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Introduction

Overview

The purpose of this document is to provide a quick introduction to GForge and its capabilities. Very briefly, GForge provides a set of tools to help distributed teams collaborate on development projects. Some of the tools GForge provides include:

- Message forums
- Mailing lists
- Wiki pages (via a plugin)
- File release management tools
- Document management tools
- News announcements
- Surveys
- Developer profiles
- Issue tracking (similar to Bugzilla)
- Task managers ('todo' lists)

Additional References

Additional information about GForge and its capabilities can be found on the web at <http://gforge.org/>, or on the main NCICB GForge site at <http://gforge.nci.nih.gov/projects/gforgehelp/>.

Side Note on Screen Shots

Screen shots have been provided to help illustrate some concepts. Since the overall look and feel of the site is still under development, these may not match exactly with the final look and feel of the site.

Getting Additional Support

Please address all requests for support or new features to ncicb@pop.nci.nih.gov. In addition, the GForge Help Project (<http://gforge.nci.nih.gov/projects/gforgehelp/>) was created specifically to provide FAQ's and guidelines for daily GForge use.

Quick Start

Creating an Account

While it is possible, depending on security settings, to browse and download project files, an account is usually required in order to request a new project, join an existing project, participate in forums, etc. GForge allows users to self-register. To create a new account, click on the 'New Account' link in the upper right corner of the page (see Creating a New Account). The registration process requires a valid email address. Once the information has been submitted, GForge will respond with an email to the address provided that contains instructions for completing the account registration.

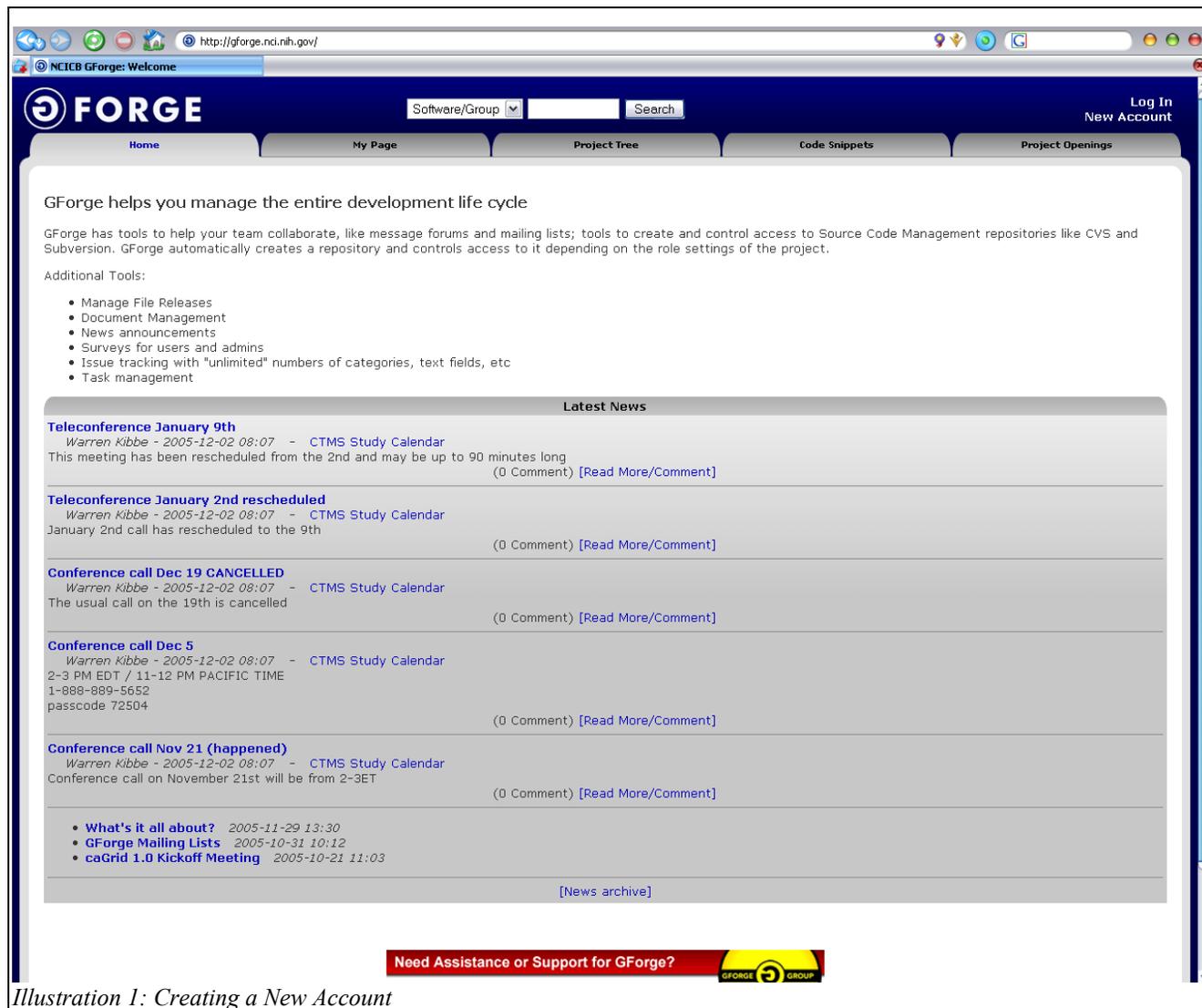


Illustration 1: Creating a New Account

Requesting a Project

Once account registration is completed, a user may request that a new project be created. Only System

Administrators can approve project requests. To request a new account, log on to GForge by clicking on the 'Log In' link in the upper right corner of the page. Once logged in, click on the 'My Page' tab and then on the 'Register Project' link (see Register a New Project below) . The resulting page asks for the project name and purpose, the type of license, a public description, and a UNIX name (a short name to be used for the project's source repository, among other things). All the fields are mandatory, and the information will be used by site administrators to determine whether to accept or reject the project. The person who requested the project is automatically made the project administrator, with complete control over all project settings. He or she may then give other registered users administrative rights to the project.

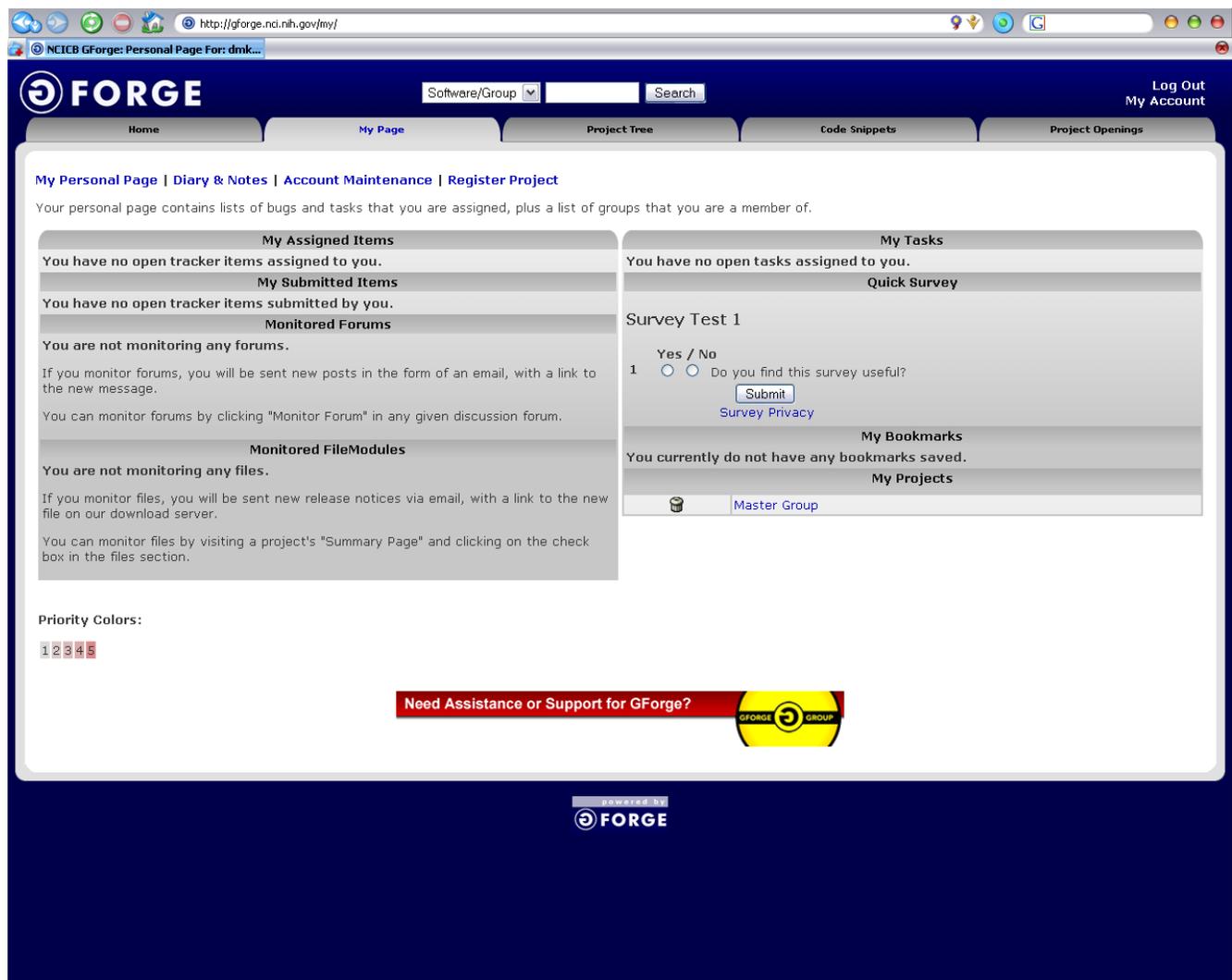


Illustration 2: Register a New Project

User Guide

User Classes

Although GForge defines a number of default roles, security privileges in GForge are project-based, and project administrators have complete control over the privileges associated with those roles. In addition, administrators can create new roles as needed for their projects. The user classes discussed here should not be confused with the GForge roles, although there are similarities. It is assumed for the purposes of this discussion that privileges are additive; thus a project member can do everything an observer can do, and more, and a project manager can do everything a project member can do, and more, etc., although this may not be strictly true given that project roles and privileges are customizable.

Observer

Observers are unregistered site browsers. By default, they have read-only privileges to project documents, repositories, file downloads, mailing lists, forums, wiki pages, trackers, tasks, etc. Most likely, observers will browse or search for a particular project either by using the 'Project Tree' tab, or the Search box at the top center of the page. Searches use the text entered by the project administrator at the time they request the project. Browsing the Project Tree relies on the categories that the project administrator has assigned to the project.

Observers may also register accounts, but until they have been granted membership to a particular project, their privileges are not affected.

The use cases that are available to observers are:

- Browse/Search Projects
- Review Documents
- Wiki
- Forums
- Mailing Lists
- Tasks
- Trackers
- Register Account

See the Use Cases section below for more discussion of these activities.

Registered User

Registered users have the same privileges as Observers, until they have petitioned for and been granted access to a project. Once registered, a user may log on and petition to join a project (or multiple

projects). The project administrator must review and accept or deny the petition. If the request is accepted, the administrator will assign the appropriate role to the new project member.

In addition to the Observer use cases, Registered Users have only three additional use cases:

- Join Project
- Administer Preferences
- Register Project

Project Member

For the purposes of this discussion, it is assumed that all project members have the same privileges. As mentioned above, access to the various project features is controlled by the role assigned, and thus this assumption may not hold strictly true for every project. However, it is probably safe to assume that these activities will be available to one or more classes of project members.

Project members will perform the day to day work of the project, ranging from collaboration using the various tools GForge provides, to working with CVS, preparing and uploading files for release, uploading documents, and so on. The use cases available to project members include:

- Upload Documents
- Upload Files for Release
- Review Documents
- CVS
- Collaborate
 - Wiki
 - Forums
 - Mailing Lists
- Tasks
- Trackers

Project Administrator

While the project administrator may also be an active project member, he has additional activities available to him, centered around project administration. These tasks include updating the project's public information, assigning trove map categories, reviewing requests to join the project, assigning roles to project members, reviewing document submissions, defining release packages, creating new trackers and task managers, among other things. In addition to the project member use cases, the project administrator has the following use cases available to him:

- Trove Map

- Administer Mailing Lists
- Administer Forums
- Administer Releases
- Define Document Categories
- Project Roles
- Administer Tasks
- Administer Trackers
- Post Jobs

System Administrator

System administrators have unfettered access to any project, regardless of whether they are members of that project. Therefore, all use cases are available to them. System administrators have an important role to play in the Register Project use case, in that all requests must be reviewed and approved by them. The additional use cases that are available only to system administrators include:

- Administer User Accounts
- Administer Trove Map
- Site Configuration
- Site-wide Statistics
- Administer Project Settings

Use Cases

Browse/Search Projects

As discussed above, the user can browse or search for projects via either the search box at the center top of the page, or by clicking on the Project Tree tab and browsing through the defined topics to find a project. The search box searches the project title and description fields. The browser depends on the trove map categories that the project manager has assigned.

Register Account

As discussed above, GForge uses a self-registration scheme. Users provide basic demographic information, including an email address. The system will send additional instructions for completing the registration to the email address provided.

If a user has forgotten his/her password, there is a “Lost your password?” link on the login page that will send instructions on how to change it to the email address on file.

The User's Home Page

The My Page tab (see Registered User Home Page) is the start page for registered users. Links at the top allow the user to access her diary and notes, account maintenance page, and to register a new project. The main body of the page provides quick links to the tracker items assigned to and submitted by the user, tasks assigned to her, links to new items monitored forums and new monitored file releases. In addition, it includes sections for surveys, the user's bookmarks, and links to all the projects of which the user is a member.

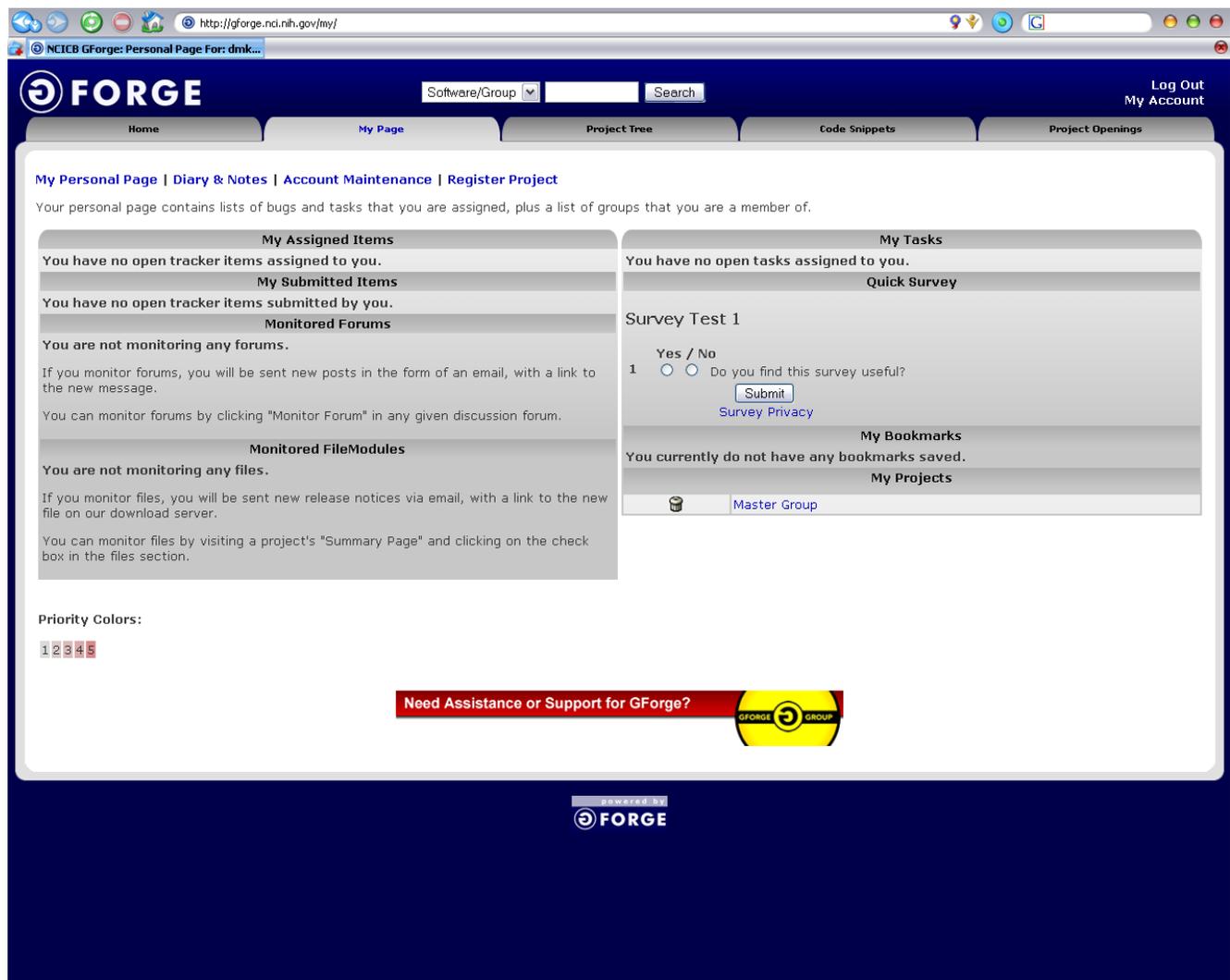
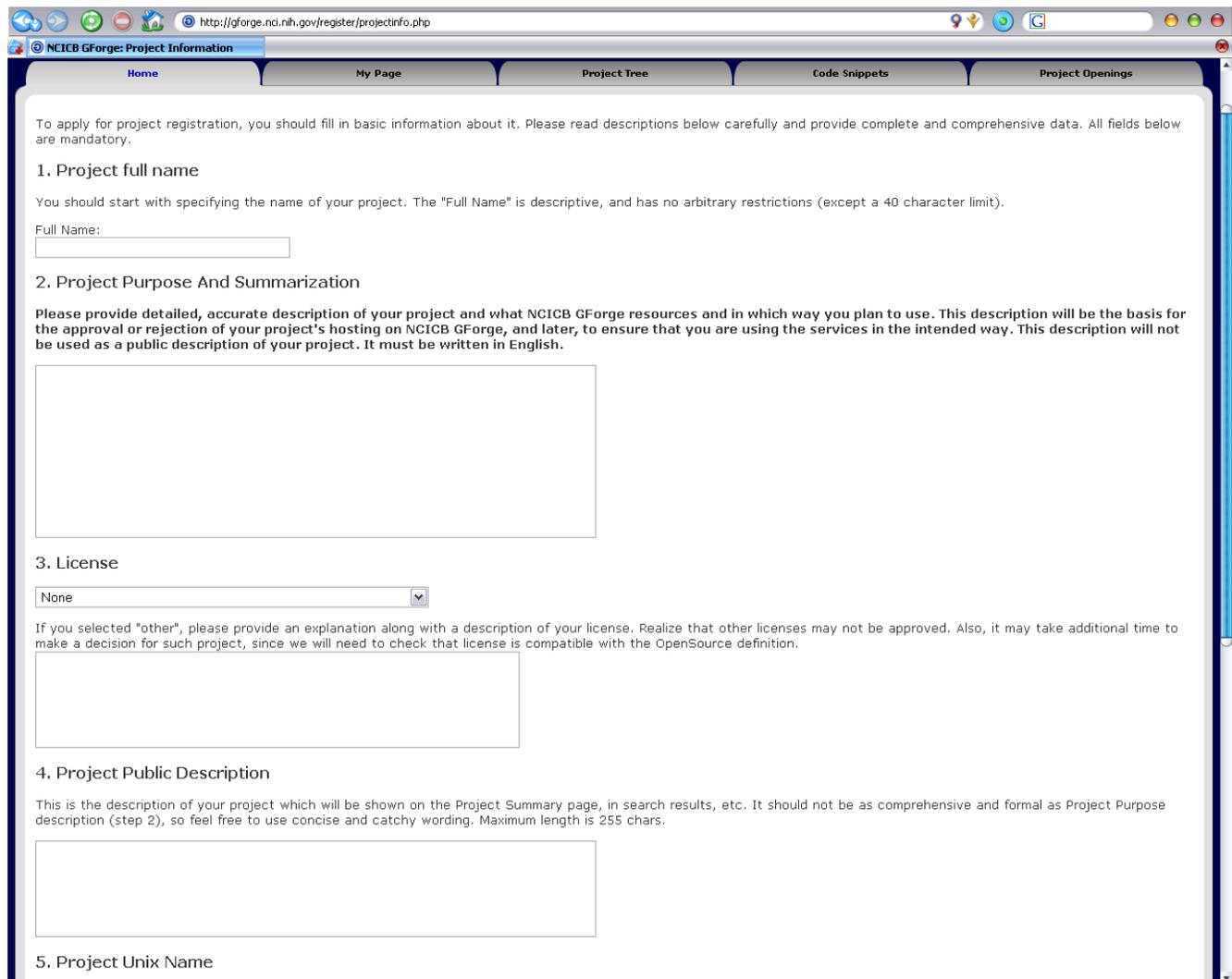


Illustration 3: Registered User Home Page

Register Project

Only registered users can request that a new project be created. The Register Project link on the user's home page opens a form that allows the user to fill in the project name, purpose, public description, and so on. This is the information that the System Administrator will use to decide whether to accept or reject the project. If accepted, the requester is automatically made the project administrator and is granted complete access to all account settings, including the ability to add new members to the project.

All of the information on the Register Project form is required. The project UNIX name must be unique. See Creating a New Account for details.



The screenshot shows a web browser window with the URL `http://gforge.nci.nih.gov/register/projectinfo.php`. The page title is "NCICB GForge: Project Information". The browser's address bar and navigation buttons are visible at the top. The page content is organized into a tabbed interface with tabs for "Home", "My Page", "Project Tree", "Code Snippets", and "Project Openings". The "Home" tab is active, displaying the registration form. The form includes a general instruction: "To apply for project registration, you should fill in basic information about it. Please read descriptions below carefully and provide complete and comprehensive data. All fields below are mandatory." The form is divided into five numbered sections: 1. Project full name (with a text input field), 2. Project Purpose And Summarization (with a large text area), 3. License (with a dropdown menu set to "None" and a text area for explanation), 4. Project Public Description (with a text area), and 5. Project Unix Name (with a text input field).

Illustration 4: Register a New Project

Join Project

Once registered, users can petition to join particular project. The project manager is responsible for approving petitions, and assigning the appropriate project role to the user. To join a project, the user must navigate to the project home page and click the Request to join link in the Developer Info section on the right side of the page. See Project Home Page for an illustration. Users can find projects through the browsing and searching capabilities of GForge. Additionally, project managers can post jobs, which will appear on the Project Openings tab until they are filled. Registered users can click on that tab and be taken to a list of all posted jobs. They can click on the job description for more information, or directly on the project link provided, to be taken to the project home page (see Project Openings), where they could 'apply' for that job.

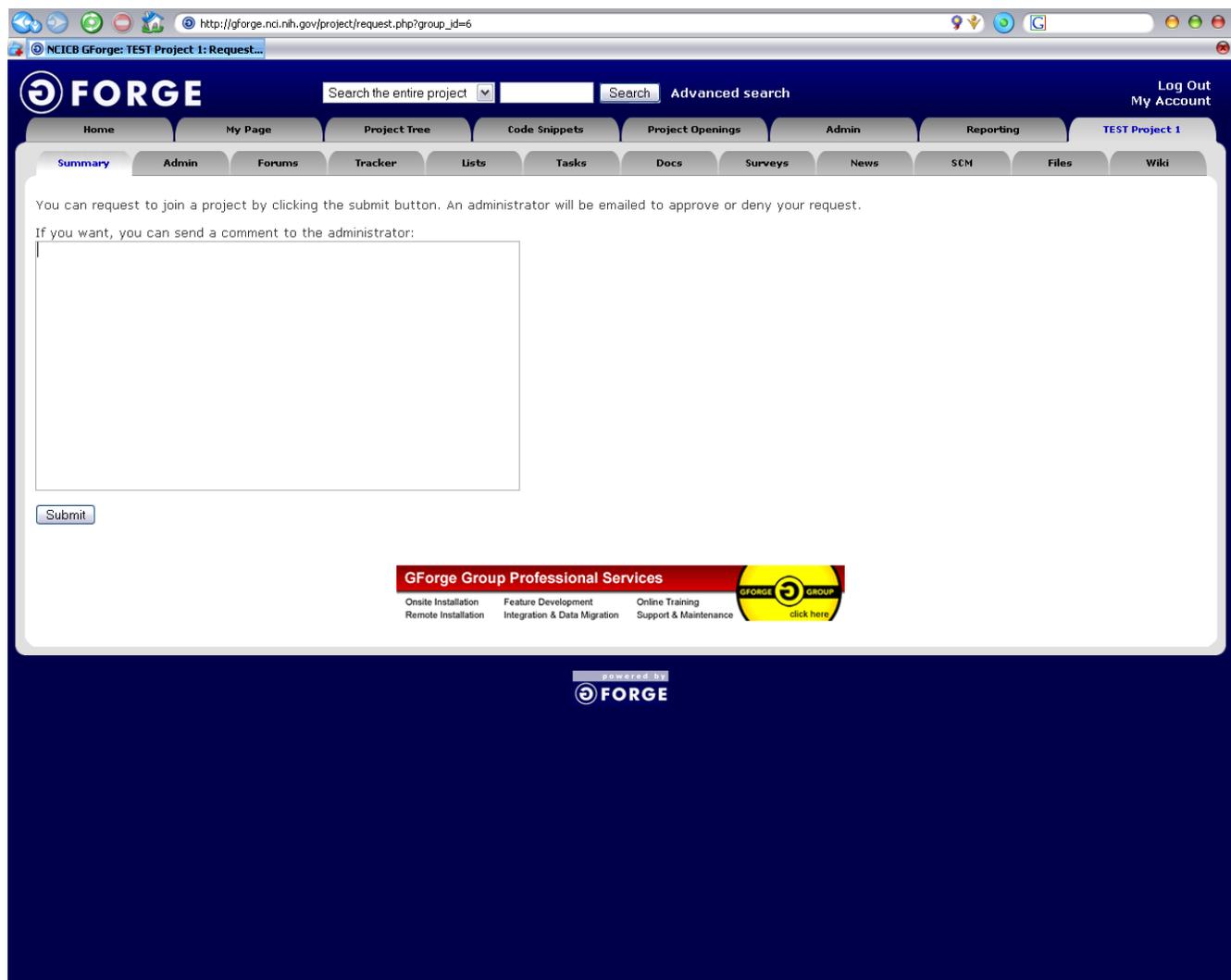


Illustration 5: Requesting to Join a Project

After clicking on the Request to join link, the user is taken to a form where she can enter additional comments justifying her request (see Requesting to Join a Project). These comments will be mailed to

the project administrator as part of the request.

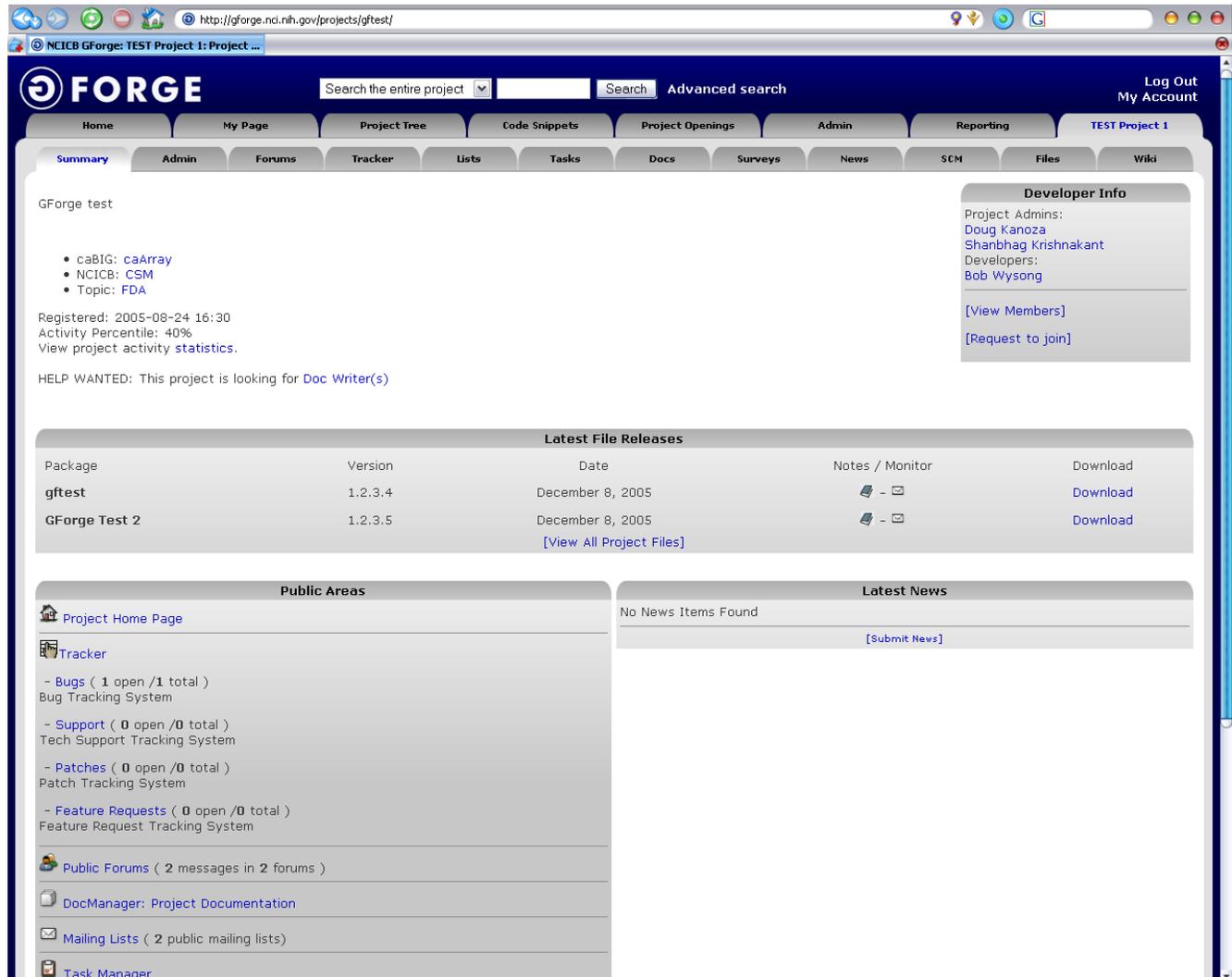


Illustration 6: Project Home Page

The Project Home Page

The project home page includes a number of useful sections. In the Developer Info section in the upper right is a list of all project developers with links to their personal pages. It also includes the Request to join link. The upper left section of the page provides links to view project statistics, and will also include a HELP WANTED section if the project manager has posted any jobs. Links here will take the user to the job description. The central part of the page includes quick links to the project's latest file release, and the lower part of the page includes links to the project's public areas and any project news items. These links are alternatives to the project tabs running across the top of the page.

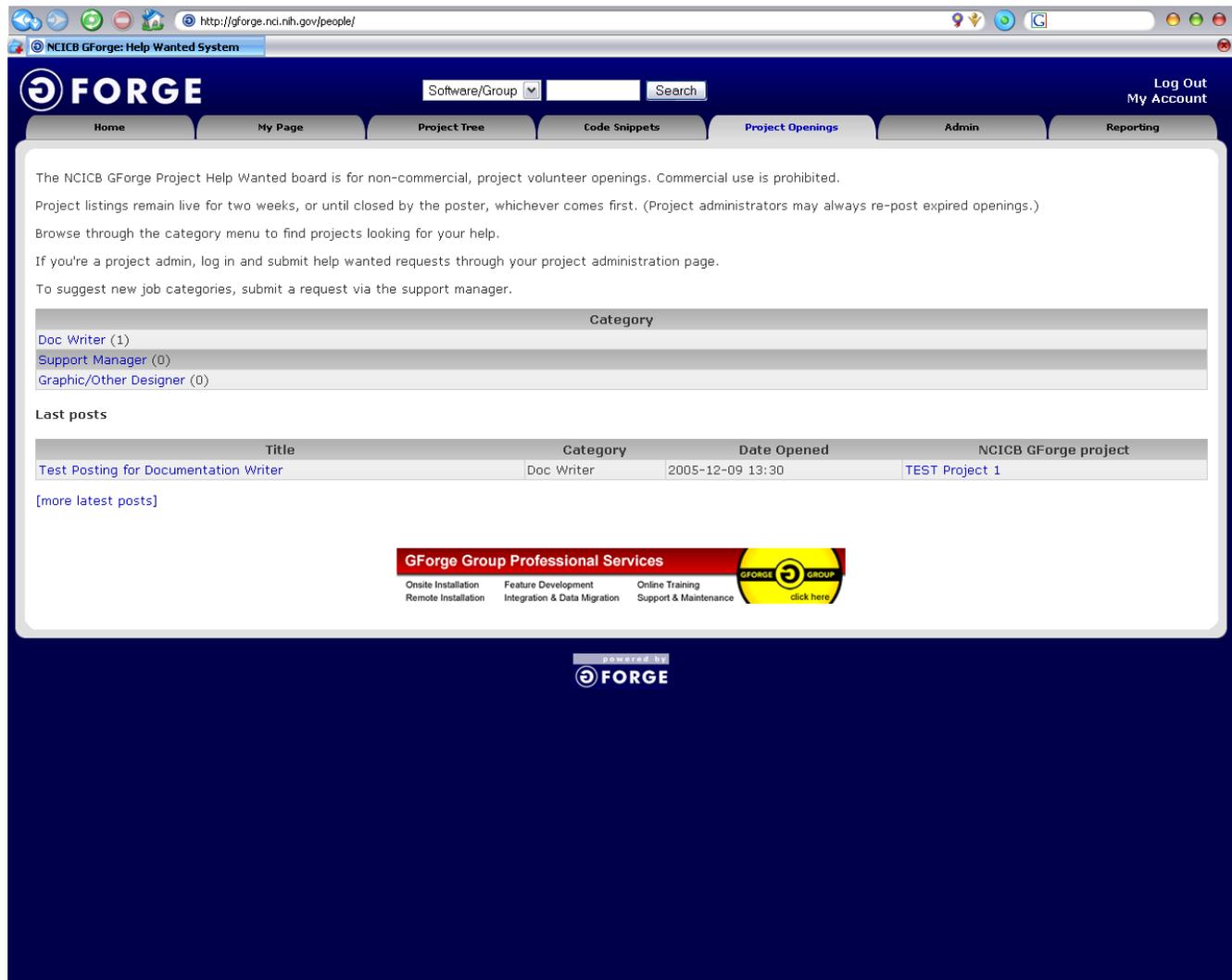


Illustration 7: Project Openings

Collaborate

Mailing Lists

Project managers can define as many mailing lists for their projects as they desire. The list's settings are customizable, allowing the project manager to require approval of all requests to join, require approval of postings, etc.

GForge mailing lists behave exactly as other mailing lists. GForge will create list archives automatically, and provides functionality to organize by Thread, Subject, Author, or Date, or to download all messages in a text file.

Forums

Project managers can define as many forums as they want for their projects. By default, forums are public, so they are readable to unregistered users, but do not allow anonymous postings.

The Forums tab will take you to a list of all the forums defined for the project. Clicking on the forum name will take you to the forum's home page. There are options on this page to allow the user to monitor/stop monitoring the forum or start a new thread. Additionally, the user may change how they view the page and the number of messages displayed at once (see Discussion Forum Home Page for a closer look).

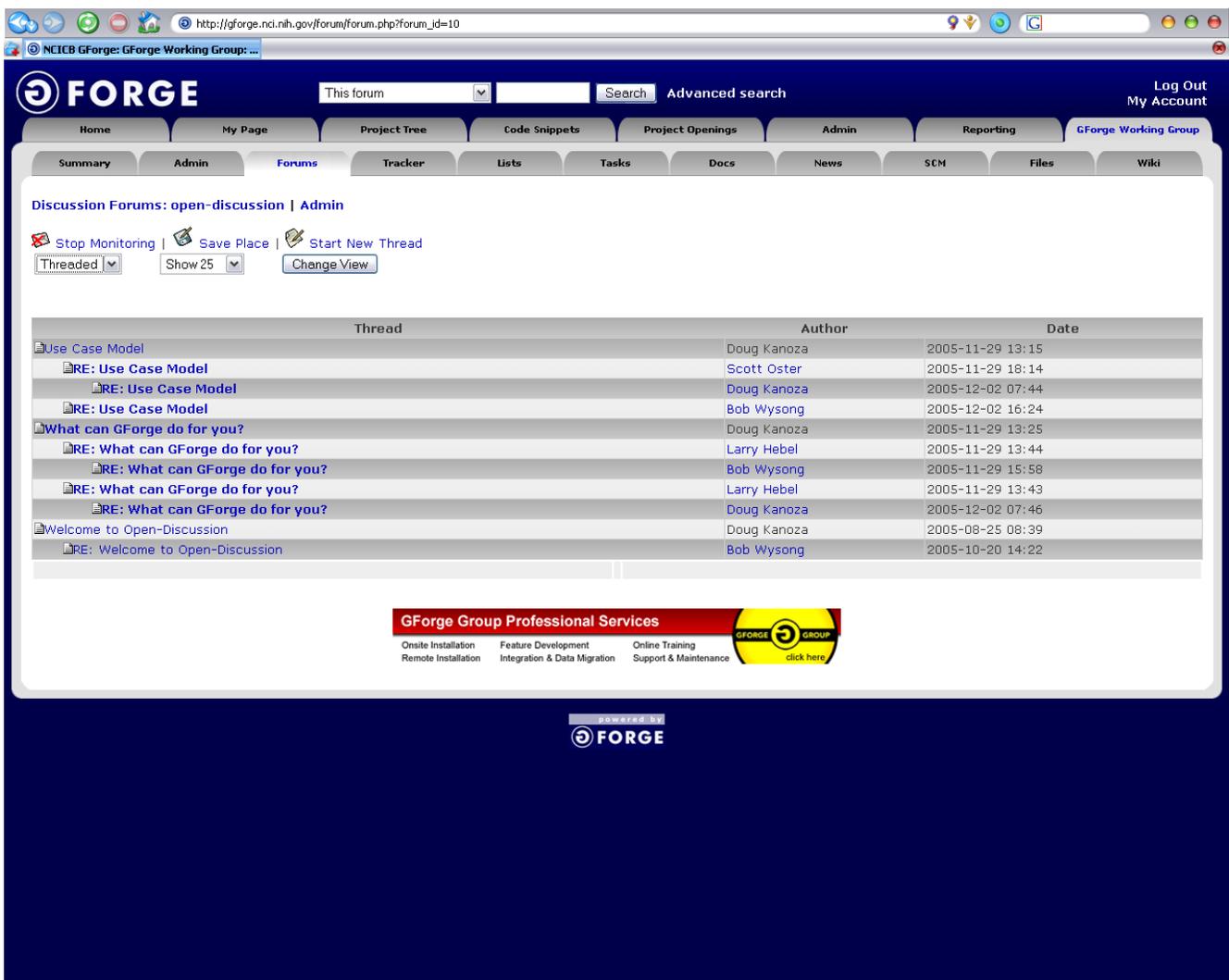


Illustration 8: Discussion Forum Home Page

Wiki

The NCICB GForge installation includes the wiki plugin, which is not part of the default installation. This plugin provides an additional tab – Wiki – for projects that choose to activate it (as with other project settings, this is available to project administrators only). The wiki plugin provides all the standard wiki functionality, and the default page provides links to resources describing how to use it, so it won't be covered here.

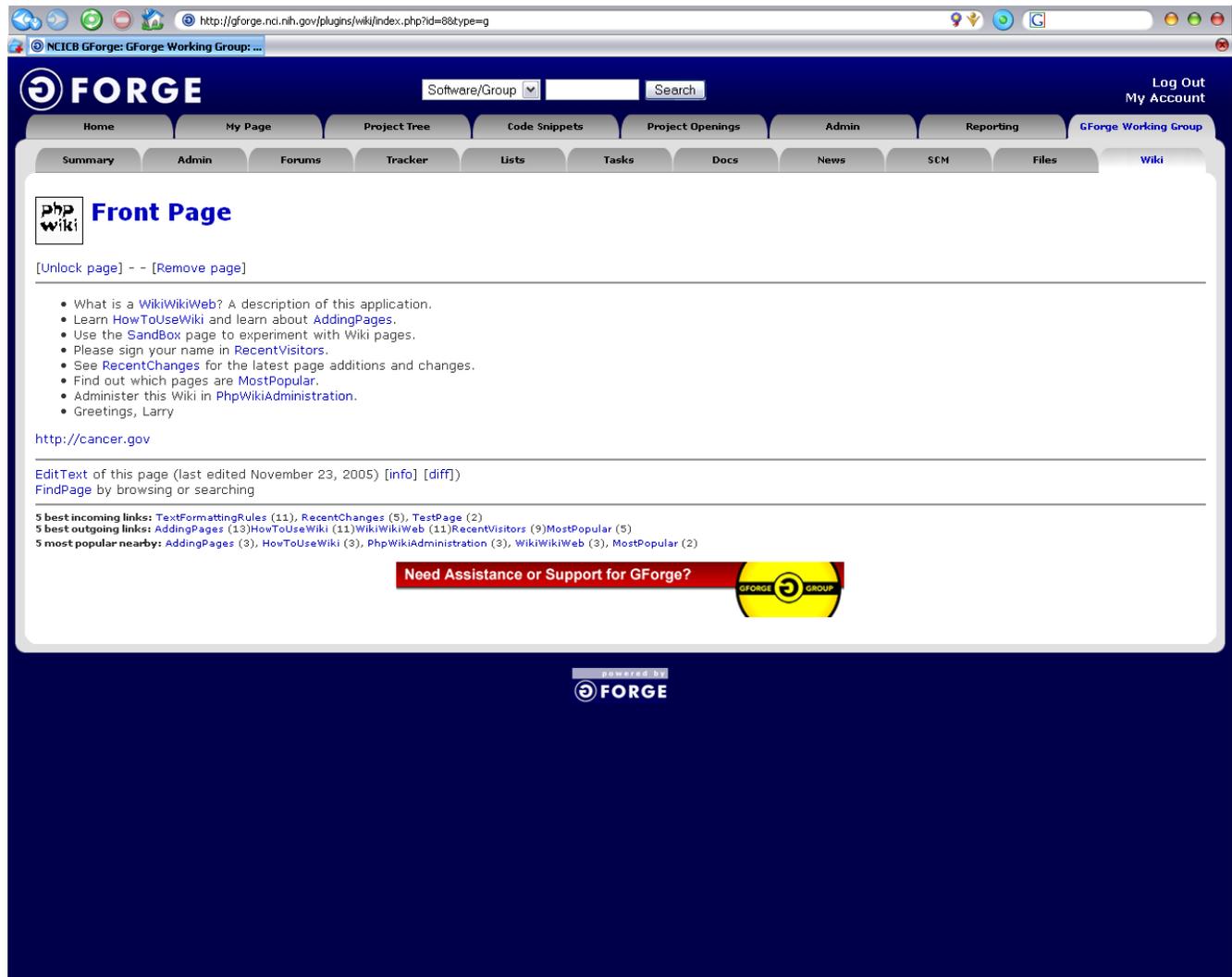


Illustration 9: Wiki Plugin

CVS

All projects that are configured to use CVS will automatically have repositories created for them. Project members, depending on their roles, will be granted write access. By default, GForge is

configured to allow anonymous access to CVS repositories. Project administrators may disable anonymous access, or the less secure pserver access, meaning that repositories will only be accessible via the CVS ext protocol, which relies on SSH. The repositories and account access settings are managed asynchronously by cron jobs, and so changes to a project member's privileges may not be immediately visible.

GForge manages repository permissions based on the member's role, but the project manager has other settings available to him. The SCM tab allows the project manager to change settings via the Admin link. It also provides a link that will allow visitors to browse the repository, and shows a brief history of repository adds and commits by developer. In addition, it is also possible to download a nightly snapshot of the repository, that is automatically created by GForge (see SCM Settings).

The screenshot shows the GForge web interface. At the top, there is a search bar and navigation tabs. The 'Admin' tab is selected, and the 'SCM' sub-tab is active. The main content area is titled 'Admin' and contains two sections: 'Anonymous CVS Access' and 'Developer CVS Access via SSH'. The 'Anonymous CVS Access' section provides instructions for checking out the repository via pserver, including the command: `cvs -d :pserver:anonymous@cbiocvs2.nci.nih.gov login` and `cvs -d :pserver:anonymous@cbiocvs2.nci.nih.gov checkout modulename`. The 'Developer CVS Access via SSH' section provides instructions for checking out the repository via SSH, including the command: `export CVS_RSH=ssh` and `cvs -d :ext:developername@cbiocvs2.nci.nih.gov checkout modulename`. A link to 'Download The Nightly CVS Tree Snapshot' is provided. On the right side, there is a 'Repository History' table with columns for Name, Adds, and Commits. The table shows one entry for 'Doug Kanoza' with 0 Adds and 2 Commits, and a 'Total' row with 0 Adds and 2 Commits. Below the table is a 'Browse the CVS Tree' section with a link to '[Browse CVS Repository]'. At the bottom, there is a 'GForge Group Professional Services' banner with links for Onsite Installation, Remote Installation, Feature Development, Integration & Data Migration, Online Training, and Support & Maintenance. The GForge logo is visible at the bottom center.

Illustration 10: SCM Settings

Upload Documents

Project members with the appropriate permissions may upload documents and assign them to one of the pre-defined categories created by the project manager. Depending on permissions, the document may be automatically visible, or may require project manager approval first. All document management features are available through the Docs tab (see Upload Documents for more details). The categories shown below have been customized, so may not reflect what you see within your projects.

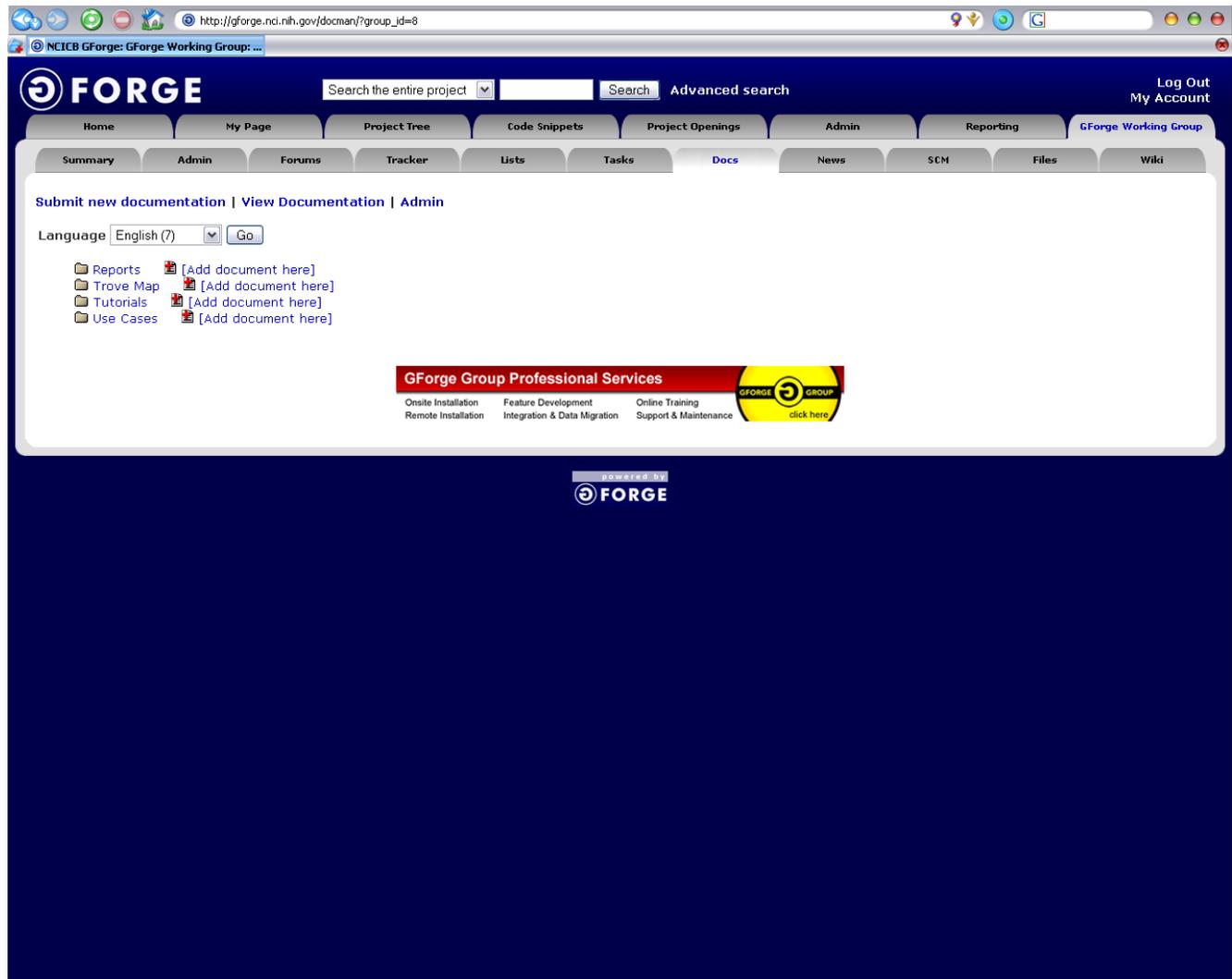


Illustration 11: Upload Documents

Review Documents

As noted above, all document management features are available through the Docs tab. Project documents are publicly visible. Document categories can be nested, so users will be able to browse

through the defined structure and download the documents they are interested in.

Tasks

Project tasks are visible on the Tasks tab (see Tasks Home Page). By default, GForge creates two task categories: To Do and Next Release, but the project manager can create as many categories (or subprojects as GForge calls them) as necessary. It is possible to move tasks between subprojects on the task description page.

Choose a Subproject and you can browse/edit/add tasks to it.

Subproject Name	Description	Open	Total
To Do	Things We Have To Do	9	15
Next Release	Items For Our Next Release	0	0

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Illustration 12: Tasks Home Page

The subproject task home page is accessed by clicking on the name in the Subproject Name field. The subproject task home page shows summary information about all currently open tasks, including task summary, start date, end date, and percent complete. The view is customizable via the selection boxes

at the top of the list. There are also features to add tasks, display all tasks in a GANTT chart, download or upload tasks in CSV format, as well as links to report and admin pages (see Subproject Home Page). At the bottom of the page are mass update functions.

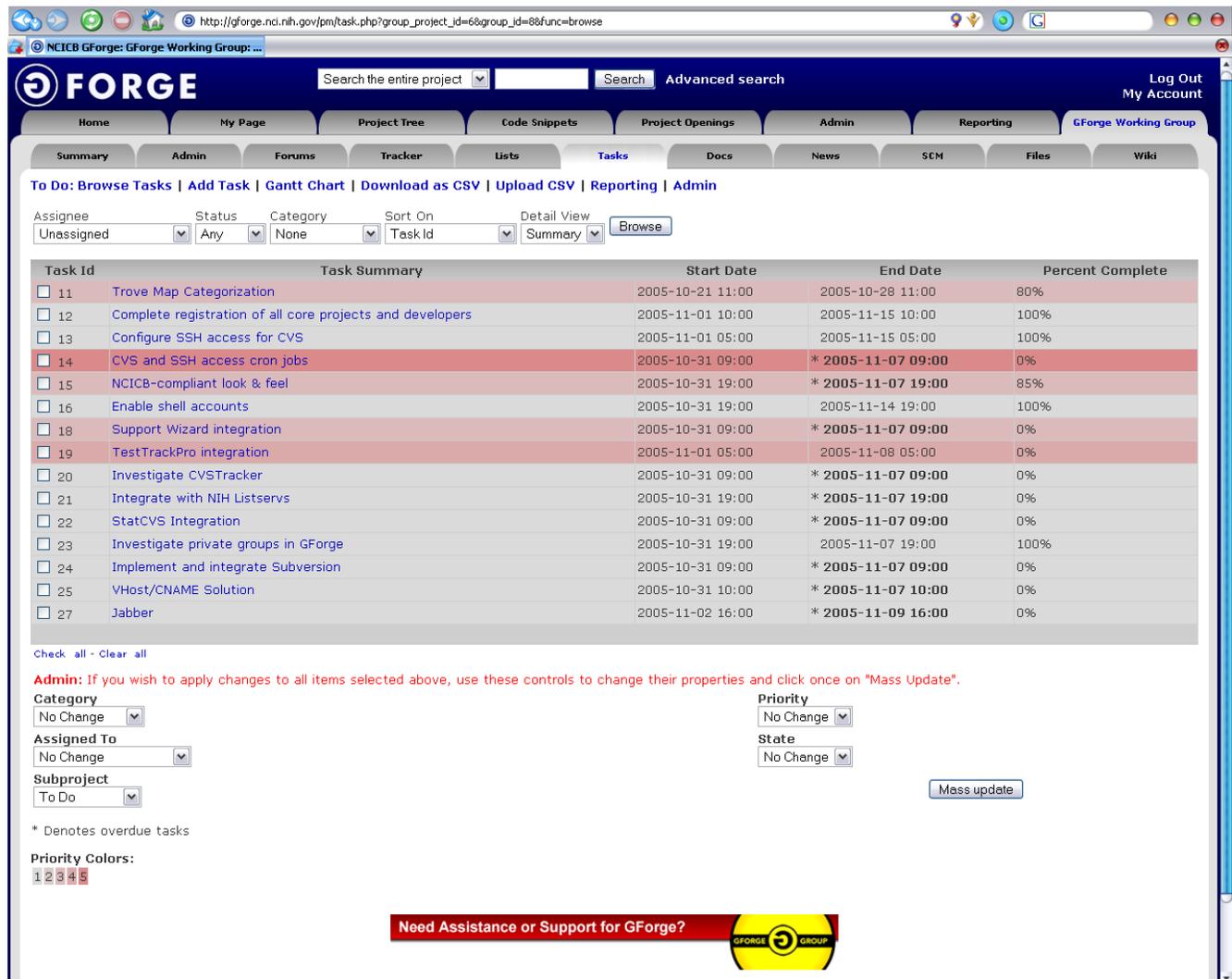


Illustration 13: Subproject Home Page

Trackers

GForge's bug tracking capabilities are modeled on those of Bugzilla (<http://www.bugzilla.org/>). It is possible to transfer defects directly from Bugzilla to GForge. By default, GForge provides four trackers: bugs, support, patches, and feature requests. As always, project managers can define as many additional trackers as they desire. The tracker tab provides a list of all trackers, with some summary information about how many open and total issues are in each (Tracker Main Page).

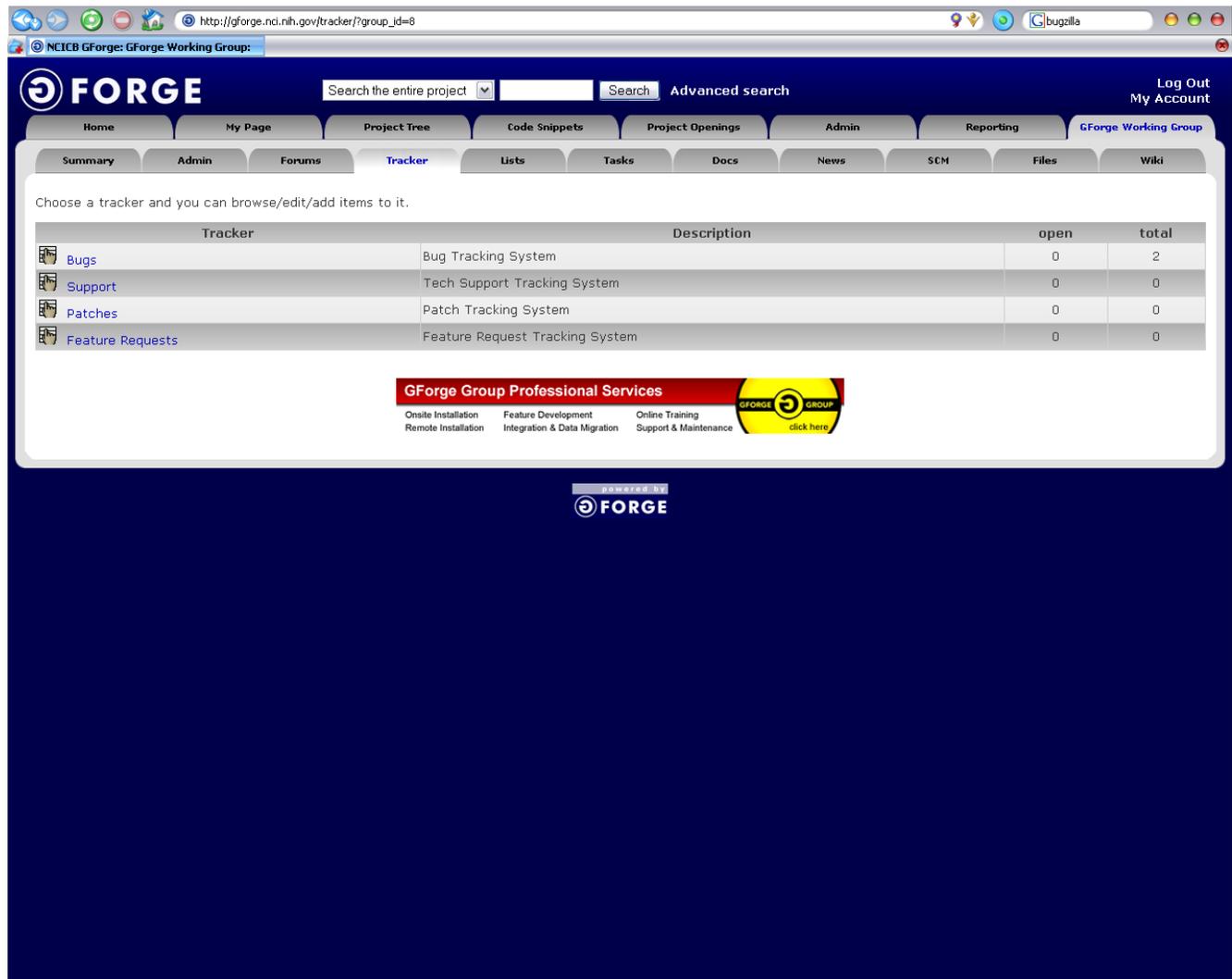


Illustration 14: Tracker Main Page

Clicking on the tracker name takes the user to the tracker main page, which shows summary information about the issues, including a summary, the date it was opened, the submitter, and the owner. By default, only project members are allowed to enter and modify tracker issues. All of the tracker fields are customizable (on a tracker level). The page also provides links to add new issues, download in CSV format, view reports, monitor a particular issue or an entire tracker, and administrative functions (see Browsing Bugs). As with Tasks above, the bottom of the page includes Mass Update functions.

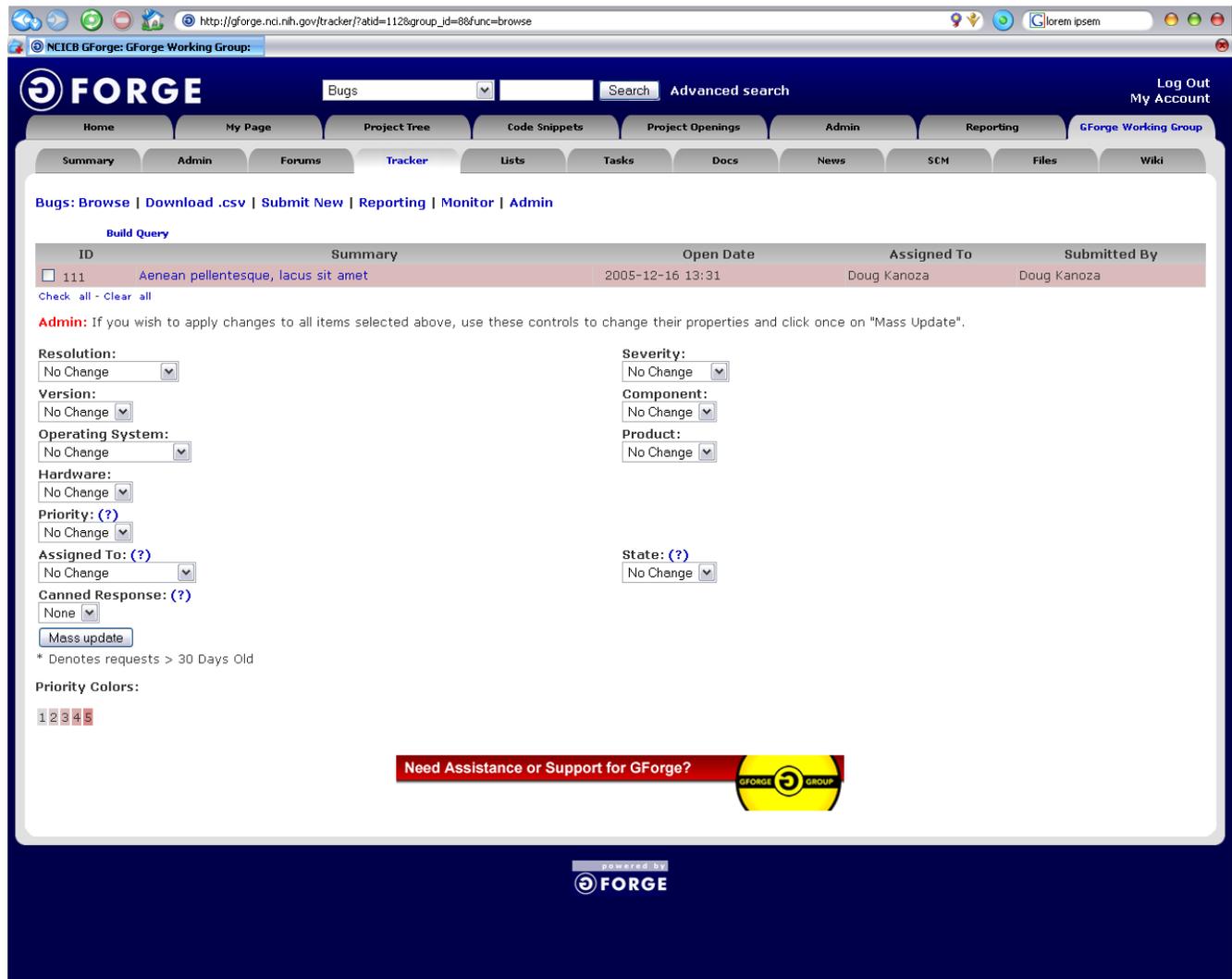


Illustration 15: Browsing Bugs

Trackers are completely customizable by clicking on the Admin link (which is by default available only to project administrators). From here it is possible to create a new tracker, update tracker settings, manage custom fields, clone the tracker (very helpful if you have heavily customized trackers; unfortunately, it's not possible to clone trackers between projects). It is also possible to delete trackers from here (see Tracker Administration).

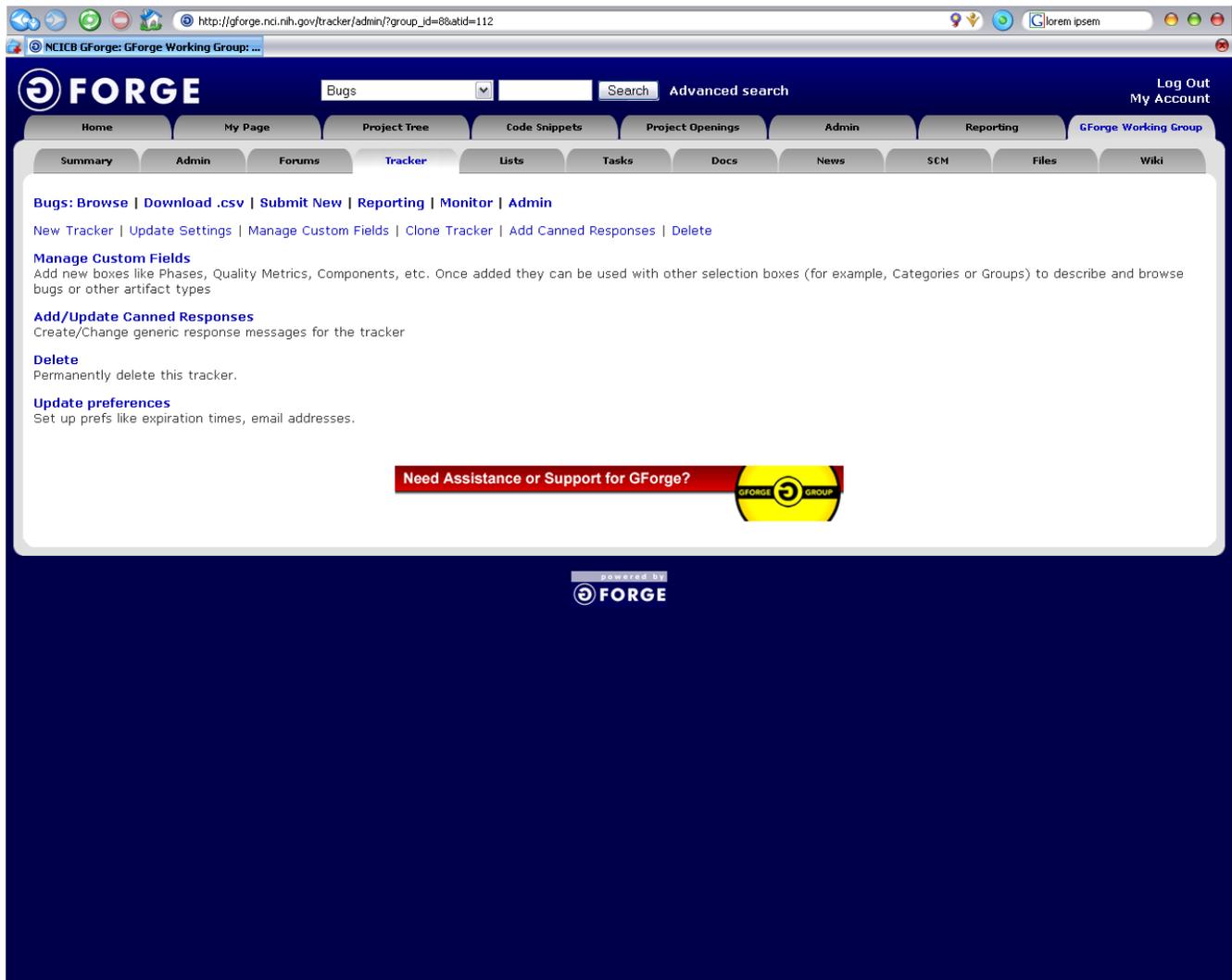


Illustration 16: Tracker Administration

Account Maintenance

Account maintenance functionality is available via a link on the My Page tab. Here the user may change his password, his theme (which controls the look and feel of the site), as well as his email preferences and personal information. There are links to view the developer's profile information, as well as to edit her skills profile, which is visible to browsers whenever they click on the user's name (for example, if they are browsing a project for which that user is a member). Note that users cannot delete their own accounts. This functionality is only available to site administrators. See Account Maintenance for more information.

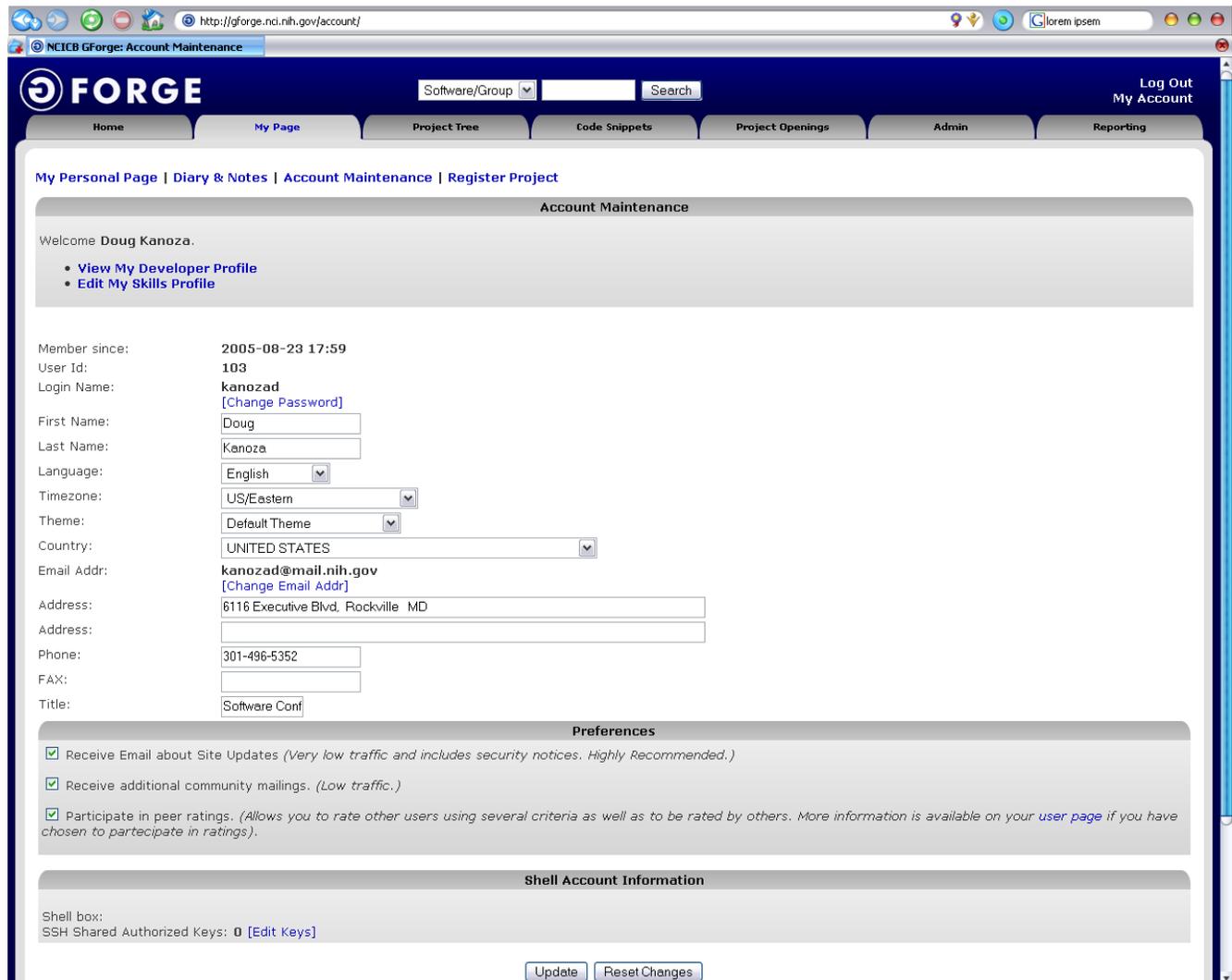


Illustration 17: Account Maintenance

Project Administration

Upload Files for Release

Project administrators can define new releases, and upload files as part of those releases. This suite of functionality is not to be confused with document upload discussed elsewhere. Releases correspond to version controlled software releases, and will generally include all the documentation and supporting materials for a particular release.

Administer Mailing Lists

This page is accessible to project administrators via the Admin link on the Lists tab. The project administrator can customize the settings for the project's mailing lists.

Administer Forums

This page is accessible to project administrators via the Admin link on the Forum tab. The project administrator can customize the forum's settings, including making them private if need be.

Administer Releases

The functionality to create new releases and packages is available to project administrators on the Files tab.

Define Document Categories

The functionality to define project categories is available to project administrators on the Docs tab.

Project Roles

Roles may be customized on the project's Admin tab. The project administrator can add or delete roles, modify a role's privileges, and modify to a degree the capabilities of the Observer role, which is the default role assigned to unregistered users.

Administer Tasks

As discussed above, project administrators can add new task subprojects, mass update existing tasks, etc. All of this functionality is available via the Admin link on the Tasks tab.

Administer Trackers

As discussed above, project administrators can add, modify, and delete trackers from the Admin link on the Tracker tab.

Trove Map

Project managers can categorize their project according to the site Trove Map, which itself can be customized only by Site Administrators. The trove map is a hierarchical categorization scheme. Projects can select up to 3 trove categories from each of the high-level categories.

Post Jobs

Project managers can post jobs to entice potential contributors to their projects. This functionality is available via the project's Admin tab.