CollabNet SourceForge Enterprise 5.0

Project Administrator Guide

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CollabNet Inc.

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Talk to CollabNet

The CollabNet SourceForge Enterprise 5.0 team welcomes your bug reports and feature requests.

Request a feature

When you identify possible functionality that would make this CollabNet product easier or more effective for you, you are encouraged to propose a feature to the CollabNet development team.

To get a possible feature considered, send an email to CollabNet Support with the following information. Although CollabNet cannot commit to the inclusion of a particular feature request in a specific release, all feature requests submitted are reviewed during the planning phases of each new release.

Note: CollabNet may generalize your request to make it satisfy similar needs from other customers.

1. Review the plans for the product posted on CollabNet's *roadmap page*.
2. If you don't see exactly what you're after on CollabNet's roadmap page, click **Discuss Roadmap** at the bottom of the page.
   Click **Post new topic** and tell us about the functionality or enhancement that you would like added to the product, or describe how you'd like the product to act differently.

   Tip: The more specific you are, the better we will be able to meet your needs. Consider these things:

   - What is the business driver or use case for your request? How will it help your organization?
   - Which version of CollabNet SourceForge are you using?
   - About how important is this new functionality or enhancement to your organization?

     1. Must-have functionality.
     2. Strongly needed functionality.
     3. A "nice to have" feature or enhancement.
     4. Might be useful.

Report a bug

You can report a bug in a CollabNet discussion forum or in the CollabNet support portal.

First check the release notes to see if your bug has been resolved or included in a recent Service Pack, or is already listed as a known issue.

1. If your organization has a CollabNet support contract, log into the *CollabNet Support Portal* and report the bug.
2. Whether you have a support contract or not, review the *CollabNet discussion forum* for the product. Someone there may have already reported the bug.
3. If the bug has not been reported, click **Post new topic** and describe the issue.
   If possible, include a description of the steps needed to trigger the behavior, and what the expected behavior should have been. Add any further information you can think of, such as:

   - Whom does it affect?

     - Just you?
     - Multiple users?
     - All users?

   - Where does the problem occur?

  - One project/tracker/artifact/forum/task/etc.?
  - Some projects/trackers/artifacts/forums/tasks/etc.?
  - Projects/trackers/artifacts/forums/tasks/etc. migrated from an earlier version?
  - All projects/trackers/artifacts/forums/tasks/etc.?

- What kind of account were you using?

  - A CollabNet SourceForge "admin" account?
  - A normal account?

- Which version of the software are you using?
- Which web browser and version you are using?
- How severe is the problem?

  1. Severe impact, loss of functionality across CollabNet SourceForge , data loss, or immediate impact to primary business plans or user base.
  2. Significant impact, isolated or limited loss of functionality, impact to a subset of users, and a workaround or avoidance mechanism is available.
  3. Impact is low or minor, a workaround exists, or the loss of functionality has no significant impact on most users' daily use.
  4. Little or no impact or loss of functionality to the majority of users.

Chapter 1

How does a project administrator support users?

In this chapter:

What is a project?

A project is a workspace where people can use the CollabNet SourceForge Enterprise 5.0 5.0 applications to collaborate and to create, store, and share data. All the work you do with CollabNet SourceForge Enterprise 5.0 5.0 is organized into projects.

Any registered CollabNet SourceForge Enterprise 5.0 user can create a project, subject to approval by a CollabNet site administrator. After a new project is approved, the project creator can configure project applications, add project members, and create and assign roles to govern each user's individual access permissions and the access permissions of groups of users. A registered CollabNet can also request membership in any CollabNet project. Requests to join projects are submitted to the project's administrators for approval.

How CollabNet SourceForge Enterprise 5.0 projects are organized is up to you and your organization. You might choose to create one large, centralized CollabNet SourceForge Enterprise 5.0 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 user on the site can create a project, subject to approval by a CollabNet SourceForge Enterprise 5.0 site administrator.

You can use a project template to pre-populate new projects with the structure and configuration of an existing project.

When you create a project, it is submitted to the CollabNet SourceForge Enterprise 5.0 administrator for approval. You will receive an email notification when the site administrator approves or rejects 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 CollabNet SourceForge Enterprise 5.0 navigation bar.

What does it mean to be a project administrator?

Project administrators are responsible for managing access to projects and making it easy for members to participate in the project.

Project administrators can control project access in the following ways:

- Designating a project as private, public, or gated community.
- Specifying global application access permissions.
- Creating and assigning roles to govern individual project members' access permissions.
- Adding and removing users from a project.
- Approving requests for project membership.

Project administrators can also create project templates, and create linked applications.

- Project templates are used to pre-populate new projects with the trackers, discussion forums, task and document folders, and roles from the source project.
- Linked applications are external applications or URLs that you can make available from within your CollabNet SourceForge Enterprise 5.0 5.0 project.

What is a project page?

A CollabNet project page is a place where users can see and add information about the project, such as messages from the project manager, open issues or documents you want people to read.

You can build your own project pages to design, manage and track your project’s lifecycle. When you create a project page, users automatically see it in their navigation panes.

To post information or provide functionality on your project page, you add a page component of the appropriate type for the information or functionality you are working with.

For example, to let people know about how the project is coming along, add a Project Statistics component to the page. To let project members upload documents for other users to read, you add a documents component.

If the page is a part of a parent page, it appears as a node in the tree in the left navigation area.

You can add a page directly to the top of the project, or as a subpage.

Tip: When you have your project pages defined and your process honed, you can export your project pages in the form of a project template, so other projects in your organization can reuse the resources you created.

What is a project page component?

A project page is a collection of simple portlet-like components that enable you to add custom HTML content, reports, project tracker queries, and much more to the project home page so your team quickly access what is important.

What is a project page component for?

Project page components add functionality to a project page. You can use components to communicate with users or project members, or to invite them to contribute information or resources to the project.

- Promote a standard lifecycle for all of your projects by using project pages to lay out information the way that works best for your business.
- Increase developers' productivity by putting the information most relevant to your project right on the homepage.
- Improve project coordination by combining related documents, graphs, artifacts, and content into single, digestible web pages.
- Maintain information security. The project manager controls who has access to each of the pages and components.
- Keep project members informed with live data and content that can be quickly updated as often as you like.

Project pages put the project manager in the driver's seat. You define how you want your project to look and what information you wish to share with your members and customers. Using a simple portlet-like layout, project pages let you add custom HTML content, reports, project tracker queries, and much more to the project home page so your team can quickly access what is important. All your pages are organized and displayed in a simple navigation menu on the left side of the home page.

In addition to customizing the project home page itself, you can also create and integrate additional web pages on the fly. Whether you need a page to display daily status reports or want to publish an HTML blog, a few clicks is all you need. No need to use any fancy tools or even know HTML.

For example, on a project page titled **QA**, you might have:

- A trend graph showing the open bugs in your project over a period of time.
- A Tracker query list showing you what hot bugs are currently in the system.
- A block of custom HTML content that the QA lead updates daily giving users his or her take on how the quality of the product is doing that day.

What is a text component?

A text component is a self-contained editor with which you can write anything you want on your project page.

You don't have to know anything about HTML.

Text components include everything you would expect in a fully functional HTML editor. You can add tables, upload images to embed into the page, create hyperlinks, and assign font colors and styles. Advanced users can work directly with the HTML source.

What is a documents component?

A documents component allows team members to work with documents directly from a project page.

A documents component is like a window into your Documents tool. Instead of making users go to the documents tool and search for a document on their own, you can create a documents component on your project page that is linked to a folder in your documents tool. Each page can have its own list of relevant documents.

Users still go the documents tool, but now you guide them to what they need there.

What is a news component?

A news component is a way to get developing information to project members via a project page.

You can use a news component to maintain a journal or blog about your project, to announce milestones met, or to share information about a rapidly changing situation.

There is a single set of news posts for your project. If you put a news component on more than one project page, the same new posts will show on all of them.

What is a Tracker Search Results component?

A Tracker Search Results component provides quick access to Tracker information from a project page.

Some tracker searches are used so frequently that you want people to be able to see their results without exploring. For example:

- People working on your project may need to know at the beginning of every work day which artifacts have been updated overnight by a remote team.
- A cross-project leadership team may need a daily count of started and completed work items to support forecasting and planning.

Such heavily-used information might be a good candidate for a tracker search component on a prominent project page, such as the project home page. When you set up this component based on a popular tracker search that you devised and saved, project members and users can save time by viewing the information at a glance, without having to go find the information themselves.

What is a project statistics component?

A project statistics component gives users a graphical view of recent statistics for tasks, trackers, documents, and file releases from the project page.

What is a wiki component?

A wiki component lets you link to an existing wiki page from a project page.

What is an activity table component?

An activity table is a special kind of text component that gives project members quick access to a focused set of artifacts, action items and work products.

An activity table includes organized links to up-to-the-minute information about work that is going on in the project. You can add, remove or change these links with the HTML editor that comes with every text component.

You can add static links to particular artifacts, or you can link to a search query. When you link to a query, you enable project users to get all the results of the query with a single click.

The activity table template is just a suggestion for how you might want to organize your information. You can change any of its properties to support the way your project members work.

How do user roles work?

Project administrators can define specific access permissions for individual project members. They do this by creating roles and assigning the roles to project members.

Under role-based access control (RBAC), permissions are not assigned directly to an individual user. Instead, each user has the permissions that are attached to any role that is assigned to that user.

A role defines these things:

- The applications and resources that project members with that role can and cannot access.
- The actions that project members can take in each application and on each resource.

A project member can be assigned multiple roles.

Note: Permissions are cumulative. If a project member is assigned a role that provides a specific permission, and another role that does not, the user has that permission.

Resources

- The tracker application might contain a bugs tracker and a feature request tracker. These are the tracker resources.
- A project can contain multiple SCM repositories. These are the SCM resources.

Permissions

View	Allows users to view and download items, but not to create or edit items, administer folders, or edit application settings.
Create or Submit	Allows users to create new items, but not to edit items, administer folders, or edit application settings. Users with the create or submit permission also have the view permission.
Edit	Allows users to edit items, but not to administer folders or edit application settings. Users with the edit permission also have the create / submit and view permissions.
Administer	Allows users to create and edit items, administer folders, and edit application settings. Users with the administer permission also have the edit, create or submit, and view permissions.

Who can access an application?

Application permissions help you minimize the need to create and assign numerous, similar roles for individual users. You can permit or restrict access to individual applications within the project for whole classes of users.

Application permissions supplement role-based access control (RBAC.) For each application's concepts, documents, file releases, trackers, and discussion forums, you can assign permissions globally based on user type.

For example, if you know that you want all project members to be able to view and submit to all project trackers, you can specify this permission using application permissions. You need to configure these settings only once. All current and future project members will be able to view and submit to all trackers without having the tracker view/submit permission assigned to them individually via a role.

Note: Before you do this, you should have identified your project as private, gated community, or public. Configuring permissions is a finer-grained level of control that operates within this hierarchy of project types.

User classes

These are the classes of users to which you can assign application permissions:

User class	Description
All users with Role Permissions	Only project members with appropriate RBAC permissions.
All project members	All project members.
All project members and unrestricted users	All unrestricted users, whether or not they are project members, plus all project members.
All logged-in users	All restricted and unrestricted users (all logged-in users,) whether or not they are project members.
All users	All users, whether or not they are logged in or have CollabNet SourceForge Enterprise 5.0 accounts.

Restrictions by type of site

On some types of sites, you can't assign application permissions to certain classes of users. In such cases, you must user role-based access control (RBAC) permissions.

- On a private site, you cannot set application permissions for these classes of users:

- All project members and unrestricted users
- All logged-in users
- All users

- On a "Gated Community" site, you cannot set application permissions for these classes of users:
  - All logged-in users
  - All users

Who can access a project?

You control access to your CollabNet SourceForge Enterprise 5.0 5.0 project by a combination of project settings, membership rules and user restrictions.

Who should I allow into my project?

To decide how to control access to your project, think about what the project is for and who will be using it.

Consider these elements:

- The project's access setting.

  Each project can be public, private, or gated community.
- The project's membership.
- Each CollabNet SourceForge Enterprise 5.0 5.0 user's user type.

Users can be restricted or unrestricted.

- Restricted users can access only public projects and projects of which they are members.
- Unrestricted users can access all projects except private projects of which they are not members.

Project access is not the same as project membership. Project access allows a user to view a project in CollabNet SourceForge Enterprise 5.0 5.0. The user can see the project in the **All Projects** list, visit the project home page, and browse selected project data. A restricted user may be able to access a project without being a project member.

A project's access setting determines which types of users can access the project. A project can be private, gated community, or public.

- **Private** - Private projects can only be accessed by project members. Private projects do not appear on the **Home** page, in the **All Projects** list, or in search or reporting results to users who are not project members.

  Create a private project when you want to strictly limit project access.
- **Gated community** - Gated community projects can be accessed by project members and by unrestricted users. As with private projects, gated community projects are not visible to users who are not allowed to access them.

  Create a gated community project when you want to exclude restricted users, but do not need to exclude other, unrestricted users. For example, your organization might wish to designate all contractors or outsourced staff as restricted users. They will not be able to see any gated community projects, but all of your full-time, regular staff will retain access.
- **Public** - Public projects can be accessed by all users.

  Create a public project when you have no need to restrict access.

This table shows which user types can access projects with each project access setting.

Project access type	Project member (Unrestricted user)	Project member (Restricted user)	Non-project member (Unrestricted user)	Non-project member (Restricted user)
Private	Yes	Yes	No	No
Gated Community	Yes	Yes	Yes	No

Project access type	Project member (Unrestricted user)	Project member (Restricted user)	Non-project member (Unrestricted user)	Non-project member (Restricted user)
Public	Yes	Yes	Yes	Yes

Who can access source code?

Placeholder text ...

This concept topic is temporarily horked. Watch this space.

Can I take away a user's SCM access?

From time to time, you may need to prevent a user from using a source code repository.

SCM access can be removed from a user by doing one of the following:

- Remove the role providing the desired SCM permissions from the user. (See Assigning roles to a project member.)
- Remove the user from the project. (See Removing a user from a project.)

In either case:

- If the SCM server that hosts the repository is managed by CollabNet SourceForge Enterprise 5.0, the user's access is removed immediately.
- If the SCM server that hosts the repository is not managed by CollabNet SourceForge Enterprise 5.0, all CollabNet SourceForge Enterprise 5.0 administrators are sent an email requesting that the change be made manually. The request appears in the **SCM Access Requests** section of the **Integrations** page for approval.
- Both the project administrator and the user receive email notifications when the CollabNet SourceForge Enterprise 5.0 administrator has made the requested change.

Who can see a project page?

A user can see a given project page if the page is not hidden and the user's role includes permission to see the page.

Note: When a page is hidden, it is only visible to users with the Project Admin role, and then only when the user has clicked **Configure: On**.

If a person can see your project, they can see the project home page and any of its subpages. To see any other page, they must be assigned permission explicitly.

Permissions determine two kinds of access:

- Anyone with access to the project can see the project homepage.
- Users whose role includes permission to see a given top-level project page can see all the subpages of that page.

Subpages inherit their permission setting from the top level page they belong to.

Who can see a project page component?

To see a given project page component, you must have permission to see both the project page where the component is and the tool that the component represents.

Your ability to see and edit the contents of a project page component is controlled by your permissions with regard to the tool the component represents.

For example:

- If you have permission to create documents in a selected folder in the Document Manager tool, you have that same permission when viewing that folder in a Documents component on a project page.
- If you do not have permission to view a folder in the Document Manager tool, you cannot see a document component that contains that folder on a project page.

Note: Users with the Project Admin role can see project page components even if they do not have access to the related tool.

What is a linked application?

A linked application is an external application or site that users can get to from inside a Sourceforge project.

You can use linked applications to incorporate these types of applications into your CollabNet SourceForge Enterprise 5.0 project:

- Third party applications
- Internally developed applications
- Integrations developed using the CollabNet SourceForge Enterprise 5.0 SOAP APIs
- Company intranet sites
- External websites

After you create a linked application, a button is added to your project navigation bar. Clicking the button displays the linked application in the main CollabNet SourceForge Enterprise 5.0 project window.

Note: >You can create as many linked applications per project as you wish. However, because each linked application adds a button to the project navigation bar, creating a large number of linked applications can cause horizontal scrolling.

CollabNet SourceForge Enterprise 5.0 administrators can also create site-wide linked applications that appear in all CollabNet SourceForge Enterprise 5.0 projects.

What is a project template?

Project templates allow you to create and configure new projects quickly, enforce organizational standards, and facilitate process improvement.

A project template is used to populate new projects with the structure and configuration of the source project. Project administrators can use an existing project to create a project template.

To create a new project, you can use any project template created by any project administrator.

Note: You can also create a new project without using a template.

The template name and description appear on the **Templates** tab of the **Projects** list, accessible from the navigation bar on your **My Workspace** page. If your site administrator has made it possible to preview the contents of project templates, click the name of a template to see what's in it.

A template can include the structure of the original project without any of the content, or it can include both the structure and the content of the original project.

- "Structure" means the folders and sub-folders in the original project.
- "Project content" means any work items you or any other project member have created as part of the project. For example, when you create a tracker artifact to manage a piece of work, that tracker artifact is part of your project's content. Any documents you upload to the project and any wiki pages you create are part of the project's content.

What is in a project template?

When you create a template from an existing project, each project tool contributes its own structure to the template, and its content if you want it.

For each tool, you can include or omit the actual content that was created with that tool.

For example, suppose you have a project for which you have created some tracker artifacts, and these artifacts have proved useful to members of the project.

- You can include those artifacts in your template, so that people who create a new project from that template will have access to the same artifacts that you developed for your original project.
- You can leave those artifacts out of the template and let future users create new artifacts to fit their own needs.

Imagine that you have documented company-wide process standards on wiki pages in an existing project.

- You can include those wiki pages in a project template, so that the manager of a project created from that template won't have to go find those pages and copy them into the new project.
- Or you can leave the wiki tool empty and let the new project's users create new wiki content for themselves.

Note: You can choose not to include content from the original project, but you can't choose not to include a project tool. Every project template you create must include all the project tools, even if the project from which you created the template does not use all the tools. Every project you create from a template will include all the tools.

Tool	**Always in Template**	**Can Be in Template**
Tracker	You can have any number of separate trackers in a project. When you create a project template from that project, all the trackers that exist in the original project are copied into the project template.	When you create a project template from an existing project, you can include the artifacts that were created in the original project, and any parent-child dependencies among them. If users of the original project have shared saved searches, these can be included too.
Documents	When you create a project template from an existing project, all the document folders that were created in the original project are copied into the project template.	If users have created documents and attachments in the original project, you can choose to include these documents in the project template.
Tasks	A project can have any number of task folders. All of those folders will be included in any project template that you create from that project.	You can include the tasks that were created in the original project, and any dependencies among them.
Discussions	All discussion forums that have been created in the original project will be included in any project template that you create from that project.	You can choose to include discussion topics, posts and attachments in your template, or leave them out.
Reports		When you create a template from an existing project, any reports that you have saved in the original project can be included in the project template.
File Releases	Any packages or releases that have been created in the original project will be included in the project template.	
Wiki		When you create a template from an existing project, all wiki pages that users have created in the original project can be included in the project template.

How is a project template structured?

When you create a template that includes project content, each tool brings in its own kind of structure, depending on the type of content it manages.

Folders

Some tools, such as Documents, Tasks, and File Releases, can be thought of as folders that contain individual items, subfolders, or both.

For example, the Documents tool has a Root Folder, inside which you can create a tree of subfolders to organize your documents according to your project's needs. Every document lives inside one of these folders.

Note: This works the same way regardless of the name of the root folder. For example, in the Tasks tool the root folder is called the Tasks Summary, and in the Discussions tool the root folder is called the Forum Summary.

In a project that has been in use for any significant time, users have probably created some number of documents, which they have shared by adding them to a folder in the Documents tool. When you create a project template from that project, you can choose to include those documents in the project template or not.

- If you choose to include the documents in the template, those documents will appear in any new project that is created using that template.
- If you do not include the documents in the template, new projects based on that template will include the Documents tool, including the Root Folder and its sub-folders, but none of the documents that existed in the original project.

Not folders

The Reports and Wiki tools are not organized in folders. When you include the content from these tools in a template, new projects created from that template include a flat collection of all the Wiki pages or reports in the original project, with all their text and data.

Who can help me with SourceForge?

You can get a wide selection of community help and professional support for SourceForge.

Contact

Peer support	Review the *SourceForge discussion forum*. The software engineers behind SourceForge monitor this discussion, and so do other users. Someone there may have found and solved the same problem. **Note:** If you are reporting a documentation error or providing feedback about documentation, please include the URL of the help page you are referring to.
Professional support	If your organization has a CollabNet support contract, log into the *CollabNet Support Portal* and ask for help.
Email	cnsupport@collab.net (Provide your name, phone number and email address.)
Phone	650-228-2561 (M-F 7am-4pm Pacific Time)

Support offerings

Online purchasing and support offering information is at *www.collab.net/products/comparison*.

Chapter 2

Create a project

In this chapter:

- *Create a project template*
- *Categorize a project*

What constitutes a project depends on your organization. Some organizations favor a small number of big, centralized projects. Others prefer a larger number of smaller, specialized projects. Your site administrator can help you decide if your work should be part of a larger project or a project of its own.

1. On your **My Workspace** page, click **Projects ➤ Templates** .
2. On the **Templates** tab, select a project template from the list and click **Create Project**.
3. On the **Create Project** page, give the project a name and a brief description.
   - The name will appear in project lists and on the project's home page.
   - A terse description is recommended. There will be unlimited room to discuss the project's aims and methods in detail on the project pages themselves.
4. Provide a URL name for the project, if you want the URL for the project to be different from the internal project name.

   If you do not enter a URL name, the project URL will be the same as the project name.
5. Click **Create**.

The project is submitted to the CollabNet SourceForge Enterprise 5.0 site administrator for approval. You will receive an email notification when the site administrator approves or rejects your project. When your project is approved, you can get to it from your **My Projects** page or from the **Projects** menu in your navigation bar.

Create a project template

To make it easier for project managers to start projects, provide project templates based on existing projects.

A project template is used to populate new projects with the structure and configuration of the source project.

If you want it to, a project template can also include the actual contents of the project it is based on, such as tasks, tracker items and documents.

1. Set up the project that will serve as the basis for the new project template.

   Tip: If you need a clean project template, you may want to create a new project specifically for this purpose.

2. Click **Project Admin** in the project navigation bar.
3. On the **Project Settings** page, click **Create Project Template**.
4. Write a name and description for the template.

   Tip: Consider the uses that you or other project managers might have for this project template, and include keywords in your description that are related to those uses.

5. Choose the items that you want to make available in new projects that are created from this template.
   - Every new project includes a **Trackers** component into which you can add new trackers; a **Documents** folder into which you can add more document folders and documents; and so on.
   - If you wish, you can include the actual trackers from the current project's **Tracker** component; the actual documents from the current project's **Documents** component, and so on.
6. Click **OK**.

The project template is created. The template is available to all users who have the required permissions to create new projects.

The template name and description appear on the **Template** tab of the **Projects** list, accessible from your personal navigation bar.

Categorize a project

Organizing projects by categories can help users find what they need on a site quickly and easily.

Project categories express the relationships among projects. If your project is in a category, it is visible to users browsing projects from the main **Project Categories** page.

Your project can be in one or more project categories.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click the **Project Categorization** tab.
   The **Project Categorization** page lists all the categories the project belongs to.
3. Click **Add**.
   The **Select Category** window shows all the available project categories.
4. If you find a project category that your project should be in, select that category and click **Add**.

Your project is now a member of the selected project category. You can repeat this process to add your project to any number of project categories.

Chapter 3

Build your project web site

In this chapter:

Create a project page

To provide information and functionality to people viewing your project, build one or more project pages.

1. Go to the page to which your new page will belong.

   Tip: Any project page can have sub-pages belonging to it. A page that belongs directly to the project home page is called a "top-level page."

2. Click **Configure: On**.
3. Choose where your new page will fit in your project's structure.
   - To create a page just under the project home page, click **Add top-level page**.

     A top-level page's title is always visible in the navigation tree at left.
   - To create a page under the page you are on right now, click **Add sub-page**.
4. Give your new project page a title.

   Keep the title brief and descriptive.
5. Choose who can see this page.

   Note: Your choice will apply to all subpages that you create under this page.

   - To show this page to anyone with the necessary permissions, select **Visible**. For example, if you have defined a group of users who have access to your project, your new project page is visible only to those users. If your project is open to the public, anyone in the world can see it. Use this option when the information on this page is ready for a wide audience.
   - To show this page only to users with the project administrator role, select **Hidden**. Use this option if you are drafting content that you aren't ready to share yet, or want to share only with other project managers.
6. Click **Configure: Off** .

Now you are ready to build functionality into your project page with components such as text, news or tracker queries.

Build a project page

Use page components to put functionality at the disposal of your project members or get information to people viewing your project.

Note: There's no limitation on number of components per screen. However, too many components on one screen may make the user scroll too much. Consider breaking your project content up into multiple project pages that fit into one or two screens each.

Create a project page component

Put information and resources in your users' hands with project page components.

For example, to let people know about important new developments, create a news component. To enable project members to find tracker items quickly, create a query component.

1. On the project page, click **Configure: On**.
2. Click **Add new component**.
3. Give your new component a title.

   Keep the title brief and descriptive.
4. Select the type of component you need.

Documents	Let project members exchange and review documents from the project page.
Project News	Maintain a journal or blog about your project, share information, make announcements.
Project Statistics	Put visual measures of your project activities on the page.
Text	Use this all-purpose component to write free-form messages, reports or rants, in plain text or HTML.
Tracker Search Results	Make saved search results available from the project page.
Wiki Page	Open up your project page to two-way communication.

5. Choose who can see this component.
   - To show this component to anyone with the necessary permissions, select **Visible**.

     For example, if you have defined a group of users who have access to trackers in your project, a query component will be visible only to those users. If your project's trackers are open to anyone, all users who view this project page will see the query component. Use this option when you are sure the component is ready for general use.
   - To keep this component under wraps until you are ready to show it, select **Hidden**.

     Now only users with the project administrator role can see this component. Use this option if you are drafting content that you aren't ready to share yet, or want to share only with other project managers.
6. Specify the location of this component on the project page.
7. Click **Configure: Off**.

Add freeform text to a project page

To write unstructured messages or reports, in plain text or with HTML markup, add an all-purpose text component to your project page.

1. On the project page, click **Configure: On**.
2. Click **Add new component**.
3. Give your new component a title.

   Keep the title brief and descriptive.
4. In the **Create Component** page, select the **Text** component.
5. Use the wysiwyg editor to write text and, if appropriate, apply bold or italic or other styles.

   Tip: Use the toolbar buttons in the editor to work with fonts, tables, links, and images.
6. Click **Save**.

Add an activity table to a project page

To put critical links and queries in front of project users, set up an activity table.

1. On the project page, click **Configure: On**.
2. Click **Add new component**.
3. Give your new component a title.

   Keep the title brief and descriptive.
4. In the **Create Component** page, select the **Text** component.
5. In the text area under **Properties of this component**, click the **Insert predefined template content** icon and select **Activity Table**.
6. Click **Insert**, then **Save**.
7. Use the **Insert-edit link** icon to point the links to the artifacts or search results you need.

List documents on a project page

To let project members easily exchange documents or review each other's documents, add a documents component to your project page.

1. On the project page, click **Configure: On**.
2. Click **Add new component**.
3. Give your new component a title.

   Keep the title brief and descriptive.
4. In the **Create Component** page, select the **Documents** component.
5. Select the folder in which the document is located and click **Save**.
   The documents in the folder are displayed on the project page.
6. To create a new document, click **Add Document** in the title bar of the document component.
7. To view the details of a document and edit it, click on its name.

Announce project news on a project page

To let people know about important new developments, put a news component on your project page.

Note: Your top few posts automatically appear on the home page of your site.

1. On the project page, click **Configure: On**.
2. Click **Add new component**.
3. Give your new component a title.

   Keep the title brief and descriptive.
4. In the **Create Component** page, select the **Project News** component and click **Save**.
   A news component is added to your project page.
5. Click **Create News Post** on the title bar of the news component.
6. Add a brief descriptive title.
7. Announce or describe important new developments in the post body.
8. Click **Create**.
   The news post appears on the project page, along with your name and the time at which you created the post.

Display project statistics on a project page

To share the progress of your project graphically, add a statistics component to your project page.

1. On the project page, click **Configure: On**.
2. Click **Add new component**.
3. Give your new component a title.

   Keep the title brief and descriptive.
4. In the **Create Component** page, select the **Project Statistics** component and click **Save**.
   Recent statistics for tasks, trackers, documents, and file releases are displayed on the project page.
5. To display an expanded view of any graph in a separate window, click the corresponding **Enlarge Graph** link.
6. To generate a new custom graph, modify the graph's parameters in the expanded view and click **Update**.

The searches are displayed on the project page. Click on a search to see the results.

Add saved tracker searches to a project page

To enable project members to find tracker items quickly, create a tracker search result component and link to searches you have saved.

1. On the project page, click **Configure: On**.
2. Click **Add new component**.

3. Give your new component a title.
   Keep the title brief and descriptive.
4. In the **Create Component** page, select the **Tracker Search Results** component.
5. Click **Add Saved Tracker Searches** to get a list of saved searches.
6. Select the searches you want to add and click **Add Selected**.
7. Use the **Move up**, **Move down** and **Remove** buttons to rearrange and trim your list of searches.
8. Specify the maximum number of rows you want displayed for each search result.
9. Click **Save**.

The searches are displayed on the project page. Click a search to see the results.

Connect a project page to a wiki

To open up a project page to two-way communication, add a wiki component.

1. On the project page, click **Configure: On**.
2. Click **Add new component**.
3. Give your new component a title.
   Keep the title brief and descriptive.
4. In the **Create Component** page, select the **Wiki Page** component.
5. Specify the name of a wiki page that exists in the project, and click **Save**.

The contents of the wiki page are displayed on the project page. Edit the wiki page by clicking **Edit Wiki Page** on the title bar of the wiki component.

Reorder project page components

To make things easy for your project members, lay out your page components in a useful order.

1. On the project page, click **Configure: On**.
2. In the title bar of the project page component you want to move, click the up arrow or the down arrow .
3. Click **Configure: Off**.

Hide a project page component

While you are preparing a project page component, you may wish to keep it from being seen.

You can hide a page component from everyone except other project administrators.

1. On the project page, click **Configure: On**.
2. In the title bar of the project page component you want to hide, click the edit button .
3. Select the **Hidden** option for **Visibility**, and click **Save**.
4. Click **Configure: Off**.

Now no one who does not have the Project Admin role can see the component, even if they have access to the project and to this page. Users with the Project Admin role can see this component only when **Configure** is set to **On**.

Rename a project page component

As a page component's focus evolves, it's a good idea to rename it to match its changing function.

1. On the project page, click **Configure: On**.
2. In the title bar of the project page component you want to rename, click the edit button .
3. Update the **Title**as appropriate to its current function, and click **Save**.
4. Click **Configure: Off**.

Delete a project page component

When a component is no longer useful, remove it from the page to avoid distracting users.

1. On the project page, click **Configure: On**.
2. In the title bar of the project page component you want to delete, click the X button .
3. Click **Configure: Off**.

Control access to a project page

Before you put information or functionality on your project page, make sure it is accessible to the people it is intended for.

Note: This is only relevant if your page is not hidden. If your page is hidden, users who are not project administrators cannot see the page even if their role-based permissions would allow it.

1. Click **Project Admin** in the SourceForge navigation bar.
2. On the **Project Settings** page, click **Permissions**.
3. Click the role to which you want to give access to your project page.

   Tip: If the appropriate role does not exist, you must create it first.

4. On the **Edit Role** page, click **Project Pages**.
5. Under **Project Pages Permissions**, select the pages that users with this role can see and edit.

   - To enable users with this role to create, read and modify all project pages, select the **Project Pages Admin** permission.
   - To allow users with this role to see pages but not edit them, select the appropriate page in the **View** section.
   - To allow users with this role to modify the contents of a text component project pages, select the appropriate pages in the **Edit Text Content** section.

   Note: The project home page is always visible to any user who is authorized to see the project.

Reorder project pages

Facilitate your users' experience in your project by putting your project pages in an order that matches their needs.

1. Click **Configure: On**.
2. Select a project page and click **Edit Structure**.
3. Rearrange the structure of this page in any of these ways:

   - Select a page, and use **Cut** and **Paste** to place it in a different location.

     Note: When you move a page, all of its sub-pages will also be moved.

   - Drag and drop a page to a different position.
   - Click **Add New Page** to add a sub-page to the current page.
   - Select one or more pages and click **Delete** to remove them.

4. Click **Save Changes** .
5. Click **Configure: Off** .

Hide a project page

While you are preparing a project page, you may wish to keep it from being seen.

You can hide a page from everyone except other project administrators.

1. Click **Configure: On**.
2. Click **Edit Page Properties**.
3. For **Visibility**, select **Hidden** and click **Save**.

Now no one who does not have the Project Admin role can see the page, even if they have access to the project and to this page's parent page.

When you are finished building your page, don't forget to switch the page to "Visible" so that the intended users can see it.

Rename a project page

As a page's focus evolves, it's a good idea to rename it to match its changing function.

1. Click **Configure: On**.
2. Click **Edit Page Properties**.
3. Change the **Title** as appropriate to its current function, and click **Save**.
4. Click **Configure: Off**.

Chapter 4

Report on project activity

In this chapter:

Report on tracker artifacts

Tracker reports give you a summary of the history of tracker artifacts. A tracker report can cover the tracker artifacts in a selected tracker or across all trackers in a project.

To generate a report, you must first define the report criteria in a template. You can then run the report at any time with a single click.

Note: Report results contain only those items that you have permission to view. Other project members with different permissions might get different results when running the same report.

1. Click **Reports** in the project navigation bar.
   The **List Reports** page displays a list of existing report templates.
2. Choose **Tracker Report** from the drop-down menu, and click **New**.
3. On the **Tracker Report Criteria: Step 1 of 2** page, define report criteria that are common across all selected trackers.
   a) Write a name and description for your report.
   b) Select the trackers from which you want tracker artifact data to be reported.
   c) Optionally, select date ranges for create date, last edited date, or closed date.
   d) Optionally, select one or more **Assigned To** or **Created By** project members.
   e) Click the icon to display a list of project members with permissions to edit or create tracker artifacts.
   f) Click **Next**.
4. On the **Tracker Report Criteria: Step 2 of 2** page, define report criteria that are specific to each selected tracker.
   a) Select values for any or all of the remaining tracker fields.
5. Click **Generate Report**.
   - The **Report Summary** tab shows your results in graphical format.
   - The **Report Details** tab shows your results in tabular format.
6. To edit the report criteria, click **Edit**, make the changes, and click **Generate Report**.
   The report is automatically regenerated with the new criteria. The new criteria are also saved in the report template for future use.
7. Repeat the last two steps until you have the report you want.

Save a report template

To run reports, you must define the report criteria and save it in a report template.

1. Click **Reports** in the project navigation bar.
   The List Reports page displays a list of existing report templates.
2. From the drop-down menu, choose a type of report template.
   - **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.
3. Click **New**.
4. On the **Task Report Criteria** or **Tracker Report Criteria** page, select your desired report criteria.
   The fields on the **Report Criteria** page depend on the report type.
5. Click **Generate Report**.

The report results appear and the template is saved.

After you have saved your report template, you are ready to run reports.

Run a report

Run a report to get fresh data on the status of your project.

You must save a report template before running a report.

The report data is regenerated each time the report is run.

Tip: You can modify the report criteria before generating the report data. 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.

Note: Report results contain only those items that you have permission to view. Other project members with different permissions might get different results when running the same report.

1. Click **Reports** in the project navigation bar.
   The **Report Templates** page displays a list of existing report templates.
2. Click the title of the desired report template.
   - The **Report Summary** tab displays your results in graphical format.
   - The **Report Details** tab displays your results in tabular format.
3. To edit the report criteria, click **Edit**, make the changes, and click **Generate Report**.
   The report is automatically regenerated with the new criteria. The new criteria are also saved in the report template for future use.
4. Repeat the last two steps until you have the report you want.

Export report results

To save your report results, you can export the data to a `.csv`, `.xml`, or tab-delimited file.

Note: If you created a report that includes trackers with different user-defined fields and click **Export** on the **Report Summary** page, the **Export Data** window will only show the fields that appear in all trackers. To export user-defined fields, click the **Report Details** tab and click **Export** for a specific tracker.

1. Click **Reports** in the project navigation bar.
   The **Report Templates** page displays a list of existing report templates.
2. Click the title of the report template.
3. On the **Report** page, click **Export**.
4. In the **Export Data** window, select an export format.
   - **CSV**
   - **Tab-delimited**
   - **XML**
5. Select the fields that you want to export and move them from the **Available Columns** list to the **Selected Columns** list.
6. Click **Export**.
7. In the **Export Data** confirmation window, click the link provided if you want to save the file again.

Delete a report template

To avoid confusion, it is a good idea to delete report templates that you no longer need.

1. Click **Reports** in the project navigation bar.

The **List Reports** page displays a list of existing report templates.

2. Select the report template that you want to delete, and click **Delete**.

The report template is deleted.

Chapter 5

Control project access

In this chapter:

Control access by project type

Projects can be open only to project members, open to everyone in the world, or something in between.

By default, all new projects are created as private projects, accessible only to project members. You can change your project to a public or gated community project at any time.

Important: Users who do not have access to a project cannot see it on the **Home** page, in the **All Projects** list, or in search or reporting results.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **Permissions**, then click the **Default Access Permissions** tab to see the project's current access setting.
3. Click **Edit**.
4. On the **Edit Default Access Permissions** page, select the kind of access you want to allow to your project.
    - **Private** - Project members only.
    - **Gated community** - Project members and unrestricted users.
    - **Public** - All users.

Control access by user role

Project administrators create roles, which they then assign to project members to define what those project members can do in the project.

Create a role

A role defines the applications that project members with that role can use, and the specific things project members can do in each application.

Any project administrator can create and assign a role.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **Permissions**.
3. Click **Create**.
4. On the **Create Role** page, write a name and description for the role and click **Save**.
5. For each application listed on the **Role Permissions** page, select the permissions and resources you want to make available to users with this role.

    Note: You can specify access to individual top-level folders, but not to specific subfolders.

6. Click **Save**.

The role is created. You can assign it to project members at any time.

Create a project administrator role

The project administrator is responsible for managing the project's users and roles.

The project creator is assigned the Founder Project Admin role, a special role granting all project and application administration permissions for the project. You can transfer the Founder Project Admin role to another user.

If the project creator is a CollabNet SourceForge Enterprise 5.0 administrator, no Founder Project Admin is created.

Note: By default, project adminstrators do not have application administration permissions, such as Tracker Admin or Task Admin. Application administration permissions can be included in a project administrator role, but must be assigned separately.

1. On the **Role Permissions** page, select **Project Admin Permissions**.
   - If you want the role to contain only the project administrator permissions to manage users and roles, **Project Admin Permissions** is all you need to select.
   - If you want the role to contain additional application administration or other permissions, check the additional permissions.
2. Click **Save**.

All project members assigned this role have project administrator permissions to manage the project's users and roles.

Change a role

If users need to do things that are not allowed by a role you have assigned to them, you may need to change the permissions associated with that role.

When you edit a role, all project members with that role get the updated permissions automatically.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **Permissions**.
3. From the list of existing roles, click the role you want to edit.
4. On the **Role** page, make the changes you need.
   - To edit the title or description of the role, click **Edit**.
   - To edit the role's permissions, choose an application from the left side of the page and select or deselect permissions and resources.
   - To edit the project members to whom the role is assigned, click **Assigned Project Members**.
5. Click **Save**.

Give roles to a project member

A project member can have any number of roles. As project administrator, you must assign each project member's roles.

Permissions are cumulative. The project member has all of the access permissions allowed by all of the assigned roles, plus any permissions that may have been assigned globally using application permissions.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **Permissions**, then click the **User-Role Matrix** tab.
   The user-role matrix lists all project members on the left and all available roles on the top.
3. Select roles for each project member.
4. Click **Save**.

The roles are now assigned to each project member.

Assign roles to a user group

Enable multiple users to do something all at once by giving their group a role.

A user group can have any number of roles. Each member of the user group has all the access permissions allowed by all of the assigned roles, plus any permissions that may have been assigned by other methods, such as application permissions or individually assigned roles.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **Permissions**, then click the **Group-Role Matrix** tab.
   The user group-role matrix lists all user groups on the left and all available roles across the top.
3. Select the roles you want for each user group and click **Save**.

   Note: When you give a group access to a CVS or Wandisco Subversion repository, members of the group can view the repository but cannot do repository actions, such as commit and update. You must assign those permissions to users individually.

The roles are now assigned to each user group.

Assign user groups to a role

To manage permissions for a lot of groups or roles at once, try assigning user groups to roles.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **Permissions**.
3. Click the name of the role that you want to assign to user groups.
4. On the **Role Permissions** page, click the **Assigned Groups** tab.
   The **Assigned Groups** page shows all user groups that are currently assigned the role.
5. Click **Add**.
6. Type some of the group's name in the **Name (search)** box and click **Find**.
7. In the **Find a user group** window, select the user groups that you want to add, and click **Finish**.

   Note: When you give a group access to a CVS or Wandisco Subversion repository, members of the group can view the repository but cannot do repository actions, such as commit and update. You must assign those permissions to users individually.

The user groups are now assigned the role.

Control access by user class

To avoid having to create and assign a lot of similar roles for individual users, give access to applications to whole classes of users whenever possible.

For each application (tasks, documents, file releases, trackers, and discussion forums), you can assign permissions globally based on user type.

For example, if you know that you want all project members to be able to view and submit to all project trackers, you can specify this permission using application permissions. You need to configure these settings only once.

1. On the **Project Admin** page, configure your project access settings and click **Next**.
2. On the **Edit Default Access Application Permissions** page, click the **+** symbol to expand the section for which you want to assign permissions.
3. For each application and resource, choose a user type from the drop-down menus.
   - All users of the selected type will have the specified permissions: view, submit/view, or post/view.
   - For discussion forums and trackers, you can also specify submit or post permissions.

   Note: You can specify access to top-level folders, but not to specific subfolders.

   Important: If you want to control access to an application or resource that is not displayed on the **Edit Default Access Application Permissions** page, you can do so using role-based access control (RBAC.)
4. Click **Finish**.

Chapter 6

Manage project membership

In this chapter:

Add a user to a project

Before a person can work on a project, you have to make them a member of the project. You can make any registered CollabNet SourceForge Enterprise 5.0 user a project member.

You can also assign roles to the user while you are adding the user to the project.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **User Membership**.
3. Click **Add**.
4. On the **Add User** page, find the user by entering search text.
   Search text is not case-sensitive. You can search by full or partial name or user name.
5. Select the user, then click **Next**.
6. On the **Add User** page, select the roles you want the user to have.
7. Save your changes.
   - Click **Finish** to return to the **Project Membership** page.
   - Click **Finish and Add Another** to add another user.

Remove a user from a project

At any time, you can remove a user from a project.

When you remove a user from a project, all items such as tasks and tracker artifacts that were assigned to the user are now assigned to None.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **User Membership**.
3. From the list of current project members, select the user you want to remove and click **Remove**.

The user is now removed from the project.

Handle a request for project membership

A registered Sourceforge user can ask to be a member of a project. As the project administrator, it's up to you to approve or reject such requests.

When a CollabNet SourceForge Enterprise 5.0 user submits a request for project membership, the request is placed in the **User Membership** section of the **Project Administration** page, pending approval by a project administrator. The request is also displayed in the **Items Pending My Approval** section of each project administrator's **My Page**.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **User Membership**, then click the **Pending Requests** tab.
3. Under **Users Requesting to Join Project**, select the user you want to approve or reject.
   - Click **Approve** to approve the request and add the user to the project.
   - Click **Reject** to deny the request.
4. To view details about the user or add a comment before approving or rejecting the request, click the user name.
   This is optional.

The user receives an email notification when the request is approved or rejected.

Handle a request to leave a project

A CollabNet SourceForge Enterprise 5.0 user who wants to leave a project must submit a request. The project administrator can approve or reject the request.

A request to leave is placed in the **User Membership** section of the **Project Administration** page, pending approval by a project administrator. The request is also displayed in the **Items Pending My Approval** section of each project administrator's **My Page**.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **User Membership**, then click the **Pending Requests** tab.
3. Under **Users Requesting to Leave Project**, select the user whose request you want to approve or reject.
    - Click **Approve** to approve the request and remove the user from the project.
    - Click **Reject** to deny the request.
4. To view the user details or add a comment before approving or rejecting the request, click the user name.

    This is optional.

The user receives an email notification when the request is approved or rejected.

Chapter 7

Make other applications available to project members

In this chapter:

Link an external application

To make an application or site outside of CollabNet SourceForge Enterprise 5.0 available to your users from inside your Sourceforge project, create a linked application.

Note: You can create as many linked applications per project as you wish. However, because each linked application adds a button to the project navigation bar, creating a large number of linked applications can cause horizontal scrolling.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **Linked Applications**.
   The **Linked Applications** page displays a list of all currently linked applications in the project.
3. On the **Linked Applications** page, click **Create**.
4. On the **Create Linked Application** page, enter a name for the linked application.
   This name will appear, with an icon you choose, in the project navigation bar.
5. Enter the server location or URL for the linked application.
6. If you are a CollabNet SourceForge Enterprise 5.0 administrator, select whether you want to use single sign-on for the linked application.

   - If you use single sign-on, CollabNet SourceForge Enterprise 5.0 manages authentication for the linked application, and users don't have to log into the application after they have logged into CollabNet SourceForge Enterprise 5.0.
   - If you do not use single sign-on, users must log into the linked application using its native authentication system.

7. Click **Browse** and select an icon for the linked application.

   The icon must be a `gif`, `.jpg`, or `.png` file.

   This icon will appear with the application name in the project navigation bar.
8. Click **Save**.

A button for the linked application is added to your project navigation bar. Clicking it launches the application in the main CollabNet SourceForge Enterprise 5.0 project window.

Change a linked application

When the use patterns of a linked application change, you may need to change the way the application integrates with Sourceforge.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **Linked Applications**.
3. On the **Linked Applications** page, select the application you want to edit.
4. Click **Edit**.
5. On the **Edit Linked Application** page, make the changes you need.

   You can edit these elements:

   - The name of the application.
   - The application's URL.
   - Whether the application uses single sign-on (if you are a CollabNet SourceForge Enterprise 5.0 administrator.

   Note: You cannot change the application icon.

6. Click **Save**.

Reorder linked applications

If the order of the buttons for your linked applications makes a difference to users, you can reorder them.

By default, linked application buttons are displayed in the project navigation bar in the order in which they were added.

1. Click **Project Admin** in the project navigation bar.
2. On the **Project Admin** menu, click **Linked Applications**.
3. On the **Linked Applications** page, click **Reorder**.
4. In the **Reorder Linked Applications** window, arrange your applications in the order that works best for your users.
   a) Select an application by clicking the title.
   b) Click **Move Up** or **Move Down** until the linked application is in the correct order.
5. Click **Save**.

Appendix A

Reference information

In this chapter:

The Project Dashboard page

The **Project Dashboard** offers a centralized view into all development projects managed in CollabNet SourceForge Enterprise 5.0 5.0.

Overview

The **Project Dashboard** provides managers with an at-a-glance overview of the status of each of their projects. It provides summary information on the number and status of the tasks and tracker artifacts in each project, and calculates project overrun and underrun statistics.

The **Project Dashboard** also provides overview information such as project start and end dates and project ranking.

You can see the **Project Dashboard** if you have both the View Tracker and View Task permissions for one or more projects. Only those projects for which you have both the View Tracker and View Task permissions appear on your **Project Dashboard**.

Getting there

In the CollabNet SourceForge Enterprise 5.0 5.0 navigation bar, click **My Workspace ➤ Dashboard** .

You can view the **Project Dashboard** if you have both the View Tracker and View Task permissions for one or more projects. Only those projects for which you have both the View Tracker and View Task permissions are displayed on your **Project Dashboard**.

Contents

For each project, the **Project Dashboard** displays the following information:

- **Project Activity ranking** - The activity of the project in relation to all other CollabNet SourceForge Enterprise 5.0 5.0 projects.
- **Start Date** or **End Date** - The start and end date of the project, based on the start and end dates of all project tasks.
- **Task Status** - The status of the project, based on the "rolled-up" status of all project tasks and task folders. You can configure the "roll up" criteria for each project from the project's **Task Manager Settings** page.
- **Status History** - The history of the project's "rolled-up" status color. These figures are calculated in real time, but do not calculate time that the project's status was **Not Started** or **Completed**.

  Click the status bar to go to the project's **Task Summary** page.
- **Task and Tracker Hours** - The project's current overrun or underrun, based on the difference between estimated and actual hours spent on project tasks and tracker artifacts.

  Only completed and closed tasks and tracker artifacts, with values in the estimated and actual hours fields, contribute to the overrun or underrun calculations.
- **Tracker Status** - The number of open tracker artifacts in the project, per priority value. The number of open tracker artifacts is indicated in parentheses.

  Click the status bar to go to the project's **Tracker Summary** page.

My Page

Your **My Page** is a personal workspace where you can manage your personal information, your preferences, and your assigned activities.

Getting there

After logging into CollabNet SourceForge Enterprise 5.0, you are taken to your **My Page**.

Contents

The following items are on your **My Page**:

CollabNet SourceForge navigation bar	After you log into CollabNet SourceForge, the full navigation bar appears at the top of the page. Whenever you are logged in, the navigation bar appears on all pages in CollabNet SourceForge . From the navigation bar, you can do the following: • Click **Home** to return to the CollabNet 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 find data in CollabNet SourceForge . **Note:** If you are a site administrator, you can also click **Admin** to access administrative functions.
Personal navigation bar	When you log in or click **My Workspace** in the navigation bar, your personal navigation bar appears. From your personal navigation bar, you can do the following: • Click **Dashboard** to view your Project Dashboard. **Note:** 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. • Click **My Page** to return to your **My Page**.
My Recent Projects	A list of your most recently accessed projects. Click a project to go to its project home page.
My Recent History	A list of the items that you have most recently created or edited. Click an item to go to its details page.
My Items	Your My Page workspace provides consolidated views of all of your CollabNet SourceForge items. All items that are assigned to you, were created by you, or are awaiting your approval 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. • If you are an administrator on the site, click **Items Awaiting My Approval** to view 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. • Click **News** to view recent news from all projects of which you are a member.

The Document Details page

Each document in CollabNet SourceForge Enterprise 5.0 has a **Document Details** page where you can find information about the document.

Contents

The **Document Details** page has these components:

Document Details	View details about the document such as the name, description, file type, and size.
Status	View the document status, including whether it is locked for editing.
Created By	Identify and contact the author of each document version.
Versions	View the version history of the document.
Associations	View any items associated with the document.
Version Comment	Explanation of changes from one version of the document to another.
Monitor	Begin or stop monitoring the document.

Wiki syntax

This page describes the effects you can get by editing text on a Wiki page.

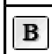
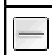
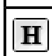
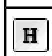
Syntax	Effect
----	Creates a horizontal rule.
\ \	Creates a line break.
[link]	Creates a link to a new Wiki page called "link." If the link is a complete URL, a link to the URL is created. If the link points to a .gif, .jpg, or .png image, the image is rendered directly in the page.
[title|link]	Creates a link to a new Wiki page called "link" with the text "title" displayed for the URL. 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 on the page with "title" as ALT text.
[WikiPageName/attachmentName]	Embeds an attachment in the page. If the attachment is a .gif, .jpg, or .png image file, the attachment will be embedded in the page; otherwise, the name of the attachment will display as a downloadable link. After adding attachments, the exact syntax for including the current page's attachments is shown next to each attachment's name in the Attachments section of the Edit Wiki page. You can use the same syntax to embed attachments from other wiki pages in the same project.
~TestText	Disables link creation for a CamelCase word. [1]
[[link]	Creates the text "[link]."
!!!text	Creates a level 1 (large) header.
!!text	Creates a level 2 (medium) header.
!text	Creates a level 3 (small) header.
''text'' [1]	Creates italic text.
text	Creates bold text.

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

Syntax	Effect
{{text}}	Creates monospaced text.
*text	Creates a bulleted list item.
#text	Creates a numbered list item.
;term:ex	Creates a definition for the word "term'"with the explanation "ex."
||head1||head2	Creates a table column with header text "head1" in the first cell and "head2" in the second cell.
Wiki syntax	Action
|col1|col2	Create a table row containing the text "col1" in the first cell and "col2" in the second cell.
{{{text}}}	Creates pre-formatted text.
%%(font-size: 150%; color: red;)Hello, world!%%	Defines a CSS-style command.
Blank line	Starts a new paragraph.

Wiki editing buttons

This page describes the uses of the buttons on the Wiki pages for getting the effects you want.

Button	Effect
	Creates bold text.
	Creates italic text.
	Creates a link to a new Wiki page.
	Creates a bulleted list.
	Creates a numbered list.
	Creates a horizontal rule.
	Creates a level 1 (large) header.
	Creates a level 2 (medium) header.