Telelogic Synergy Help

Release 6.6a

Before using this information, be sure to read the general information under Appendix: Notices on page 344.

This edition applies to **VERSION** 6.6a, Telelogic Synergy and to all subsequent releases and modifications until otherwise indicated in new editions.

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Create a working environment

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Copy an object

Copying an object is a simple way to create a new object using the previous information as a guide. Use this procedure to create any of the following objects:

- folder (page 338)
- folder template (page 338)
- process (page 339)
- project (page 340)
- release (page 340)
- task (page 341)

All users can copy a folder, project, or task; only build managers can copy a folder template, process, or release.

Steps...

If you need to find a process, project, folder, folder template, release, or task, see Find an object (page 141).

1. Right-click over the object you want to copy, and select **Copy** *object*.

   The appropriate **Copy** dialog box appears.

2. Set the properties for the new object.

   See the following topics for details about properties:

   - Modify the properties of a folder (page 109)
   - Modify the properties of a project (page 111)
   - Modify the properties of a task (page 115)

     The **Associate object from task** *number* check box is only available from the **Copy Task** dialog box. This option is selected by default and will associate all objects from the copied task to the new task. This is useful if you are copying a task to use for parallel releases.

     > **Note** If you created this task to fix a bad task, you'll need to create a relationship between this (fix) task and the bad task. See Specify one task to fix another (page 90) for details.

   - Define a query (page 148)

3. Click **OK**.

Related Topics

- Copy a project to the file system (page 17)

- Create a project (page 13)
- Define a query (page 148)
- Modify the properties of a file or directory (page 108)
- Query for predefined versions of objects (page 174)
- Refresh choices during a session (page 229)
- Update a project (page 22)
- Use a different baseline (page 53)
- View the history of an object or release (page 143)

Create a project

Use the following procedure to create a project. Additionally, you can Copy a project (page 14) to create a project or Create a file, directory, or subproject (page 63) to create a subproject.

> **Note** You must have your current task set. See Select a task (page 75) for more information.

Note that if you want a copy of a project's files in the file system, you can Copy a project to the file system (page 17). This enables you to have a copy of the files from a project without having your own version of the project.

Steps...

1. Create a project.
   - Click the **Task** menu, point to **New**, and choose **Project**.

     If you need to find a directory, see Find an object (page 141).

   OR

   - Right-click over the appropriate project grouping, and choose **Create Project**.
2. Type a descriptive name.
3. Select a release and purpose, then click **OK**.

   A project's purpose defines what it is used for, for example, **Insulated Development**, **Integration Testing**, or **System Testing**. When you set your project's purpose, Telelogic Synergy uses specific selection criteria when you update the project or project grouping.

Related Topics

- Add to a directory (page 69)
- Delete an object (page 66)
- Edit a file (page 64)
- Refresh choices during a session (page 229)
- Rename a file in a project (page 70)
- Select a task (page 75)

Copy a project

Copying a project is a simple way to create a new project using the previous information as a guide.

Note that if you just want to view the contents of a project without making any changes to files, you can Copy a project to the file system (page 17), which enables you to view the project and its members without checking out a version.

Steps...

1. Right-click over the project you want to copy, and select **Copy Project**.

   The **Copy Project** dialog box appears.
2. Use the original project's release value or set a new one in the **For Release** box.
3. Set the purpose for the new project in the **For Purpose** box.

   A project's purpose defines what it is used for, for example, **Insulated Development**, **Integration Testing**, or **System Testing**. When you change your project's purpose, Telelogic® Synergy™ uses different selection criteria when you update the project or project grouping.
4. If there are subprojects, you can choose to copy only the subprojects for the release, subsystem, all subprojects, or no subprojects.

   If you want to set which subproject is copied, click .

   The **Copy Project** dialog box expands to display each subproject in the project you're copying, each subproject associated with the baseline, and each subproject associated with the project grouping. Select or clear the **Copy** check box to choose which subprojects Telelogic Synergy will copy.

   If you copy a subproject from the context of its parent project, the new subproject will be a member in the parent project only if its release and purpose match that of the parent project.
5. Use the default version or type a new version.

   A version is a specific variation of a project.
6. Use the work area path used by the project you're copying or set a new path by typing it in or clicking the browse button.
7. By default, Telelogic Synergy updates all new projects after it copies the projects. If you don't want the new projects to be updated, clear the **Update new projects** check box.
8. Click **OK**.

Related Topics

- Create a project (page 13)

- Create a project member (page 16)
- Copy a project to the file system (page 17)
- Copy an object (page 11)

Create a project member

Use the following procedure to add a new file, directory, or subproject to a project. Telelogic Synergy associates the new member with the current task.

> **Note** You must have your current task set. See Select a task (page 75) for more information.

Steps...

If you need to find a file, directory, or project, see Find an object (page 141).

- Right-click over the directory in which you want the new object to be a member and point to **Create Member**.

  To add a file, choose **File**. The **Create File** dialog appears. Enter the name of the new file and click **OK**.

  To add a directory, choose **Directory**. The **Create Directory** dialog appears. Enter the name of the new directory and click **OK**.

  To add a subproject, choose **Subproject**. The **Create Subproject** dialog appears. Enter the name of the new subproject and click **OK**.

Related Topics

- Select a task (page 75)

Copy a project to the file system

Use this procedure to create a copy of a project's files in the file system.

The project is only a copy and is independent from any other work area. You cannot maintain or sync it after it is copied to the file system.

Steps...

If you need to find a project, see Find an object (page 141).

1. Right-click over the checked-in project you want to copy, and point to **Copy to File System**. You can copy **Members Only** or **Members and Subprojects**.

   The **Copy** dialog box appears.

2. Select the directory where you want the copy to reside.

   If the specified directory contains a file or subdirectory with the same name as the project's name, an error message appears.

3. Click **Copy**.

Related Topics

- Check in (page 61)
- Create a project (page 13)
- Update a project (page 22)

Modify a project-specific directory template

If you change the default path, ensure that the work area (page 342) paths are unique; that is, two work areas should not default to the same path. For example, if you have a project (page 340) named **toolkit** for both release 2.1 and 3.0, and you don't have a project-specific work area path set, both projects would default to the same path. (Note that the default setting ensures that work area paths are unique.)

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **Actions** tab, then click **Copy Project** in the left pane.
3. Modify the project-specific directory template.
   a. Indicate whether or not you want a project-specific directory to be used as part of your work area path.

      The project-specific directory tells Telelogic Synergy to add the name of the project to the end of the base directory.

      Note that if you cancel the setting, the project-specific directory name no longer displays in the **Example path using above settings** box.

   b. Change the keywords used to further describe your project-specific directory.

      You can use keywords to describe the format of the path. When you check out a project or change its work area path, the values appropriate to the project replace the keywords. For example, a directory template containing the keyword **%release** is replaced with the project's release value (for example, **2.0**).

      The directory template can contain multiple keywords, and can map to a directory tree (that is, a directory with subdirectories), rather than just a directory name.
4. To return to the default settings after making changes, click **Use Defaults**.

Related Topics

- Stop automatic addition of required tasks (page 102)
- Set the default work area path (page 19)

Set the default work area path

The following procedure shows you how to set the default path where all work area (page 342)s for new and copied project (page 340)s appear.

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **Actions** tab, then click **Copy Project** in the left pane.

   If you clicked **Change Default Path** in the **Properties** dialog box, the **Options** dialog box appears with the **Actions** tab, **Copy Project** option in view.
3. Set the default path.
   a. Change the base directory.

      You can change the base directory to the path you want.

      Note that as you change the base directory, it displays in the **Example path using above settings** box.

   b. Indicate whether or not you want the name of the database in the work area path.

      The database name is useful if you work in more than one database.
4. To return to the default settings after making changes, click **Use Defaults**.
5. Click **Apply**.

Related Topics

- Stop automatic addition of required tasks (page 102)
- Change update options (page 42)
- Ignore files by pattern (page 43)
- Modify a project-specific directory template (page 18)
- Modify the settings in a work area (page 117)

Update projects

- Update a project (page 22)
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- Change the update properties for a project (page 45)

Update a project

Perform this operation to use the most recent versions of files, directories, or projects from other developers. Your work area is insulated from other users' changes until you decide you're ready to update your project.

Steps...

- Right-click over the appropriate project, and point to **Update**.

  If you are updating a project, choose **Members Only** or **Members and Subprojects**.

  If you are updating a projects from a project grouping, choose **All Projects** or **All Projects and Subprojects**.

Related Topics

- Keep the baseline and tasks from changing during an update (page 51)
- Update the baseline and tasks (page 50)
- Reverse an update (page 23)
- Use a different version of a file (page 24)

Reverse an update

Use this operation to cancel changes made by a previous update to a selected project or directory. This operation restores the members that were in the project before it was last updated. Note that you can only restore projects and directories that you updated during the current Telelogic Synergy session.

Steps...

- Right-click over the project that you updated, point to **Update** and select **Undo**.

Related Topics

- Update a project (page 22)
- Use a different version of a file (page 24)

Use a different version of a file

Use the following procedure to use a different version of a file in the **Work** pane.

Steps...

If you need to find a version of a file, see Find an object (page 141).

1. Right-click over the appropriate file, and select **Use Version**.

   The **Use Version** dialog box appears.
2. Select a file version to use or click **Recommend** to use the recommended version.
3. Click **OK**.

Related Topics

- Update a project (page 22)
- Reverse an update (page 23)
- Use the recommended version of an object (page 25)

Use the recommended version of an object

Use the following procedure to use the object version selected by Telelogic Synergy.

Steps...

If you need to find a file, see Find an object (page 141).

- In the **Work** pane, right-click over the appropriate file, directory, or subproject, and select **Use Recommended Version**.

  You'll typically use this operation after you've performed a manual **Use Version** operation to use a different version.

Related Topics

- Update a project (page 22)
- Reverse an update (page 23)
- Use a different version of a file (page 24)

Resolve membership conflicts in a project or project grouping

Membership conflicts occur when the project membership doesn't match the baseline and task settings on the project grouping. This causes incorrect task and object relationships, such as parallel changes, missing changes, or extra changes. (Missing changes are changes you have asked for, but don't have because the objects aren't members in the project[s] even though the task is in the project grouping. Extra changes are changes you didn't ask for but have because the task isn't in the project grouping even though the objects are members in the project[s].)

To solve these problems, you'll need to do one or more of the following:

- Find and compare parallels, and then, if appropriate, merge them.
- Find and include changes that you requested, but that aren't in your project.
- Find and exclude changes that you didn't request, but that are in your project.

The **Membership Conflicts** dialog box enables you to check for conflicts between your project's members and its project's update properties (page 340). Normally, you'll perform this procedure after an update to see where conflicts exist. The best time to view membership conflicts is immediately after an update because the project members are up-to-date with your project's update properties at that time.

Conflict Message Definitions

The tables below, and the explanation of conflict detection that follows the tables, use the following definitions:

- "conflict" is defined as one of the following situations:

  An object associated with a task not specified to be in your project was included.

  An object associated with a task that was specified to be in your project was not included.

  An object's task relationships are not as expected (i.e., no task or multiple tasks were associated with the object).
- "explicit" means "directly requested," that is, included in your project's update properties (page 340).
- "implicit" means "indirectly depended upon or partially included," that is, not included in your project's update properties.

Conflict Message	Conflicts Shown by Default?	Description
Conflict Category: Extra Changes		
No task	yes	The object version is included implicitly in this project, but not associated with any task. (It cannot be included explicitly because this would require its task to be included in the project's update properties (page 340).)
Implicitly included	yes	The object version is not explicitly specified, but it is included in the project. The task is implicitly included in the project.
Included by "use" operation?	yes	The object version is not explicitly specified, not implicitly required, and update would not have selected it.
Implicit task from explicit object	yes	The task's associated object has multiple assigned tasks. At least one of the object's associated tasks is explicit (that is, included in the project's update properties (page 340)), but this task is not.
Conflict Category: Missing Change		
Explicitly specified but not included	yes	The task is explicitly specified by the project, but is not included.
Explicitly specified but not included - newer	yes	The object version is explicitly specified on the project, but is a successor of the currently selected version of that object. The task is explicitly specified by the project, but is not included.
Implicitly required but not included	yes	The task is implicitly required, but not included in the project.
Implicitly required but not included - newer	yes	The object version is implicitly required, but is not included in the project. It is a successor of the current selected object version.

Conflict Message	Conflicts Shown by Default?	Description
Implicitly required by multiple tasks - newer	yes	The object version is implicitly required because it was associated with a task that was implicitly included because another object in the project was associated with multiple tasks. The object version in conflict is not included in the project, and is a successor of the object version currently in the project.
Conflict Category: Other		
Multiple Tasks	no	The object version is included in this project, and is associated with multiple tasks.
Implicitly required but before baseline	no	The object version is implicitly required, but it is a predecessor of the baseline. (This is not really a conflict because it is implicitly included, but it might indicate a process problem.)
Explicitly specified but before baseline	no	The object version is explicitly specified on the project, but is a predecessor of the baseline. (This is not really a conflict, since it is implicitly included, but it might indicate a process problem.)
Explicitly specified but object not in project	no	The object version is explicitly specified on the project, but no versions of it are in the project. This is probably normal, since the same project's update properties (page 340) are shared across entire project hierarchies.
Implicitly required but object not in project	no	The object version is implicitly required through a task included in the project, but no versions of it are in the project. This is probably normal, since the same project's update properties are shared across entire project hierarchies.
Conflict Category: Parallel Changes		
Implicitly required but not included - parallel	yes	The object version is implicitly required but not included in the project. It is parallel to the currently selected version, and may require a merge.

Conflict Message	Conflicts Shown by Default?	Description
Implicitly required by multiple tasks - parallel	yes	The object version is implicitly required because it is associated with a task that was implicitly included because another object in the project was associated with multiple tasks. The object version in conflict is not included in the project, and is parallel to the object version currently in the project.
Explicitly specified but not included - parallel	yes	The object version is explicitly specified on the project, but is not included in the project. It is parallel to the current version, and may require a merge.
Conflict Category: Bad Task		
Excluded task explicitly included	yes	An excluded task is included in the project's project grouping.
Excluded task implicitly included	yes	An excluded task is implicitly included in the project's project grouping.
Completed fix task not included	yes	A bad task is included in the project's project grouping, but its completed good task is not included.
Assigned fix task not included	no	A bad task is included in the project's project grouping, but its *task_assigned* good task is not included.
Task fixed by task not included	yes	A bad task is not included in the project's project grouping, but the good task is included.

Task and object relationships

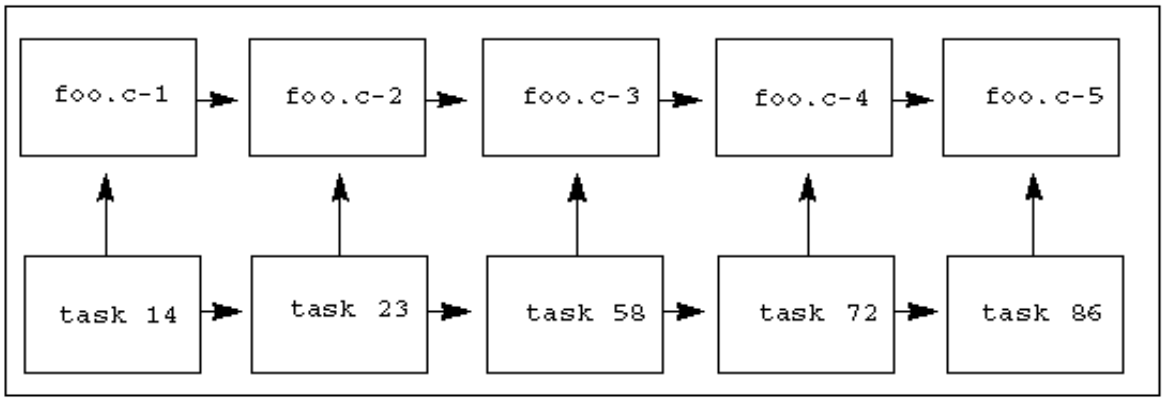
A task and a set of object versions can have a relationship. In Telelogic Synergy, you can associate a set of object versions with a task, which tells Telelogic Synergy that those object versions should be used together and that they depend on each others' changes. If your project includes only part of the changes associated with a task, your project probably will fail to build, or even worse, will fail to run correctly.

For example, if you change a function signature, you must update every other program that calls the function to have the signature change. You must include all of those changes together in the project, or you should not include any of the changes.

Object history relationships

Tasks have a history relationship, but it is different from an object's history relationship. An object's history usually is numerically consecutive. A task's history is a conceptual relationship only, based on its associated files' history relationship. Because a task groups files necessary to complete a change, the task's history relationship causes a current set of changes to depend on the previous set of changes.

The following figure shows a version history for one object and each task associated with the object throughout the object's history.



The **foo.c** object has five versions. Each version is associated with a different task. (The task number associated with each version is shown below the object version.)

Telelogic Synergy considers that a change to an object version contains the changes to all of its predecessor object versions. Therefore, in the example shown above, version 3 is considered to contain the changes from versions 2 and 1.

For example, if you changed the signature of a function in version 2, then version 3, version 4, and every version after that would include that signature change. The changes are layered on top of each other. Even a change that removes a part of another change is layered on top of its history versions. However, the change in **foo.c-3** applies only to **foo.c-2**, since the change was made to that version.

Task dependencies

Furthermore, because version 3 contains the changes from versions 1 and 2, version 3's associated tasks are considered to depend on the tasks associated with versions 1 and 2. So in this example, task 58 depends on tasks 23 and 14.

Explicitly specified update properties

Consider the project **myproj-sue**, which contains **foo.c-4**.

If a task is in project's project grouping, the project has **specified explicitly** that it should include the objects associated with that task. For example, if the **myproj-sue** project's update properties (page 340) include tasks 72 and 23, then it has specified explicitly that it should include the object versions associated with tasks 72 and 23. In the previous figure, if the project has specified explicitly tasks 72 and 23, then it also has specified explicitly object versions **foo.c-4** and **foo.c-2**.

Remember that **foo.c-4** contains the changes from **foo.c-2**, and task 72 depends on task 23.

When you update a project, its explicitly specified object versions are its candidates. Update will select the most appropriate candidate, usually the newest. So in this example, **myproj-sue** would use tasks 72 and 23 to determine the candidate list: **foo.c-4** and **foo.c-2**. It would pick **foo.c-4** as the newest candidate. Therefore, the project would include both the changes from **foo.c-4** and **foo.c-2**. Likewise, it would contain the changes from both task 72 and task 23.

Implicitly specified update properties

Because the **myproj-sue** project contains **foo.c-4**, it contains task 72, which its project's update properties (page 340) explicitly specified. It also depends on **foo.c-3**, since **foo.c-3** is a predecessor of **foo.c-4**. It also depends on the task that is associated with **foo.c-3**: task 58.

However, if task 58 (and therefore, **foo.c-3**) is not explicitly specified in **myproj-sue**'s project's update properties, but the change is included anyway through its history relationship, then both the task and the object version are **specified implicitly** in the project. Note that objects associated with an implicitly specified task are not included in the project automatically.

Conflicts

Suppose that you are preparing to release your project. You specify that the release should contain tasks 72 and 23, but you do not specify task 58. After your build, you might be surprised to find that task 58 was included in the application you were preparing. Telelogic Synergy can warn you that a task you did not request will be included. This is called a *conflict*.

There are many different types of conflicts. If you had manually used **foo.c-5** in the project, but the project's update properties (page 340) didn't explicitly specify task 86, and no other tasks that you had explicitly specified depended on task 86, that would be another type of conflict. Telelogic Synergy can warn you that it appears that an object version has been used in your project, rather than its task being explicitly specified.

Some conflicts are more serious than others.

For example, your team might decide that they will not fix more than one bug in a single version of a file because then it is too difficult to tell which changes fixed which bug. Further, your team decides that each developer should associate only one task with each object version he changes. If an object version in the release you are preparing is associated with more than one task, you need to know so that you can remind the developer that this is not a

good idea. However, it is not a severe conflict, since the software you are preparing for the release contains all the changes it needs.

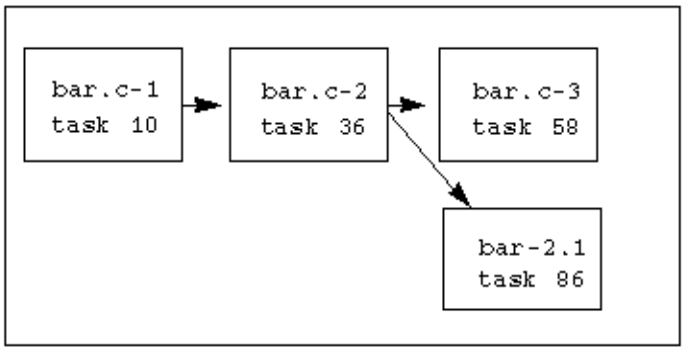
A more serious conflict is an implicitly included object version that is not associated with **any** task.

Telelogic Synergy can warn you about both types of conflicts.

Parallel conflicts

One of the most important types of conflict detection is detecting parallel object versions.

If your project has explicitly specified a change and it is not included, that is a serious conflict. For example, consider a situation where two parallel objects are associated with two different tasks, and both tasks are explicitly specified. In this example, assume that **myproj-sue** contains **bar.c-3**. The **bar.c** object has the history relationships and task associations shown in the following figure.



The **myproj-sue** project's update properties (page 340) specify that tasks 58 and 86 should be included. But your project includes only **bar.c-3**, which is associated with task 58. It is impossible for it also to include **bar.c-2.1**, which is associated with task 86, because that is a parallel branch. There is no one version of **bar.c** that contains both changes you have requested. This is a severe conflict, since an object version that you know should be included in your project is not there.

Parallel conflicts can mean missing changes, but there are other types of missing changes as well.

Missing changes

Consider what would happen if you manually included **bar.c-2.1** in the **myproj-sue** project. Changes for both tasks 58 and 86 would be missing, even though they were explicitly specified, because they are newer than the version of the object currently in the project.

This change is explicitly specified, but missing. You might notice that it is missing if you looked at the tasks included in the project's update properties (page 340) to see that they were included in your project. Other types of conflicts are even more difficult to detect.

Let's say we refreshed the project's update properties on **myproj-sue** to include tasks 86 and 36, rather than tasks 86 and 58. Now task 58 is no longer explicitly specified. Task 86 is associated with **foo.c-5**, and its predecessor is **foo.c-4**, which is associated with task 72. So task 86 implicitly includes task 72. If your project includes **foo.c-5**, it includes both changes, and everything is fine. But what about **bar.c**? **bar.c-2.1** is specified explicitly because it is associated with task 86, and **bar.c-3** is specified implicitly because it is associated with task 58 (which is implicitly included in your project). Therefore, once again there is no version of **bar.c** that contains all of the changes that your project requested.

Large-scale conflict detection

Now let's consider a project with hundreds of object members, each of which has many versions in its history, and a release that comprises hundreds of tasks. No matter how careful your team is, the bigger your project, the greater the opportunity for errors, for example, those due to parallel development (forgotten merges) or human error (forgotten object/task association). The solution is to find out about the errors and correct them **before** you build. Telelogic Synergy can detect conflicts on a large-scale project so that your team can resolve issues before they become problems (i.e., hold up the build).

Telelogic Synergy uses its knowledge of all of the history relationships and task relationships to detect these conflicts for you. In all, it can detect 24 different conflicts, and most are shown by default. The others are not severe, and they are not shown by default because seeing extra conflicts makes it more difficult to concentrate on the conflicts that really affect your software's integrity. However, if you want to change the conflicts that are shown by default, your CM administrator can do so by changing the **conflict_parameters** model attribute.

Telelogic Synergy analyzes a project to determine whether it has any conflicts, then displays the conflicts.

Depending on the size and characteristics of your project, conflict detection can be time-consuming, so only you will know the best time to show conflicts. Build managers should show conflicts after every update of a build management project. Developers may not want to show conflicts unless they suspect that their projects contain parallel versions or other conflicts that are causing problems.

Steps...

If you need to find a project, see Find an object (page 141).

1. Right-click over the project or project grouping whose conflicts you want to view, point to **Detect Membership Conflicts**, and select **Project Only** or **Project and Subprojects**, whichever is appropriate.

   The **Membership Conflicts** dialog box appears if conflicts are detected.

   Each conflict is in a category and contains a specific conflict message to help you determine the cause of the problem. See Conflict Message Definitions (page 26) for a description of each conflict.

2. Resolve conflicts.

Determine the appropriate resolution for each conflict.

To choose a resolution, do one of the following:

- Right-click over the conflict and choose the appropriate resolution.

OR

- Select a conflict and choose one of the active icons representing an appropriate resolution in the toolbar.

Telelogic Synergy narrows your choices for resolving conflicts. When you select a conflict to resolve, only the resolution(s) that make sense for the selected conflict will be available. For example, if you have an object conflict with an associated task in the **Extra Changes** category, you'll have the option of either using the recommended version or adding the task to the project grouping. Other resolutions exist, but only these are appropriate for the selected conflict.

Note that you can select more than one conflict, but you'll see only the actions that are available for all of the selections. In some cases, no actions will resolve all of the conflicts selected, and then you'll need to deal with each conflict individually.

Another way that Telelogic Synergy reduces the number of conflicts automatically is by only showing conflicts once per project grouping, even if the same conflicts are detected for multiple projects in the hierarchy.

If you have several conflicts in the **Missing Changes** or **Extra Changes** categories, you can use the **Use Recommended Version** option for all of these conflicts by clicking . This causes the object version that would be brought in if you performed an update on the project to be used. It might be safer to use this feature instead of performing an update until you've resolved all conflicts and are ready to update all members of the hierarchy and run conflict detection again.

If you have conflicts in the **Bad Tasks** category, you can use one of the following resolutions to resolve them. For a **Task fixed by task not included** conflict, the fix task is part of the update properties (page 342), but the task it fixes is not. Choose the **Add Bad Task to Project Grouping** resolution if either of the following are valid:

- The bad task contains changes that you need in your project grouping.
- The bad task is still excluded and should have had the exclusion removed when the fix task was completed.

If you have a **Completed fix task not included** conflict, then a bad task is included in the update properties, but the fix task is not. Choose the **Remove Bad Task from Project Grouping** resolution if any of the following are valid:

- The bad task was excluded, but the user has turned off **Auto Update** for the project grouping; therefore, the bad task wasn't automatically removed.
- The user who created the fix task forgot to exclude the bad task.
- The fix tasks aren't yet completed and a partial fix could be harmful.

If the project or project grouping contains many conflicts, you can filter the conflicts. Click and choose the criteria that you want to view (which filters out the rest of the criteria), such as **Message**, then use the list box to specify the conflict messages you want to view. To see all conflicts again, click and choose **Turn Off Filtering**.

Note that if the column being filtered has 10 or fewer unique values, then the filter value will display in a list box. You can add an existing value; however, you can also enter your own value into that field. If the column has more than 10 unique values, it will be a text field, and you can enter values to apply filtering. For more information on using Java regular expressions to filter the criteria displayed, see Pattern matching and Telelogic Synergy (page 259).

Once you resolve a conflict, the **Actioned** column indicates that an action has taken place by displaying a check in the corresponding check box. After you've attempted to resolve all conflicts that you need to deal with (some conflicts might end up remaining, depending on your team process), you're ready to run another update and conflict detection. Do this by clicking .

During and after conflict resolution, you'll typically need to perform some of the following procedures. The order in which you follow the procedures might vary, but the following is a plausible workflow for most users.

- View properties. (page 35)
- View the history of the object. (page 36)
- Compare parallel versions. (page 36)
- Merge two parallel versions. (page 36)
- Update members and run conflict detection again. (page 36)
- Run membership conflict detection again. (page 36)

3. View properties.

Right-click over the conflict, and choose **Properties**.

The **Properties** dialog box displays the properties for the object in conflict.

4. View the history of the object.

   Right-click over the conflict, and choose **History**.

   The **History** dialog box appears. Note that you can compare and merge parallel versions by using the icons at the top of the dialog box.

5. Compare parallel versions.

   Right-click over the conflict, and choose **Compare**.

   The **Compare** dialog box displays the differences. Once you've compared parallel versions, you're ready to merge parallels.

6. Merge two parallel versions.

   Right-click over the conflict, and choose **Merge**.

   The **Merge** dialog box appears. When you merge parallel files, the new merged file is automatically associated with the current task and placed in your project.

7. Update members and run conflict detection again.

   Use this feature to update members of the project or project grouping and run conflict detection again by clicking . If you're updating a project, you can choose to update **Project Only** or **Project and Subprojects**. If you're updating a project grouping, you can choose to update **All Projects** or **All Projects and Subprojects**.

   This is useful after you've resolved several conflicts and are ready to update the project or project grouping with the membership changes caused by the resolutions.

8. Run membership conflict detection again.

   Perform the **Detect Membership Conflicts** action again on the same project or project grouping by clicking .

   Run this operations to clear the original list of conflicts and populate it with any conflicts that remain in your project or project grouping.

   When you run membership conflict detection and Telelogic Synergy no longer returns conflicts or only returns conflicts that are allowed in your project, you're ready to build your product.

Related Topics

- Compare two files (page 188)
- Ignore files by pattern (page 43)
- Pattern matching and Telelogic Synergy (page 259)
- Show parallel versions (page 190)

- View the history of an object or release (page 143)

Perform deep conflict detection

Conflict detection compares a project's members with its update properties (page 342). Telelogic Synergy uses baseline (page 335)s to speed update operations, but if there were membership conflicts in a build management project used during the creation of the baseline, then those membership conflicts could go undetected by users of the baseline. Deep conflict detection performs a deep analysis, and doesn't disregard the makeup of the baseline.

When you choose deep conflict detection, only conflict detection on projects that use a process rule are impacted. The project's members are compared with the baseline plus a larger set of tasks, as follows:

- The **Tasks on Top of the Baseline** and the **Manually Added Tasks** on the project's project grouping are used for comparison.
- If the baseline has the same release as the project, the baseline's tasks are also included.

Note that the following tasks in the baseline are not added: Any tasks that the baseline creation operation determines might not be included in all projects in the baseline.

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **Actions** tab, then click **Detect Membership Conflicts** in the left pane.
3. Set **Perform deep conflict detection** by clicking the check box.
4. To return to the default settings after making changes, click **Use Defaults**.
5. Click **Apply** to save the changes.
6. Right-click over the appropriate project grouping, then choose **Detect Membership Conflicts**.

Related Topics

- Ignore files by pattern (page 43)
- Modify a project-specific directory template (page 18)
- Resolve membership conflicts in a project or project grouping (page 26)
- Update a project (page 22)
- Set the default work area path (page 19)

Sync work area with database

Use this procedure to compare the files in your work area to those in the database and resolve the differences.

This operation is useful if you've manually changed files in the file system without checking out the files or if a project update fails because of changes in the file system. By syncing the work area, you can select a conflict in the **Work Area Conflicts** dialog box, then compare the differences from the file in the file system with the file in the database.

The following operation discusses ways in which to resolve work area conflicts after a sync.

Steps...

If you need to find a project, see Find an object (page 141).

1. Right-click over a modifiable project, point to **Sync Work Area**, and select **Members Only** or **Members and Subprojects**, whichever is appropriate.

   The **Work Area Conflicts** dialog box appears if there are conflicts.

2. Review the list of conflicts.

3. Resolve conflicts.

   You can resolve conflicts in the following ways: discard work area changes, keep work area changes, or ignore files you do not want to control.

   Discard work area changes

   Select this icon if you want to discard changes to specified files in your work area. Additionally, if you choose to discard a directory, the directory and all of its members will be discarded from your work area. In both cases, the file(s) and directory will be replaced in your work area with the latest database version.

   Keep work area changes

   Select this icon if you want to sync changes to a directory and file(s) in your work area with the database. Note that this can result in new files because a file in your work area, but not in the database will be added to the database.

   Ignore files you do not want Synergy to control

   If you see conflicts for files that you don't want to control, you can choose to Ignore files by pattern (page 43). Doing this sets filters to keep files with specified patterns from appearing as conflicts after you perform a **Sync Work Area** operation.

   To view or change the patterns used to ignore files, click .

   If you set filters, you will need to perform another sync to refresh the output in the **Work Area Conflicts** dialog box.

Related Topics

- Compare two files (page 188)
- Merge parallel files or directories (page 180)

Change update options

Use the **Update** option to modify how this operation works.

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **Actions** tab, then click **Update** in the left pane.
3. Change the subprojects setting.

   If you do not want subprojects to be replaced during an **Update** operation, clear the **Allow subprojects to be replaced** check box.
4. Change the depth of message information given in the **Messages** dialog box by clearing the **Show verbose messages** check box.

   Verbose messages give detailed information for an **Update** operation. This is useful if you want to find out why a particular version was or was not selected.
5. If you want to detect membership conflicts each time after you perform an update operation, set the **Detect membership conflicts after updating projects** check box.
6. To return to the default settings after making changes, click **Use Defaults**.
7. Click **Apply** to save the changes.

Related Topics

- Stop automatic addition of required tasks (page 102)
- Ignore files by pattern (page 43)
- Modify a project-specific directory template (page 18)
- Update a project (page 22)
- Set the default work area path (page 19)

Ignore files by pattern

Use this procedure to ignore files of a certain pattern. When set, the filters will keep uncontrolled files with the specified patterns from appearing as conflicts after you perform a **Sync Work Area** operation. Patterns are useful for keeping the many temporary files created by some IDEs from being controlled in the Telelogic Synergy database.

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **Actions** tab, then click **Sync Work Area** in the left pane.
3. Modify the filter list.

   The **Database defaults** list shows the files that Telelogic Synergy will ignore. This list is set by your CM Administrator and shared by all users.You cannot add to or delete from the defaults list.

   You can add to the **My additional patterns** list by typing patterns directly in the scroll box, one pattern per line only. To remove a pattern, highlight it and delete it.

   Additionally, you can use pattern syntax values to further customize filters. The syntax is similar to standard wildcard strings. Thus, ***** matches 0 or more characters of any value, **?** matches one character of any value, and **** (Windows) and **/** (UNIX) separates directories.

   For example, a directory name followed by ***** matches all contents of the directory and its subdirectories. (This applies at the end of the string.)

   The following examples show ways to customize filters by using patterns:

   - Filter the **tempfiles** subdirectory in the **myproj-me** project:

     C:\ccm_wa\mydb\myproj-me\myproj\tempfiles*

   - Filter the **tempfiles** subdirectory in any project:

     tempfiles*

   - Filter all **HTML** files:

     ***.html**

   - Filter all Java files from the **test** directory:

     test*.java

   To share filters with team members, have the CM administrator add them to the database defaults.
4. To return to the default settings after making changes, click **Use Defaults**.
5. Click **Apply** to save the changes.

Related Topics

- Stop automatic addition of required tasks (page 102)
- Change update options (page 42)
- Sync work area with database (page 40)

Change the update properties for a project

The update properties are properties that a project uses to decide which object versions to select when a project is updated. Therefore, when you change the update properties for a project, you also change the members of a project.

The following shows ways to change a project's update properties.

- If you want full control over the way your projects are updated, you can manually choose a baseline and a list of tasks to be used for your custom projects for a particular release. See Use a different baseline (page 53) for detailed information and steps.
- You can add a task to a project grouping, which enables a project grouping to quickly gather additional objects necessary to proceed with a build. Conversely, you can also remove a task from a project grouping, which enables a project grouping to quickly gather only the necessary objects to proceed with a build.

  You can add a task to a project grouping as follows:

  - Right-click over a task. This is described in Add a task to a project grouping (page 95), which is for users who don't need to view manually added tasks (page 338), task (page 341)s and baseline (page 335)s, or tasks on top of the baseline (page 341).
  - Right-click over a project grouping, which starts the **Project Grouping Properties** dialog box. This operation is described in Add tasks (page 45). It's for users who need to view and modify manually added tasks, tasks and baselines, or tasks on top of the baseline.

  You can remove a task from a project grouping as follows:

  - Right-click over a task. This is described in Remove a task from a project grouping (page 94).
  - Right-click over a project grouping, which starts the **Project Grouping Properties** dialog box. This is described in Remove tasks (page 46).

Add tasks

A project grouping groups projects by purpose and release, and holds the tasks and baseline used when you update a project. Adding a task to a project grouping provides a quick way for a project grouping to gather the objects necessary to proceed with a build.

For example, a developer is working in an **Insulated Development** project grouping and is ready to complete a task, but first he needs to merge parallel versions. He merges his changes, then adds the tasks for the objects he just merged with to his project grouping. After he adds the tasks associated with the objects to his project grouping, he'll update his projects, and then build.

A build manager would want to add tasks to a project grouping in the following example. The build manager has just completed what could be the final **System Testing** build. SQE

finds a problem that needs to be fixed before the release. Development fixes the problem, then hands off the task to the build manager. He adds the task to the **System Testing** project grouping, then performs another build.

Steps...

1. Right-click over the appropriate project grouping, and select **Properties**.

   The **Properties** dialog box appears.

2. Click the **Tasks** tab.

   This tab shows the tasks that you've manually added to the project grouping, either in this dialog box or by using the **Add to Project Grouping** option from the **Tasks** context menu or the **Actions** main menu.

   Note that the tasks you add manually are not the only tasks in the project grouping. The project grouping contains the tasks completed after the baseline was created.

   Therefore, project groupings can contain tasks because of the following occurrences:

   - The tasks are associated with the baseline.

     View these tasks by clicking the **Baseline Projects** tab, then double-clicking the baseline. The **Properties** dialog box displays the tasks in the **Tasks** tab.

   - The tasks are in the update template (page 342), but aren't in the baseline.

     View these tasks by clicking the **Tasks** tab and looking in the **Tasks on top of the baseline** list.

   - You added the tasks manually.

     Click the **Tasks** tab to view these tasks. (Note that when you manually add a task, its required tasks are also added.)

   You can choose which tasks on top of the baseline you want to use.

   - To use all of the tasks on top of the baseline, click **Use All**.
   - To choose which tasks are used, clear or select each task in the appropriate **Used** check box.

3. Click the **Add Task** button.

   The **Select Task** dialog box appears. Use it to find the task that you want to add to the project grouping.

Remove tasks

A project grouping groups projects by purpose and release, and holds the tasks and baseline used when you update a project. Removing a task from a project grouping provides a quick way for a project grouping to gather only the necessary objects to proceed with a build.

You can remove tasks from a project grouping if the tasks were added manually and if the tasks were added to the project grouping automatically by the update template (page 342).

Steps...

1. In the **Explorer** pane **Projects** tab, right-click over the appropriate project grouping and choose **Properties**.

   The **Properties** dialog box appears.
2. Click the **Tasks** tab to view the manually added tasks or the tasks on top of the baseline, wherever the tasks you want to remove are located.
3. Right-click over the task(s) that you want to remove, and select **Remove from Project Grouping**.
4. Update a project (page 22).

Related Topics

- Create a task (page 78)
- Update the baseline and tasks (page 50)
- Exclude a task (page 82)
- Create a fix task (page 92)
- Modify the properties of a file or directory (page 108)
- Modify the properties of a task (page 115)
- Sync work area with database (page 40)
- Update a project (page 22)
- Use a different baseline (page 53)
- View properties (page 119)

Make changes using baselines

- Update the baseline and tasks (page 50)
- Keep the baseline and tasks from changing during an update (page 51)
- Select a new baseline (page 52)
- Use a different baseline (page 53)

Update the baseline and tasks

By default, when you update a project, Telelogic Synergy updates the baseline and tasks on the project grouping and chooses new members based on the new tasks.

> **Caution!** This operation updates permanently. There is no undo or cancel operation after you've updated from the **Project Grouping Properties** dialog box. Canceling out of the dialog box will not cancel the update.

Steps...

- In the **Projects** explorer, right-click over the appropriate project grouping and choose **Properties**.

  The **Project Grouping Properties** dialog box appears.
- Click to refresh the baseline and tasks.

Related Topics

- Add to the current task (page 83)
- Change the update properties for a project (page 45)
- Keep the baseline and tasks from changing during an update (page 51)
- Refresh an object (page 260)
- View an associated task (page 87)

Keep the baseline and tasks from changing during an update

By default, when you update a project, Telelogic Synergy updates the baseline and tasks on the project grouping. However, there will be times when you won't want to update the baseline and tasks. For example, a developer might not want any new tasks if he's in the middle of unit testing, but needs to pick up a dependent change from another developer. A build manager might not want to pick up any new tasks if he's already done an update, but needs to add a task to fix a build.

The baseline and tasks are a part of the project grouping; therefore, if you don't want the baseline and tasks to be updated when you update a project, you can clear the update option in the project grouping that the project is in.

Steps...

- In the **Projects** explorer, right-click over the appropriate project grouping and select **Automatically Update Baseline & Tasks**.

  This clears the check mark to the left of the option. Additionally, if you start the **Properties** dialog box for the project grouping, notice that the **Auto Update** check box is cleared. It will remain cleared until you select it or right-click over the project grouping in the **Projects** explorer and select **Automatically Update Baseline & Tasks**.

Related Topics

- Add to the current task (page 83)
- Refresh an object (page 260)
- Update the baseline and tasks (page 50)
- Remove a task from a project grouping (page 94)
- View an associated task (page 87)

Select a new baseline

A developer can set a new baseline if he changes a project to have a **Custom Development** purpose or creates a new project with a **Custom Development** purpose. This would create a new project grouping, and the developer would need to set the project grouping baseline appropriately.

Steps...

1. Copy a project (page 14) with a custom purpose and a new release.
2. Right-click over the new project grouping and select **Properties**.

   The **Properties** dialog box appears.
3. Set the baseline.
   a. Click the **Baseline Projects** tab, then click **Select Baseline**.

      The **Select Baseline** dialog box appears. By default, baselines display in the results field based on the project grouping's release, for example, **toolkit/2.0**.
   b. Choose the baseline and click **OK**.
4. Click **OK** to save the changes.

Related Topics

- Modify the properties of a baseline (page 107)
- Use a different baseline (page 53)

Use a different baseline

A developer who wants full control over the way his projects are updated can create a project grouping with a **Custom Development** purpose; he can then manually choose a baseline and a list of tasks to be used for all of his custom projects for a particular release.

For example, if a developer needs to configure his projects to be exactly like the last baseline, but with four additional tasks, he could create a project with a **Custom Development** purpose, set the project grouping baseline to match the last release, and add the four tasks. (This would be useful for a small team developing a patch without the initial support of a build manager.)

The following procedure shows the actions required to use a different baseline.

Steps...

1. Change a project to have a custom purpose.
   a. Right-click over a project and select **Properties**.

      The **Properties** dialog box appears.

      If you need to find a project, see Find an object (page 141).
   b. Change the purpose to **Custom Development**.
   c. Cick **Apply** to save changes.
2. Right-click over the appropriate project grouping and select **Properties**.

   The **Properties** dialog box appears.
3. Click the **Baseline Projects** tab to view the current baseline.
4. Select a different baseline (page 335) for the project grouping.
   a. Click the **Select Baseline** button.

      The **Select Baseline** dialog box appears. By default, baselines display in the results field based on the project grouping's release, for example, **toolkit/2.0**.
   b. Choose the baseline and click **OK**.
5. Add tasks (page 45) to a project grouping.

Related Topics

- Modify the properties of a baseline (page 107)
- Select a new baseline (page 52)

Make changes to files

Change file content (page 60)

- Check in (page 61)
- Check out (page 62)
- Create a file, directory, or subproject (page 63)
- Edit a file (page 64)

Change file placement (page 65)

- Add to a directory (page 69)
- Change a file's type (page 71)
- Delete an object (page 66)
- Move a file (page 68)
- Rename a file in a project (page 70)

Change file content

- Check in (page 61)
- Check out (page 62)
- Create a file, directory, or subproject (page 63)
- Edit a file (page 64)

Check in

Use this procedure to perform a check in after making a modification to an object, which will make it available to other users.

Steps...

If you need to find a file, directory, or project, see Find an object (page 141).

- Right-click over the object you want to check in and choose **Check In**.

  If the **Check In** operation results in a parallel version (page 339), you will receive a warning message before the objects are checked in. You will have the option to continue the check in or cancel out of it.

  If you check in a file that has required attributes that need to be set, the **Properties** dialog box displays the values you must set before the check in is successful. You'll need to make the necessary changes, and then click **Check In**. Telelogic Synergy will save the changes and attempt to check in the file.

  When you check in a file or directory, the check in occurs without confirmation from you. When you check in a project, you are asked to confirm the check in.

Related Topics

- Complete the current task (page 76)
- Delete an object (page 66)
- Merge parallel files or directories (page 180)
- Merge two file versions (page 179)

Check out

Use the following procedure to check out a new version of a file or directory. Telelogic Synergy associates the file with the current task.

> **Note** You must have your current task set. See Select a task (page 75) for more information.

Steps...

If you need to find a file, see Find an object (page 141).

- Right-click over the file or directory you want to check out and choose **Check Out**.

Related Topics

- Check in (page 61)
- Select a task (page 75)

Create a file, directory, or subproject

Use the following procedure to create a file (page 337), directory, or subproject.

Steps...

If you need to find a directory, see Find an object (page 141).

1. Right-click over the directory where you want the new file, directory, or subproject to reside. Point to **Create Member**, and select **File**, **Directory**, or **Subproject**.

   The dialog box appropriate for the kind of object you are creating appears.

2. Type the name of the new file, directory, or subproject, and click **OK**.

Related Topics

- Add to a directory (page 69)
- Add to the current task (page 83)
- Create a project (page 13)
- Create a task (page 78)
- Edit a file (page 64)
- Rename a file in a project (page 70)
- Select a task (page 75)

Edit a file

Use this operation to view or modify a file.

Note You can only edit files that are modifiable by you.

Steps...

If you need to find a file, see Find an object (page 141).

- Double-click the file.

Related Topics

- Add to a directory (page 69)
- Check out (page 62)
- Delete an object (page 66)
- Rename a file in a project (page 70)
- Update a project (page 22)
- Use a different version of a file (page 24)

Change file placement

- Add to a directory (page 69)
- Change a file's type (page 71)
- Delete an object (page 66)
- Move a file (page 68)
- Rename a file in a project (page 70)

Delete an object

Use this operation to remove one or more of the following objects from the database:

- files
- directories
- folders
- folder templates
- processes
- process rules
- projects
- tasks
- saved queries
- releases
- baselines
- project groupings

If you're deleting the first version of a file, the file is deleted and removed from the database. If the file has a predecessor, your modifiable version is deleted and replaced by its predecessor.

> **Note** The **Delete** operation permanently removes the selected object from the database. If you want to remove an object without deleting it, use **Cut**.

Steps...

If you need to find an object, see Find an object (page 141). Note that you can delete more than one of the same type of object at a time.

1. Right-click over the object(s) you want to delete, and choose **Delete**.

   The **Delete** dialog box appears.

2. Select the object(s) you want to delete from the list.

   If you're deleting a project, you can also delete all subprojects by selecting the **Delete Subprojects** check box.

   If you're deleting a project grouping, all the projects in the project grouping will be deleted as well.

   If you're deleting a baseline, the baseline will be marked for deletion. You can set it up to be removed by using the **Save Offline and Delete** facility. See Telelogic Synergy CLI Help, soad Command.

   If you are deleting a task, the objects associated with the task are **not** deleted.

If you are deleting a release, the release must not be in use.

If you are deleting a folder or folder template, be sure that it's not being used by process rules. (You cannot delete a folder or folder template being used by process rules.)

If you are deleting a process rule, be sure that it's not being used by processes.

If you are deleting a process, be sure that you don't need it anymore. Process rules associated with a process are not deleted when you delete the process.

3. Click **Delete**.

Related Topics

- Copy a project to the file system (page 17)
- Create a project (page 13)
- Remove a saved query (page 217)
- Rename a file in a project (page 70)
- Reverse an update (page 23)

Move a file

Use this procedure to move a file to another directory.

Files or directories that are checked out will be associated to your task. This ensures that updated members will work properly.

Steps...

1. Right-click over the file you want to move, and select **Cut**.

   If you need to find a file, see Find an object (page 141).
2. Select the directory where you want to move the file.
3. Right-click over the appropriate directory, and select **Paste**.

Related Topics

- Delete an object (page 66)
- Rename a file in a project (page 70)
- Reverse an update (page 23)
- Use drag and drop (page 252)

Add to a directory

Use the following procedure to add an existing file (page 337), directory (page 337), or project (page 340) to your directory.

Steps...

If you need to find a file, directory, or project, see Find an object (page 141).

1. Right-click over the file, directory, or project you want to add, and choose **Copy**.
2. Right-click over the directory where you want to add the object, and choose **Paste**.

Related Topics

- Copy an object (page 11)
- Create a file, directory, or subproject (page 63)
- Create a project (page 13)
- Define a query (page 148)
- Find where an object is used (page 142)
- Query for predefined versions of objects (page 174)
- Use drag and drop (page 252)

Rename a file in a project

Use this operation to change the name of a file.

To rename a file, it must be checked out by you and used in a modifiable project. A file cannot have the same name as another file in the same directory.

Steps...

1. Right-click over the file you want to rename, and choose **Rename**.

   If you need to find an file, see Find an object (page 141).

2. Type the new name.

Related Topics

- Change a file's type (page 71)
- Move a file (page 68)
- Use a different version of a file (page 24)

Change a file's type

When you create a file in the Telelogic Synergy database, the file type is automatically added based on the extension. For example, a file called **foo.c** would be given a type of **csrc** in the Telelogic Synergy database. However, sometimes you will need to change a file's type.

Steps...

If you need to find a file, see Find an object (page 141).

1. Select a file that is a member of a modifiable project.

   Note The file you are changing must be modifiable and a member of a single project.

2. On the **Edit** menu, choose **Change Type**.
3. In the **Change Type** dialog box, select the new type and click **OK**.

   The type will change unless the file is a member of other projects.

Related Topics

- View the history of an object or release (page 143)
- View properties (page 119)

Working with tasks

Daily use of tasks (page 74)

- Select a task (page 75)
- Complete the current task (page 76)
- Assign a task (page 77)
- Create a task (page 78)
- Exclude a task (page 82)
- Add to the current task (page 83)
- Add tasks to or remove tasks from an object (page 85)
- Add a task to a folder (page 84)
- View your assigned tasks (page 86)
- View an associated task (page 87)

Fixing tasks (page 89)

- Specify one task to fix another (page 90)
- Create a fix task (page 92)
- Remove a task from a project grouping (page 94)
- Add a task to a project grouping (page 95)

Tasks and change requests (page 97)

- Create a task automatically associated with a change request (page 98)
- Remove a file or change request from a task (page 99)
- View the change request for an associated task (page 100)
- Resolve a change request (page 101)
- Stop automatic addition of required tasks (page 102)

Daily use of tasks

- Select a task (page 75)
- Complete the current task (page 76)
- Assign a task (page 77)
- Create a task (page 78)
- Copy a task (page 80)
- Exclude a task (page 82)
- Add to the current task (page 83)
- Add tasks to or remove tasks from an object (page 85)
- Add a task to a folder (page 84)
- View your assigned tasks (page 86)
- View an associated task (page 87)

Select a task

Use the following procedure to change the current task (page 337). After you set the current task, Telelogic Synergy associates **every** file and directory that you create or change with the current task.

You can use the results of your query to Modify the properties of a task (page 115) and Remove a file or change request from a task (page 99).

Steps...

1. If you need to find an assigned task, open the **Tasks** explorer and look at the tasks under **My Assigned Tasks**.
2. Right-click over the task you want to select, and choose **Set as Current Task**.

   You are ready to begin work on the task.

Related Topics

- Add to the current task (page 83)
- Assign a task (page 77)
- Create a task (page 78)
- Delete an object (page 66)
- Modify the properties of a task (page 115)
- View your assigned tasks (page 86)

Complete the current task

Use this procedure to complete your current task (page 337), and check in the associated files and directories.

When you complete the current task, it no longer displays on the **Current Task** toolbar and it's no longer modifiable.

Steps...

1. Be sure the task you want to complete is the current task.

   The current task displays below the main menu bar. If the task you want to complete is not set as the current task, see Select a task (page 75).

2. On the **Current Task** toolbar, click .

   If no conflicts are found, you'll receive a confirmation dialog box where you can complete the task.

   If the current task is associated with objects that have parallel versions, you will see the **Parallels** dialog box. You can compare and merge objects from this dialog box, or you can bypass the merge and complete the check in by clicking **Complete**.

   If your team follows a methodology that requires a task to be associated with a change request, and if attributes for the task are missing, then the **Task Properties** dialog box will appear. Fill in the missing attributes and try to complete the task again.

Related Topics

- Add to the current task (page 83)
- Assign a task (page 77)
- Create a task (page 78)
- Modify the properties of a task (page 115)
- Define a query (page 148)
- Select a task (page 75)
- View your assigned change requests (page 145)
- View your assigned tasks (page 86)

Assign a task

Use the following procedure to assign a task. Developers can assign a task to themselves if they created the task.

Steps...

If you need to find a task, see Find an object (page 141).

1. Right-click over a task and choose **Properties**.

   The **Properties** dialog box appears.

2. Select a new resolver's name from the **Resolver** list.

   This changes the user who will resolve the task. The new resolver will receive mail announcing that you have assigned the task to him. All other attributes that display in the dialog box will remain the same.

   If the task is your current task, it's removed from the **Current Task** toolbar. Therefore, you must set a new current task to continue. See Select a task (page 75) for more information.

Related Topics

- Complete the current task (page 76)
- Specify one task to fix another (page 90)
- Create a task (page 78)
- Delete an object (page 66)
- Exclude a task (page 82)
- Define a query (page 148)
- Select a task (page 75)
- View the change request for an associated task (page 100)
- View your assigned tasks (page 86)
- View an associated task (page 87)

Create a task

Use the following procedure to create a task. When you create a task, it is automatically assigned to you and set as your current task.

If you want to create a task and have it associated automatically with a change request, see Create a task automatically associated with a change request (page 98).

Steps...

1. On the **Current Task** toolbar, click .

   The **Create Task** dialog box displays all the fields required to complete a task, even custom fields added by a team's CM administrator.
2. Enter a synopsis for the task.
3. Enter a description of the work you'll do to complete the task.
4. Set the task's release from the **Release** list.
5. Select a resolver's name from the **Resolver** list.

   This specifies the user who will resolve the task. The resolver will receive mail announcing that you have assigned the task to him.
6. Enter other properties, as required.
7. Associate a change request to the current task by entering the change request ID or by clicking .

   The **Select Change Request** dialog box appears. Choose the appropriate change request and click **OK**. The change request ID displays in the **Change Request** field.
8. If your team uses Telelogic Synergy Distributed, you can assign a task to a user who is a user in a different database by using the **Modifiable In** list box.

   Select the appropriate database, then change the resolver in the **Resolver** list.
9. Click **OK**.

> **Note** If you created this task to fix a bad task, you'll need to create a relationship between this (fix) task and the bad task. See Specify one task to fix another (page 90) for details.

Related Topics

- Add to the current task (page 83)
- Assign a task (page 77)
- Complete the current task (page 76)
- Delete an object (page 66)

- Exclude a task (page 82)
- Define a query (page 148)
- Refresh choices during a session (page 229)
- Select a task (page 75)
- View the change request for an associated task (page 100)
- View your assigned tasks (page 86)

Copy a task

Use the following procedure to copy a task. When you copy a task, it is automatically assigned to you and set as your current task.

Steps...

If you need to find a task, see Find an object (page 141).

1. Right-click over the appropriate task and choose **Copy Task**.

   The **Copy Task** dialog box displays all the fields required to complete a task, even custom fields added by a team's CM administrator. The dialog box will populate all fields with information from the task you're copying.

2. Type a new synopsis for the task.
3. Type a description of the work you'll do to complete the task.
4. Change the task's release from the **Release** list, if necessary.
5. Change the resolver's name from the **Resolver** list, if necessary

   This specifies the user who will resolve the task. The resolver will receive mail announcing that you have assigned the task to him.

6. Enter other properties, as required.
7. Change the change request that's associated to the current task by typing a new change request ID or by clicking .

   The **Select Change Request** dialog box appears. Choose the appropriate change request and click **OK**. The change request ID displays in the **Change Request** field.

8. If your team uses Telelogic Synergy Distributed, you can assign a task to a user in a different database by using the **Modifiable In** list box.

   Select the appropriate database, then change the resolver in the **Resolver** list.

9. Click **OK**.

> **Note** If you created this task to fix a bad task, you'll need to create a relationship between this (fix) task and the bad task. See Specify one task to fix another (page 90) for details.

Related Topics

- Add to the current task (page 83)
- Assign a task (page 77)
- Complete the current task (page 76)
- Create a task (page 78)

- Delete an object (page 66)
- Exclude a task (page 82)
- Define a query (page 148)
- Refresh choices during a session (page 229)
- Select a task (page 75)
- View the change request for an associated task (page 100)
- View your assigned tasks (page 86)

Exclude a task

When you exclude a task, you ensure that it won't be used automatically in any project grouping. This keeps the objects that are, for example, breaking a build, from being used in your projects.

A build manager might first use this option to prevent other team members from getting a bad task, then Specify one task to fix another (page 90). Alternatively, a build manager might exclude a task that contains features that are being pulled out of a release; in this case, he wouldn't need to create a fix task.

Note that you can only exclude a completed task.

Steps...

- Right-click over the appropriate completed task and select **Exclude**.

  The task is excluded; you'll see a small red x over the task icon.

  If you don't want the task to be excluded, right-click over the task and select **Remove Exclusion**.

Related Topics

- Assign a task (page 77)
- Complete the current task (page 76)
- Create a fix task (page 92)
- Specify one task to fix another (page 90)
- Find an object (page 141)
- Define a query (page 148)
- Select a task (page 75)
- View the change request for an associated task (page 100)
- View your assigned tasks (page 86)

Add to the current task

Use the following procedure to add a specific file, directory, project, or change request to the current task.

Steps...

If you need to find a file, directory, project, or change request, see Find an object (page 141).

- Right-click over the file, directory, project, or change request that you want to add to the current task, and choose **Add to Current Task**.

  The file, directory, project, or change request is added to the current task.

  To remove a file, directory, project, or change request from the current task, right-click over the same file, directory, project, or change request and choose **Remove from Current Task**.

  If your organization uses Telelogic Change, you might need to add a change request to the task you are currently working on. Telelogic Synergy and Telelogic Change work together so you can connect all the pieces of a fix: from a customer's request for a change, to your task detailing how to make the fix, to the files that you'll change to complete the fix.

Related Topics

- Add a task to a folder (page 84)
- Complete the current task (page 76)
- Create a task (page 78)
- Delete an object (page 66)
- Define a query (page 148)
- Select a task (page 75)
- View your assigned change requests (page 145)
- View your assigned tasks (page 86)

Add a task to a folder

Typically, users don't need to manually add tasks to a folder. However, sometimes a special situation will occur. For example, a developer might need to add tasks to a folder that he'll give to the build manager to transfer to another site using DCM. A build manager might need to share a hotlist folder for a manually populated hotlist, in which case he would manually add tasks to a folder.

Steps...

- In the **Tasks** explorer, right-click over the task you want to add to the folder and choose **Add to Folder**.

  The **Select Folder** dialog box appears. Use it to find the folder to add the task to.

Related Topics

- Add to the current task (page 83)
- Create a task (page 78)
- View your assigned tasks (page 86)
- View an associated task (page 87)

Add tasks to or remove tasks from an object

The following describes how to Add Tasks to an Object (page 85) or Remove Tasks Associated with an Object (page 85).

Add Tasks to an Object

Steps...

1. Right-click over the appropriate object and select **Properties**.

   The **Properties** dialog box appears.
2. Click the **Tasks** tab.
3. Click the **Add Task** button.

   The **Select Task** dialog box appears. Use it to find the task that you want to add to the object.
4. Click **OK** to apply the change.

Remove Tasks Associated with an Object

Steps...

1. Right-click over the appropriate object and select **Properties**.

   The **Properties** dialog box appears.
2. Click the **Tasks** tab.
3. Right-click over a task that is modifiable by you and choose **Cut**.
4. Click **OK** to apply the change.

View your assigned tasks

Use the following procedure to display all your assigned tasks for a specific release.

Steps...

- In the **Tasks** explorer, click **My Assigned Tasks**.

Related Topics

- Add to the current task (page 83)
- Complete the current task (page 76)
- Create a task (page 78)
- Delete an object (page 66)
- Define a query (page 148)
- Remove a task from a project grouping (page 94)
- Select a task (page 75)
- View your assigned change requests (page 145)
- View an associated task (page 87)

View an associated task

Use this procedure to view a task that is associated task with a file, directory, project, or change request.

Steps...

If you need to find a file, directory, project, or change request, see Find an object (page 141).

- Right-click over the appropriate file, directory, project, or change request, and select **Tasks Properties**.

  The **Properties** dialog box displays the properties for the associated task.

Related Topics

- Compare two files (page 188)
- Delete an object (page 66)
- Merge parallel files or directories (page 180)
- Show parallel versions (page 190)

Fixing tasks

- Specify one task to fix another (page 90)
- Create a fix task (page 92)
- Remove a task from a project grouping (page 94)
- Add a task to a project grouping (page 95)

Specify one task to fix another

Use this operation if you've created two unrelated tasks and find that one is needed to fix the other. This operation describes how to create a relationship between two unrelated tasks, if you want (for example, for conflict detection).

You can create this relationship from the fix task by Using the "This task fixes" table (page 90) or from the bad (broken) task by Using the "This task is fixed by" table (page 90).

Using the "This task fixes" table

If you need to find a task, see Find an object (page 141).

Steps...

1. Right-click over the fix task, and select **Properties**.

   The fix task can be in the *working* or *completed* state.

   The **Properties** dialog box appears.
2. Click the **Fix Tasks** tab.
3. In the **This task fixes** table, click the plus sign.

   The **Select Task** dialog box appears. Use it to find the bad task that you want to add to the fix task.

   A fix task is a regular task with a special relationship to the bad task that it fixes. These tasks become dependent on each other.
4. Click **OK** to save the change.

Using the "This task is fixed by" table

If you need to find a task, see Find an object (page 141).

Steps...

1. Right-click over the bad task, and select **Properties**.

   The bad task must have a state of *completed* or *excluded*.

   The **Properties** dialog box appears.
2. Click the **Fix Tasks** tab.
3. In the **This task is fixed by** table, click the plus sign.

   The **Select Task** dialog box appears. Use it to find the fix task that you want to add to the bad task.

   If you need to create a fix task, you can click **Create Fix Task** to start the **Create Fix Task** dialog box and create a fix task. Creating a fix task this way creates the

relationship between the fix task and the bad task, and automatically sets the fix task as the current task. (See Create a fix task (page 92) for details on the **Create Fix Task** dialog box.)

A fix task is a regular task with a special relationship to the bad task that it fixes. These tasks become dependent on each other.

4. Click **OK** to save the change.

Related Topics

- Create a fix task (page 92)
- Create a task (page 78)
- Exclude a task (page 82)
- Modify the properties of a task (page 115)

Create a fix task

A broken task occurs for the following reasons:

- A completed task did not entirely fix a change request.
- A completed task created a bug that needs to be fixed.

In both situations, your scenario is probably close to the following: You had a task to complete. You set the current task, checked out all objects necessary to complete the task, and worked on the task. You then completed the current task and all associated objects. Later, you found a problem with the task you had just completed.

The following shows the work flow for fixing the problem task.

1. Ascertain the best way to fix the existing task.
2. Create a task to fix the existing task (using the **Create Fix Task** dialog box), which automatically creates a relationship between the fix task and the bad task.

   When you create a task, it is automatically assigned to you and set as your current task.

   A fix task is a regular task with a special relationship to the completed or excluded (broken) task that it fixes. Sometimes these tasks need to be dependent on each other; sometimes they mustn't be used together, as explained in following.

   If you have good changes in the bad task that have nothing to do with the problems caused by the bad changes and they need to be included in the build, then you **must** include the excluded (broken) task back into the appropriate project grouping. This means that the bad task and the task that fixes it both will be included in the build. After you've created the fix task and the relationship between the two tasks and completed the fix task, you will need to remove the exclusion on the bad task. (This is described in Exclude a task (page 82).)

   If the excluded task contains changes that are moving the product in the wrong direction, and the fix task contains changes that correct this problem, then you don't need to include the excluded task again.
3. Complete the work that fixes the bad task.
4. Complete the fix task and all associated objects.

   If you created a fix task by using the **Create Task** dialog box, you'll need to create the relationship between the fix task and the bad task. See Specify one task to fix another (page 90) for instructions.

Steps...

1. Right-click over the completed or excluded task you want to fix, and click **Create Fix Task**.

   The **Create Fix Task** dialog box appears.

2. Enter a description for the task.
3. Set the task's release in the **Release** list.
4. If you are not the resolver, set the task's resolver in the **Resolver** list.
5. Enter other properties, as required.
6. Associate a change request to the current task by entering the change request ID or by clicking .

   The **Select Change Request** dialog box appears. Choose the appropriate change request and click **OK**. The change request ID displays in the **Change Request** field.
7. Change the **Exclude Task** *task* check box, if necessary.

   A developer or team lead might set this option to prevent other team members from getting a bad task. For example, if a team lead experiences an integration build failure, he would track down the bad task, assign a fix task to a developer, then exclude the bad task. He would then perform an update to remove the bad task's objects from the projects and perform the build again.

   Set this option if you do **not** want the task to be associated with anyone's project grouping whenever an **Update** or **Refresh Baseline & Tasks** operation is performed.
8. Click **OK**.

Related Topics

- Add to the current task (page 83)
- Assign a task (page 77)
- Complete the current task (page 76)
- Specify one task to fix another (page 90)
- Create a task (page 78)
- Delete an object (page 66)
- Exclude a task (page 82)
- Define a query (page 148)
- Select a task (page 75)
- View the change request for an associated task (page 100)
- View your assigned tasks (page 86)

Remove a task from a project grouping

You can remove a task from a project grouping, which enables a project grouping to quickly gather only the necessary objects to proceed with a build.

The following operation shows how to do this from a task. Another way to do this is from a project grouping. This operation is described in Change the update properties for a project (page 45), which is for users who need to view and modify manually added tasks (page 338), tasks and baselines, or tasks on top of the baseline (page 341).

Steps...

If you need to find a task, see Find an object (page 141).

1. Right-click over a task and choose **Remove from Project Grouping**.

   The **Select Project Grouping** dialog box appears.
2. Select the project grouping that you want to remove the task from.
3. Click **OK**.

Related Topics

- Add a task to a project grouping (page 95)
- Create a task (page 78)
- Create a fix task (page 92)
- Exclude a task (page 82)
- Remove a file or change request from a task (page 99)
- View an associated task (page 87)

Add a task to a project grouping

You can add a task to a project grouping, which enables a project grouping to quickly gather additional objects necessary to proceed with a build.

The following operation shows how to do this from a task. Another way to do this is from a project grouping. This operation is described in Change the update properties for a project (page 45), which is for users who need to view and modify manually added tasks (page 338), tasks and baselines, or tasks on top of the baseline (page 341).

Steps...

If you need to find a task, see Find an object (page 141).

1. Right-click over a task and choose **Add to Project Grouping**.

   The **Select Project Grouping** dialog box appears.
2. Select the project grouping that you want to add the task to.
3. Click **OK**.

Related Topics

- Create a fix task (page 92)
- Create a task (page 78)
- Exclude a task (page 82)
- Remove a file or change request from a task (page 99)
- Remove a task from a project grouping (page 94)
- View an associated task (page 87)

Tasks and change requests

- Create a task automatically associated with a change request (page 98)
- Remove a file or change request from a task (page 99)
- View the change request for an associated task (page 100)
- Resolve a change request (page 101)
- Stop automatic addition of required tasks (page 102)

Create a task automatically associated with a change request

Use the following procedure to create a task and have it associated automatically with a change request. When you create a task in this way, it is automatically assigned to you, associated with the change request, given the change request's synopsis, and set as your current task.

If you don't want to create a change request association to the new task, see Create a task (page 78). If you want to fix a task that's broken, see Create a fix task (page 92).

Steps...

1. In the **Change Requests** explorer, right-click over the appropriate change request and select **Create Task**.

   The **Create Task** dialog box appears.
2. Enter a description of the work you'll do to complete the task.
3. Set the task's release from the **Release** list.
4. Change the resolver's name in the **Resolver** list, if you are assigning it to someone else.
5. Enter other properties, as required.
6. If your team uses Telelogic Synergy Distributed, you can assign a task to a user who's a user in a different database by using the **Modifiable In** list box.

   Select the appropriate database, then change the resolver in the **Resolver** list.
7. Click **OK**.

Related Topics

- Add to the current task (page 83)
- Assign a task (page 77)
- Complete the current task (page 76)
- Create a fix task (page 92)
- Delete an object (page 66)
- Exclude a task (page 82)
- Define a query (page 148)
- Select a task (page 75)
- Specify one task to fix another (page 90)
- View the change request for an associated task (page 100)
- View your assigned change requests (page 145)

Remove a file or change request from a task

Use this operation To remove a file (page 99) or To remove a change request (page 99) from a specified task.

To remove a file

If you need to find a task, see Find an object (page 141).

Steps...

1. Right-click over the appropriate task, and choose **Properties**.

   The **Properties** dialog box appears.
2. Select the **Objects** tab.
3. Right-click over the appropriate file, and select **Cut**.

To remove a change request

If you need to find a task, see Find an object (page 141).

Steps...

1. Right-click over the appropriate task, and choose **Properties**.

   The **Properties** dialog box appears.
2. Click the **Change Requests** tab.
3. Right-click over the appropriate change request, and select **Cut**.

Related Topics

- Add to the current task (page 83)
- Complete the current task (page 76)
- Specify one task to fix another (page 90)
- Create a task (page 78)
- Delete an object (page 66)
- Define a query (page 148)
- Select a task (page 75)
- View the change request for an associated task (page 100)
- View your assigned tasks (page 86)

View the change request for an associated task

If your organization uses Telelogic Change to track change requests submitted for your application, you can look at the change request that is associated with any task. Telelogic Synergy and Telelogic Change work together so that you can obtain detailed information quickly and easily about how to fix a task. The following steps show how to view the submitter's comments in the change request, which caused the assignment of the task.

Steps...

- Right-click over the appropriate task and choose **Change Requests Properties**.

  The properties of the change request display in the Telelogic Change interface. For Help with this dialog box, click **Help** in the main menu at the top of the interface.

Related Topics

- Assign a task (page 77)
- Create a fix task (page 92)
- Create a task (page 78)
- Delete an object (page 66)
- Exclude a task (page 82)
- Remove a file or change request from a task (page 99)
- View an associated task (page 87)
- View your assigned tasks (page 86)

Resolve a change request

If your organization uses Telelogic Change, use the resolve action to finish an assigned change request. This action starts the Telelogic Change interface, where you can resolve the change request.

Steps...

- Right-click over the appropriate change request and choose **Resolve**.

  This starts Telelogic Change. The interface displays the screen in which you can resolve the change request. For Help with this dialog box, click **Help** in the main menu at the top of the interface.

Related Topics

- View an associated task (page 87)
- View your assigned change requests (page 145)

Stop automatic addition of required tasks

The following procedure shows how to stop the automatic addition of required tasks for tasks manually added to project groupings. (A task is required by an added task if the added task depends on the required task, and the required task is not already in the project grouping's baseline and tasks for the project.)

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **Actions** tab, then click **Add to Project Grouping** in the left pane.
3. Change the add required tasks setting.

   By default, Telelogic Synergy adds required tasks when you add tasks to project groupings.

   To clear this option, click the check box, then click **Apply**.
4. To return to the default setting, click **Use Defaults**, then click **Apply**.

Related Topics

- Ignore files by pattern (page 43)
- Modify a project-specific directory template (page 18)
- Update a project (page 22)
- Set the default work area path (page 19)

Using properties

Modify object properties (page 106)

- Modify the properties of a baseline (page 107)
- Modify the properties of a file or directory (page 108)
- Modify the properties of a folder (page 109)
- Modify the properties of a project (page 111)
- Modify the properties of a project grouping (page 113)
- Modify the properties of a task (page 115)
- Modify the settings in a work area (page 117)
- View properties (page 119)

Make changes through property settings (page 120)

- Add a project to a project grouping (page 127)
- Change the default application tools (page 122)
- Change the security settings for objects (page 125)
- Customize user properties (page 121)

Modify object properties

- Modify the properties of a baseline (page 107)
- Modify the properties of a file or directory (page 108)
- Modify the properties of a folder (page 109)
- Modify the properties of a project (page 111)
- Modify the properties of a project grouping (page 113)
- Modify the properties of a task (page 115)
- Modify the settings in a work area (page 117)
- View properties (page 119)

Modify the properties of a baseline

Use the following procedure to change the information about a baseline.

Steps...

If you need to find a baseline, see Find an object (page 141).

1. Right-click over the baseline whose properties you want to modify, and select **Properties**.

   The **Properties** dialog box appears.

2. Modify the fields in the **Properties** tab, as required.

   The build and name properties are modifiable by build managers if the baseline hasn't been released. The following describes the default modifiable fields:

   - **Name**

     This is a baseline's name. By default, Telelogic Synergy names baselines with the creation date; for example, 20060309 stands for March 9 2006.

   - **Build**

     The build property shows the build identifier (letters, numbers, or combination) associated with a baseline. The build identifier can contain a maximum of 64 characters.

3. The **Projects**, **Tasks**, and **Change Requests** tabs are not modifiable, but they show you important information about the baseline and change requests.

   The **Projects** tab shows you the projects in the baseline, also known as baseline projects.

   The **Tasks** tab shows you the tasks in the baseline.

Related Topics

- Select a new baseline (page 52)
- Use a different baseline (page 53)

Modify the properties of a file or directory

Use the following procedure to change the information about a file, directory, or project.

Steps...

If you need to find a file, directory, or project see Find an object (page 141).

1. Right-click over the file, directory, or project whose properties you want to modify, and select **Properties**.

   The **Properties** dialog box appears.

2. Modify the fields in the **Properties** tab, as required. The following describes the modifiable fields:

   - **Version**

     A version is a specific variation of a file, directory, or project.

   - **Release**

     A release is an attribute that identifies a project or task that is specific to a particular release of your application.

   - **Platform**

     A platform is an attribute that designates an object to be a particular kind of hardware.

   - **Is Product**

     A product is a file that is built by processing other files. Some examples of products include a **.class** file, **.jar** file, and **.exe** file.

3. Change the security settings for objects (page 125).

   The **Security** tab displays in this dialog box for teams who have a group security license and have set up groups in their database. Use the **Security** tab to allow or restrict users to modify and check out the selected object, and to allow or restrict viewing of the object's source.

4. Click **Apply** to save the changes.

Related Topics

- Create a file, directory, or subproject (page 63)
- Sync work area with database (page 40)
- View properties (page 119)

Modify the properties of a folder

Use the following procedure to change the information about a folder.

Steps...

If you need to find a folder, see Find an object (page 141).

1. Right-click over the folder whose properties you want to modify, and select **Properties**.

   The **Properties** dialog box appears.

2. Modify the fields in the **Properties** tab, as required.

   > **Note** Changes to this folder's properties will cause the folder template to no longer control this folder. If you want the folder template to continue to control this folder, make changes to the folder properties in the **Properties for Folder Template** dialog box.

   The following describes the modifiable fields:

   - **Description**

     A description gives a short explanation about the folder.

   - **Modifiable by**

     This list shows who has permission to change the folder. The choices include **No one**, **Owner**, **Build Managers**, and **Everyone**.

3. Change the task selection mode in the **Tasks** tab, if necessary.

   - To use a query, click **Using Query**.
   - To make changes manually, click **Manually**.

   If your folder's task selection mode is manual, you can also add or remove tasks.

   - To add a task, click the plus sign icon. The **Select Task** dialog box appears. Use it to find the task that you want to add to the folder.
   - To remove a task, click the task and click the minus sign icon.

4. Save your work by clicking **Apply**.

5. Change the security settings for objects (page 125).

   The **Security** tab displays in this dialog box for teams who have a group security license and have set up groups in their database. Use the **Security** tab to allow or restrict users to modify and copy the selected folder.

6. Click **Apply** to save the changes.

Related Topics

- View properties (page 119)

Modify the properties of a project

Use the following procedure to change the information about a project.

Steps...

If you need to find a project see Find an object (page 141).

1. Right-click over the project whose properties you want to modify, and select **Properties**.

   The **Properties** dialog box appears.

2. Modify the fields in the **Properties** tab, as required.

   The following describes the default modifiable fields.

   - **Version**

     A version is a specific variation of a file, directory, or project.

   - **Release**

     A release is a property that identifies a project that is specific to a particular release.

   - **Purpose**

     A project's purpose defines what it is used for, for example, **Insulated Development**, **Integration Testing**, or **System Testing**. When you change your project's purpose, Telelogic Synergy uses different selection criteria when you update the project or project grouping.

   - **Platform**

     A platform is a property that designates an object to be designated for a particular kind of hardware.

   - **Project Grouping**

     You cannot change this field, but you can perform actions on it by right-clicking over the project grouping name and using the context menu.

   - **Baseline Project**

     You cannot change this field, but you can perform actions on it by right-clicking over the baseline project name and using the context menu.

     The project version on which you base your project is called its baseline project. The baseline project is a part of the baseline set in the project grouping properties. For example, the baseline project for the **editor-2.0** project would be **editor-1.0**. When you check out a new version of a project, its baseline project is set automatically.

3. Modify the settings in a work area (page 117), if necessary.
4. Change the security settings for objects (page 125), if necessary.

   The **Security** tab displays in this dialog box for teams who have a group security license and have set up groups in their database. Use the **Security** tab to allow or restrict users to modify and copy the selected project.
5. Click **Apply** to save the changes.

Related Topics

- Modify the properties of a project grouping (page 113)
- Modify the properties of a task (page 115)
- Modify the settings in a work area (page 117)
- Sync work area with database (page 40)
- View properties (page 119)

Modify the properties of a project grouping

Use the following procedure to change the information about a project grouping.

Steps...

If you need to find a project grouping, see Find an object (page 141).

1. Right-click over the project grouping whose properties you want to modify, and select **Properties**.

   The **Properties** dialog box appears.

2. Modify the fields in the **Properties** tab, as required. The following fields are modifiable:

   - The **Auto Update** check box is selected by default. When selected, it will Update the baseline and tasks (page 50) when updating a project. When cleared, it will Keep the baseline and tasks from changing during an update (page 51).

3. In the **Projects** tab, you can add projects to the project grouping by clicking the plus sign.

   The **Select Project** dialog box appears. Use it to add a project to the project grouping.

4. Modify the fields in the **Baseline Projects** tab, as needed.

   The following fields are modifiable.

   - The **Select Baseline** button is active when the process rule used by the project grouping is set to allow you to select the baseline. To select a baseline, click **Select Baseline**.

     The **Select Baseline** dialog box appears. By default, baselines display in the results field based on the project grouping's release, for example, **toolkit/2.0**.

   - The **Baseline** table shows the baseline for this project grouping, if one exists. If the process rule used by the project grouping is set to **Latest static or build management projects**, then this table will be empty.
   - The **Baseline projects you have a copy of** table contains the projects found by the process rule as baseline projects that you have a copy of in this project grouping. If the process rule uses baselines, then these projects will be from the baseline. If the process rule uses **Latest static or build management projects**, then these projects will be found by the latest projects rule.
   - The **Baseline projects you don't have a copy of** table will contain projects found by the process rule that you don't have a copy of in this project grouping.

5. Modify the fields in the **Tasks** tab, as needed. The following fields are modifiable:

   - The **Tasks on top of the baseline** table will contain the tasks provided by the process rule that are not part of the baseline, if the process rule uses baselines. If

the process rule uses **Latest static or build management projects**, then this table will contain all tasks provided by the process rule.

- Click **Use All** to use all of the tasks on top of the baseline.
- The **Manually added tasks** table will contain the tasks you've manually added to the project grouping and the implicitly required tasks. To add more tasks, click the plus sign.

  The **Select Task** dialog box appears. Use it to find the task that you want to add to the project grouping.

6. Click **Apply** to save the changes.

Related Topics

- Change the update properties for a project (page 45)
- Modify the properties of a task (page 115)
- Sync work area with database (page 40)
- Use a different baseline (page 53)
- View properties (page 119)

Modify the properties of a task

Use the following procedure to change the information about a task.

Steps...

If you need to find a task, see Find an object (page 141).

1. Right-click over the task whose properties you want to modify, and select **Properties**.

   The **Properties** dialog box appears.

2. Modify the fields in the **Properties** tab, as required.

   The following describes the default modifiable fields.

   - **Synopsis**

     The synopsis is a one line summary of the task.

   - **Release**

     Release is a property that identifies a project or task that is specific to a particular deployment.

   - **Priority**

     Priority is a property that gauges the importance of the task.

   - **Subsystem**

     Subsystem is a property that specifies the software subsystem for the task. For example, if you develop a client-server software application, your subsystems might be **client**, **server**, and **communication**.

   - **Platform**

     Platform is a property that specifies the hardware platform applicable to the logical change.

   - **Resolver**

     Resolver is the name of the person who will complete the task.

   - **Estimated/Actual Effort**

     These dates enable you to add an estimated and actual time frame in whatever time increment (hours, days, months) for the task effort.

   - **Estimated Completion Dates**

     Use the calendar to add an estimated date of completion for the task.

   - **Modifiable In**

     If your team uses Telelogic Synergy Distributed, you can assign a task to a user in a different database by using the **Modifiable In** list box to change the name of the database, then use the **Resolver** list to set the resolver's name.

3. Modify the description in the **Description** tab, if necessary. A description enables you to give a multiline explanation about code changes made to fix the task.
4. Add or remove objects in the **Objects** tab, if necessary.

   To add objects, click the plus sign. The **Select Object** dialog box appears. Use it to select one or more objects to add to the task.

   To remove objects, choose the object(s) you want to delete and then click the minus sign.
5. Use the **Fix Tasks** tab to Specify one task to fix another (page 90).
6. Use the **Change Requests** tab to add or remove associated change requests.
7. Change the security settings for objects (page 125).

   The **Security** tab displays in this dialog box for teams who have a group security license and have set up groups in their database. Use the **Security** tab to allow or restrict users to modify and copy the selected task.
8. Click **Apply** to save the changes.

Related Topics

- Create a task (page 78)
- Copy a task (page 80)
- View properties (page 119)
- View your assigned tasks (page 86)

Modify the settings in a work area

Use the following procedure to change your work area settings.

Steps...

If you need to find a project, see Find an object (page 141).

1. Right-click over the project whose work area settings you want to modify, and choose **Properties**.

   The **Properties** dialog box appears.

2. Click the **Work Area** tab.

3. Modify the fields, as required.

   The following describes the default modifiable fields.

   - **On/Off**

     When you select this option (**On**), Telelogic Synergy maintains a copy of the project in your work area. Selecting this option also causes the project to sync automatically when you click the **Apply** button.

     When cleared (**Off**), Telelogic Synergy does not maintain a copy of the project in your work area, and all options in this dialog box are shaded.

   - **Path**

     The **Path** field shows the work area directory for the project. However, if you want to change the path, you can enter a new path by hand, by using the browse button, or by clicking the Use Default Path (page 117) button.

     Note that the work area directory must be visible to the interface host.

   - **Change Default Path**

     Click this button to view the path that is set in the **Options** dialog box **Actions** tab, in the **Copy Project** option. (The path displays in the **Set default path for all work areas** field.)

     See Set the default work area path (page 19) for more information.

   - **Use Default Path**

     Click this button to use the default path (set in the **Options** dialog box **Actions** tab, in the **Copy Project** option).

     See Set the default work area path (page 19) for more information.

   - **Place work area relative to parent project's**

     When selected, this option specifies that the work area is relative; that is, the work area is a subdirectory within the parent project's work area.

A subproject in a relative work area can be used as a subproject only once because it resides with its parent project's work area. However, if a relative project is static, you can use it in multiple projects.

When cleared, this option specifies that the work area is absolute.

In the file system, an absolute work area exists as a separate directory structure. Other projects can find and use a subproject in an absolute work area.

- **Include project-specific directory in work area path**

  When selected, this option creates a project-specific directory in the work area. All directories and files in the project will be created under this project-specific directory.

  See Modify a project-specific directory template (page 18) for more information.

- **Make all files modifiable**

  Use this option to create a work area in which all files are modifiable. Making all files modifiable is useful if you use ActiveCM or you need to change files while working outside of the Telelogic Synergy database.

- **Use time when file was copied as modified time**

  This option sets the timestamp to reflect the time a file was copied to the work area, rather than the time a file was last modified.

- **Translate new lines in ASCII format**

  This option is available to Windows users only.

  When selected, this option converts the carriage return/line feed characters to the correct format (UNIX or Windows, when copying files between a Windows client and a UNIX server).

  When cleared, the conversion will not occur.

4. Click **Apply** to save the changes.

Related Topics

- Modify the properties of a file or directory (page 108)
- Modify the properties of a project grouping (page 113)
- Modify the properties of a task (page 115)
- View properties (page 119)

View properties

Use this procedure to view information about a file, folder, folder template, directory, task, project, project grouping, process, process rule, baseline, release, or change request.

Steps...

If you need to find the appropriate object, see Find an object (page 141).

- Right-click over the appropriate object, and select **Properties**.

  The **Properties** dialog box appears for the selected object (except for a change request). Click the appropriate tab to find the information you want.

  The properties of a change request display in the Telelogic Change interface. For help with this dialog box, click **Help** in the main menu at the top of the interface.

OR

- Right-click over the appropriate object, and choose to view the properties for a related object.

  For example, if you want to view the properties for the tasks related to a file, right-click over the file and select **Task Properties**. The **Task Properties** dialog box displays task information for the selected file.

OR

- View the properties of the current task by clicking .

  The **Properties** dialog box appears. Click the appropriate tab to find the information you want.

OR

- Select an object and choose **Properties** from the **View** menu.

Related Topics

- Modify the properties of a baseline (page 107)
- Modify the properties of a file or directory (page 108)
- Modify the properties of a folder (page 109)
- Modify the properties of a project (page 111)
- Modify the properties of a project grouping (page 113)
- Modify the properties of a task (page 115)
- Show properties in the Work pane (page 256)

Make changes through property settings

- Add a project to a project grouping (page 127)
- Change the default application tools (page 122)
- Customize user properties (page 121)
- Start Telelogic Synergy in copy-based mode (page 238) (UNIX users only)

Customize user properties

You can change the editor, text viewer, merge tool, and compare tool used by Telelogic Synergy.

The **ccm.user.properties** file contains the local user settings for the Telelogic Synergy interface.

Steps...

1. Windows users: In C:\Documents and Settings*username*, open the **ccm.user.properties** file.

   UNIX users: In your home directory, $HOME, open the **.ccm.user.properties** file.
2. Use a text editor to Change the default application tools (page 122).
3. Save and exit.

Related Topics

- Compare (page 187)
- Merge (page 178)

Change the default application tools

The merge tool, compare tool, and editor are set by default in the **ccm.properties** file located in the **etc** directory of your client installation for Windows and **ccm.user.properties** file for UNIX.

> **Note** Telelogic Synergy requires the double backslash separators.

- Default applications for windows (page 122)
- Default applications for UNIX (page 123)

Default applications for windows

Windows Options	Description
windows.tool.edit.project	Defines the utility used to edit a project on a Windows system.
windows.tool.edit.dir	Defines the utility used to edit a directory on a Windows system.
windows.tool.view.project	Defines the utility used to view a project on a Windows system.
windows.tool.view.dir	Defines the utility used to view a directory on a Windows system.
windows.tool.compare.ascii	Defines the utility used to compare files on a Windows system.
windows.tool.merge.ascii	Defines the utility used to merge files on a Windows system.

```
windows.tool.compare.ascii = %ccm_compare
windows.tool.compare.binary = FAIL
windows.tool.merge.ascii = %ccm_merge
windows.tool.merge.binary = FAIL
windows.tool.edit.ascii = "%ccm_home\\bin\\util\\ccm_exec" "%file1"
windows.tool.edit.binary = "%ccm_home\\bin\\util\\ccm_exec" "%file1"
windows.tool.edit.executable = "%file1"
windows.tool.edit.project = explorer.exe "%file1"
windows.tool.edit.dir = explorer.exe "%file1"
windows.tool.view.ascii = "%ccm_home\\bin\\util\\ccm_exec" "%file1"
windows.tool.view.binary = "%ccm_home\\bin\\util\\ccm_exec" "%file1"
windows.tool.view.executable = "%file1"
windows.tool.view.project = explorer.exe "%file1"
windows.tool.view.dir = explorer.exe "%file1"
```

Note The values shown are only examples. You may use other commands.

The following keywords are available:

```
edit: %file1, %ccm_home
view: %file1, %ccm_home
help: %file1, %ccm_home
FAIL: operation is not supported for that command
compare: %file1, %file2, %file1_label, %file2_label, %ccm_home
merge: %outfile, %ancestor %file1, %file2, %file1_label, %file2_label,
ccm_home
```

where `%file1` is the first filename, `%ccm_home` is the directory where the client is installed, `%file2` is the second filename, `%file1_label` and `%file2_label` are labels for the files, `%ancestor` is the common ancestor file used by merge, and `%outfile` is the merged results.

Default applications for UNIX

UNIX Options	Description
unix.tool.edit.project	Defines the utility used to edit a project on a UNIX system.
unix.tool.edit.dir	Defines the utility used to edit a directory on a UNIX system.
unix.tool.view.project	Defines the utility used to view a project on a UNIX system.
unix.tool.view.dir	Defines the utility used to view a directory on a UNIX system.
unix.tool.compare.ascii	Defines the utility used to compare files on a UNIX system.
unix.tool.merge.ascii	Defines the utility used to merge files on a UNIX system.

```
unix.tool.compare.ascii = %ccm_compare
unix.tool.compare.binary = FAIL
unix.tool.merge.ascii = %ccm_merge
unix.tool.merge.binary = FAIL
unix.tool.edit.ascii = xterm -geometry 80x40 -e vi %file1
unix.tool.edit.binary = FAIL
unix.tool.edit.project = /bin/sh -c ^(cd '%file1'; xterm)^
unix.tool.edit.dir = /bin/sh -c ^(cd '%file1'; xterm)^
unix.tool.view.ascii = xterm -geometry 80x40 -e vi %file1
```

```
unix.tool.view.binary = FAIL
unix.tool.view.project = /bin/sh -c ^(cd '%file1'; xterm)^
unix.tool.view.dir = /bin/sh -c ^(cd '%file1'; xterm)^
```

Note The values shown are only examples. You may use other commands.

The following keywords are available:

```
edit: %file1, %ccm_home
view: %file1, %ccm_home
help: %file1, %ccm_home
FAIL: operation is not supported for that command
compare: %file1, %file2, %file1_label, %file2_label, %ccm_home
merge: %outfile, %ancestor %file1, %file2, %file1_label, %file2_label,
ccm_home
```

where `%file1` is the first file name, `%ccm_home` is the directory where the client is installed, `%file2` is the second file name, `%file1_label` and `%file2_label` are labels for the files, `%ancestor` is the common ancestor file used by merge, and `%outfile` is the merged results.

Related Topics

- Customize user properties (page 121)

Change the security settings for objects

Use the **Properties** dialog box **Security** tab to allow or restrict users to modify and check out or copy the selected object, and to allow or restrict viewing the object's source.

About database security

A Telelogic Synergy database can contain many different collections of objects. It might not always be appropriate for all users to check out, copy, modify, or even view all objects. Security allows you to restrict these permissions to a specified group of users.

You can change the specified security settings for the following kinds of objects:

- Files: view, modify, and check out permissions
- Directories: modify and check out permissions
- Folders: modify and copy permissions
- Tasks: modify and copy permissions
- Projects: modify and copy permissions
- Releases: modify and copy permissions

The **Security** tab appears if you have set the **Show security properties on objects** check box in the **Options** dialog box's **View** tab, in the **General** pane. Additionally, the options are only active if you own the object.

This option is available to teams who have a group security license and have set up groups in their database. These teams might need to allow some users to check out, modify, and view certain objects while disallowing other users.

For information on how to remove the **Security** tab from all **Properties** dialog boxes, see Show the Security tab in the Properties dialog boxes (page 231).

Steps...

1. Start the appropriate **Properties** dialog box for the object whose security settings you want to change.
2. If you're changing the security settings for folders, tasks, projects, or releases, you can change which group of users can modify and copy these objects.

   Select **Allow anyone to modify and copy this object** if you want to give all users access to modify and copy this folder, task, project, or release. By default, this option is selected.

   To restrict settings, keep the default setting for **Restrict object modification and check out to the following groups**, and click the groups to be restricted.
3. If you're changing the security settings for files and directories, you can change which group of users can modify and check out these objects, as well as which group of users can view the file's source.

Select **Allow anyone to modify and copy this** *object* if you want to give all users access to modify and check out this file or directory. By default, this option is cleared.

To restrict settings, select the **Restrict object modification and check out to the following groups** setting, and click the groups to be restricted.

Select **Allow anyone to view this object's source** if you want to give all users access to read this file. By default, this option is set.

To restrict settings, keep the default setting for **Restrict source access to the following groups**, and click the groups to be restricted.

4. Click **Apply** to save the changes.

Related Topics

- Modify the properties of a file or directory (page 108)
- Modify the properties of a folder (page 109)
- Modify the properties of a project (page 111)
- Modify the properties of a task (page 115)

Add a project to a project grouping

A project grouping groups projects by purpose and release, and holds the tasks and baseline used when you update a project. Adding a project to a project grouping provides a quick way to reuse a project with a different purpose or release.

A developer often has several project hierarchies, each with a different purpose. Some projects are used for **Insulated Development**, others for **Collaborative Development**, and if a developer is also a team lead, he might have some projects used for **Integration Testing**. Usually, he only builds a few projects, but occasionally he'll need to build another. For example, if the developer can't build his projects in **Collaborative Development**, he might move them to the **Insulated Development** project grouping to build the projects in a more controlled environment.

Think of adding a project to a project grouping as moving a different project into the workspace you're currently developing in. Instead of making another copy of the project, you can just move the project to a different project grouping, and then Update a project (page 22).

Steps...

1. Right-click over the appropriate project grouping, and select **Properties**.

   The **Properties** dialog box appears.

2. Click the **Projects** tab.
3. Click the **Add Project** button.

   The **Select Project** dialog box appears. Use it to choose a project to add to the project grouping.

Related Topics

- Change the update properties for a project (page 45)
- Use a different baseline (page 53)
- Modify the properties of a project grouping (page 113)
- Update a project (page 22)

Find files and more

Find objects (page 140)

- Find an object (page 141)
- Find where an object is used (page 142)
- View the history of an object or release (page 143)
- View your assigned change requests (page 145)

Set up queries (page 147)

- Customize a query (page 154)
- Define a query (page 148)
- Save a query (page 150)
- Save a query with a new name (page 151)
- Rename a saved query (page 153)
- View a saved query (page 152)

Use predefined queries (page 173)

- Edit a saved query (page 176)
- Query for predefined versions of objects (page 174)
- Run a saved query (page 175)

Find objects

- Find an object (page 141)
- Find where an object is used (page 142)
- View the history of an object or release (page 143)
- View the history of an object or release (page 143)
- View your assigned change requests (page 145)

Find an object

You can use the **Query** dialog box to locate objects of any type. The **Find** menu shows the different kinds of objects that you can query for, which include tasks, objects, change requests, projects, project groupings, baselines, releases, folders, processes, process rules, and folder templates.

When you use the **Find** menu to select a kind of object to look for, the **Query** dialog box displays the correct information to create a query for that object.

Steps...

- In the main menu, click **Find**, and select one of the following: **Tasks**, **Objects**, **Change Requests**, **Projects**, **Project Groupings**, **Baselines**, **Releases**, **Folders**, **Process**, **Process Rules**, or **Folder Templates**.

  The **Query** dialog box displays the correct information to create a query for the type of object you selected.

  For detailed information on defining a query, see Define a query (page 148).

Related Topics

- Add a saved query to the Find menu (page 215)
- Customize a query (page 154)
- Run a saved query (page 175)
- Save a query (page 150)
- Save a query with a new name (page 151)

Find where an object is used

Use the following procedure to search the database for projects, baselines, project groupings, or folders that use a specific file, project, directory, or task. You can also search for baselines and project groupings that use a specific change request.

Steps...

- Right-click over the file, project, directory, or task, and point to **Find**, then select **Use in Projects**, **Use in Folders**, **Use in Baselines**, or **Use in Project Groupings**.

  Note that you can also right-click over a change request ID and point to **Find**, then select **Use in Baselines** or **Use in Project Groupings**.

  The **Query** dialog box appears. All projects, folders, baselines, or project groupings display in the results field.

Related Topics

- Customize a query (page 154)
- Find where an object is used (page 142)
- Query for predefined versions of objects (page 174)
- Save a query (page 150)
- Save a query with a new name (page 151)

View the history of an object or release

This topic shows you how to view the history of an object or release whether you know the name and version of the object or release or not.

Use this feature if you know the name and version of an object or release you want to view in the **History** dialog box. Using the **Show History** dialog box to view an object or release obviates the need to query first, then use the query results to show the project in the **History** dialog box.

Alternatively, if you don't know the name and version of the object or release, you can query to find out, then use the query results to view version history, check for parallels, determine if you are copying a project from the most current version, and update history relationships after a DCM transfer.

Steps...

1. From anywhere in Telelogic Synergy, enter **control-H**.

   The **Show History** dialog box appears.

2. To view an object's history, type a name (for example, **newdoc.txt**), a name and version separated by the version delimiter (for example, **newdoc.txt-beta**), or a four-part name, consisting of object name, version, type, and instance (for example, **newdoc.txt-beta:ascii:ccmintdb#1**).

   If the object name you enter produces more than one version, the **Select Object** dialog box appears. Select the appropriate object, then click **OK**.

3. To view a release's history, type the complete release name (for example, **editor/2.0**) or the component release (for example, **3.2_patch**).

   If Telelogic Synergy can't determine a release from the release name you enter, the **Select Release** dialog box displays the releases matching the name entered. Choose the appropriate release name, then click **OK**.

   You can use the question mark (**?**) and asterisk (*****) characters as substitutes for the unknown part of the four-part name, component, or component name and you'll still receive results.

OR

- Right-click over the appropriate file, directory, or project, and select **History**.

  If you need to find an object or release, see Find an object (page 141).

  The **History** dialog box displays all versions of the object or release.

  If you are using Telelogic Synergy Distributed and want to update history relationships after a DCM transfer, click .

Related Topics

- Open a project in the Work pane (page 255)
- Remove tabs from the Work pane (page 228)
- Show properties in the Work pane (page 256)

View your assigned change requests

Use the following procedure to display all your assigned change requests.

Steps...

- In the **Explorer** toolbar, click **Change Requests**.

  All of your assigned change requests display under the **My Assigned Change Requests** saved query.

Related Topics

- Add to the current task (page 83)
- Define a query (page 148)
- Remove a file or change request from a task (page 99)
- Resolve a change request (page 101)
- View an associated task (page 87)

Set up queries

- Define a query (page 148)
- Rename a saved query (page 153)
- Save a query (page 150)
- Save a query with a new name (page 151)
- View a saved query (page 152)
- Customize a query (page 154)

Define a query

Based on the information you know, use the following procedure to locate one or more tasks, projects, objects, change requests, baselines, or project groupings in your database. You can use the results of your query to view object properties, add objects, delete objects from a project or database, and more. Additionally, you can Add a saved query to an Explorer (page 214) or Add a saved query to the Find menu (page 215) from within the appropriate explorer.

Steps...

1. In the main menu, click **Find**, and select the type of object you're looking for: **Tasks**, **Objects**, **Change Requests**, **Projects**, **Project Groupings**, **Baselines**, **Releases**, **Folders**, **Process**, **Process Rules**, or **Folder Templates**.

   The **Query** dialog box displays the object type you selected.

2. Select criteria from the list box beneath **Find**, and then set the value correctly in the box to the right.

   Add more fields by clicking the plus sign icon. See Customize a query (page 154) for detailed information about criteria. See "Query Examples" below to read about useful queries, along with scenarios for their use.

   Additionally, you can build a new query from an existing saved query, then click **Save As** to create the new query.

   Query examples

   - You have completed tasks, but have forgotten to resolve the change requests. The following builds a query that gathers all of your assigned change requests that are marked for release **XX/10** and that have completed tasks.

     In the main menu, click **Find**, and select **Change Requests**. In **Custom**, enter:

     ```
     release='XX/10' and crstatus='assigned' and resolver='%user' and
     has_associated_task(status='completed')
     ```

   - You have several assigned tasks, each with associated objects, and need to work on more than one task at a time. The following query gathers your assigned tasks that have associated objects, and enables you to quickly choose a task that has changes and make it your current task.

     a. In the main menu, click **Find**, and select **Tasks**.
     b. Set **Assigned** to: `%user`
     c. In **Custom**, enter: `not has_no_associated_cv()`

   - You need to find *working* state objects that are members of the **ico-1** project.

     In the main menu, click **Find**, and select **Objects**. In **Custom**, enter:

     ```
     status='working' and is_member_of('ico-1')
     ```

- You need to find and show all **executable**-type object versions associated with task 374.

  In the main menu, click **Find**, and select **Objects**. In **Custom**, enter:

  ```
  type='executable' and is_associated_cv_of('task374-1:task:dbid')
  ```

3. Click .

   All results display in the results field.

   Additionally, you can use built queries that you haven't saved, but want to run again. Use the left and right arrows at the top, left of the dialog box to search the query stack for queries you've performed **during the session**. This enables you to run the query without building it again.

4. If you are creating a saved query, Save a query (page 150).

   ~~**Note** If you run the query, but forget to save it and close out of the **Query** dialog box, you can get the query back. The query is written to the **Messages** dialog box after you run it.~~

Related Topics

- Edit a saved query (page 176)
- Find where an object is used (page 142)
- Query for predefined versions of objects (page 174)
- Rename a saved query (page 153)
- Run a saved query (page 175)
- Save a query (page 150)
- Save a query with a new name (page 151)
- Customize a query (page 154)

Save a query

You can Define a query (page 148) and Save a query (page 150) using the **Query** dialog box. Once you've created the query definitions for tasks, objects, change requests, projects, project groupings, baselines, releases, folders, process, process rules, or folder templates, you can Add a saved query to an Explorer (page 214) or Add a saved query to the Find menu (page 215) from within the appropriate explorer.

Steps...

If you need to define a query, see Define a query (page 148).

1. In the **Query** dialog box, click .

   The **Query** dialog box displays the **Saved Queries** tab, and the name of the query you created is modifiable.

2. Enter a unique name for the saved query.

   Now the query will always be in view in the **Query** dialog box **Saved Queries** tab, unless you delete it from there.

Related Topics

- Add a saved query to an Explorer (page 214)
- Add a saved query to the Find menu (page 215)
- Customize a query (page 154)
- Edit a saved query (page 176)
- Rename a saved query (page 153)
- Save a query with a new name (page 151)

Save a query with a new name

You can save a query with a new name in the **Query** dialog box by using a saved query. By using an existing query to create a new one, you can use it as a basis for the new query by changing the criteria to suit your new needs.

Additionally, you can Add a saved query to an Explorer (page 214) or Add a saved query to the Find menu (page 215) from within the appropriate explorer.

Steps...

If you need to find a query, see View a saved query (page 152).

1. In the **Query** dialog box, change the properties of the existing query to suit your needs.
2. Click .

   The **Query** dialog box displays the **Saved Queries** tab, and the name of the query you created is modifiable.
3. Enter a unique name for the saved query.

   Now the query will always be in view in the **Query** dialog box **Saved Queries** tab, unless you delete it from there.

Related Topics

- Add a saved query to an Explorer (page 214)
- Add a saved query to the Find menu (page 215)
- Customize a query (page 154)
- Edit a saved query (page 176)
- Rename a saved query (page 153)
- Save a query (page 150)

View a saved query

The following procedure shows how to peruse the query criteria for a saved query.

Steps...

- In the appropriate explorer, right-click over a saved query (for example, **My Project Groupings**, **My Assigned Tasks**, **My Assigned Change Requests**), and choose **View**.

  The criteria display in the **Query** dialog box.

  You can edit a query, create a saved query, save an existing query as a new query, and much more.

Related Topics

- Save a query (page 150)
- Save a query with a new name (page 151)
- Remove a saved query (page 217)
- Edit a saved query (page 176)
- Rename a saved query (page 153)
- Run a saved query (page 175)

Rename a saved query

The following operation shows how you can rename a query. Note that you can only rename a query that is modifiable by you.

Steps...

- From within the **Query** dialog box or in one of the explorers, right-click over the appropriate saved query and select **Rename**.

  The name of the query will become modifiable.

  Once you have modified and saved the change, the new name is used in all places where the query is displayed, for example the **Find** menu, the **Find** list, and the explorers.

Related Topics

- Add a saved query to an Explorer (page 214)
- Add a saved query to the Find menu (page 215)
- Customize a query (page 154)
- Edit a saved query (page 176)
- Run a saved query (page 175)
- Save a query (page 150)
- Save a query with a new name (page 151)

Customize a query

You can build queries to search for objects, projects, tasks, baselines, change requests, and project groupings in the Telelogic Synergy database in two ways: by using definitions and by using clause criteria.

Use query definitions to find defined and specific information in the database, such as **My Assigned Tasks**, **My Assigned Change Requests**, and so forth.

Use clause criteria to construct a custom query from a wide variety of criteria, such as functions, relative operators, and so forth.

Related Topics

- Query clause criteria (page 163)
- Query definitions (page 154)
- Queries using both attribute value and function test clauses (page 160)
- Queries using keywords (page 160)
- Nested queries (page 162)

Query definitions

Use the query definitions to build queries. You can form your query by selecting a series of values in the combo boxes and entering information in the text boxes. You can select the custom query and enter a custom query statement.

Find

Specifies the type of query you want. The choices are:

- Baselines (page 155)
- Change requests (page 155)
- Folders (page 155)
- Folder templates (page 155)
- Objects (page 155)
- Processes (page 155)
- Process rules (page 155)
- Projects (page 155)
- Project groupings (page 155)
- Releases (page 156)
- Tasks (page 156)

Baselines

If you select **Baselines** from the **Find** list, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Change requests

If you select **Change Requests** from the **Find** list, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Folders

If you select **Folders** from the **Find** list, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Folder templates

If you select **Folder Templates** from the **Find** list, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Objects

If you select **Objects** from the **Find** list, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Processes

If you select **Processes** from the **Find** list, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Process rules

If you select **Process Rules** from the **Find** list, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Projects

If you select **Projects** from the **Find** list, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Project groupings

If you select **Projects Groupings** from the **Find** list, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Releases

If you select **Releases**, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Tasks

If you select **Tasks** from the **Find** list, you can select one or more criteria to further define your query. See the Query criteria table (page 157) for more information.

Query criteria table

Query criteria options

The following table lists the available query criteria options and their actions.

Criteria	Action
Assigned	Finds all tasks assigned after, during, or before a specified date, or for a range of dates.
Assigned To	Finds all tasks assigned to a specific user.
Auto Update	Finds all project groupings that are set to automatically update the baseline and tasks when updating a project.
Baseline and Tasks Updated	Finds all project groupings that are set to automatically update the baseline and tasks when updating a project (true). Finds all project groupings that are set not to automatically update the baseline and tasks when updating a project (false).
Completed	Finds all tasks completed after, during, or before a specified date, or for a range of dates.
Completed By	Finds all tasks completed by a specific date.
Completed in Database	Finds all objects completed in a specific database.
Created	Finds all objects created after, during, or before a specified date, or for a range of dates.
Created in Database	Finds all objects created in a specific database.
Custom	Finds all objects with the criteria you've specified.
Estimated to be Completed	Finds all tasks estimated to be completed by a specific date, or for a range of dates.
For Change Request	Finds all tasks associated with a specific change request.
For Component	Finds all releases with a specific component name.
For Platform	Finds all objects for a specific platform.
For Release	Finds all objects for a specific release.
In a Process	Finds the process rules in a process (true) or not in a process (false).
In State	Finds all objects in the requested state. This box is not editable.
Is Product	Finds files defined as products.

Criteria	Action
Local to Database	Finds the object or project with the database ID of the database in which the object was either initialized or created.
Of Type	Finds all files of a specific type value.
Modifiable By	Finds all folders and folder templates that can be modified by no one, owner, build manager, or everyone.
Modifiable in Database	Finds all objects that can be modified in a specific database.
Modified	Finds all objects modified after, during, or before a specified date.
That are Active	Finds all releases that are active (true) or inactive (false).
That Finds Baseline Projects Using	Finds baseline projects that use the specified process rule criteria.
Using	Finds the object that you're trying to find a relationship with. The types of objects that display for a specified object depend on the specified object.
Using a Query	Finds folders or folder templates that use a query (true) or don't use a query (false).
With Actual Effort	Finds all tasks that state a specific actual effort time.
With Build	Finds all baselines that use the specified build.
With Description	Finds a task, folder, or folder template with a specific description. Is case-sensitive.
With Estimated Effort	Finds all tasks that state a specific estimated effort time.
With ID	Finds a task or folder with a specific identification. Is case-sensitive.
With Instance	Finds all objects with a specific instance value.
With Maintained Work Area	Finds all projects that do or do not maintain a work area.
With Name	Finds all objects with a specific name.
With Owner	Finds all objects with a specific owner's name.
With Parallel Restrictions	Finds all releases with the specified parallel restrictions setting.
With Priority	Finds all tasks with a specific priority value.

Criteria	Action
With Purpose	Finds all projects, project groupings, process rules, or baselines with a specific purpose value.
With Relative Work Area	Finds all projects with relative (true) or absolute (false) work areas
With Subsystem	Finds all tasks with a specific subsystem value.
With Version	Finds all objects with a specific version.

Queries using attribute value clauses

A query clause based on an attribute value finds all object versions with (or without) matching attributes.

The syntax for this type of clause consists of the attribute name (*attr_name*), a relative operator (*relative_operator*), and the attribute's value (*constant*), as shown below:

"*attr_name relative_operator 'constant'*"

Examples

- Find all object versions with a status of *working*.

  ```
  ccm query "status='working'"
  ```

- Find and show all object versions with version 2.

  ```
  ccm query "version='2'"
  ```

Queries using function test clauses

A query clause based on a function test finds all object versions that match the function's results.

The syntax for this type of clause consists of the function (*function*) and its arguments, as shown below:

"*function('function_arguments')*"

The functions are pre-defined. See Functions (page 164) for function descriptions.

Examples

- Find and delete all object versions that have the predecessor `ico-1:executable:2`.

  ```
  ccm query "has_predecessor('ico-1:executable:2')"
  ccm delete @
  ```

- Find and select all object versions of type `wdt`.

  ```
  ccm query "type='wdt'"
  ```

Queries using both attribute value and function test clauses

You can combine query clauses to narrow your search. The following lines show how to combine query clauses:

"**not** *query_clause*"
"*query_clause* **and** *query_clause*"
"*query_clause* **or** *query_clause*"

Examples

- Find and show all object versions that are not members of a project.

  ```
  ccm query "not is_bound()"
  ```

- Find and show all object versions that are members of a project, and that have a modification time older than December 12, 2001.

  ```
  ccm query "is_bound() and modify_time < time('Fri Dec 12 2001')"
  ```

Queries using keywords

Valid keywords

Certain *keywords* relative to time can be used in query expressions. The following table shows the valid keywords.

Keyword	Description
`%today_begin`	Beginning today, 00:00:00
`%today_end`	End of today, 23:59:59
`%this_week_begin`	End of this week, 23:59:59) See Note 1
`%this_week_end`	Beginning of last week, 00:00:00 See Note 1
`%last_week_begin`	Beginning of last week, 00:00:00 See Note 1
`%last_week_end`	Beginning of last week, 23:59:59 See Note 1
`%this_month_begin`	Beginning of this month, 00:00:00
`%this_month_end`	End of this month, 23:59:59
`%last_month_begin`	Beginning of last month, 00:00:00
`%last_month_end`	End of last month, 23:59:59

Keyword	Description
%this_year_begin	1 Jan this year, 00:00:00
%this_year_end	31 Dec this year, 23:59:59
%today_minus<N>days	Today minus <N> days, 00:00:00
%today_plus<N>days	Today plus <N> days, 00:00:00
%today_minus<N>weeks	Today minus <N> weeks, 00:00:00
%today_plus<N>weeks	Today plus <N> weeks, 00:00:00
%today_minus<N>months	Today minus <N> months, 00:00:00 See Note 2
%today_plus<N>months	Today plus <N> months, 00:00:00 See Note 2
%today_minus<N>years	Today minus <N> years, 00:00:00 See Note 3
%today_plus<N>years	Today plus <N> years, 00:00:00 See Note 3

Note 1 The first day of the week is Sunday by default. The model attribute `start_day_of_week` can be set to change this default. A value of 1 means Monday, 2 Tuesday and so on.

Note 2 When subtracting or adding months, if the current day of the month is greater than the number of days in the resultant month, the effective date is the last day of that month. In both cases, time starts at 00:00:00. For example, if today was 30 January 2003, then `%today_plus1month` would be 28 February 2003, 00:00:00.

Note 3 When subtracting or adding years, if the current day of the month is greater than the number of days in that month in the resultant year, the effective date is the last day of the month. For example, if today was 29 February 2004, then `%today_plus1years` gives 28 February 2005, 00:00:00.

Example

- Show all files called `file1.c` that were created today.

```
ccm query "name='file1.c' and create_time > time('%today_begin')"
```

Nested queries

A *nested query* is a query expression that uses a function test, in which one or more of the function's arguments is a query expression.

Query functions usually have the following syntax:

```
query_function('object_name'|
               'project_name'|
                  'type_name'|
                  'attr_name'|
              'privilege_name'
                  [,sort_order])
```

You can replace any object name, project name, or type name argument with any query expression that evaluates to zero or more objects of the appropriate type. Queries can be nested to any desired depth.

Examples

- Find all members of all projects named `editor`.

```
ccm query "is_member_of(cvtype='project' and name='editor')"
```

- Find all version 1.0 projects that have the same members as project `toolkit-1.0`.

```
ccm query "has_member(is_member_of('1/project/toolkit/1.0')) and
version = '1.0'"
```

- Find all subprojects in all projects named `editor`, using the fastest search method (by specifying "none").

```
ccm query "hierarchy_asm_members(cvtype='project' and name = 'editor',
'none')"
```

- Find all objects that have object `save.c-1` (of type `csrc`) as their predecessor.

```
ccm query "has_predecessor(cvtype='csrc' and name='save.c' and
version='1')"
```

- Find all objects used in directory `sources-1` in project `editor-fcheng`.

```
ccm query "is_child_of('sources-1:dir:1', cvtype='project' and
name='editor' and version='fcheng')"
```

- Find all projects containing objects associated with tasks, for which the tasks' release values are set to 1.0.

```
ccm query "has_member(is_associated_cv_of(cvtype='task' and
release='1.0'))"
```

Note When you construct a query expression in the **Query** dialog box, you need not enclose the outer query expression in double quotes.

Query clause criteria

Query clauses are made of individual criteria. You can use the following criteria to construct a custom query clause:

- Functions (page 164)
- Relative operators (page 169)
- Logical operators (page 170)
- Constants (page 171)

Functions

Use the following function arguments and functions to construct function-based custom query clauses.

- Function arguments (page 164)
- Function definitions (page 164)

Function arguments

The function arguments are as follows:

attr_name

Specifies the name of any attribute, such as *is_product* or *platform*.

object_name

Specifies the object reference form of any object version:

name-version:*type*:*instance*

order_spec

Specifies the search order. If the value **depth** is used for the *order_spec*, the value indicates that a depth-first search is done. **breadth** is used to specify a breadth-first search. If the value "none" is used for the *order_spec*, it indicates that the order is not significant and the search can be done in any order (the fastest method is used).

```
none | depth | breadth
```

privilege_name

Specifies the name of a permission such as *read* or *write*.

project_name

Specifies the name of any project object version:

project_name-version

Function definitions

The query functions are as follows:

baseline (’*baseline_spec*’)

Queries the database for baselines that match the specified information.

build (’*build_string*’)

Queries the database for baselines that have the specified build string. This query function expands to "`cvtype='baseline'` and `build='build_string'`", which returns the set of all baselines with the given build string, i.e., with a matching build attribute.

cr (’*cr_id*’)

Queries the database for change requests that have the specified number.

folder (’*folder_id*’)

Queries the database for folders that have the specified number.

has_attr (’*attr_name*’)

Queries the database for all object versions that have the attribute *attr_name* (e.g., *is_product* or *platform*).

has_child (’*object_name*’,’*project_name*’)

Queries the database for all directory object versions in *project_name* that have *object_name* as a member.

has_member (’*object_name*’)

Queries the database for all project object versions that have the specified object version as a member.

has_model (’*object_name*’)

Queries the database for all of the object versions that use the specified model object version as their model.

For example, if you use the Base Model, this query is *has_model*(`base-1:model:base'`).

has_no_*relationship* ()

Queries the database for objects that do not have a relationship of that name to any object.

For example, `has_no_successor` returns every object that does not have a successor.

has_predecessor (’*object_name*’)

Queries the database for all object versions that have the specified object version as an immediate predecessor.

has_priv (’*privilege_name*’)

privilege_name specifies the name of a privilege, such as *read* or *write*.

has_purpose (’*purpose_name*’)

Queries the database for all projects that have the specified purpose.

has_*relationship* (’*object_name*’)

Queries the database for all object versions that have a relationship of type *relationship* with *`object_name`*. For example, Telelogic Synergy uses *has_successor* to show history relationships in the **History** dialog box.

The *relationship* can be any established relationship such as *associated_cv* or *associated_task*.

Note that is_*relationship*('***objectspec***', '***operator***', *time*) is the inverse query of has_*relationship*_of('***objectspec***', '***operator***', *time*).

For information on how to create a relationship, see Telelogic Synergy CLI Help, history Command.

has_type ('*type_name*')

Queries the database for all object versions of type *type_name*.

For example, a query of *has_type* ('csrc-1:cvtype:base') might find HelloWorld-1:csrc:1.

hierarchy_project_members ('*project_name*', *order_spec*)

Queries the database for all projects in the project hierarchy specified by *project_name*. The *order_spec* argument specifies the search order, as described in *order_spec*.

The query returns an ordered list of object version names. Use of other queries in conjunction with this query may change the result's order.

Note that the *project_name* **is** returned from this query.

For a description of *order_spec*, see order_spec (page 164).

is_bound()

Queries the database for object versions that are members of any project. This is best used when specifying other limiting options, such as the name of a project.

is_child_of('*object_name*','*project_name*')

Queries the database for all object versions that are used in directory *object_name* in project *project_name*.

is_hist_leaf()

Queries the database for objects that are leaf nodes in the **History** dialog box (i.e., queries for objects that do not have successors).

is_hist_root()

Queries the database for objects that are root nodes in the History View (i.e., queries for objects that do not have predecessors).

is_member_of ('*project_name*')

Queries the database for all object versions that are members of the specified project.

is_model_of ('*object_name*')

Queries the database for the model object version associated with the specified object version.

is_no_*relationship* ()

Queries the database for every object that is not the target of a relationship of that name to any object.

For example, `is_no_successor` returns any objects that are not successors.

is_predecessor_of ('*object_name*')

Queries the database for all object versions that are immediate predecessors of the specified object version.

is_*relationship*_of ('*objectspec*', '*operator*', *time*)

Queries for all objects having the specified relation from the specified object whose relation create time matches the specified operator (that is, =, !=, >,<=, >, or >=) and time value.

For example:

```
is_associated_cv_of ( 'task23-1:task:M', '>', time ('May 1, 2002')
)
```

This query finds all the associated objects of task M#23 that were related to the task after May 1, 2002.

Note that `has_relationship('objectspec', 'operator', time)` is the inverse query of `is_relationship_of('objectspec', 'operator', time)`.

For information on how to create a relationship, see Telelogic Synergy CLI Help, history Command.

is_type_of ('*object_name*')

Queries for the *`type`* object version in the model that was used to create *`object_name`*.

recursive_is_member_of ('*project_name*', *order_spec*)

Queries the database for all members of all projects of the project hierarchy specified by *`project_name`*.

The query returns a list of object version names, with all non-projects occurring first in the list followed by the projects that are members of the hierarchy. Only the projects' positions within the results are significant to the search order. Use of other queries in conjunction with this query may change the result's order.

Note that the *`project_name`* **is not** returned from this query.

For a description of *`order_spec`*, see order_spec (page 164).

task ('*task_id*')

Queries the database for tasks requests that have the specified number.

versions_in_a_baseline (’*project_spec*’)

Queries for project versions in a baseline. This query function expands to "`cvtype='project'` and `name='<project_name>'` and `instance='<project_subsystem>'` and `not is_no_project_in_baseline()'`", which returns, for the project object, the set of all project versions that are in any baseline.

Relative operators

Relative operators are allowed in queries. The following table shows the relative operators available for constructing a custom query clause.

Operator	Description
=	The value of the attribute must be equal to the value of the constant.
!=	The value of the attribute must not be equal to the value of the constant; however, the attribute must exist.
<	The value of the attribute must be less than the value of the constant.
<=	The value of the attribute must be less than or equal to the value of the constant.
>	The value of the attribute must be greater than the value of the constant.
>=	The value of the attribute must be greater than or equal to the value of the constant.
match	The value of the attribute must match a value of the constant, where the constant can include the wild card characters "*" and "?". The wild card "*" matches any number of missing characters and the wild card "?" matches a single missing character. The **match** operator is case-sensitive. You can use the wild card match only on the first 63 characters of an attribute.
!match	The value of the attribute cannot match any of the possible values of the constant.
smatch	The value of the attribute must match a string. The **smatch** operator is case-sensitive.

Logical operators

The logical operators you can use to construct custom query clauses are **and**, **or**, and **not**.

- *query_clause1* **and** *query_clause2*

  Only object versions that meet the requirements of both *query_clauses* are selected.

- *query_clause1* **or** *query_clause2*

  Object versions that meet the requirements of either *query_clause* are selected.

- **not** *query_clause*

  Only object versions that do not meet the requirements of the *query_clause* are selected.

  The `not` operator takes precedence over the `and` operator. The `and` operator takes precedence over the `or` operator. Use parentheses in a query to override the existing rules of precedence.

Constants

The constants allowed in custom query clauses are shown in the following table. Note that the class of attribute types found is determined by the constant specified. For example, if the constant is a string, only string attributes, or attributes that are a subtype of string, are found.

Constant Type	Comments
string	Enclose strings in single quotes.
integer	Integer values can be zero to +-2147483647.
boolean	Boolean values can be **TRUE** or **FALSE**.
time	Time values must be in a date format. See Telelogic Synergy CLI Help, Date Formats for more information.

Grouping query clauses

You also can group query clauses (without a depth limit) using parentheses.

Use predefined queries

- Query for predefined versions of objects (page 174)
- Run a saved query (page 175)
- Edit a saved query (page 176)

Query for predefined versions of objects

Search for all projects that match the predefined version criteria: **Prep Versions**, **All Versions**, **Released Versions**, or **Working Versions**.

Steps...

- Right-click over an object, then choose **Find**. Select the appropriate predefined version criteria: **Prep Versions**, **All Versions**, **Released Versions**, or **Working Versions**.

  The **Query** dialog box appears. All objects that match the criteria display in the results field.

Related Topics

- Customize a query (page 154)
- Find where an object is used (page 142)
- Run a saved query (page 175)

Run a saved query

The following operation shows how you can run a saved query.

Steps...

- In the appropriate explorer, right-click over a saved query and select **Query**.

  The **Query** dialog box appears. All queried objects display in the results field.

OR

1. In the main menu, click **View** and choose **Query**.

   The **Query** dialog box appears.

   Notice that the **Find** list box shows the saved queries that you've run during the session, and contains default queries and any saved queries you've created.
2. Click the **Saved Queries** tab.
3. Double-click the saved query you want to run.

   The **Query** dialog box appears with the **Define Query** tab in view, and the query results in the results field.

Related Topics

- Add a saved query to an Explorer (page 214)
- Add a saved query to the Find menu (page 215)
- Customize a query (page 154)
- Edit a saved query (page 176)
- Rename a saved query (page 153)
- Save a query (page 150)
- Save a query with a new name (page 151)

Edit a saved query

Sometimes you need to edit a query when you move on to a new release, to search for a different team member's objects, want to gather task information for a different completion date, and so forth.

Steps...

1. In the main menu, click **View**, and select **Query**.

   The **Query** dialog box appears.
2. Click the **Saved Queries** tab.
3. Right-click over the query you want to edit, and select **Edit**.

   The query criteria displays in the **Define Query** tab.
4. Edit the query criteria, removing, adding, or changing fields, as necessary.
5. Save the changes by clicking .

Related Topics

- Add a saved query to an Explorer (page 214)
- Add a saved query to the Find menu (page 215)
- Customize a query (page 154)
- Rename a saved query (page 153)
- Save a query (page 150)
- Save a query with a new name (page 151)

Merge and compare

Merge (page 178)

- Merge two file versions (page 179)
- Merge parallel files or directories (page 180)
- Edit the merge results (page 181)
- View the next merge difference (page 182)
- Include nonconflicting merges (page 183)
- Save the merged file (page 184)
- Clear merge changes (page 185)

Compare (page 187)

- Compare two files (page 188)
- Compare parallel files or directories with predecessor (page 189)
- Show parallel versions (page 190)
- Compare two like objects (page 192)

Merge

Telelogic Synergy Merge and Compare use SiberMerge as the default tool. The following information is applicable to both merge and compare:

SiberMerge supports files written in a variety of character encodings. Note that all files involved in a compare or merge must be written using the same file encoding. For example, it is not possible to compare a file written in Shift-JIS to a file written in UTF-16.

When first run, SiberMerge creates two files, **.ccm_merge.enc** and **.ccm_merge.dat**.

The file named **.ccm_merge.enc** is located in your (UNIX) home or (Windows) profile directory and contains a list of file encodings that are offered in the encoding menus. Initially, the list includes all supported encodings; you can shorten the menus by deleting encodings that you do not use.

The file named **.ccm_merge.dat** is located in your (UNIX) home or (Windows) profile directory and contains the set of default compare/merge options, such as whether or not to ignore spaces, etc. You can edit this file to modify your default compare/merge options.

- Merge two file versions (page 179)
- Merge parallel files or directories (page 180)
- Edit the merge results (page 181)
- View the next merge difference (page 182)
- Include nonconflicting merges (page 183)
- Save the merged file (page 184)
- Clear merge changes (page 185)

Merge two file versions

Use this procedure to merge information from two file versions. When you merge two versions, a new third version is created.

Steps...

1. Right-click to choose the file and select **History**.

   If you need to find a file, see Find an object (page 141).

2. In the **History** dialog box, select the two objects you want to merge; click the first object, and control-click the second object.

   Both objects will be highlighted.

   The first file you select becomes the First File in the merge utility. The second file you select becomes the Second File.

3. From the **History** dialog box toolbar, click **Merge**.

   The **Merge** dialog box will appear.

4. After you have finished resolving all the conflicts and modifying the results to your satisfaction, Save the merged file (page 184).

Related Topics

- Clear merge changes (page 185)
- Edit the merge results (page 181)
- Include nonconflicting merges (page 183)
- Save the merged file (page 184)
- View the next merge difference (page 182)

Merge parallel files or directories

Use this procedure to merge two parallel files or directories.

Steps...

If you need to find a file or directory, see Find an object (page 141).

1. Right-click over the file or directory you want to merge, and select **Show Parallels**.

   The **Parallels** dialog box appears.

   If more than one parallel is listed, start the **History** dialog box to View the history of an object or release (page 143) and get a better idea of which file or directory you want to merge with.

2. Select the version you want to merge with the selected version, and click .

   The new merged file or directory is automatically associated with the current task and placed in your project.

Related Topics

- Compare two files (page 188)
- Show parallel versions (page 190)
- Resolve membership conflicts in a project or project grouping (page 26)
- View properties (page 119)

Edit the merge results

Use the following procedure to change the merge results.

Steps...

1. In the **Merge** dialog box results pane, choose the section you want to edit.
2. From the **Edit** menu, select **Edit**.

   Make the necessary changes. Notice that the section is now pink, indicating that you made changes.

Related Topics

- Clear merge changes (page 185)
- Include nonconflicting merges (page 183)
- Merge two file versions (page 179)
- Save the merged file (page 184)
- View the next merge difference (page 182)

View the next merge difference

Use the following procedure to see the next difference shown at the top of the view.

Steps...

- On the **Merge** dialog box toolbar, click **Next change**.

Related Topics

- Clear merge changes (page 185)
- Edit the merge results (page 181)
- Include nonconflicting merges (page 183)
- Merge two file versions (page 179)
- Save the merged file (page 184)

Include nonconflicting merges

Use the following procedure to apply all the nonconflicting changes from the left and right panes to the results pane.

Steps...

- From the **Merge** dialog box toolbar, click **Apply all nonconflicting changes** .

Related Topics

- Clear merge changes (page 185)
- Edit the merge results (page 181)
- Merge two file versions (page 179)
- Save the merged file (page 184)
- View the next merge difference (page 182)

Save the merged file

Use this procedure to save the merge results to a file.

> **Note:** You must save your merged file to the default file name, otherwise Telelogic Synergy will not be able to copy that file into the database.

Steps...

- From the **Merge** dialog box toolbar, click **Save File**.

Related Topics

- Clear merge changes (page 185)
- Edit the merge results (page 181)
- Include nonconflicting merges (page 183)
- Merge two file versions (page 179)
- View the next merge difference (page 182)

Clear merge changes

Use the following procedure to clear the results field of any changes, and start the merge again. Notice that when you start over, you permanently change the entries that you previously made in the results field.

Steps...

- On the **Merge** dialog box toolbar, click **Back to base blocks** .

Related Topics

- Edit the merge results (page 181)
- Merge two file versions (page 179)
- Save the merged file (page 184)
- View the next merge difference (page 182)

Compare

Telelogic Synergy Merge and Compare use SiberMerge as the default tool. The following information is applicable to both merge and compare:

SiberMerge supports files written in a variety of character encodings. Note that all files involved in a compare or merge must be written using the same file encoding. For example, it is not possible to compare a file written in Shift-JIS to a file written in UTF-16.

When first run, SiberMerge creates two files, **.ccm_merge.enc** and **.ccm_merge.dat**.

The file named **.ccm_merge.enc** is located in your (UNIX) home or (Windows) profile directory and contains a list of file encodings that are offered in the encoding menus. Initially, the list includes all supported encodings; you can shorten the menus by deleting encodings that you do not use.

The file named **.ccm_merge.dat** is located in your (UNIX) home or (Windows) profile directory and contains the set of default compare/merge options, such as whether or not to ignore spaces, etc. You can edit this file to modify your default compare/merge options.

- Compare two files (page 188)
- Compare two like objects (page 192)
- Compare parallel files or directories with predecessor (page 189)
- Show parallel versions (page 190)

Compare two files

Use the following procedure to examine the similarities and differences of two file versions from the **History** dialog box.

The versions can be writable, and need not have a common ancestor. Comparisons are relative to the second version selected.

Steps...

If you need to find a file, see Find an object (page 141).

1. Right-click over the file you want to compare, and select **History**.

   The **History** dialog box appears.

2. Click the first file you want to compare, and CTRL-click the second. Both are highlighted.

3. On the **History** dialog box toolbar, click .

   The **Compare** dialog box displays the differences.

Related Topics

- Compare an object to a related object (page 191)
- Compare parallel files or directories with predecessor (page 189)
- Merge parallel files or directories (page 180)
- Show parallel versions (page 190)
- View the history of an object or release (page 143)

Compare parallel files or directories with predecessor

Use this procedure to compare files or directories with their predecessors.

Steps...

If you need to find a file or directory, see Find an object (page 141).

- Right-click over the file or directory you want to compare, and select **Compare with Predecessor**.

  The appropriate **Compare** dialog box displays the differences between the selected objects.

Related Topics

- Compare an object to a related object (page 191)
- Compare two files (page 188)
- Compare two like objects (page 192)
- Show parallel versions (page 190)
- View the history of an object or release (page 143)

Show parallel versions

A parallel conflict occurs when there are parallel versions of a file or directory. If you find parallel versions in your project, you can compare and merge the files, view a file's history, and view properties of the files.

Depending on the action you are taking, you might start the **Parallels** dialog box intentionally or Telelogic Synergy might start it for you to inform you about the parallels.

Steps...

If you need to find a file or directory, see Find an object (page 141).

- Right-click over the file or directory whose parallels you want to see, and select **Show Parallels**.

  The **Parallels** dialog box displays the objects with parallels and the merge candidates for the object with parallels.

  Use the toolbar at the top of the dialog to Compare two files (page 188), Merge two file versions (page 179), View the history of an object or release (page 143), and View properties (page 119).

OR

1. Right-click over the task to be completed and select **Complete**.

   If the task contains objects with parallel versions, the **Parallels** dialog box displays the conflicts.

2. You can Merge two file versions (page 179) or ignore the parallel(s) and continue to complete the task by clicking **Complete**.

OR

1. Right-click over the files or directories to be checked in and select **Check In**.

   If the files or directories contain parallel versions, the **Parallels** dialog box displays the conflicts.

2. You can Merge two file versions (page 179) or ignore the parallel(s) and continue with the check in by clicking **Check In**.

Related Topics

- Compare an object to a related object (page 191)
- Compare two files (page 188)
- Compare two like objects (page 192)
- Resolve membership conflicts in a project or project grouping (page 26)

Compare an object to a related object

Use the following procedure to examine the similarities and differences of an object version to its associated object. You can compare a project with its baseline project, a project grouping with its baseline, and a process rule with its process.

Steps...

If you need to find a project, project grouping, or process rule, see Find an object (page 141).

1. Right-click over the appropriate object, and select **Compare with Baseline Project**, **Compare with Baseline**, or **Compare with Process Rule from Process**.

   The appropriate **Compare** dialog box appears. Use the tabs to view unique and common members.

2. View the properties of an object by selecting the object and clicking .
3. View the history of an object by selecting the object and clicking .
4. Compare two object versions by clicking the first version, control-clicking the second version, then clicking .

Related Topics

- Compare two files (page 188)
- Compare parallel files or directories with predecessor (page 189)
- Compare two like objects (page 192)
- Show parallel versions (page 190)
- View properties (page 119)

Compare two like objects

Use the following procedure to examine the similarities and differences between two of the same types of objects. The following are the types of objects that you can compare:

- Directory
- Folder
- Folder template
- Process rule
- Project
- Project grouping

Additionally, you can compare files; however, you are actually comparing the content of the files, not the properties.

Steps...

1. Find an object (page 141), if necessary.
2. Right-click over the appropriate object, and select **Compare with**.

   A selection dialog box appears.
3. Select the object you want to compare with the specified object and click **OK**.

   The appropriate **Compare** dialog box displays the following information:

   - Directories: Unique and common entries
   - Folders and process rules: Properties and tasks
   - Folder templates: Properties
   - Projects: Unique and common members
   - Project groupings: Properties, projects, and tasks
4. View the properties of an object by selecting the object and clicking .
5. View the history of an object by selecting the object and clicking .
6. Compare two object versions by clicking the first version, control-clicking the second version, then clicking .

Related Topics

- Compare an object to a related object (page 191)
- Compare two files (page 188)
- Compare parallel files or directories with predecessor (page 189)
- Show parallel versions (page 190)
- View properties (page 119)

Manage builds

Note that all of the following operations exist in Telelogic Synergy Help, but with more general usage scenarios and without the methodology and process discussions. The operations in this section are tailored to fit the needs of a build manager working with the **Integration Testing** projects.

- Fix a broken build (page 195)
- Perform a build (page 196)
- Perform a rebuild (page 198)
- Build using specific tasks (page 202)
- Create a snapshot of a build (page 204)
- Rebuild without a baseline (page 206)

Builds

- Fix a broken build (page 195)
- Perform a build (page 196)
- Perform a rebuild (page 198)
- Build using specific tasks (page 202)
- Create a snapshot of a build (page 204)
- Rebuild without a baseline (page 206)

Fix a broken build

Sometimes, you'll need to add a task to or remove a task from a project grouping to fix the associated objects that are breaking a build. After you add or remove the task, you'll want to perform an update to add or remove all the files that are associated with the change.

Steps...

1. Determine which objects are causing the build to break.
2. Add or remove the task associated with the objects from the project grouping.

   In the **Work** pane, right-click over the appropriate file or directory, and select either **Add Task to Project Grouping** or **Remove Task from Project Grouping**.

   The **Select Project Grouping** dialog box appears. Use it to select the project grouping to add the task to.
3. Right-click over the appropriate project grouping and select **Automatically Update Baseline & Tasks**. (Be sure the check mark to the left of the option is cleared.)

   This will keep other new tasks from being retrieved.
4. Update the project. (Update a project (page 22).)
5. Build your project again.
6. Right-click over the same project grouping (in step 3) and select **Automatically Update Baseline & Tasks** to select this option.

Related Topics

- Add to the current task (page 83)
- Update the baseline and tasks (page 50)
- Copy and paste an object, task, or change request (page 250)
- Keep the baseline and tasks from changing during an update (page 51)
- Remove a task from a project grouping (page 94)
- View an associated task (page 87)

Perform a build

> **Note** This operation exists elsewhere in Telelogic Synergy Help, but with more general usage scenarios and without the methodology and process discussions. This operation is tailored to fit the needs of a build manager working with the **Integration Testing** projects.

Your application probably will contain many projects organized into a project hierarchy. You'll create a build management project hierarchy, referred to as the **Integration Testing** projects. These projects will be a part of an **Integration Testing** project grouping, which will enable you to collect, build, and test the latest completed tasks checked in by developers. The members of this project hierarchy are brought in through a query of all completed tasks for a specific release.

You'll want to build your **Integration Testing** projects frequently to ensure that the tasks completed by developers still work when built together and to provide developers with a common build area for testing purposes. Many teams build these **Integration Testing** projects daily. You'll want to create a build schedule that makes sense for the needs of your team.

Steps...

If you need to find a project grouping, see Find an object (page 141).

1. Right-click over the appropriate **Integration Testing** project grouping, point to **Update**, and select **All Projects**.

   The update operation queries for all completed tasks, replaces them in the **Integration Testing** project grouping, and updates the membership of the projects.

2. Show and resolve membership conflicts. (See Resolve membership conflicts in a project or project grouping (page 26) for details.)

3. Build your product.

   After a successful build, you'll want to test what you've built by running through a series of basic operations to ensure the integrity of the build, such as start the application, perform a few often-used operations, and exit from the application.

   > **Note** If your build fails, see Perform a rebuild (page 198).

4. Create a snapshot of a build (page 204).

   If you're creating a test baseline for a team to perform further testing, don't publish or release the baseline for everyone's use.

   If you want to make the Integration Testing build available to developers right away, set the **Publish** check box when you create the baselin.

Note If the requirements for your team change and you need to add a task to or exclude a task from a build, see Perform a rebuild (page 198).

Perform a rebuild

> **Note** This operation exists elsewhere in Telelogic Synergy Help, but with more general usage scenarios and without the methodology and process discussions. This operation is tailored to fit the needs of a build manager working with the **Integration Testing** projects.

When you perform a build for your team, you are gathering all of the completed tasks for the **Integration Testing** project grouping and building them for integration and testing. When you perform a rebuild for your team, you are manually adding a task to or excluding a task from the **Integration Testing** project grouping, then rebuilding just that change.

About rebuilding a broken build

You might need to rebuild your team's application for one of the following reasons.

- The requirements for the build changed and you need to add a feature.
- The requirements for the build changed and you need to remove a feature.
- A testing team found a problem during testing and they need a new build.
- A task that is necessary to the build wasn't included (for example, it wasn't completed in time or its release was set incorrectly).
- An object associated with a task is breaking the build and needs to be removed.
- A developer completed a fix task to fix a task that wasn't working properly, and you need to add the fix task to your build.

Regardless of why the build is broken, you'll need to rebuild. The timing of the rebuild could occur at any point in your process. A broken build could happen at any milestone; likewise, a situation where your requirements changed could happen any time. Because you are building the **Integration Testing** projects, which change frequently and are built often (as opposed to the **System Testing** projects, which are typically more stable), you might rebuild fairly often. Your workflow would be similar to the following:

- Keep the baseline and tasks in the **Integration Testing** project grouping from changing during an update.
- Manually add, remove, or exclude tasks in the **Integration Testing** project grouping.

  You might add one or several tasks, add and remove tasks, exclude a task, or any combination. You might do this quickly or over several days.
- Update the **Integration Testing** project grouping.
- Show and resolve membership conflicts.

  You might resolve conflicts yourself or have team members resolve the conflicts. Therefore, you might resolve conflicts quickly or over several days.
- Rebuild your product.

If you're building a small product with one or two added or removed tasks, the build might go quickly and your smoke test might be immediately successful. However, if you can't get your product to build, regardless of its size, see Rebuild without a baseline (page 206).

- Create a baseline.
- Allow the baseline and tasks in the **Integration Testing** project grouping to change during an update.

The following steps show you how to Add a task to a build (page 199) or Remove a task from a build (page 200), and then perform a rebuild.

Add a task to a build

If you need to find a project grouping, see Find an object (page 141).

Steps...

1. Right-click over the appropriate **Integration Testing** project grouping, and select **Properties**.

   The **Properties** dialog box appears.

2. Clear the **Auto Update** check box, and click **Apply**.

   This keeps the baseline and tasks from changing during an update operation. For more details, see Keep the baseline and tasks from changing during an update (page 51).

3. Click the **Tasks** tab.

   This tab shows the tasks that you've manually added to the project grouping, either in this dialog box or by using the **Add to Project Grouping** option from the **Tasks** context menu or the **Actions** main menu.

   For a detailed description of the various ways tasks are added to a project grouping, see "Add Tasks" in Change the update properties for a project (page 45).

4. Click the **Add Task** button.

   The **Select Task** dialog box appears. Use it to find the task(s) that you want to add to the project grouping.

5. Choose a task and click **OK**.

   You can choose one or more tasks.

6. Right-click over the **Integration Testing** project grouping, point to **Update**, and select **All Projects**.

   The update operation will bring in the changes from the new task(s).

7. Show and resolve membership conflicts. (See Resolve membership conflicts in a project or project grouping (page 26) for details.)

Once you've added a task, you might have conflicts as a result of broken dependencies. For example, if the task you added has other tasks that it depends on that weren't added, you'll need to work through these dependencies to decide on the best way to resolve conflicts.

8. Rebuild your product.

   After a successful rebuild, you'll want to test what you've built by running through a series of basic operations to ensure the integrity of the build, such as start the application, perform a few often-used operations, and exit from the application.

9. Create a snapshot of a build (page 204).

   If you're creating a test baseline for a team to perform further testing, don't publish or release the baseline for everyone's use.

   If you want to make the Integration Testing build available to developers right away, set the **Publish** check box when you create the baselin.

10. In the **Properties** dialog box for the **Integration Testing** project grouping, click the **Properties** tab, select the **Auto Update** check box.

    This enables the baseline and tasks to change during the next update operation.

Remove a task from a build

Steps...

1. Right-click over the appropriate **Integration Testing** project grouping, and select **Properties**.

   The **Properties** dialog box appears.

2. Clear the **Auto Update** check box.

   This keeps the baseline and tasks from changing during an update operation. For more details, see Keep the baseline and tasks from changing during an update (page 51).

3. Remove tasks (page 46).

4. Optionally, you can Exclude a task (page 82).

   By excluding a task, you keep it from being associated with the **Integration Testing** project grouping and team members' projects when they're updated. This is essential to keep objects that are breaking a build out of the **Integration Testing** projects and out of developers' projects.

   If you are excluding a task to keep team members from getting a bad task, you might also need to Specify one task to fix another (page 90). This operation creates a relationship between the bad task and the task that fixes it. (This relationship is useful if you use conflict detection.)

5. Right-click over the **Integration Testing** project grouping, point to **Update**, and select **All Projects**.

   If you are removing a feature, the update operation will exclude the objects from the excluded task. If you have created a fix task, the update operation will bring in the changes from the fix task if it's complete. If you want only the new fix task, you can add it. (See Add a task to a build (page 199).)

6. Show and resolve conflicts. (See Resolve membership conflicts in a project or project grouping (page 26) for details.)

   Once you've removed a task, you might have conflicts as a result of broken dependencies. For example, if the task you removed has other tasks dependent on it, you'll need to work through these dependencies to decide on the best way to resolve conflicts.

7. Rebuild your product.

8. Create a snapshot of a build (page 204).

   If you're creating a test baseline for a team to perform further testing, don't publish or release the baseline for everyone's use.

   If you want to make the Integration Testing build available to developers right away, set the **Publish** check box when you create the baselin.

9. In the **Properties** dialog box for the **Integration Testing** project grouping, click the **Properties** tab, select the **Auto Update** check box.

   This enables the baseline and tasks to change during the next update operation.

   > **Note** Once you've created and published a baseline with the changes from a bad task, marking the task for exclusion will have no effect on your build because the objects associated with the task will still be in your baseline. You'll need to create a fix task and new versoins of the bad objects to back out the changes from the bad task, then create and publish another baseline to make the changes available to developers.
   >
   > If backing out or fixing changes isn't easy, mark the baselne for deletion so it's not picked up (and the previous baseline is used).

Build using specific tasks

Note This operation exists elsewhere in Telelogic Synergy Help, but with more general usage scenarios and without the methodology and process discussions. This operation is tailored to fit the needs of a build manager working with the **Integration Testing** projects.

After your team has coded the majority of the application and you've completed code freeze, you'll be ready to perform selective builds. These builds will no longer include every completed task; you'll want to include only specific tasks in the build.

Workflow for small and large teams

If your team is small and your application is part of a larger application, you might be the only person to determine which tasks are allowed in a build. The workflow would be similar to the following:

- Code freeze is over and the developers and testers are using the application. They find a problem that needs to be fixed in developer Joe's area.
- Joe creates a task and assigns it to himself. He makes the fix and completes the task.
- Joe notifies Bob, his build manager, that this task needs to be included and why. Bob approves the change and manually adds it to the next scheduled build.

If your team is big and your application is a deliverable, you might work as part of a change control board to determine which tasks are necessary to deliver a quality product that meets the requirements. The flow would be similar to the following:

- Code freeze is over and SQE is testing the application. They find several problems and submit them using Telelogic Change.
- The program manager gives each change control board member a list of change requests from SQE, and the team decides which will be fixed.
- The build manager assigns the tasks to be fixed to his team members, and informs them of the next build date.
- When the developers have completed their assigned tasks, they notify the build manager, and the build manager manually adds the completed tasks to the build.

At this point, the build manager can add the tasks to the build in the following way.

Steps...

1. Right-click over the appropriate **Integration Testing** project grouping, choose **Automatically Update Baseline & Tasks**, and be sure it's cleared.

   This keeps the baseline and tasks from changing during an update operation. For more details, see Keep the baseline and tasks from changing during an update (page 51).

2. Add approved tasks to the project grouping in any of the following ways:
   - Drag and drop the approved tasks onto the project grouping.
   - Right-click over the approved task. See Add a task to a project grouping (page 95) for instructions.
   - Use the **Manually Added Tasks** table in the **Project Grouping Properties** dialog box, in the **Tasks** tab. See "Add a Change" in Perform a rebuild (page 198) for instructions.
3. Right-click over the **Integration Testing** project grouping, point to **Update**, and select **All Projects**.

   The update operation will bring in the changes from the new task(s).
4. Show and resolve conflicts. (See Resolve membership conflicts in a project or project grouping (page 26) for details.)
5. Rebuild your product.
6. Create a snapshot of a build (page 204).

   Once you're satisfied with the build quality, you can create a test baseline, which saves a copy of the build made available to SQE and enables developers to view the changes in the build, but doesn't publish or release the baseline for everyone's use.

   Note that **Auto Update** is still disabled for the **Integration Testing** project grouping. You can enable it when you're ready to accept all completed tasks again.

Create a snapshot of a build

> **Note** This operation exists elsewhere in Telelogic Synergy Help, but with more general usage scenarios and without the methodology and process discussions. This operation is tailored to fit the needs of a build manager working with the **Integration Testing** projects.

After you have successfully built the **Integration Testing** projects, you can create a snapshot of the build so that testing can begin and developers can see what's gone into the build that's being tested. This snapshot is a test baseline, which means that it's not yet ready to be made available to everyone.

After SQE has tested the build and it passes testing, then you can publish the baseline for developers to use.

The following is the flow for creating a test baseline:

- The build manager builds the **Integration Testing** projects, and the build is successful.
- The build manager creates a test baseline.
- Baseline testing begins; the developers are able to see what's in the build.
- The build passes testing and is ready for the build manager to publish to developers.

Steps...

1. Right-click over the appropriate **Integration Testing** project grouping and select **Create Baseline**.

   The **Create Baseline** dialog box appears.

   > **Note** When you create a baseline, you'll choose a list of projects to be included in the baseline. Be sure to include **all** related projects in your baseline so that you have a complete set for reference.

2. If you'd like, modify the **Name**, **Description**, and **Build** properties.

   - **Name**

     This is a baseline's name. It uniquely identifies this baseline within this database. By default, Telelogic Synergy names baselines with the creation date; for example, 20040309 stands for March 9 2004. However, you can modify it. The following are restricted characters and shouldn't be used in the name: **/ \ ' " : ? * [ ] @ - #**

     > **Note** If you're creating baselines in more than one database and you're using Telelogic Change to generate reports on these builds, use the same baseline name in

each of the databases. This allows you to generate a build report that has a related baseline in more than one database.

- **Description**

  This field provides a place for you to describe the baseline you are creating.

- **Build**

  The build property shows the build identifier (letters, numbers, or combination) associated with a baseline. The build identifier can contain a maximum of 64 characters.

3. Click **OK**.
4. After the build has passed testing, the build manager can publish a test baseline to developers.

Note that the above steps only describe how a build manager creates and uses a test baseline. Baseline management has several more areas to be considered, for example, changing projects in the baseline, publishing the baseline upon creation, releasing the baseline and objects upon creation, and so forth.

Rebuild without a baseline

> **Note** This operation exists elsewhere in Telelogic Synergy Help, but with more general usage scenarios and without the methodology and process discussions. This operation is tailored to fit the needs of a build manager working with the **Integration Testing** projects.

When you create a baseline, you communicate the added, removed, or excluded tasks to your team through the published baselines. For example, if you exclude a task, team members will know that a task was excluded when they update their projects and get the new baseline.

If you are unable to create a baseline, for example, because the application won't build or because your smoke test is failing, then you'll need to communicate with your team differently.

Now the build methodology is different from that given in the previous operations. Because you can't build successfully, you'll need developers to test and fix before you can create a baseline. The following operation explains how to do this.

Steps...

Notify developers that the build is broken and they'll need to test and fix their completed tasks.

1. Developers will need to right-click over the **Integration Testing** project grouping and select **Copy All Tasks**.

   This enables developers to obtain the latest tasks.

2. Developers paste the tasks to their appropriate project grouping.

   Projects might contain many of the same tasks that are in the **Integration Testing** project grouping, but Telelogic Synergy only pastes the tasks that are not in the developer's project grouping.

3. Developers test and fix tasks, informing you when tasks are completed.

4. Manually add the completed tasks to the **Integration Testing** project grouping. (See Add a task to a build (page 199).)

5. Rebuild your product.

   This might fix the build problems; however, sometimes teams must go through many test and fix iterations before they can get a successful build.

6. Once you build successfully and the build meets your quality standards, Create a snapshot of a build (page 204).

Customize the interface

Using the explorers (page 208)

- Close one or all explorers (page 209)
- Customize an explorer (page 210)
- Dock one or more explorers (page 212)
- Group query results in Explorers (page 213)
- Add a saved query to an Explorer (page 214)
- Add a saved query to the Find menu (page 215)
- Refresh the results of a query used by an Explorer (page 216)
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Change the look of the Interface (page 219)

- Add a property to a column heading (page 226)
- Customize the dialog boxes and panes (page 220)
- Change colors (page 221)
- Change the font type and size (page 223)
- Change the Work pane look (page 224)
- Close a project (page 225)
- Display the Releases explorer (page 230)
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Using the explorers

- Close one or all explorers (page 209)
- Customize an explorer (page 210)
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- Group query results in Explorers (page 213)
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- Refresh the results of a query used by an Explorer (page 216)
- Remove a saved query (page 217)

Close one or all explorers

The following operation explains how to close one or all docked explorers.

Steps...

- To close one docked explorer, click the **Pushpin** icon.
- To close all docked explorers, click the **X** icon in the top explorer toolbar.

Related Topics

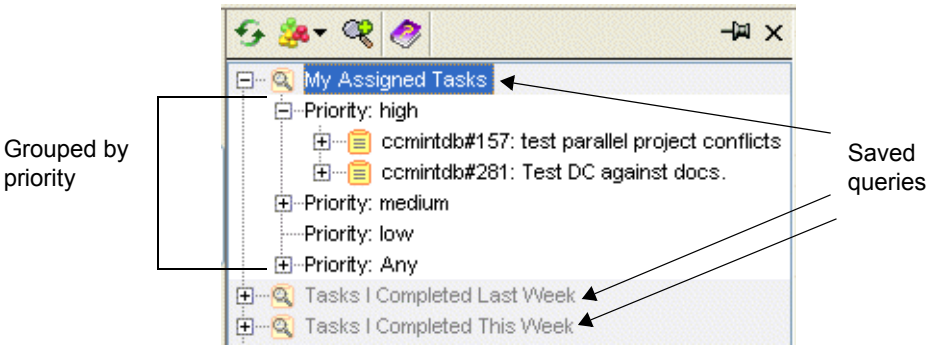
- Add a saved query to an Explorer (page 214)
- Customize an explorer (page 210)
- Dock one or more explorers (page 212)
- Group query results in Explorers (page 213)
- Refresh the results of a query used by an Explorer (page 216)

Customize an explorer

Each explorer shows a particular type of object, either projects, tasks, or change requests. The objects shown in an explorer are defined by queries that return that type of object. For example, the **Tasks** explorer shows **My Assigned Tasks**.

You can change the objects available for browsing in the explorer by adding, removing, or repositioning the queries. Telelogic Synergy provides predefined queries for objects you are likely to need. You can add any of the predefined queries to an explorer or create your own.

Within a saved query, you can group objects by their properties. For example, in the **Tasks** explorer, you could group your tasks by priority, as shown in the following figure:



The following Help topics show ways in which you can customize an explorer:

- Customize a query (page 154)

  Shows how to use query clause elements (such as functions, relative operators, logical operators, and so forth) to build a custom query.

- Define a query (page 148)

  Gives steps showing how to locate objects in your database.

- Find an object (page 141)

  Gives steps showing how to locate objects in your database by using **Find** menu.

- Query for predefined versions of objects (page 174)

  Gives steps showing how to locate projects in your database that match the predefined version criteria.

- Run a saved query (page 175)

  Gives steps to show how to run your own saved query or a system query.

- Save a query (page 150)

  Gives steps to save a query once you've created a custom query.

After you've completed the previous steps and have a saved query, you can Add a saved query to an Explorer (page 214) or Add a saved query to the Find menu (page 215) from the appropriate explorer.

Related Topics

- Group query results in Explorers (page 213)
- Refresh the results of a query used by an Explorer (page 216)

Dock one or more explorers

You can work with explorers in two ways. When you start an explorer, you're looking at it in a sliding pane; the pane that the explorer displays in has slid over a portion of the **Work** pane. If you click an object or project tab in the **Work** pane, the explorer will slide back and you'll have to click an explorer button to get it back.

When you click the **Pushpin** icon and dock the explorer, you're looking at a docked pane that is now sharing the main window space with the **Work** pane. When you dock an explorer, it remains in view regardless of other explorers or projects you view. This is useful if you work with more than one explorer regularly.

You can dock more than one explorer. When you do this, the explorers are stacked vertically between the **Explorer** toolbar and the **Work** pane.

Steps...

1. In the **Explorer** toolbar, click the appropriate explorer button to bring it into view.

   The explorer slides into place to the right of the **Explorer** toolbar and over a portion of the **Work** pane.
2. In the **Explorer** toolbar, click the **Pushpin** icon to dock the explorer.
3. Repeat step 1 with a different explorer, and then dock it by clicking the **Pushpin** icon.

Related Topics

- Add a saved query to an Explorer (page 214)
- Close one or all explorers (page 209)
- Customize an explorer (page 210)
- Group query results in Explorers (page 213)
- Refresh the results of a query used by an Explorer (page 216)

Group query results in Explorers

This operation describes how to change the organization of query results within an explorer.

Each project, task, and change request has a set of properties, and you can use the grouping feature to organize query results to display in an explorer according to the properties that are most important to you. For example, if you have 20 assigned tasks, you might want to group tasks so that those with the highest priority are the most visible. Another useful grouping is to gather all recently created baselines by release so that you are up to date on the progress of a release. With change requests, you might be tracking all the submitted change requests from a particular client, and can quickly find them by grouping the query results by submitter.

Steps...

1. In the **Explorer** toolbar, right-click over the appropriate query, click **Group by**, and choose the option that will group the query results the way you want.

   Alternatively, in the appropriate explorer, click the query whose content you want to reorganize. Click and select one of the options.

   When you make a change, you modify the organization of the results for the query you've chosen.

2. To make the same change to other queries or in a query in a different explorer, repeat step 1 above.

Related Topics

- Add a saved query to an Explorer (page 214)
- Close one or all explorers (page 209)
- Customize an explorer (page 210)
- Dock one or more explorers (page 212)
- Refresh the results of a query used by an Explorer (page 216)

Add a saved query to an Explorer

Use this operation to add a query to an explorer. Adding a query enables you to quickly access query results, view associated objects for query results, and group the results in like categories. Some examples of queries you might want to save include teammates' projects and tasks, all released baselines, or all of your team's completed tasks for the past month.

You can add queries for projects, project groupings, and baselines to the **Projects** explorer, add queries for tasks and folders to the **Tasks** explorer, add queries for change requests to the **Change Requests** explorer (if Telelogic Change is installed), and add queries for processes, process rules, releases, and folder templates to the **Releases** explorer. Note that you can't add queries for objects to an explorer.

The following steps show how to add a query to an explorer.

Steps...

1. In the **Explorer** toolbar, click .

   The **Select Query** dialog box appears.

2. Select the query you want to add to the explorer and click **OK**.

   The added query displays at the bottom of the appropriate explorer.

   Note that you can also create a query by clicking **Create** and using the **Create Query** dialog box.

   Alternatively, you can start the **Query** dialog box and click the **Define Query** tab to Define a query (page 148). After you Save a query (page 150), you can add it to an explorer by right-clicking and choosing **Add to Explorer**.

Related Topics

- Customize an explorer (page 210)
- Customize a query (page 154)
- Close one or all explorers (page 209)
- Dock one or more explorers (page 212)
- Refresh the results of a query used by an Explorer (page 216)
- Group query results in Explorers (page 213)

Add a saved query to the Find menu

Use this operation to add a saved query to the **Find** menu. Adding a saved query to the **Find** menu gives you a short cut to find teammates' projects and tasks, all released baselines, or almost anything else you want to add a query to find.

Adding a shortcut is useful if you find that you often work without viewing explorers, but want to quickly find baselines, directories, files, projects, tasks, folders, folder templates, process rules, and releases.

The queries in the **Find** menu are also availabe in select dialog boxes to make it easy to find objects using your own criteria.

Steps...

1. Start the **Query** dialog box from the **View** menu.
2. In the **Query** dialog box, click the **Saved Queries** tab to view all queries that you can add to the **Find** menu.
3. Right-click over the appropriate query and choose **Add to Find Menu**.

   The added query displays at the bottom of the **Find** menu, in the main menu. Selecting a query from the **Find** menu causes the **Query** dialog box to display the results of the query in it.

   Note that you can add multiple saved queries to the **Find** menu at once. Also, if you right-click over a saved query that's already in the **Find** menu, the **Remove from Find Menu** action will be available.

Related Topics

- Save a query (page 150)
- Remove a saved query (page 217)
- Edit a saved query (page 176)
- Rename a saved query (page 153)
- Run a saved query (page 175)
- View a saved query (page 152)

Refresh the results of a query used by an Explorer

Use this operation to refresh the query results shown in an explorer.

Some queries, (the queries supplied with Telelogic Synergy), are automatically refreshed when you perform an action associated with one of the queries. For example, if you create and assign a task to yourself, the **My Assigned Tasks** saved query is refreshed automatically. A query that you have created is never refreshed automatically. In this case, you would need to refresh the query results manually, by performing the following operation.

Steps...

1. In the explorer of your choice, find the query whose results you want to refresh.
2. Right-click over the query and choose **Refresh Results**.

   The query will run and make the appropriate changes.

Related Topics

- Add a saved query to an Explorer (page 214)
- Close one or all explorers (page 209)
- Customize an explorer (page 210)
- Dock one or more explorers (page 212)
- Group query results in Explorers (page 213)

Remove a saved query

The following procedure shows how to cut or delete a saved query, for example, **My 1.0 Patch Projects**, from an explorer.

Steps...

- In the appropriate explorer, right-click over a saved query (for example, **My 1.0 Patch Projects**), and choose **Cut**.

  The saved query still exists, and you can view and use it again from within the **Select Query** dialog box. (See Add a saved query to an Explorer (page 214) for information.)

  If you no longer want the saved query to reside in the database, choose **Delete** instead. Note that **Delete** is not available from the **Tasks** explorer context menu.

  Note that you can **cut** a default saved query, such as **My Project Groupings** or **Build Management Project Groupings**, but you can't **delete** it.

Related Topics

- Add a saved query to the Find menu (page 215)
- Delete an object (page 66)
- Edit a saved query (page 176)
- Rename a saved query (page 153)
- Run a saved query (page 175)
- Save a query (page 150)
- View a saved query (page 152)

Change the look of the Interface

- Add a property to a column heading (page 226)
- Customize the dialog boxes and panes (page 220)
- Change colors (page 221)
- Change the font type and size (page 223)
- Change the Work pane look (page 224)
- Close a project (page 225)
- Display the Releases explorer (page 230)
- Remove a property from a column heading (page 227)
- Remove tabs from the Work pane (page 228)
- Refresh choices during a session (page 229)
- Show the Security tab in the Properties dialog boxes (page 231)

Customize the dialog boxes and panes

You can customize where information displays in tables by adding, reorganizing, or removing columns in any dialog box that contains a table.

Steps...

1. Add a property to a column heading (page 226)
2. Remove a property from a column heading (page 227)
3. Change the order of columns by dragging a column heading to a new location within the heading bar.
4. Resize a column by clicking the border of the column heading and dragging it to the width you want.

   If the text in a column is too narrow to be displayed in its entirety, the text will be truncated with ellipses.

Note that whatever column heading you set, Telelogic Synergy will save that setting when you quit your session. Your new setting will be the default column setting.

Change colors

Telelogic Synergy allows you to change the color settings to suit your style.

The colors you configure apply to all explorers, dialog boxes, and panes.

Use the **View** tab **Color** pane to do the following:

- Change the selection color. (page 221)
- Change the ledger line color. (page 221)
- Change the text color. (page 221)
- Change the project icon color. (page 221)

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **View** tab, then click **Color** in the left pane.
3. Change the colors.
   a. Change the selection color.

      Click **Selection** in the middle pane.

      You can change the foreground and background colors. The large color box shows the current color settings for selection. Look in **Preview of colors** for an example of what the selection color will look like in Telelogic Synergy.

   b. Change the ledger line color.

      Click **Table Row** in the middle pane.

      You can change the odd and even background colors. The large color box shows the current color settings for the ledger lines. Look in **Preview of colors** for an example of what the color will look like in Telelogic Synergy.

   c. Change the text color.

      Click **Object Text** in the middle pane.

      You can change the colors for modifiable and non-modifiable text. The large color box shows the current color settings for the text. Look in **Preview of colors** for an example of what the color will look like in Telelogic Synergy.

   d. Change the project icon color.

      Click **Project Icon** in the middle pane.

      You can change the color that displays in the project icon for each purpose. The box to the right of the third pane shows the current color settings for the different purposes. Look in **Preview of colors** for an example of what the color will look like in Telelogic Synergy.

4. Change a default color by right-clicking on one in the color palette.

   Additionally, you can set a color by right-clicking on one of the gray boxes in the color palette and doing one of the following in the **Choose a color** dialog box:

   * Pick a standard color from the **Swatches** tab.

   * Create a custom color from the **HSB** tab by setting the hue, saturation, and brightness for a color.

   * Create a custom color from the **RGB** tab by "mixing" the colors red, green, and blue.

   If you change a color to a custom color and apply it to a selection, ledger line, text, or icon, then that color is saved and will be used in this and other sessions.

5. To return to the default settings after making changes, click **Use Defaults**.

6. Click **Apply** or **OK** to save the change.

Related Topics

- Change the font type and size (page 223)
- Change the Work pane look (page 224)

Change the font type and size

You can change the font type and size that displays in all explorers, panes, and dialog boxes. Additionally, you can set the font type and size for all messages displayed in Telelogic Synergy.

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **View** tab, then click **Font** in the left pane.
3. Change the **Normal** or **Message** font type.

   Click **Normal** or **Message**, whichever is appropriate.

   You can change the font type to a logical font or a physical font. The logical fonts are those fonts guaranteed to be in the Java Runtime Environment; they display if the **Show All** check box is cleared. The physical fonts are those fonts available to the machine; they display if the **Show All** check box is selected.

   The **Show All** check box is cleared by default.
4. Change the font size.

   In the **Font Size** box, click the up arrow to increase the font size or the down arrow to decrease the font size.
5. To return to the default settings after making changes, click **Use Defaults**.
6. Click **Apply** or **OK** to save the changes.

Related Topics

- Change colors (page 221)
- Change the Work pane look (page 224)

Change the Work pane look

Use the following procedure to control the look of the **Work** pane.

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **View** tab, then click **Work Pane** in the left pane.
3. Change the ledger line option.

   By default, this option is selected and the ledger line in the **Work** pane matches the color of the project being shown.

   If you clear this option, the ledger lines will be the same as in other dialog boxes.
4. Change the maximum number of tabs displayed in the **Work** pane.

   By default, a maximum of 10 tabs can be displayed in the **Work** pane. You can use the up arrow to increase the number of tabs or the down arrow to decrease the number of tabs.
5. Change the maximum number of characters that display in tab titles.

   By default, a maximum of 20 characters display in tab titles. Use the up arrow to increase the number of characters or the down arrow to decrease the number of characters.
6. Change the kind of objects that will display in the **Work** pane when selected in the **Explorer** pane.

   By default, any object you select in the **Explorer** pane displays in the **Work** pane. You can change this setting to show only projects or only projects and tasks in the **Work** pane.
7. To return to the default settings after making changes, click **Use Defaults**.
8. Click **Apply** or **OK** to save the changes.

Related Topics

- Change colors (page 221)
- Change the font type and size (page 223)

Close a project

Steps...

- In the **Work** pane, right-click over the project tab that you want to close and select **Close**.

  Closing a project removes the tab in the **Work** pane.

  If you close a project, you can open it again by using **Show** or by clicking in the **Work** pane toolbar, typing the project name, and clicking **OK**.

  If you don't remember the name, you can query first, then follow the instructions in Show properties in the Work pane (page 256).

Related Topics

- Open a project in the Work pane (page 255)
- Show properties in the Work pane (page 256)

Add a property to a column heading

This feature provides a convenient way to add a property to the table header context menu.

For example, let's say that you want to view the **change_request** values in the **Work** pane table. You type **change_request** in the **Add Property** dialog box, and the table column shows the values for the Telelogic Change change request.

Steps...

1. Right-click in a table header to start the context menu, and choose **Add Property**.

   The **Add Property** dialog box appears.

2. Type the name of the property you want to add and click **OK**.

   If you're adding a custom attribute, be sure to enter its exact name. Names are case-sensitive. The default attribute names must match those in the database.

Related Topics

- Remove a property from a column heading (page 227)

Remove a property from a column heading

This feature provides a convenient way to remove a property that you added to the table header context menu.

For example, let's say that you want to view the **status** values in the **Work** pane table. You type **state** in the **Add Property** dialog box, but the new table column doesn't show any values. You realize that you typed the wrong name, so you add the correct name by using the **Add Property** dialog box, and remove the wrong name by using the **Remove Property** dialog box. The table column then shows the values for **status**.

Steps...

1. Right-click in a table header to start the context menu, and choose **Remove Property**.

   The **Remove Property** dialog box displays the names of properties that you've added.

2. Select the property you want to remove and click **OK**.

Related Topics

- Add a property to a column heading (page 226)

Remove tabs from the Work pane

If you have opened several objects in the **Work** pane, you'll notice that you have many tabs—one for each object that you've opened. This can make it difficult to find projects and tasks that you're actively working on. The following procedure shows how to remove tabs.

Steps...

- In the **Work** pane, right-click over the tab that you want to remove, and select **Close**.

  Additionally, you can select the following choices:

  - **Close Others**

    Use this option when you want to remove all the tabs from the **Work** pane, except the one you're currently using.

  - **Close All**

    Use this option when you want to remove all the tabs from the **Work** pane.

Related Topics

- Show properties in the Work pane (page 256)

Refresh choices during a session

Use this feature to refresh choices in the **Properties**, **Query**, and **Create Task** dialog boxes that have changed since you started your session.

For example, if a new user is added to the database while you're running a session, you can't create a task and assign it to that user until you perform a **Refresh Choices** operation (because the user's name won't be in the **Create Task** dialog box **Resolver** list). Some other choices that could change during a session include platform, priority, release, and so forth.

Steps...

- Click the **View** menu, and choose **Refresh Choices**.

  Choices in the **Properties**, **Query**, and **Create Task** dialog boxes are refreshed whether the dialog boxes are opened or closed.

Related Topics

- Delete an object (page 66)
- Keep the baseline and tasks from changing during an update (page 51)
- Update the baseline and tasks (page 50)

Display the Releases explorer

By default, developers won't see the **Releases** explorer. However, if you often view process related objects (processes, process rules, releases, and folder templates), you can use the following steps to display the **Releases** explorer. This option also controls menu items for process-related objects.

If you are both a developer and a build manager, you'll see the **Releases** explorer by default.

> **Note** You might need to restart Telelogic Synergy after making this change.

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **View** tab, then click **General** in the left pane.
3. Set the **Show Releases Explorer and related objects** option by clicking the check box.

   By default, this option is cleared, and developers won't see the **Releases** explorer in the **Explorer** toolbar.
4. Click **Apply** to save the changes.

Related Topics

- Change colors (page 221)
- Change the font type and size (page 223)

Show the Security tab in the Properties dialog boxes

Use this option to display the **Security** tab and its group security options in the **Properties** dialog box for the following objects:

- Files
- Directories
- Folders
- Tasks
- Projects
- Releases

This option is available to teams who have a group security license and have set up groups in their database. These teams might need to allow some users to check out, modify, and view certain objects while disallowing other users.

Steps...

1. Start the **Options** dialog box by clicking **Tools** in the main menu and choosing **Options**.
2. Click the **View** tab, then click **General** in the left pane.
3. Set the **Show security properties on objects** option by clicking the check box.

   By default, this option is cleared, and the **Security** tab doesn't display in the **Properties** dialog boxes, whether or not group security has been set up.
4. Click **Apply** to save the changes.

Related Topics

- Change colors (page 221)
- Change the font type and size (page 223)

Start and learn the interface

Start Telelogic Synergy products (page 235)

- Start Telelogic Synergy from the command line (page 236)
- Start Telelogic Change (page 237)
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For new users (page 239)

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Move files (page 249)

- Copy and paste an object, task, or change request (page 250)
- Use cut, copy, and paste to move files (page 251)
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Problem solving (page 258)

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- Recover text (page 259)

- Refresh an object (page 260)

Start Telelogic Synergy products

- Start Telelogic Synergy from the command line (page 236)
- Start Telelogic Change (page 237)
- Start Telelogic Synergy in copy-based mode (page 238) (UNIX users only)

Start Telelogic Synergy from the command line

cmsynergy Command

Synopsis

```
cmsynergy [-user | -u user_name] [-password | -pw password]
          [-host | -h engine_host] [-database | -d database_path]
```

Description and Uses

Use the **cmsynergy** command to start a session.

This command will open the **Start** dialog box with any specified settings.

Options and Arguments

`-user | -u user_name`

This option is available for Windows users only.

Specifies the user's name for the session.

`-pw | -password password`

Specifies the user's password for the session.

`-h | -host engine_host`

Specifies the engine host for this session.

`-d | -database database_path`

Specifies the database path for the Telelogic Synergy Classic database to connect to this session.

Examples

- Start Telelogic Synergy using all values.

  ```
  > cmsynergy -u linda -pw jupiter -h milkyway -d \\galaxy\ccmdb\earth
  ```

- Start Telelogic Synergy using three of the values (*user_name*, *engine_host*, and *database_path*).

  ```
  > cmsynergy -u linda -h milkyway -d \\galaxy\ccmdb\earth
  ```

Start Telelogic Change

If your organization uses Telelogic Change, you might need to start it while working within Telelogic Synergy. The following steps show how to do this.

Steps...

- In the **Tools** main menu, click **Start Telelogic Change**.

  A browser opens and Telelogic Change starts in it. For Help with Telelogic Change, click **Help** in the main menu at the top of the interface.

Related Topics

- Resolve a change request (page 101)
- View properties (page 119)
- View your assigned change requests (page 145)

Start Telelogic Synergy in copy-based mode

This option applies to UNIX users only.

Setting a value of **false** for the **user.allow.link.based.workareas** key indicates that you want to start Telelogic Synergy in copy-based mode. This causes work areas to be copy based by default. When a work area is copy-based, Telelogic Synergy places copies of projects in your file system. (This is different from a link-based work area where Telelogic Synergy places in your file system links to the files in the database.) Type the setting in the following form in your $HOME/.ccm.user.properties file:

user.allow.link.based.workareas=false

Setting this value to anything other than **false** will cause Telelogic Synergy to start in link-based mode. Note that the value is case-insensitive.

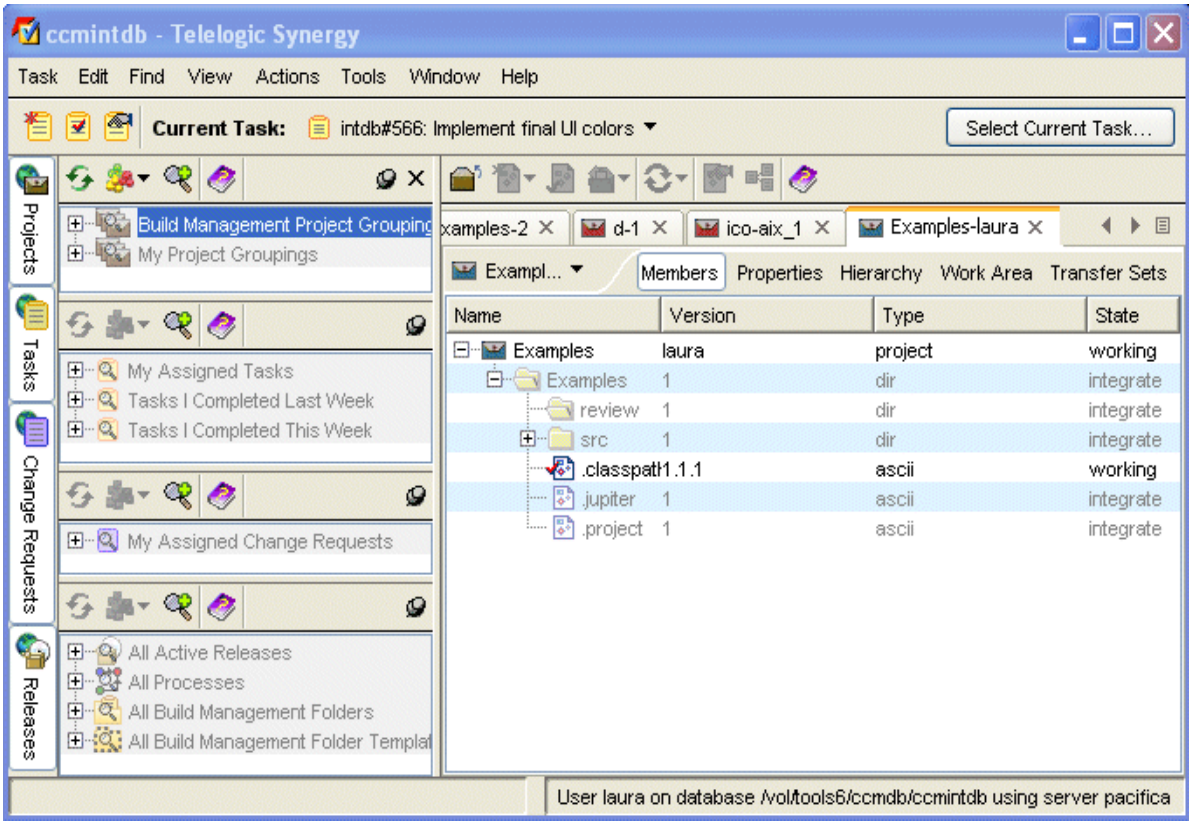
For new users

- Take the Telelogic Synergy tour (page 239)
- Get started with Telelogic Synergy (page 243)
- Use keyboard shortcuts (page 244)
- Use mouse shortcuts (page 247)
- Getting help (page 247)

Take the Telelogic Synergy tour

This interface is designed to manage change for software products. The interface and usage model enable you to maintain focus on your work.

To expand this interactive graphic, click the thumbnail below. To read a description of an area in the expanded graphic, place your cursor over the area and a tooltip will appear with explanatory information.



The following features are described in this section:

- Explorer toolbar (page 240)
- Work pane (page 241)
- Ledger line colors (page 242)
- Automatic tab management (page 242)
- Drag and drop support (page 242)
- General shortcuts (page 245)

Explorer toolbar

The **Explorer** toolbar allows you to view the **Projects**, **Tasks**, **Releases**, and **Change Requests** explorers.

- **Projects explorer**

  The **Projects** explorer allows you to find projects you reference often. By default, it shows your personal projects, the current build management projects, and baselines created in the last 30 days. You can define queries to add other projects of interest, which will make them available for quick reference.

- **Tasks explorer**

  The **Tasks** explorer allows you to find tasks you frequently need. By default, it shows your assigned tasks as well as tasks you've recently completed. You can define queries to add other tasks of interest, such as tasks other team members have been assigned, and so forth.

  Additionally, saved queries that return folders will display in the **Tasks** explorer if you Add a saved query to an Explorer (page 214).

- **Releases explorer**

  The **Releases** explorer allows you to quickly view the properties of a release or of a process rule being used by the release. When you select a release, process, process rule, or folder template in the **Releases** explorer, you can view its properties in the **Work** pane and make changes to the object, if necessary.

- **Change Requests explorer**

  The **Change Requests** explorer provides quick access to change requests you use frequently. By default, it displays your assigned change requests. You can define queries to add other change requests of interest, such as change requests assigned to other team members, and so forth. Note that the **Change Requests** explorer is available only if you use Telelogic Change.

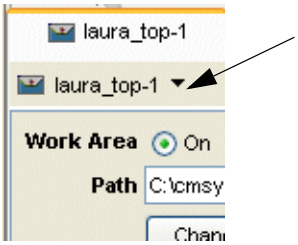
Work pane

The **Work** pane displays different types of information for projects, tasks, project groupings, baselines, folders, folder templates, processes, process rules, or releases that you select in the following ways:

- Select the appropriate object from one of the explorers.
- If you've already viewed the object once in the **Work** pane, click the tab displaying the name of the object.
- In any dialog box where you can select a project, task, project grouping, baseline, folder, folder template, process, process rule, or release, right-click over the appropriate object and select **Show**.
- Enter a project name in the **Show Project** dialog box to open it in the **Work** pane.

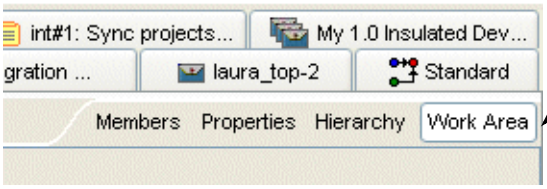
In addition to displaying different types of information for objects, the **Work** pane offers two ways to organize and access information.

- The object menu, shown below, enables you to perform actions on the object shown in the **Work** pane. This is especially helpful when you're viewing other aspects of an object (for example, working in the **Work Area** tab for a project) and the project's members are not showing. You can still copy the project, look at its history, and so on without switching back to the **Members** tab.



This is the object menu.

- The tab bar, shown below, organizes the different kinds of information you can view for an object in the **Work** pane. Beyond organization, the information in each tab enables you to perform operations for a variety of objects without explicitly opening a specific dialog box. For example, if you want to change the work area path for a project, you can click the **Work Area** tab and perform the change immediately.



This is the tab bar for a project.

See Show properties in the Work pane (page 256) to learn about the kinds of information you can view for an object in the **Work** pane.

Ledger line colors

Every other ledger line in the **Work** pane (and any dialog box showing tables) is highlighted by a color. The default color that displays is determined by the purpose of the project you're looking at. For example, if you're looking at a project with an **Insulated Development** purpose, every other ledger line will be highlighted in blue.

The colors show what kind of project you're in. This is useful if you work in Telelogic Synergy as both a developer and a build manager. When you look at a project used for development activities, every other ledger line is blue. When you look at a project used for build management, every other ledger line is either red or green (see table below). This occurs automatically according to the purpose; you don't have to set or change anything. However, if you'd like to change the default row colors, see Change colors (page 221).

The following table shows the default ledger line colors for tables.

purpose	Project State	Color
Insulated Development	*working*	blue
Collaborative Development	*working*	blue
Custom Development	*working*	blue
Shared Development	*shared*	blue
Visible Development	*visible*	blue
Integration Testing	*prep*	red
Master Integration Testing	*prep*	red
System Testing	*prep*	green
static projects	static projects	gray

Note that the icons on the project tabs reflect the same color scheme as the rows. This is also true of icons that display in the **Projects** explorer.

Automatic tab management

By default, you can see a maximum of 10 tabs in the **Work** pane.

Drag and drop support

Drag and drop support is described in Use drag and drop (page 252).

Get started with Telelogic Synergy

Telelogic Synergy has a process and strategy for use, called the workflow. The workflow enables you to work at peak efficiency. The basic steps of the workflow are outlined in the following steps.

All of the operations that you will perform are described in Help. The following links will take you to the steps in Help.

Steps...

The Telelogic Synergy session begins after you start the interface with the **Start** dialog box. The **Start** dialog box collects all the necessary information for you to successfully log into the appropriate database.

1. Set the current task to a task (page 341) that is assigned to you.

   You will need to either find and select a task or create one. See Create a task (page 78), Define a query (page 148), and Select a task (page 75) for more information.

2. Create a project or copy one for your use.

   See Create a project (page 13) or Copy a project to the file system (page 17) for more information. Note that this step is optional if you already have a project.

3. Work on your assigned current task (page 337), that is, make the changes needed for your current task.

   You might use a development tool other than Telelogic Synergy to do this. Your development work may involve any of the following operations:

   - Check out (page 62)
   - Edit a file (page 64)
   - Rename a file in a project (page 70)
   - Create a project (page 13)
   - Delete an object (page 66)
   - Add to a directory (page 69)

4. Update a project (page 22)
5. Test and debug your changes
6. Complete the current task (page 76)

Related Topics

- Terms and concepts (page 333)

Use keyboard shortcuts

You can use shortcut keys to perform many operations. For information on how to use shortcut keys, click the appropriate dialog:

- Compare dialog box (page 244)
- Merge dialog box (page 244)
- General shortcuts (page 245)
- Show history (page 246)
- Show project (page 246)

Telelogic Synergy offers several keyboard shortcuts to make navigation easier. You can quickly accomplish tasks you perform frequently by using the following shortcut keys.

Compare dialog box

To do this	Press this
Display the next difference between two files.	CTRL + DOWN ARROW
Display the previous difference between two files.	CTRL + UP ARROW

Merge dialog box

To do this	Press this
Revert back to the original merge results for a given difference.	CTRL + B
Edit the merge results.	CTRL + E
Apply changes from the file from the left pane to the merge results pane.	CTRL + L
Apply changes from the file from the right pane to the merge results pane.	CTRL + R
Display the next difference between two files.	CTRL + DOWN ARROW
Display the previous difference between two files.	CTRL + UP ARROW

General shortcuts

Use the following shortcuts from any dialog box, pane, or explorer.

To do this	Press this
Copy selected text or object to the clipboard.	CTRL + C
Add selected object to the current task.	CTRL + D
Remove selected object from the current task.	CTRL + M
Create a new task.	CTRL + N
Check out the selected objects.	CTRL + O
Find your assigned change requests.	CTRL + R
Find your assigned tasks.	CTRL + T
Paste text or object from the clipboard to the selected area.	CTRL + V
Cut selected text or object.	CTRL + X
Delete selected text or object.	DEL
Display Help.	F1
Rename the selected object.	F2
Refresh the data for the selected object or members of the selected project.	F9
Exit.	ALT + F4
Open the **Conflicts** dialog box when it is closed.	CTRL + SHIFT + C
Open the **Messages** dialog box when it is closed.	CTRL + SHIFT + M
Open the **Query** dialog box when it is closed.	CTRL + SHIFT + Q

Show history

To do this	Press this
Open the **Show History** dialog box.	CTRL + H

Show project

To do this	Press this
Open the **Show Project** dialog box.	CTRL + P

Use mouse shortcuts

Use the following mouse button actions to use objects:

- Click left mouse button

  Selects the object. Menu choices are dynamically enabled or disabled on the set of objects you select.

- Shift-click left mouse button

  Selects all objects between two selected objects, or changes the range of a selection set.

- Control-click left mouse button

  Selects multiple noncontiguous objects by clicking each object you want to select, or deselects an object without affecting other selected objects.

- Double-click left mouse button

  Invokes the default action for an object. This action usually edits an object or, for a directory, opens the directory in the **Work** pane.

  Additionally, this action starts a **Properties** dialog box and displays properties for the selected object.

- Click right mouse button

  Displays the **Shortcut** menu for the selected object.

Getting help

Use Help for procedural and background information about Telelogic Synergy. Help is in HTML format and is designed to run on any supported platform using Internet Explorer on Windows or Mozilla on UNIX. Help uses frames to give you a fast and persistent way of finding information in the help system.

Additionally, the Telelogic Synergy Help displays information based on the kind of tasks you're working on. Users performing developer tasks will see information that is appropriate for developers; users performing build management tasks will see information that is appropriate for both developers and build managers. The kind of information is displayed automatically. You don't need to change anything to see information appropriate for the kind of tasks you're working on.

Your browser must be enabled to use cookies for Help to store and retrieve certain settings. If cookies are disabled, the Help system will not open with the last tab page you selected nor link to the Telelogic Synergy Web site.

Move files

- Copy and paste an object, task, or change request (page 250)
- Use cut, copy, and paste to move files (page 251)
- Use drag and drop (page 252)
- Display shortcut menus (page 254)

Copy and paste an object, task, or change request

The following operation enables you to change the relationships between objects, tasks, and change requests quickly. You can copy and paste objects, tasks, and change requests in the following ways:

- Copy a file and paste it to a directory or task.
- Copy a directory and paste it to a different directory in a project or task.
- Copy a project and paste it to a directory, task, or project grouping.
- Copy a task and paste it to a project grouping or change request.
- Copy a change request and paste it to a task.

Copy and paste works on any object, task, or change request that you can select.

Steps...

1. In any pane or dialog box in which you can select an object, task, or change request, right-click over the appropriate object and select **Copy**.
2. Right-click over the appropriate object, task, or change request and select **Paste**.

Related Topics

- Change colors (page 221)
- Change the font type and size (page 223)
- Change the Work pane look (page 224)
- Delete an object (page 66)
- Use drag and drop (page 252)
- Use cut, copy, and paste to move files (page 251)

Use cut, copy, and paste to move files

- Use the **Cut** command to remove a selected object from a pane or dialog box and place it on the clipboard.
- Use **Copy** to copy an object and place it on the clipboard.
- Use **Paste** to place cut or copied objects elsewhere in the pane or dialog box or in another pane or dialog box.

The objects you cut or copy will remain on the clipboard until you cut or copy another object.

- Use the copy behavior anywhere an object appears.
- Use the cut and paste behavior in many of the panes and dialog boxes.

You can use cut and paste to remove and add relationships.

Use cut to do the following:

- Remove an object from a task.
- Remove a change request from a task.
- Remove a file or project from a directory.

Use paste to do the following:

- Add an object to a task.
- Add a change request to a task.
- Add a file or project to a directory.

Related Topics

- Change colors (page 221)
- Change the font type and size (page 223)
- Change the Work pane look (page 224)

Use drag and drop

You can perform drag and drop operations from many different locations throughout Telelogic Synergy, including tables in non-modal dialog boxes, such as **History** and **Properties**, the explorers, and objects in the **Work** pane.

Anything that you can select in Telelogic Synergy can be used for drag and drop operations. A drag and drop operation will indicate whether this was a copy or a move. Drag operations that perform a copy work the same as described in Use cut, copy, and paste to move files (page 251).

For example, the following are some of the operations you can perform by using drag and drop:

- Associate an object to a task
- Associate a task to a change request
- Add a task to a project grouping
- Move or add files to a directory
- Use a different version of an object in a directory
- Set the baseline for a project grouping
- Add projects to a baseline
- Associate a task to another task to fix it
- Add folder templates to a process rule
- Add generic process rule (page 338)s to a release
- Modify properties of an object
- Reorder saved queries in explorers

Related Topics

- Change colors (page 221)
- Change the font type and size (page 223)
- Change the Work pane look (page 224)

Open, close, select, and view in dialog boxes and panes

- Display shortcut menus (page 254)
- Open a project in the Work pane (page 255)
- Show properties in the Work pane (page 256)
- View messages (page 257)
- Select multiple files (page 257)
- View files, projects, and tabs (page 257)

Display shortcut menus

Instead of using the main menus to execute commands, you can right-click over objects to display the **Shortcut** menu. The **Shortcut** menu shows the available commands for an object in that particular pane or dialog.

Open a project in the Work pane

Use this feature if you know the name and version of a project you want to view in the **Work** pane. Using the **Show Project** dialog box to open a project obviates the need to query first, then use the query results to show the project in the **Work** pane.

1. In the **Work** pane toolbar, click .

   The **Show Project** dialog box appears.

2. Type a project name (for example, **calculator**), a project name and version separated by the version delimiter (for example, **calculator-int_3.0**), or a four-part name, consisting of project name, version, type, and instance (for example, **calculator-int_3.0:project:ccmintdb#1**).

   You can use the question mark (**?**) and asterisk (*****) characters if you don't know the complete name or version. If you are unsure of a property in the four-part name, you can substitute the asterisk for the unknown part and still receive project results.

   If the name you enter produces more than one project, the **Select Project** dialog box appears. Select the appropriate project, then click **OK**.

Related Topics

- Close a project (page 225)
- Remove tabs from the Work pane (page 228)
- Show properties in the Work pane (page 256)
- View the history of an object or release (page 143)

Show properties in the Work pane

You can view properties and associations for objects that you select. The properties and associations display in a tab in the **Work** pane.

If you need to find an object, see Find an object (page 141).

- In any dialog box where you can select a project, task, project grouping, baseline, folder, folder template, process, process rule, or release, right-click over the appropriate object and select **Show**.

  The object displays in the **Work** pane with the following defaults:

  - For a project, the information displays in the **Members** tab.
  - For a project grouping, the projects in the project grouping display in the **Properties** tab.
  - For a baseline, folder, folder template, process, process rule, release or task, the information displays in the **Properties** tab.

  In addition to viewing the default information, you can view other types of information, such as the following:

  - For a project, you can view its properties, hierarchy, and work area settings.
  - For a project grouping, you can view baseline projects and tasks associated with the project grouping.
  - For a baseline, you can view the description, and the projects, tasks, and change requests associated with the baseline.
  - For a folder, you can view the tasks associated with the folder.
  - For a folder template, you can view the properties for the folders created by the folder template.
  - For a process, you can view the process rules that make up the process.
  - For a process rule, you can view the baseline projects for the project grouping using the specified process rule and the tasks for the project grouping using the specified process rule.
  - For a release, you can view the process rules that are used by the release.
  - For a task, you can view the description, and the objects, fix tasks, and change requests associated with the task.

Related Topics

- Remove tabs from the Work pane (page 228)

View messages

The status line is located on the bottom of the Telelogic Synergy main window. This area provides information about the current state of what you are viewing. Also, most dialog boxes contain a status line at the bottom.

Most messages that display in the status line are written to the **Messages** dialog box.

Select multiple files

You can select multiple files for specific actions, for example, to check in, check out, or copy multiple files.

To select a set of files:

- Click the first file, and shift-click the last file to be included.

To select noncontiguous files:

- Click the first file, and control-click the noncontiguous files.

View files, projects, and tabs

By clicking a project in the **Projects** explorer, you can view a project's contents in the **Work** pane. For every project you click, a new tab is created in the **Work** pane. To view a project already opened, click the corresponding tab.

Additionally, you can view tasks and folders from the **Tasks** explorer, change requests from the **Change Requests** explorer (if Telelogic Change is installed), and processes, process rules, releases, and folder templates from the **Releases** explorer.

Problem solving

- Pattern matching and Telelogic Synergy (page 259)
- Recover text (page 259)
- Refresh an object (page 260)

Pattern matching and Telelogic Synergy

You can use pattern matching to filter fields in two Telelogic Synergy dialog boxes: **Baseline Compare** and **Membership Conflicts**. For example, in the **Membership Conflicts** dialog box, you can use Java regular expressions (page 340); you can enter either of the following filter values in the **Membership Conflicts** dialog box **Filter** field:

- **A regular expression**

  Any string that starts with **^** is treated as a regular expression using the normal Java regular expression rules. The following are some examples:

  ^$** matches a blank value since **^** means match the start of the line, and **$ means match the end of the line

  ^Extra.* matches any line starting with the string **Extra**. This is different from the exact substring **Extra** which would match that string in any position within the line.

  ^.*Extra.* matches the string **Extra** anywhere in the line.

  ^T..k matches a string that starts with **T** followed by two characters followed by **k** (the period character matches any single character).

  Java regular expressions are defined in the Javadoc for Pattern Web site and in the Sun Developer Network site.

- **An exact substring**

  Any string that doesn't start with **^** is treated as an exact substring. For example, if you enter **as** it will match values such as **Bad Task**, **Extra Task**, **Missing Task**. If you enter the string **a.b** then it will match the substring anywhere in the line including **aaa.b**, **a.bbbb**, **a a a a.b b b b**. The substring is always interpreted literally.

Related Topics

- Resolve membership conflicts in a project or project grouping (page 26)

Recover text

Use the **ESC** key to restore original text in a field. For example, let's say that you changed the text in the **Properties** dialog box **Properties** tab **Version** field in error. Press the **ESC** key on your keyboard and the original text that was in the **Version** field will appear.

Refresh an object

Use this operation to refresh the data for the selected object or members of the selected directory.

Steps...

- Right-click over any object (file or directory), project, or project grouping that is selectable, and choose **Refresh Object**.

Related Topics

- Delete an object (page 66)
- Keep the baseline and tasks from changing during an update (page 51)
- Recover text (page 259)
- Update the baseline and tasks (page 50)

Top create baseline operations

Select a new baseline | Use a different baseline

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

- Select a task
- Complete the current task
- View your assigned tasks
- More...

Find files and more

- Find an object
- Find where an object is used
- Query for predefined versions of objects
- More...

Make changes using baselines

- Use a different baseline
- Update the baseline and tasks
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Make changes to files

- Check in
- Check out
- Edit a file
- More...

Using properties

- Modify the properties of a file or directory
- Modify the properties of a task
- View properties
- More...

Merge and compare

- Merge two file versions
- Compare parallel files or directories with predecessor
- Show parallel versions
- More...

Customize the interface

- Customize the dialog boxes and panes
- Close one or all explorers
- Add a property to a column heading
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Common create baseline questions

- I’m a project lead and need a baseline for testers...is this a different baseline?
- Can I change a baseline’s name after I’ve published it?

Top Change Requests explorer operations

Group query results in Explorers | Add a saved query to the Find menu | Add a saved query to an Explorer | Customize an explorer

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

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Common Change Requests explorer questions

- Why does the explorer keep closing?
- Can I display more than one type of explorer?
- When I start Synergy again, will the four explorers display in the same order?
- Can I look at a change request in Synergy or do I have to start Telelogic Change?
- Can I resolve a change request in Synergy or only through Telelogic Change?
- What’s a "saved query?"

Top Explorer operations

Dock one or more explorers | Group query results in Explorers | Add a saved query to an Explorer | Remove a saved query | Customize an explorer

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

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Common Explorer questions

- Where should I start?
- How can I change the color of the table lines around my projects and files?
- How can I find a project quickly?

Top History operations

View the history of an object or release | View the history of an object or release | Merge parallel files or directories | Compare two files

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

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Common History questions

- Where should I start?
- How can I change which properties are shown in the History View?
- What's the fastest way to view the history of an object?

Top membership conflicts operations

Resolve membership conflicts in a project or project grouping | Merge two file versions | Compare two files | Update members and run conflict detection again.

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

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Find files and more

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Common membership conflicts questions

- Is conflict resolution required?
- My project has several conflicts and I’m not sure how to resolve them. Where do I start?
- My project is huge and I want to find conflicts before I build. How can I do this?
- Do I need to resolve all conflicts that Synergy finds?
- My team requires that developers resolve conflicts after updating...where can I do this?
- Why would I need to Perform deep conflict detection?

Top merge and compare operations

Merge parallel files or directories | Edit the merge results | Compare two files | Compare two like objects

Create and update projects

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- Update a project
- Reverse an update
- More...

Working with tasks

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Common merge and compare questions

- How can I change the merge and compare tool?
- Is a merge required before I can complete my task?
- The Parallels dialog box came up when I was completing the task, but I ignored it. How do I get it back now that I'm ready to merge?
- How can I find out who owns the parallel version I need to merge with?

Top options operations

Change update options | Sync work area with database | Stop automatic addition of required tasks | Ignore files by pattern | Change the Work pane look | Display the Releases explorer

Create and update projects

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- Update a project
- Reverse an update
- More...

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Common options questions

- Why doesn’t the project I copied show up in my work area?
- How can I stop the many extraneous files created by my IDE from appearing as conflicts?
- How can I change the size of the fonts in the GUI?
- How can I change the color of the table lines around my projects and files?

Top parallels pperations

Show parallel versions | Merge parallel files or directories | Complete the current task

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

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Common parallels questions

- I didn’t start the Parallels dialog box, but it appeared...why?
- Is a merge required before I can complete my task?
- How can I find out if I need to merge parallel versions?
- The Parallels dialog box came up when I was completing the task, but I ignored it. How do I get it back now that I’m ready to merge?

Top Releases explorer operations

Group query results in Explorers | Add a saved query to the Find menu | Add a saved query to an Explorer | Customize an explorer

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

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Common Releases explorer questions

- Why does the explorer keep closing?
- How can I change the color of the project icons that display in an explorer?
- Can I display more than one type of explorer?
- When I start Synergy again, will the four explorers display in the same order?
- What’s a "saved query?"

Top Work pane operations

Check in | Check out | Create a project | Edit a file | Move a file | Automatic tab management

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

- Select a task
- Complete the current task
- View your assigned tasks
- More...

Find files and more

- Find an object
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Common Work pane questions

- Where should I start?
- How can I change the color of the table lines around my projects and files?
- How can I find a project quickly?
- Every time I use Help, I get pop-up messages about active content...how can I get rid of them?
- How can I look in the Synergy log files?

Top Projects explorer operations

Group query results in Explorers | Add a saved query to the Find menu | Add a saved query to an Explorer | Customize an explorer

Create and update projects

- Copy an object
- Update a project
- Reverse an update
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Working with tasks

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Common Projects explorer questions

- Why does the explorer keep closing?
- How can I change the color of the project icons that display in an explorer?
- What's a "saved query?"
- How do I create a project grouping?
- Can I display more than one type of explorer?
- When I start Synergy again, will the four explorers display in the same order?
- How can I find a project quickly?

Top file and directory properties operations

Modify the properties of a file or directory | View properties | Change the security settings for objects | Customize user properties

Create and update projects

- Copy an object
- Update a project
- Reverse an update
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Working with tasks

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Find files and more

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Common file and directory properties questions

- Where should I start?
- I need to change an object's release, and the build manager just created the release in the database, but I don't see it in my Properties dialog box...why not?
- How do I see the properties of an object's task?
- How do I find where an object is used?

Top baseline properties operations

Modify the properties of a baseline | Select a new baseline | Use a different baseline | View properties

Create and update projects

- Copy an object
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- Reverse an update
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Working with tasks

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Common baseline properties questions

- Can I change a baseline's name after I've published it?
- How can I compare baselines?

Top folder properties operations

Modify the properties of a folder | Delete an object (Folder) | Add a task to a folder

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

- Select a task
- Complete the current task
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Find files and more

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Common folder properties questions

- What are folders used for?
- How do I create a folder?
- How can I tell what's included in a folder?
- How do I change a query-based folder to manual and vice versa?

Top folder template properties operations

Delete an object (folder template)

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

- Select a task
- Complete the current task
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Find files and more

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Common folder template properties questions

- How can I find out which database controls how objects are brought into the project grouping during update?
- How can I find which process rule uses a folder template?
- How can I find which folders were created from this template?
- How can I test my folder template's query?

Top process properties operations

Delete an object (process) | View properties | Change the security settings for objects

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

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Common process properties questions

- How can I find out which database controls how objects are brought into the project grouping during update?

Top process rules properties operations

View properties | Delete an object (process rule) | Change the security settings for objects

Create and update projects

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Common process rules properties questions

- Why isn't my project updating right?
- How can I find out which database controls how objects are brought into the project grouping during update?

Top project properties operations

Create a project | Copy a project | Set the default work area path | Modify the properties of a project | Change the security settings for objects

Create and update projects

- Copy an object
- Update a project
- Reverse an update
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Working with tasks

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- Telelogic Synergy Tutorial
- ActiveCM Help
- Telelogic Synergy CLI Help
- Build Manager's Guide

Common project properties questions

- How can I find a project quickly?
- Why doesn't the project I copied show up in my work area?
- How can I go to my project's work area quickly?
- How can I view just the projects in the project hierarchy?
- How can I view the update properties for my project

Top project grouping properties operations

Add a project to a project grouping | Add a task to a project grouping | Remove a task from a project grouping | Modify the properties of a project grouping | Resolve membership conflicts in a project or project grouping

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

- Select a task
- Complete the current task
- View your assigned tasks
- More...

Find files and more

- Find an object
- Find where an object is used
- Query for predefined versions of objects
- More...

Make changes using baselines

- Use a different baseline
- Update the baseline and tasks
- Select a new baseline
- Keep the baseline and tasks from changing during an update

Start and learn the interface

- Start Telelogic Change
- Start Telelogic Synergy from the command line
- Take the Telelogic Synergy tour
- More...

Make changes to files

- Check in
- Check out
- Edit a file
- More...

Using properties

- Modify the properties of a file or directory
- Modify the properties of a task
- View properties
- More...

Merge and compare

- Merge two file versions
- Compare parallel files or directories with predecessor
- Show parallel versions
- More...

Customize the interface

- Customize the dialog boxes and panes
- Close one or all explorers
- Add a property to a column heading
- More...

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Top release properties operations

Delete an object (release) | View properties

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

- Select a task
- Complete the current task
- View your assigned tasks
- More...

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Top task properties pperations

Modify the properties of a task | Change the security settings for objects | View properties | Exclude a task | Add tasks to or remove tasks from an object

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

- Select a task
- Complete the current task
- View your assigned tasks
- More...

Find files and more

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Common task properties questions

- How can I copy a task?
- I’m working on a project that has security set for tasks, but I don’t see the Security tab in the Task Properties dialog box...why not?
- Where do I fix a task for a task that’s breaking the build?
- I’m in the Task Properties dialog box looking at the objects associated with the task I’m about to complete and I see some objects that shouldn’t be associated with the task. What should I do?

Top query operations

Define a query | Save a query | Run a saved query | Edit a saved query | View a saved query

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

- Select a task
- Complete the current task
- View your assigned tasks
- More...

Find files and more

- Find an object
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Make changes using baselines

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- More...

Using properties

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- More...

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Common query questions

- How can I find all the working versions of a project that dozens of users are working on?
- Where can I find a query that I've already used and saved once before?
- What's the query to find tasks that have been assigned to a specific user?
- How can I find all objects in the database that aren't part of a project?

Top Tasks explorer operations

Create a task | Complete the current task | View your assigned tasks | Add a saved query to an Explorer | Customize an explorer

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

- Select a task
- Complete the current task
- View your assigned tasks
- More...

Find files and more

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Common Tasks explorer questions

- Why does the explorer keep closing?
- How can I change the color of the project icons that display in an explorer?
- Can I display more than one type of explorer?
- When I start Synergy again, will the four explorers display in the same order?
- What’s a "saved query?"

Top work area conflicts operations

Sync work area with database | Resolve membership conflicts in a project or project grouping | Perform deep conflict detection | Modify the settings in a work area

Create and update projects

- Copy an object
- Update a project
- Reverse an update
- More...

Working with tasks

- Select a task
- Complete the current task
- View your assigned tasks
- More...

Find files and more

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Common work area conflicts questions

- Is conflict resolution required?
- My project has several conflicts and I'm not sure how to resolve them. Where do I start?
- My project is huge and I want to find conflicts before I build. How can I do this?
- Do I need to resolve all conflicts that Synergy finds?
- How can I go to my project's work area quickly?

Common questions

Baselines (page 312)

- I'm a project lead and need a baseline for testers...is this a different baseline? (page 312)
- Can I change a baseline's name after I've published it? (page 312)
- How can I compare baselines? (page 312)

Development (page 317)

- Where should I start? (page 317)
- How can I change the color of the table lines around my projects and files? (page 317)
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- How can I change the merge and compare tool? (page 317)
- Is a merge required before I can complete my task? (page 318)
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- I didn't start the Parallels dialog box, but it appeared...why? (page 318)
- How can I find out if I need to merge parallel versions? (page 318)
- How can I check the value of a macro or environment variable in a build? (page 318)
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- How can I stop the many extraneous files created by my IDE from appearing as conflicts? (page 319)
- How can I change the size of the fonts in the GUI? (page 319)
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Build management (page 313)

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- How do I get rid of unwanted changes in my project? (page 313)
- Why isn't update selecting the right objects? (page 313)
- My project has developers all over the world and I'm ready to do some file transfers to remote Synergy teams...where are the DCM dialogs? (page 314)
- How do I start the Synergy CLI so I can set up build scripts to kick-off builds in the middle of the night? (page 314)
- How do I change a query-based folder to manual and vice versa? (page 314)
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Conflicts (page 315)

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- What are folders used for? (page 323)
- How do I create a folder? (page 323)
- How can I tell what's included in a folder? (page 323)
- How can I find out which database controls how objects are brought into the project grouping during update? (page 323)
- Why isn't my project updating right? (page 323)
- I'm working on a project that has security set for tasks, but I don't see the Security tab in the Task Properties dialog box...why not? (page 323)
- Where do I fix a task for a task that's breaking the build? (page 324)
- I'm in the Task Properties dialog box looking at the objects associated with the task I'm about to complete and I see some objects that shouldn't be associated with the task. What should I do? (page 324)
- How do I see the properties of an object's task? (page 324)
- How do I find where an object is used? (page 324)
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Baselines

- I’m a project lead and need a baseline for testers...is this a different baseline?

  You’ll need to create a test baseline. Test baselines are not published at creation. See Create a snapshot of a build (page 204) for details on creating a test baseline.

- Can I change a baseline’s name after I’ve published it?

  You can change a published baseline’s name by using the **Baseline Properties** dialog box. See Modify the properties of a baseline (page 107) for details.

- How can I compare baselines?

  1. Right-click over a baseline and choose **Compare with**.
  2. Choose a baseline for comparison in the **Select Baseline** dialog box, and then click **OK**.

     The **Baseline Compare** dialog box displays the differences and similarities of the two baselines.

Build management

- How do I fix a broken build?

  When a build breaks, you'll need to do one of the following to fix it:

  - If you have built successfully before the break and have established a baseline build, see Fix a broken build (page 195).
  - If you haven't yet had a successful build and don't have a baseline build, see Rebuild without a baseline (page 206).

- How do I get rid of unwanted changes in my project?

  The following are the two categories of conflicts:

  • Changes that are in your project, but not in your update properties. For example, if you use a new object version without adding its task to your update properties, the object will show as a conflict.

  • Changes that are in your update properties, but not in your project. For example, if your project's update properties contain two tasks that are associated with parallel versions of the same object, the version that is not a member of your project will show as a conflict.

  Fixing these problems is described in Resolve membership conflicts in a project or project grouping (page 26).

- Why isn't update selecting the right objects?

  Check the following items in the order given:

  1. Check the project's process rules to be sure that:

     * the task queries are correct on the folder template.

     * the correct folders or folder templates are a part of the process rule. (You might need to update the process rule if the project's folders or folder templates are incorrect.)

     * the baseline is set.

  2. Run the update operation, using the **verbose** option. The **verbose** option generates extra information about the candidates that are analyzed. It shows the scores for each candidate, and why they received the scores. Troubleshoot using the given information.

  3. Check the project grouping properties.

     * If you turned off **Auto Update**, be sure that you turned it back on.

     * If you removed a task temporarily, check to be sure you added it back.

     * If you manually added a task, be sure you want to keep it.

     * Check that the baseline project is set.

- My project has developers all over the world and I'm ready to do some file transfers to remote Synergy teams...where are the DCM dialogs?

  The DCM dialog boxes are not in Synergy 6.6. To use the DCM features, you must start Synergy Classic.

- How do I start the Synergy CLI so I can set up build scripts to kick-off builds in the middle of the night?

  > ccm start -nogui

- How do I change a query-based folder to manual and vice versa?

  1. Right-click over a folder and choose **Properties**.
  2. Click the **Tasks** tab.

     If the folder is query-based and you want it to be manual, click **Manually**. If the folder is manual and you want it to be query-based, click **Using Query**, and then set up the query.
  3. Be sure to click **Apply** to save your changes.

- How can I find which process rule uses a folder template?

  Right-click over the folder template, point to **Find** and choose **Use In Process Rules**.

- How can I find which folders were created from this template?

  Right-click over the folder template, point to **Find** and choose **All Folders**.

- How can I test my folder template's query?

  1. Right-click over the folder template and choose **Properties**.
  2. In the **Folder Properties** tab, make changes to your query, then click .

     The **Choose Test Values** dialog box appears.
  3. Enter a value for the keyword, then click **OK**.

Conflicts

- Is conflict resolution required?

  You don't have to run conflict resolution prior to building your project, but it's a good idea to do so.

  Conflict resolution helps you to weed out problems before you build. This gives you or your team members an opportunity to fix any problems that might cause your build to fail or your application not to run.

  Developers typically show conflicts if they suspect that their projects contain parallel versions or other conflicts that are causing problems.

  Build managers run conflict detection after every update of a build management project, before they build, so that they can find problems and ask team leads or developers to fix them before integrating all the completed tasks.

  Conflict resolution is discussed in Resolve membership conflicts in a project or project grouping (page 26).

- My project has several conflicts and I'm not sure how to resolve them. Where do I start?

  The filter feature enables you to choose the criteria that you want to view and filters out the rest of the criteria. See "Determine the appropriate resolution for each conflict" in Resolve membership conflicts in a project or project grouping (page 26).

  Additionally, you can use Java regular expressions to further filter the criteria displayed. See Pattern matching and Telelogic Synergy (page 259).

- My project is huge and I want to find conflicts before I build. How can I do this?

  Large projects have special needs. For example, Synergy can detect 24 different conflicts, most of which are shown by default. However, not all of the default conflicts will necessarily be bad for your team. Therefore, you can decide which conflicts are valid and which are not, then have your CM administrator change the defaults (by modifying the **conflict_parameters** model attribute).

  After you customize the conflicts, run conflict detection and you'll see only the conflicts that your team needs to resolve. In a large project, customizing the conflicts you see can save time and frustration.

  For more information, see "Large-Scale Conflict Detection" in Resolve membership conflicts in a project or project grouping (page 26).

- Do I need to resolve all conflicts that Synergy finds?

  No. Not all conflicts are bad. Synergy can detect 24 different conflicts, most of which are shown by default. Before you resolve conflicts, be sure to check with your build manager to find out which conflicts must be resolved.

- My team requires that developers resolve conflicts after updating...where can I do this?

  The easiest way is to automate running conflict detection. You can do this by setting the **Detect membership conflicts after updating projects** option in the Options dialog box. See Change update options (page 42) for steps.

Development

- Where should I start?

  If you're just getting started and you haven't read any document, you should start by reading the Introduction to Synergy and then going through the Synergy Tutorial.

  If you must get up and running immediately to complete a task, read Get started with Telelogic Synergy (page 243). This section will tell you which steps are necessary to start working with Synergy right away.

- How can I change the color of the table lines around my projects and files?

  The table lines around projects and files are called "ledger lines." A description of the lines is in Ledger line colors (page 242). Steps on how to change the ledger line colors are available in Change colors (page 221).

- How can I find a project quickly?

  The fastest way to find a project is to use the **Projects** explorer. Steps on how to use the **Projects** explorer are in Show properties in the Work pane (page 256).

- Every time I use Help, I get pop-up messages about active content...how can I get rid of them?

  Windows XP Service Pack 2 causes changes to default security settings. These changes can result in unexpected pop-up messages from Internet Explorer about restricting active content, such as script and ActiveX controls.

  To allow this content to run, perform the following:

  1. Open Internet Explorer.
  2. Go to **Tools** > **Internet Options** > **Advanced Tab**
  3. Scroll down to the section labeled **Security**.
  4. Check the box labeled **Allow active content to run in files on My Computer**.
  5. Click **OK**.

- How can I copy a task?

  Right-click over any task and choose **Copy Task**. For help with filling in the fields, see Copy a task (page 80).

- What's the fastest way to view the history of an object?

  Right-click over any object and choose **History**.

- How can I change which properties are shown in the **History View**?

  Right-click in the empty area of the **History View**, then choose an attribute.

- How can I change the merge and compare tool?

Changing Synergy's merge tool, compare tool, or editor is described in Change the default application tools (page 122).

The default merge and compare tool on Windows and UNIX is SiberMerge. The default editor on Windows is Notepad; on UNIX, it's vi.

- Is a merge required before I can complete my task?

  A merge is required only if your team requires it. Check with your project lead, build manager, or CM administrator to find out what your default setting is for parallel versions when completing a task.

  If your team doesn't require a merge and you're the first developer owning a parallel version to check in a parallel, then you might or might not need to merge later. (You can only merge checked-in versions. If there is only one other parallel version and it's in the working state, then the other developer will need to merge his changes with yours when he completes his task. If the parallel version is checked in, then you can either merge now or later. If there are two or more versions, then you might need to merge a parallel version later. This depends on the state of the other versions.)

  If your team doesn't require a merge and you're not the last developer owning a parallel version to check in a parallel, then you can opt to merge later.

  One helpful way to remember that you have a parallel version that needs to be merged is to start the **History** dialog box for the version you need to merge. This lets you keep an eye on your version and the state of the other parallels.

- The **Parallels** dialog box came up when I was completing the task, but I ignored it. How do I get it back now that I'm ready to merge?

  Starting the **Parallels** dialog box is described in Show parallel versions (page 190).

- How can I find out who owns the parallel version I need to merge with?

  You can right-click over the version and select **History** to start the **History** dialog box and view the owner of the object. You can also right-click over the version and select **Properties** to start the **Properties** dialog box and view the owner.

- I didn't start the **Parallels** dialog box, but it appeared...why?

  Synergy starts the **Parallels** dialog box to inform you about parallels in your project. You might not know that parallels exist, but you might need to resolve them. See Show parallel versions (page 190) for a discussion.

- How can I find out if I need to merge parallel versions?

  Use the **History** dialog box to View the history of an object or release (page 143).

- How can I check the value of a macro or environment variable in a build?

  Use the following directives. Note that they do not need to be listed as part of any target's build commands:

  !IFNDEF VARIABLE

!ERROR VARIABLE [**Note** Set before running make.]

!ENDIF

Do not indent the ! directives with spaces or a tab character.

- Why doesn't the project I copied show up in my work area?

  If you copied a project with work area maintenance turned off, you'll need to turn it on, and then Synergy will sync the project automatically.

- How can I stop the many extraneous files created by my IDE from appearing as conflicts?

  You can set the extraneous files to be ignored by Synergy. See Ignore files by pattern (page 43).

- How can I change the size of the fonts in the GUI?

  See Change the font type and size (page 223) to change the size of text that displays in all explorers, panes, and dialog boxes.

- How can I look in the Synergy log files?

  If you have a Synergy session open, go to the **Help** menu and choose **Explore Logs**.

  If you don't have a Synergy session open, the Windows Synergy logs are located in *drive*:\Documents and Settings*username*\Application Data\Telelogic\Synergy

  UNIX Synergy logs are located in your home directory.

- How can I redirect my **ccm_client.log** file?

  You can redirect the **ccm_client.log** (user interface log) file so that it points to a location other than your Windows profile directory (Windows users) or home directory (UNIX users). This is done by setting the **user.default.logfile** key in your **ccm.user.properties** file as follows:

  1. Open your properties file.

     For Windows users, the file is called **ccm.user.properties** and is located in your Windows profile directory.

     For UNIX users, the file is called **.ccm.user.properties** and is located in your home directory.

     - To redirect a log file to C:\cmsynergy\synint\bob, do the following:

       ```
       user.default.logfile=C:\\cmsynergy\\synint\\bob\\ccm_client.log
       ```

     - To rename a log file (typically when working in multiple databases), for a database named **int**, do the following:

       ```
       user.default.logfile=C:\\cmsynergy\\bob\\ccm_client_int.log
       ```

  2. Save and exit the file.

Note that when using the **user.default.logfile** key, you must use the complete path and file name, as in the example above.

Additionally, users must enter Windows paths using double backslashes.

- How can I find all objects in the database that aren't part of a project?

  Perform the following steps:

  1. Open the **Query** dialog box by clicking the **Find** menu and choosing **Objects**.
  2. Set the list box to **Custom**, then type the following string in it:

     not is_bound() and type!='project' and has_attr('source')
  3. Click .

     All results display in the results field.

- How can I find all the working versions of a project that dozens of users are working on?

  You can Query for predefined versions of objects (page 174).

- Where can I find a query that I've already used and saved once before?

  You can Run a saved query (page 175).

- What's the query to find tasks that have been assigned to a specific user?

  Rather than querying for tasks assigned to a user, query for tasks with a specific resolver.

  In the **Query** dialog box, choose **With Resolver**, set the name of the resolver, then click .

Explorers

- Why does the explorer keep closing?

  When you start an explorer, you're looking at it in a sliding pane; the pane that the explorer displays in has slid over a portion of the **Work** pane. If you click an object or project tab in the **Work** pane, the explorer will slide back and you'll have to click an explorer button to get it back.

  To keep the explorer from closing, see Dock one or more explorers (page 212).

- How can I change the color of the project icons that display in an explorer?

  You'll need to change the **Project Icon** color in the **Options** dialog box. See Change colors (page 221) for instructions.

- What's a "saved query?"

  A saved query is one that you've created and saved. (The other kind of query is a system saved query, for example, **My Projects**, **My Assigned Tasks**.)

- Can I look at a change request in Synergy or do I have to start Telelogic Change?

  You can View your assigned change requests (page 145) in Synergy.

- Can I resolve a change request in Synergy or only through Telelogic Change?

  You can Resolve a change request (page 101) in Synergy.

- How do I create a project grouping?

  Synergy creates project groupings from the settings you give to a project. When you create a project, you set the release and purpose. After Synergy creates or copies the project, it makes the new project a member of one of your project groupings. If you create or copy a project without a corresponding project grouping, Synergy creates a new project grouping and places the project in it.

  If, for example, you need to create unique names for platform-specific projects, then you can create the new projects with unique names and Synergy will create appropriate project groupings with those unique names. The following are basic instructions for how to do this:

  1. Create new projects with unique names for each platform.
  2. For each of the new platform projects, add the existing projects for that platform as subprojects, using **Copy** and **Paste**.
  3. Create a top-level grouping project.
  4. Right-click over the top-level grouping project and choose **Properties**.
  5. Click **OK**.
  6. Add each of the new projects for each platform to the top-level grouping project, using **Copy** and **Paste**.

- Can I display more than one type of explorer?

  You can display one type of explorer at a time, but you can show (and dock) all four explorers at once.
- When I start Synergy again, will the four explorers display in the same order?

  Synergy will remember your settings and display the explorers appropriately.

Properties

- I need to change an object's release, and the build manager just created the release in the database, but I don't see it in my **Properties** dialog box...why not?

  Values can change after you start a database. If you want to see new choices added after you started a session, either Refresh choices during a session (page 229) or restart your database.

- What are folders used for?

  A folder is a named grouping of tasks. Folders store the tasks that the folder template has queried for.

- How do I create a folder?

  You can create a folder by clicking **Task** in the main menu, then pointing to **New** and choosing **Folder**. This creates a pattern or template that creates one or more folders.

- How can I tell what's included in a folder?

  There are several places in Synergy where you can find this information, but the easiest way is to do the following:

  1. Use the **Query** dialog box to find the folder you want to find out more about. Right-click over the folder and choose **Show**.

     The folder properties display in the **Work** pane.

  2. Click the **Tasks** tab to see tasks that are part of the folder.

  3. In the selection set, click the plus sign next to any task to view the objects that are associated with the specified task.

- How can I find out which database controls how objects are brought into the project grouping during update?

  You can view a list in the **Properties** dialog box that shows which database controls the folder template, release, process, or process rule. The folder template, release, process, or process rule must be in the controlling database for you to modify it (for example, to change which objects are brought into the project grouping during update).

- Why isn't my project updating right?

  Check the baseline setting in the **Process Rules Properties** dialog box. Ensure that the baseline is set correctly. If it is, be sure to see Why isn't update selecting the right objects? (page 313).

- I'm working on a project that has security set for tasks, but I don't see the **Security** tab in the **Task Properties** dialog box...why not?

  You need to set the **Security** tab to display. See Show the Security tab in the Properties dialog boxes (page 231).

- Where do I fix a task for a task that's breaking the build?

  You can do this using the **Task Properties** dialog box. This is described in Specify one task to fix another (page 90).

- I'm in the **Task Properties** dialog box looking at the objects associated with the task I'm about to complete and I see some objects that shouldn't be associated with the task. What should I do?

  Select each object that shouldn't be associated with the task, then click the minus sign to the right of the table. The objects are removed from the task.

- How do I see the properties of an object's task?

  Right-click over any object and choose **Properties**.

- How do I find where an object is used?

  Right-click over any object and point to **Find**, then choose in what type of project the object is used: projects, folders, project groupings, or baselines.

- How can I go to my project's work area quickly?

  Right click over your project and choose **Explore**.

- How can I view just the projects in the project hierarchy?

  Open the project in the **Work** pane and click the **Hierarchy** tab.

- How can I view the update properties for my project

  Right-click over the project and choose **Project Grouping Properties**.

Terms and concepts

- active release (page 335)
- baseline (page 335)
- baseline project (page 335)
- baseline release (page 335)
- build (page 336)
- build manager (page 336)
- change request (page 336)
- check in (page 336)
- check out (page 336)
- common ancestor (page 336)
- compare (page 336)
- complete a task (page 336)
- conflicts (page 336)
- controlled product (page 336)
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- delete (page 337)
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- type (page 342)
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- work area (page 342)
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active release

An active release is used for ongoing development.

baseline

This is a snapshot of a set of projects and tasks at a point in time. May be used as the starting point for further development; may be compared to other baselines for reference.

baseline project

The project version on which you base your project is called its baseline project. For example, the baseline project for the **editor-2.0** project would be **editor-1.0**. When you check out a new version of a project, its baseline project is set automatically. A baseline is made up of baseline projects.

baseline release

The baseline release may be used as a fallback release when defining a baseline selection method.

For example, the baseline for the Insulated Development purpose is the latest Integration Testing baseline that has the same release as the project; however, if that doesn't exist, then the latest baseline from the baseline release is used.

To be more specific, the baseline release for CM 6.5 is CM 6.4 SP1. If integration testing baselines aren't yet available for CM 6.5, then a 6.5 insulated development project would pick up the latest CM 6.4 SP1 baseline.

build

A build is the execution of commands for a target in a makefile. It is also a process the build manager uses to create a product.

build manager

The build manager is a user who gathers and builds changes for a development team.

Change

See Telelogic Change (page 342).

change request

A change request is a request for a change.

check in

The check in operation preserves one or more objects and makes them available to other users.

check out

The check out operation creates a new version of an object that can be modified by the user who checked it out.

common ancestor

The common ancestor is the most recent predecessor of the files being merged. When you start a merge session, the results contain the contents of the common ancestor.

compare

The compare operation shows the differences between the contents of two objects.

complete a task

You can complete a task when all work on the task is finished. This causes all objects associated with the task to be checked in and available to the build manager to build the product.

conflicts

Conflicts can be in your work area (for example, after performing a sync operation) or project members (after you've run conflict detection).

controlled product

An object that's set to have a property of a product and is changed by a build.

copy project

The copy project operation copies a project for your use. You will need to make a copy of a project to modify it.

current task

The current task is the task that you are currently working on.

database

The Synergy Classic database is a data repository that stores all of your controlled data, including source and data files, their properties, and their relationships to one another.

DCM

Using Telelogic's Distributed Change Management product option, you can transfer data between multiple databases, enabling multi-site development.

delete

The delete operation removes an object from the Synergy Classic database.

difference

A difference is one variance between two files that have been compared or merged. Two files may have more than one difference.

directory

A Synergy directory keeps track of which files belong in it.

directory entry

For each file that belongs in a directory, the directory has a place holder, called a directory entry. The directory entry identifies the file that belongs there, but not the version of the file.

Distributed process

This is the process defined for Telelogic Synergy Distributed.

file

A file is a collection of data or information.

fix task

A fix task is a regular task with a special relationship to the completed or excluded (broken) task that it fixes.

folder

A folder is a named grouping of tasks.

folder template

A folder template provides a pattern used to create folders.

generic process rule

A process rule specifies how projects for a particular purpose will choose new members during an update. It does this by specifying how the system will find a baseline to use as a starting point and which tasks the system should use to find new members.

A generic process rule is a process rule that isn't part of a release.

grouping project

A project that groups projects, for example, to contain a software application's different platforms. Grouping projects are optional. It is easier to check in a set of projects or check out a new set of projects when the projects are all grouped in a hierarchy.

history

The history operation displays all the versions of a file, directory, or project, and the relationships between versions.

inactive release

An inactive release is not available for ongoing development. However, if you need to use it again, you can activate it to make it available again.

inline differences

Inline differences show the individual modified line and character differences of two compared files.

instance

An instance is a property of an object. It is used to distinguish between multiple objects with the same name and type, but that are not versions of each other.

manually added tasks

These are the tasks that you've manually added to the project grouping, by using the **Project Grouping Properties** dialog box, the **Add to Project Grouping** option from the **Tasks** context menu, or the **Actions** main menu.

merge

The merge feature enables you to combine information from two parallel versions of a file. When you merge two files, a third file is created. The third file contains the blended information from both files.

merge conflict

A merge conflict is an inconsistency between two modified files, where both were modified on the same line but in different ways.

object

Object is a general term that describes different types of data you can store in a Telelogic database, including files, directories, projects, tasks, and change requests.

parallel conflicts

A parallel conflict occurs when one or more parallel versions are checked out.

parallel version

Parallel versions occur when two or more versions are checked out from a single file.

process

A process is a collection of process rules that define how the projects for a release are updated. For example, a release might contain a purpose called Integration Testing. Within the Integration Testing purpose, the build manager might have three process rules: Hotlist Testing, Integration Testing, and Resolved CRs. The Integration Testing purpose is flexible; it can be used to build an Integration Testing area or to perform testing in hotlist mode, depending on which process rule the build manager sets the purpose to have. Developers don’t set processes or process rules; they only set purposes on projects.

process rule

A process rule contains patterns that define how projects will be updated; it specifies rules for determining the baseline plus a set of tasks to be used when someone updates a project. (In previous releases, "process rule" was called "update template.")

product

A product is a file that is built by processing other files. Some examples of products include a **.class** file, **.jar** file, and **.exe** file.

project

A project is a logical grouping of selected versions of files and directories, arranged in a specific structure.

project's update properties

The project's update properties are the baseline and tasks on the project's project grouping.

project grouping

Synergy groups projects by purpose and release, for example, **My 3.0 Collaborative Projects**. This is called a project grouping. A project grouping holds the tasks and baseline used when you update a project.

properties

The properties of an object, also known as its attributes, enable you to track a variety of information. Examples of properties are name, version, and release.

purpose

A project's purpose defines what it is used for, for example, Insulated Development, Integration Testing, System Testing. When you change your project's purpose, Synergy uses different selection criteria when you update the project.

query

A query (or find) operation enables you to search the Synergy database for objects, project groupings, tasks, and change requests. You can save queries for future use (see "saved query.")

regular expressions

Regular expressions are strings of characters that define patterns used to search for matching text.

release

A release is an attribute that identifies a project or task that is specific to a particular release of your application.

release name

A release name consists of an optional component name and release delimiter, and a component release. The component name might represent the name of an application or component, such as **Synergy** or **editor**. The component release identifies the

specific release of that application or component. **Synergy/6.4** is an example of a release name.

release-specific process rule

A process rule specifies how projects for a particular purpose will choose new members during an update. It does this by specifying how the system will find a baseline to use as a starting point and which tasks the system should use to find new members.

A release-specific process rule is a process rule that was created for a particular release.

remove

The remove operation takes an object out of a directory or project, but does not remove it from the database.

saved query

You can use two kinds of queries: queries that you've created and saved and system saved queries, for example, **My Projects**, **My Assigned Tasks**, and so forth.

Standard process

This is the standard process defined for Synergy.

sync

The sync operation compares your work area files to those in the database and enables you to resolve any conflicts between them.

task

A task is a to-do list item that is assigned to a user. A task also tracks the files that were modified to complete it.

task-based methodology

Task-based methodology enables a development organization to track changes to a software application using tasks, rather than individual files, as the basic unit of work.

tasks on top of the baseline

These are the tasks that are in the project grouping, but aren't in the baseline.

Telelogic Change

Telelogic Change is a change request management system that is web-based and integrated with Synergy. This document describes its usage with Synergy, which is relevant only if you use Telelogic Change.

type

A type is the class of data contained in the object. The type defines the behavior or characteristics of an object. Examples of types are java, library, executable, and HTML.

update

You can perform an update operation to update your project or directory with recent versions checked in by other users.

update properties

These are properties that a project uses to decide which object versions to select when someone updates a project.

update template

See process rule.

use a version

You can use a different version of a file or directory in your project. You may perform the use operation during unit testing, when you want to go back to a previous version of a file in your project.

version

A version is a specific variation of a file, directory, or project.

work area

The work area is a location in the file system that contains your copies of projects.

work area conflict

A work area conflict is an inconsistency between the contents of your work area and the database.

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