



SERENA®

# BUSINESS MANAGER

## SourceBridge User's Guide

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# Chapter 1: Welcome to SourceBridge

This document describes SourceBridge, an extension that enables developers to associate source code control files with SBM items.

## Audience and scope

This guide describes how to install, configure, and use SourceBridge.

This guide is meant for SBM users who install and use SourceBridge on their workstations. Typically, SourceBridge is used within an integrated development environment (IDE) to associate source code control files with SBM items. You can also use SourceBridge from within the Serena PVCS Version Manager 8.1 and later.

## Guide to SBM Documentation

The SBM documentation set includes the following manuals in PDF format. Most documents are installed with SBM; to obtain a document that is not installed with the product or to download the complete documentation set, visit <http://www.serena.com/support>.

Manual	Description
<i>Serena® Business Manager Installation and Configuration Guide</i>	Provides information on installing SBM and creating a database. Database and Web server configuration information is also provided.
<i>SBM Composer Guide</i>	Provides details on using SBM Composer to create the tables, fields, workflows, orchestrations, and other design elements comprised in process apps. Information about saving, versioning, importing, and exporting process apps is also provided. This document is intended for individuals who want to design and maintain process apps.
<i>SBM Application Administrator Guide</i>	Provides information on using Application Administrator to deploy process apps to runtime environments and to promote configured applications from one environment to another.
<i>SBM System Administrator Guide</i>	Provides information on configuring and administering the SBM Application Engine. Instructions for managing projects, user accounts, system settings, and authentication are included.

Manual	Description
<i>Serena® Business Manager User's Guide</i>	Provides information about the SBM User Workspace and is intended for end users. Instructions on using the SBM User Workspace, including the robust reporting feature in SBM, are included. To ease the process of providing a copy for every user in your system, the <i>Serena® Business Manager User's Guide</i> is provided in PDF and can be accessed from the <b>Product Information</b> tab of the <b>About</b> page in the SBM User Workspace.
<i>Serena® Business Manager Licensing Guide</i>	Explains how to manage licenses for Serena® Business Manager. License types are discussed, along with instructions for installing and using the Serena License Manager. This guide is intended for administrators who will install and implement Serena® Business Manager.
<i>Serena® Business Manager Web Services Developer's Guide</i>	Provides an overview of all SBM Web services, including descriptions for all calls, arguments, and responses. Installation instructions and information about the sample Web service programs are also provided.
<i>SBM AppScript Reference</i>	Provides information on customizing SBM using SBM AppScript, a programming language built around VBScript 4.0. This guide is intended for VBScript programmers who want to use SBM AppScript to implement custom features in an SBM system.
<i>Moving to Serena® Business Manager</i>	Provides migration information for existing TeamTrack customers who are moving to SBM. It explains how to upgrade your existing system, and it explains the expanded SBM paradigm in relation to the TeamTrack paradigm.

## Accessing Online Help

**SourceBridge User Help** provides information to end users about operating SourceBridge.

To access help, click the **Help** button located on each dialog box.

# Chapter 2: Installing and Configuring SourceBridge

SourceBridge is an extension that allows you to associate source control actions with SBM items and record version control history in SBM. SourceBridge intercepts check-out, check-in, undo check out, and add file processes to allow you to associate source files with SBM items. The source control processes are captured and recorded in the SBM database as well as in the source control environment.

SourceBridge can be used with integrated development environments that comply with Microsoft Source Code Control Interface (MSSCCI) standards, such as Serena PVCS Version Manager. You can also use SourceBridge from within supported versions of Serena PVCS Version Manager.

- [Installing SourceBridge \[page 7\]](#)
- [Source Control Registry Settings \[page 7\]](#)
- [Configuring SourceBridge \[page 9\]](#)

## Installing SourceBridge

SourceBridge is installed on each user's machine. Before installation, the integrated development and source control environments must be installed and configured.

To use SourceBridge, you must be granted the "Logon from SourceBridge" privilege. The "Logon from SourceBridge" privilege also enables you to create, run, modify, and delete **Version Control Actions** reports in the SBM User Workspace. Contact your SBM administrator to determine if you have been granted this privilege.

In addition, select the **Version Control History** check box on the **Display** tab of your user profile in SBM. This setting allows you to view version control history in the SBM User Workspace.

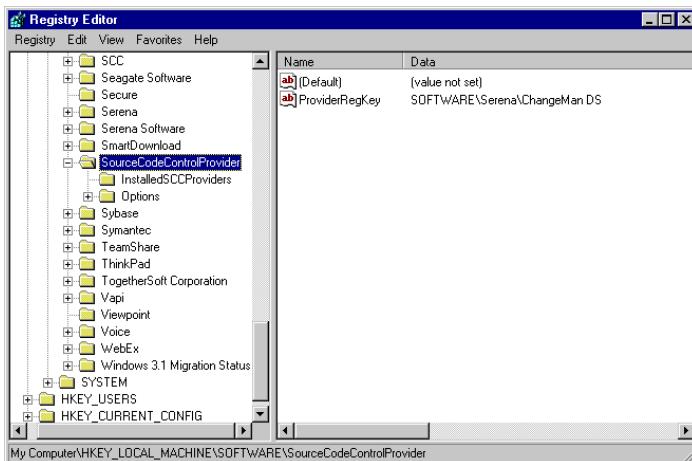
## Source Control Registry Settings

The SourceBridge installation modifies the system registry to allow SourceBridge to insert itself between the integrated development environment and source control.

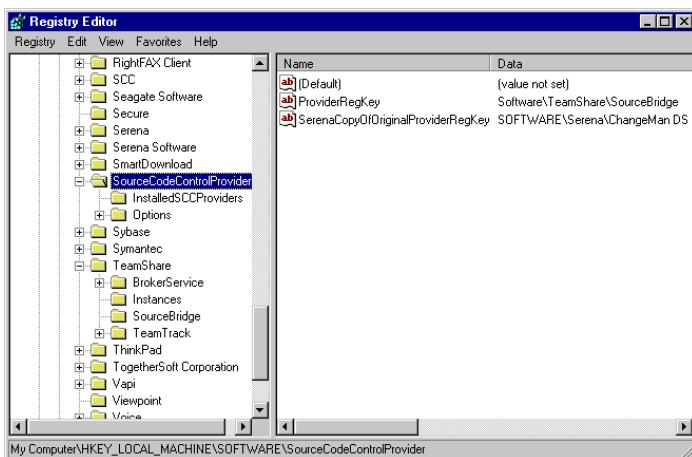
### Understanding the Registry Settings

The following figures show how the SourceCodeControlProvider key is displayed before and after SourceBridge has been installed.

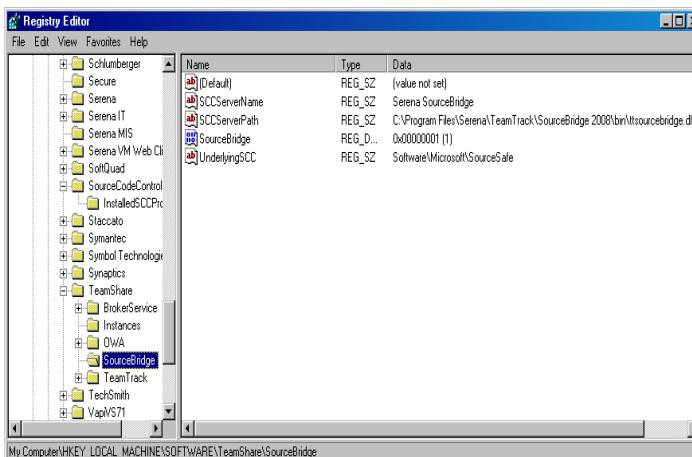
The following figure shows the Windows registry editor before the SourceBridge installation. The **ProviderRegKey** points to the source control provider.



The following figure shows is the Windows registry editor after the SourceBridge installation. The **ProviderRegKey** points to SBM. The prior setting of **ProviderRegKey** is saved in **SerenaCopyofOriginalProviderRegKey**.



The SourceBridge installation also adds registry keys to the **Local Machine\Software\TeamShare\SourceBridge** folder, as shown in the following figure. The **UnderlyingSCC** key points to the source control provider that is intercepted by SourceBridge.



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## Troubleshooting the Installation

When SourceBridge is installed, the **ProviderRegKey** points to the **Local Machine\Software\TeamShare\SourceBridge** folder. If SourceBridge is reinstalled without first uninstalling, the **ProviderRegKey** value is copied without first checking to see if SourceBridge is already installed and your development environment may be unable to locate your source control provider. Repeated reinstallations may crash the development environment. To fix this problem, uninstall SourceBridge through the **Add/Remove Programs Properties** dialog box located in the Windows **Control Panel**, then reinstall.

In addition, if you upgrade or re-install your source control tool, you must update the ProviderRegKey to point to the **Local Machine\Software\TeamShare\SourceBridge** folder.

## Configuring SourceBridge

Before using SourceBridge, you must provide the SBM Web server location, your SBM login ID and password, and your source control provider. These settings are made on the **System Settings** tab of the **Settings** dialog box, which automatically opens when you try to check a file in or out for the first time after installing SourceBridge.

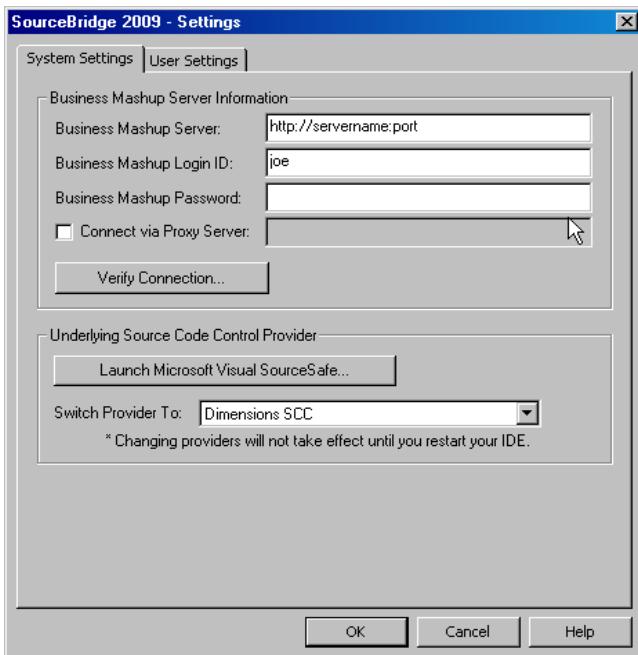
You can also open the **Settings** dialog box manually using the following methods:

- Click the Source Control icon located on your IDE toolbar.
- Depending on your IDE, select **Source Control** from the **Project** menu in the IDE. For example, in Microsoft Visual C++, select **Source Control** from the **Project** menu, and then select your source control provider, such as **Serena PVCS Version Manager**.
- In Serena PVCS Version Manager, select **SourceBridge** from the **Tools** menu.

When the **SourceBridge** dialog box opens, click the **Settings** button to open the **Settings** dialog box to the **System Settings** tab.

## Configuring System Settings

The following options can be set on the **System Settings** tab of the **Settings** dialog box.



- **SBM Server** - Type the name, IP address, or URL of the SBM Web server. For a secure connection, type the URL of the SBM Web server, including the https://secure protocol.
- **SBM Login ID** - Type your SBM login ID.
- **SBM Password** - Type your SBM password.
- **Connect via Proxy Server** - Select this check box to connect to the Web server through a proxy server. You may also enter a URL here.
- **Verify Connection** - Click this button to verify that SourceBridge can connect to the SBM Web server. If SourceBridge is unable to connect to the SBM server, modify information in the **SBM Server**, **Login ID**, and **Password** boxes as needed or verify with your SBM administrator that the Web server is running.



**Note:** If you are using SourceBridge within the Serena PVCS Version Manager Windows client, the following options are not available.

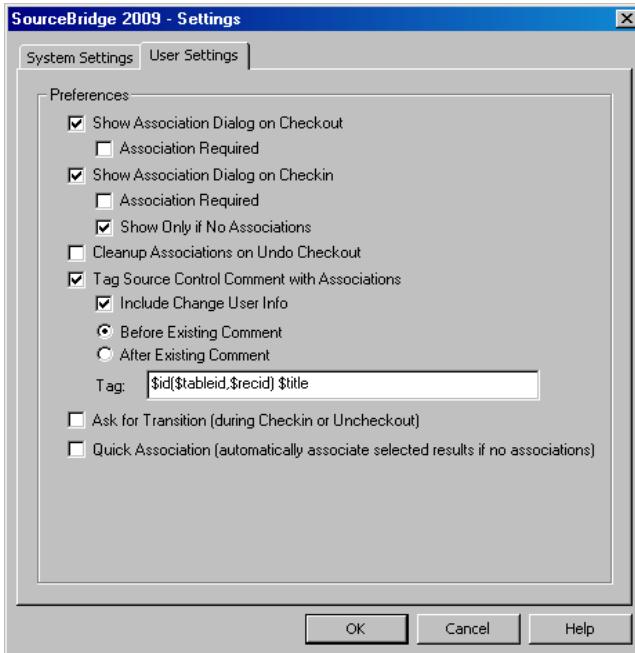
- **Launch Source Control Provider** - Click this button to launch the source control provider configured to work with SourceBridge.
- **Switch Provider to** - Select the source control provider you want to use from the drop-down list. This list is populated with all source control applications that comply with MSSCCI standards that are installed on the your machine. You must restart your development environment after selecting a new source control provider.

## Configuring User Settings

The following options are available on the **User Settings** tab of the **Settings** dialog box.



**Note:** Your administrator can override certain settings. Settings that have been overridden by your administrator are disabled and marked with an asterisk. Settings that cannot be changed are disabled.



- **Show Association Dialog on Checkout** - Select this check box to open the **SourceBridge - Check Out** dialog box each time source files are checked out. This enables you to associate SBM items with the files being checked out. The **Show Association Dialog on Checkout** check box is selected by default. Note that this setting has no effect when SourceBridge is used through the Serena PVCS Version ManagerWindows client.
  - **Association Required** - This check box is enabled if the **Show Association Dialog on Checkout** check box is selected. Select the **Association Required** check box to require that at least one SBM item is associated with the file or files being checked out. By default, this check box is cleared.
- **Show Association Dialog on Checkin** - Select this check box to open the **SourceBridge - Check In** dialog box each time source files are checked in. This enables you to associate new SBM items with the files or to modify associations made at check in. This option also opens the **SourceBridge - Add to Source Control** dialog box each time you add files to source control. By default, the **Show Association Dialog on Checkin** check box is selected. Note that this setting has no effect when SourceBridge is used through the Serena PVCS Version Manager Windows client.
  - **Association Required** - This check box is enabled if the **Show Association Dialog on Checkin** check box is selected. Select the **Association Required** check box to require that at least one SBM item is associated with the file or files being checked in or added to source control. By default, this check box is cleared.

- **Show Only if No Associations** - This check box is enabled if the **Show Association Dialog on Checkin** check box is selected. Select the **Show Only if No Associations** check box to open the **SourceBridge Check In** dialog box if file or files being checked in are not already associated with an SBM item. By default, this check box is selected.
- **Cleanup Associations on Undo Checkout** - Select this check box to automatically remove check out records from SBM items when an undo-checkout operation is performed. Clear this check box to log undo checkout records and to store check out records in SBM when an undo checkout operation is performed. By default, the **Cleanup Associations on Undo Checkout** check box is cleared.
- **Tag Source Control Comment With Associations** - Select this check box to record SBM item associations in the comments area for each file's source control properties for some source control environments. For details, refer to [SBM Data in the Source Control Tool \[page 23\]](#).
  - **Include Change User Info** - Select this check box to include your SBM user name and login ID in the comments area for each file you associate with items as you perform check out and check in operations. By default, this check box is selected.
  - **Before Existing Comment** - Select this option to add SBM association information to the beginning of existing comments.
  - **After Existing Comment** - Select this option to add SBM association information after existing comments. This option is selected by default.
  - **Tag** - Specify a format for association information added to comments. The tags can be made up of text and the following data identifier tags:
    - **\$id** - Returns the Item ID for the SBM item.
    - **\$ownid** - Returns the login ID of the user who owns the SBM item at the time of the association.
    - **\$project** - Returns the name of the project in which SBM items reside at the time of the association.
    - **\$recid** - Returns the SBM item's database record ID.
    - **\$tableid** - Returns the SBM item's database table ID.The default tag is `$id($tableid,$recid) $title`.
- **Ask for Transition (During Checkin or Uncheckout)** - Select this check box for SBM to prompt you to transition items on completion of associated check in and undo check out operations. By default, this check box is cleared.
- **Quick Association** - Select this check box to associate SBM items selected in the **Results** list on the **SourceBridge Check In** or **SourceBridge Check Out** dialog boxes with the files being checked in or out. This enables you to quickly associate items without clicking the **Associate** button in the **Associations** area. By default, this check box is cleared.
- **Use Version Labels on Checkin** - This setting is available when Serena PVCS Version Manager is used as the underlying source control system. Select this check

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box to add a version label to the file that contains the SBM Item ID when you check in files.



# Chapter 3: Using SourceBridge

SourceBridge enables you to associate source control actions with SBM items from within the development environment and record these actions in SBM and the source control environment. You can also search for SBM items and launch SBM.

For details, refer to:

- [Using SBM Within SourceBridge \[page 15\]](#)
- [Associating Items With Source Control Actions \[page 17\]](#)
- [Accessing SourceBridge Information in SBM \[page 22\]](#)
- [SBM Data in the Source Control Tool \[page 23\]](#)

## Using SBM Within SourceBridge

The **SourceBridge** dialog box enables you to work with SBM items from within the integrated development environment or from within Serena PVCS Version Manager.

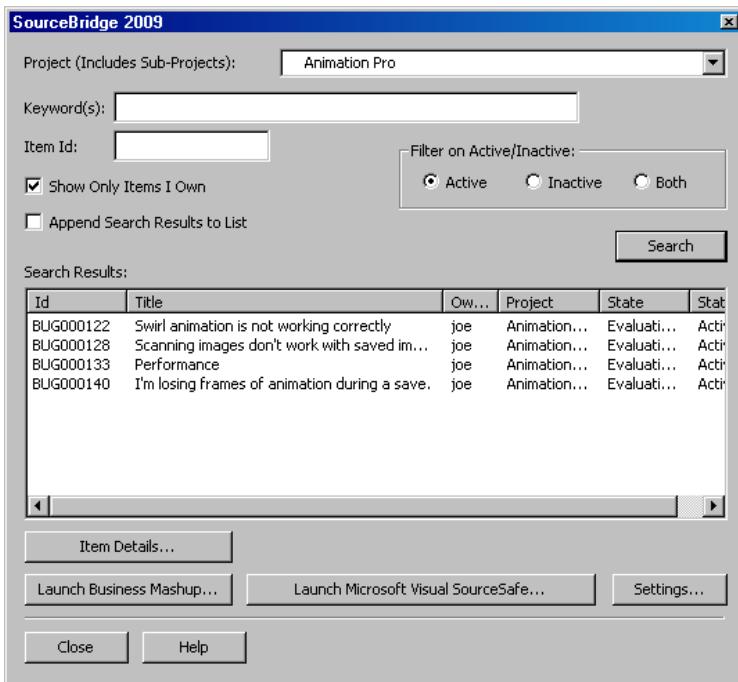
Specifically, you can use the **SourceBridge** dialog box to:

- Search for items you have privileges to transition and launch SBM to open to those items.



**Note:** SBM items are associated with source control files using the **SourceBridge - Check In**, **SourceBridge - Check Out**, and **SourceBridge - Add to Source Control** dialog boxes. For details, refer to [Associating Items With Source Control Actions \[page 17\]](#).

- Launch the SBM User Workspace.
- Launch your source control application, if applicable.
- Access SourceBridge system and user settings.



You can open the **SourceBridge** dialog box using the following methods:

- Click the **Source Control** icon located on your IDE toolbar.
- Depending on your IDE, select **Source Control** from the **Project** menu in the IDE. For example, in Microsoft Visual C++, select **Source Control** from the **Project** menu, and then select your source control provider, such as **Serena PVCS Version Manager**.
- In Serena PVCS Version Manager, select **SourceBridge** from the **Tools** menu.

The following options are available on the **SourceBridge** dialog box:

- **Project (Includes Sub-projects)** - This option enables you to filter searches by projects in which you have privileges to transition items. If a parent project is selected from the drop-down list, items are returned from the parent project and any of its sub-projects.
- **Keyword(s)** - Use the **Keyword** box to search for information in **Text** fields that are set up for keyword searching by your administrator. Keyword searches typically apply to the *Title* and *Description* fields, but may include other fields as well. Type the keyword you want to use for the search in the **Keyword** box. Separate multiple keywords with a space. To find an exact phrase, enclose the phrase with quotation marks. Asterisks (\*) serve as wildcard characters.
- **Item ID:** To find items by ID, type the Item ID in the box. The following criteria applies to Item ID searches:
  - Prefixes specified with the ID number are ignored.
  - Leading zeros on the ID number may be left off your search criteria. For example, to find item ID number "BUG00017," type "17."

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- Wildcard characters are automatically prepended and appended to your search criteria.
  - If you provide search criteria in the Keyword(s) and Item ID boxes, the Keyword criteria is ignored, and the search is based on the Item ID criteria.
  - If multiple items with the same ID number are found in a project and its descendant, each of these items is added to the **Search Results** list.
  - If a single digit is typed in the **Item ID** box, each item in the database with an Item ID that includes that digit is returned. For example, if 5 is typed, items with ID numbers 5, 52, 75, and so on are returned.
  - **Filter on Active/Inactive** - This option enables you to list active items you can transition, inactive items you can transition, or both.
  - **Show Only Items I Own** - Select this check box to list all items you own in the specified project and its sub-projects. Clear this check box to list all items you can transition in the specified project and sub-projects. If the **Show Only Items I Own** check box is cleared, you must specify a keyword or item id as search criteria.
  - **Append Search Results to List** - Select this check box to add search results to the existing **Search Results** list. Clear this check box to replace the **Search Results** list with search results.
  - **Search** - Click **Search** to search for SBM items based on specified criteria.
  - **Search Results** - Items meeting the search criteria are listed in the **Search Results** list. The list displays the Item ID, Title, Owner, Project, State, and Active/Inactive status for each item.
  - **Item Details** - Select an item from the **Results** list, and then click **Item Details** to open the SBM User Workspace to that item.
  - **Launch SBM** - Click this button to launch SBM. You can then work with reports, submit items, etc.
  - **Launch Source Control Provider** - Click this button to launch the source control provider configured to work with SourceBridge.
  - **Settings** - Click this button to open the **Settings** dialog box and set system and user settings. For details, refer to [Configuring System Settings \[page 9\]](#) and [Configuring User Settings \[page 11\]](#).

## Associating Items With Source Control Actions

SourceBridge leverages the development environment's integration with version control software; therefore, unless you are using Version Manager, all files must be checked in and checked out from within the IDE to be recorded in SBM. If you are using Version Manager and SourceBridge is properly installed and configured, file operations performed from the source control environment are recorded in SBM.

The process for checking files in and out depends on your source control application and integrated development environment.

## Associating SBM Items With Check-Out Actions

Depending on your user settings, the **SourceBridge - Check Out** dialog box opens when you check out files from the IDE or Serena PVCS Version Manager. If you are using Serena PVCS Version Manager, you can also click the **Associate Issues** button on the **Check Out File** dialog box to open the **SourceBridge - Check Out** dialog box.

The **SourceBridge Check Out** dialog box is used to associate SBM items listed in the **Results** list with source files being checked out. The check-out actions are then recorded in the SBM database and can be viewed in the **Version Control History** section of associated items in SBM if you have selected the **Version Control History** display option in your user profile. Depending on your user settings, these actions are also recorded in the source control environment. For details, refer to [Configuring User Settings \[page 11\]](#) and [SBM Data in the Source Control Tool \[page 23\]](#).



**Tip:** Click the **Launch SBM** button to open the SBM User Workspace.

### To associate SBM items with files on check out:

1. Using the search mechanisms described in [Search Options \[page 20\]](#), locate SBM items to associate with files being checked out.
2. Associate SBM items with the files being checked out, as described in [Association Options \[page 21\]](#).
3. Click **Complete** to finish your action or **Cancel** to abort your action.

## Associating SBM Items With Check In Actions

Depending on your user settings, the **SourceBridge - Check In** dialog box opens when you check files in from the IDE or from Serena PVCS Version Manager. For details on user settings, refer to [Configuring User Settings \[page 11\]](#).

If you are using Serena PVCS Version Manager, you can also click the **Associate Issues** button on the **Check In File** dialog box to open the **SourceBridge - Check In** dialog box.



**Tip:** Click the **Launch SBM** button to open the SBM User Workspace.

### To associate SBM items with files on check in:

1. Using the search mechanisms described in [Search Options \[page 20\]](#), locate SBM items to associate with files being checked in.
2. Associate SBM items with the files being checked in, as described in [Association Options \[page 21\]](#).
3. Click **Complete** to finish your action or **Cancel** to abort your action.

## Transitioning Items On Check In or Undo Checkout

You can transition items upon completion of associated check in and undo check out operations.

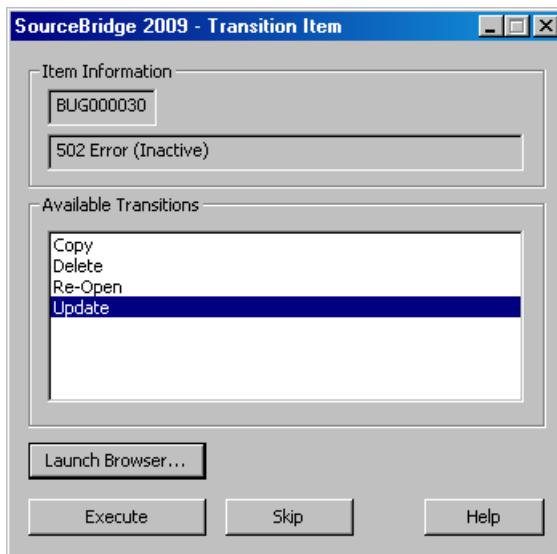
If you are associating multiple SBM items with the version control operation, SourceBridge prompts you to transition each item individually. This enables you to select different transitions for individual items as needed. If required fields need data, SourceBridge prompts you to finish the transition in SBM. SourceBridge also prompts you to finish the transition in SBM if you selected a special transition type, such as Copy, Post Item, or Publish Problem.

If multiple files are associated with an SBM item, you are prompted to transition the item when you check in the last file or you "undo" the check out on the last file.

To use the transition feature, you must select the **Ask for Transition** check box on the **User Settings** tab of the **Settings** dialog box. For details, refer to [Configuring User Settings \[page 11\]](#).

#### To transition items using SourceBridge:

1. After the file check in or undo check out operation completes, the SourceBridge **Transition Item** dialog box opens. The Item ID and Title of the first item selected are shown in the **Item Information** area.



2. Select the appropriate transition from the **Available Transitions** list, and then click one of the following options:

- **Launch SBM** - Click this button to launch the SBM User Workspace to the **Transition** form for this item. You can then update items as needed and transition them manually.
- **Execute** - Click this button to transition the selected item. Click **Yes** to launch SBM and finish the transition. Click **No** to cancel the transition.



**Note:** The version control operation is completed before the transition prompt is given, so cancelling the transition does not cancel the version control operation.

- **Skip** - Click this button to record the version control operation in SBM without transitioning the item.

## Associating SBM Items With Add to Source Control Actions

Depending on your user settings, the **SourceBridge - Add to Source Control** dialog box opens when you add files to source control, enabling you to associate SBM items with these items. For details on user settings, refer to [Configuring User Settings \[page 11\]](#).



**Tip:** Click the **Launch SBM** button to open the SBM User Workspace.

### To associate SBM items with files being added to source control:

1. Using the search mechanisms described in [Search Options \[page 20\]](#), locate items to associate with files being added.
2. Associate SBM items with the files being added, as described in [Association Options \[page 21\]](#).
3. Click **Complete** to finish your action or **Cancel** to abort your action.

## Search Options

Search options are used in the **SourceBridge Check Out**, **SourceBridge Check In**, and **SourceBridge - Add to Source Control** dialog boxes. The following search options are available:

- **Project (Includes Sub-projects)** - This option enables you to filter listed items by projects in which you have privileges to transition items. If a parent project is selected from the drop-down list, items are returned from the parent project and any of its sub-projects.
- **Keyword(s)** - Use the **Keyword** box to search for information in **Text** fields that are set up for keyword searching by your administrator. Keyword searches typically apply to the *Title* and *Description* fields, but may include other fields as well. Type the keyword you want to use for the search in the **Keyword** box. Separate multiple keywords with a space. To find an exact phrase, enclose the phrase with quotation marks. Asterisks (\*) serve as wildcard characters.
- **Item ID:** To find items by ID, type the Item ID in the box. The following criteria applies to Item ID searches:
  - Prefixes specified with the ID number are ignored.
  - Leading zeros on the ID number may be left off your search criteria. For example, to find item ID number "BUG00017," type "17."
  - Wildcard characters are automatically prepended and appended to your search criteria.
  - If you provide search criteria in the Keyword(s) and Item ID boxes, the Keyword criteria is ignored, and the search is based on the Item ID criteria.
  - If multiple items with the same ID number are found in a project and its descendants, each of these items is added to the **SourceBridge Check Out** list.

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- If a single digit is typed in the **Item ID** box, each item in the database with an Item ID that includes that digit is returned. For example, if 5 is typed, items with ID numbers 5, 52, 75, and so on are returned.
  - **Filter on Active/Inactive** - This option enables you to list active items you can transition, inactive items you can transition, or both.
  - **Show Only Items I Own** - Select this check box to list all items you own in the specified project and its sub-projects. Clear this check box to list all items you can transition in the specified project and sub-projects. If the **Show Only Items I Own** check box is cleared, you must specify a keyword or item id as search criteria.
  - **Append Search Results to List** - Select this check box to add search results to the existing **Results** list. Clear this check box to replace the **Results** list with search results.
  - **Search** - Click **Search** to search for SBM items based on specified criteria.
  - **Results** - Items meeting the search criteria are added to the **Results** list. The list displays the Item ID, Title, Owner, Project, State, and Active/Inactive status for each item. Double-click an item to add it to the **Associations** list, or select an item, and then click **Associate**.
  - **Item Details** - Select an item from the **Results** list, and then click **Item Details** to open the SBM User Workspace to that item.

## Association Options

Association options are used in the **SourceBridge Check Out**, **SourceBridge Check In**, and **SourceBridge - Add to Source Control** dialog boxes. The Associations area enables you to associate files being added, checked in, or checked out with SBM items in the **Results** list. Files that are being checked out, checked in, or added to source control are listed under the **All Files** root folder in the **Associations** list. Once SBM items are associated with the files, the items are listed under each file.



**Tip:** SourceBridge remembers the last SBM item or items associated with source files by automatically selecting them the next time a file is checked out or added to source control. When you check items in, SourceBridge automatically remembers the last item associated with source files if you have opted not to associate items with files on check out. If an item has been closed or you no longer own it, it does not automatically show up in the **Results** list.

The following Association options are available:

- **Associate** - Associate selected files in the **Associations** list with SBM items in the **Results** list by selecting the files, and then clicking **Associate**. Multiple items can be selected by pressing CTRL and clicking each item. Items are associated with files as follows:
  - If the **All Files** root folder is selected, the association is made for all files in that folder.
  - If files are selected under the root folder, the association is made for the selected files.

- If an SBM item is selected and no files are selected, the **Associate** button is disabled.



**Note:** If you associate an SBM item and a file at check in, the version control record in SBM does not contain any check out information.

- **Unassociate** - Remove SBM item associations from files by selecting files or items in the **Associations** list, and then clicking **Unassociate**. Items are unassociated from files as follows:
  - If the **All Files** root folder is selected, you are asked if you want to remove all associations for all files. Click **Yes** to remove associations; click **No** to keep associations intact.
  - If a file is selected, you are asked if you want to remove all associations for the file. Click **Yes** to remove associations; click **No** to keep associations intact.
  - If an SBM item is selected, it is moved from the **Associations** list.



**Note:** If you remove the association between an item and a file during check in, the version control record is deleted from SBM.

- **Item Details** - Select an SBM item that is associated with a file, and then click **Item Details** to launch SBM to that item.

## Related Topics

[Associating SBM Items With Check-Out Actions \[page 18\]](#)

[Associating SBM Items With Check In Actions \[page 18\]](#)

[Associating SBM Items With Add to Source Control Actions \[page 20\]](#)

# Accessing SourceBridge Information in SBM

You have two methods of accessing SourceBridge information in SBM:

- **Version Control History** - The version control history associated with each primary item can be viewed in the **Item Details** frame for that item. Refer to the [Version Control History \[page 22\]](#) for details.
- **Version Control Actions Report** - This report type allows you to generate reports based on items associated with files checked in or checked out, date ranges, and users performing version control actions via SourceBridge. Refer to the [Version Control Actions Report \[page 23\]](#) for details.

## Version Control History

In SBM, all checkout and check-in operations performed using SourceBridge are displayed in the **Item Details** page for individual primary items and can be viewed if you select the **Version Control History** check box in your SBM user profile. If you choose to record undo check out operations, these are recorded as well. If you select the **Cleanup Associations on Undo Checkout** option in your SourceBridge user settings, however, all check out associations are deleted.

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The **Version Control History** section contains names of the files associated with an item, the date and time files were checked in and out, the SBM user who performed the source control action, and comments associated with check-in actions. Depending on your source control tool, the version number of the file associated with the SBM item may be displayed as well.

SourceBridge does not need to be installed for you to view the Version Control History in the SBM User Workspace, but if your application uses custom forms, the Version Control History section must be included on the form. If you cannot view the Version Control History section, contact your system administrator.



**Note:** If your administrator grants appropriate privileges, you can add, modify, and delete version control actions, also referred to as file associations, from within SBM.

## Version Control Actions Report

Version control actions can be retrieved by **Version Control Actions** reports. **Version Control Actions** reports allow you to access information pertaining to source control files associated with SBM primary items. You can generate reports based on items associated with files checked in or checked out, date ranges, SBM users performing version control actions via SourceBridge, and more. File association information is also available. For details on working with Version Control Actions reports, refer to the *Serena® Business Manager User's Guide*.



**Note:** Privileges granted by your administrator determine if you can create, run, modify, and/or delete reports. In addition, to access **Version Control Actions** reports, you must be granted the Logon From SourceBridge system privilege.

## SBM Data in the Source Control Tool

SourceBridge can record SBM association information in each file's source control properties for some source control tools. This enables you to trace information related to SBM items from within the source control tool. To enable this feature, select the **Tag** **Source Control Comment With Associations** check box in your SourceBridge user settings. For details, refer to [Configuring User Settings \[page 11\]](#).

Each time a file is checked in or checked out and associated with an SBM item in the integrated development environment, information about the item is added to the comments entered. Depending on the action you are performing, these comments are stored in the **Comment** field in the file's check out status properties or the file history **Comment** field in the source control environment.



**Note:** **Comment** fields are commonly used in source control applications that adhere to the MSSCCI standard. They may be accessed differently or not at all, depending on the development environment and source control applications being used.

By default, SourceBridge adds the SBM user's name, login ID, item ID, and comments to the **Comment** field. Additional information is also stored with each Item ID to allow the item to be uniquely identified in the SBM database. You can customize comment setting in your SourceBridge user settings. For details, refer to [Configuring User Settings \[page 11\]](#).



**Note:** The number of characters that can be appended to the **Comment** field varies depending on the source control application and the length of the comment entered when the file is checked out. The data appended by SourceBridge may be truncated by the source control application if the total length of the comment exceeds the maximum it allows.