resource
Resources are the specific contents of each application. For example, the Tracker application contains a bugs tracker, a feature request tracker, and a number of user-created trackers. These are the tracker resources.

Restricted user
Restricted users can access only public projects and projects of which they are members.
Role
A role defines the applications and resources that project members with that role can and cannot access, and the specific permissions that project members are allowed for each application and resource.

Site administration navigation bar
The site administration navigation bar displays when you click Admin. It contains a link for the SourceForge administration tools: projects, users, integrations, and server status.

SourceForge administrator
A SourceForge administrator, also called a site administrator, has unlimited access to all SourceForge projects, user accounts, and site administration functions. A SourceForge administrator is responsible for administering users, projects, and integrations with external tools such as software configuration management (SCM) systems.

SourceForge Explorer
SourceForge Explorer is a .NET client application that allows SourceForge-held data to be accessed via Windows.

SourceForge navigation bar
The SourceForge navigation bar is at the top of your screen. It contains the Home, My Workspace, Admin, Projects, and Search menus.

Tracker artifact
A tracker artifact is a single entry in a tracker.

Unmanaged SCM
An unmanaged SCM server is one that is not managed by SourceForge. All repository and user creation and management must be done manually.

Unrestricted user
Unrestricted users can access all projects except private projects of which they are not members.

VOB
A VOB, or versioned object base, is an IBM Rational ClearCase code repository.
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