

AccuRev[®]

Getting Acquainted with AccuRev

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Overview



This guide gets you acquainted, quickly and easily, with AccuRev® — the new generation software configuration management software with integrated issue management (AccuWork™) — from AccuRev, Inc.

You will first learn how to populate a repository of files under AccuRev version control. You will then go through typical Developer and Release Engineer experiences using AccuRev configuration management, followed by setup of AccuWork, AccuRev's integrated issue management system.

This guide does not attempt to provide exhaustive explanations of product features. For full details, see the AccuRev documentation set, which you can download from <http://www.accurev.com>. The manuals are in PDF format, and can be viewed using Acrobat Reader. AccuRev's graphical user interface has a context-sensitive help system.

Before You Begin

Perform a full product installation (client and server) of AccuRev as described in the *AccuRev Installation and Release Notes* prior to using this guide.

Getting Help

Your AccuRev installation includes a complete set of user documentation (including this guide) and online help. PDF and HTML documentation is installed in the \doc folder where you install AccuRev. You can get online help at any time by pressing F1 or clicking the Help button (?) in the AccuRev toolbar.

The support team at AccuRev, Inc. is also available to help you at any time as you get acquainted with our software. So please e-mail us with any questions and/or comments at support@accurev.com.

Graphical Conventions

Throughout this guide, the > symbol denotes navigation in a menu, such as the main AccuRev menu, or a context menu that you display by right-clicking an object in the AccuRev GUI display. For example: **Admin > Depots** indicates that you should select the **Admin** menu and then select the **Depots** command from the menu.

This guide omits some trivial steps, such as clicking the **Ok** or **Close** button in message or status windows.

Setting up AccuRev®


In this section, you will use AccuRev's "Quick Setup Wizard" for initial data setup. If you prefer the do-it-yourself approach, using individual AccuRev commands, please follow the procedure in [Initial Setup without Using the Quick Setup Wizard](#) on page 21.

Before You Begin

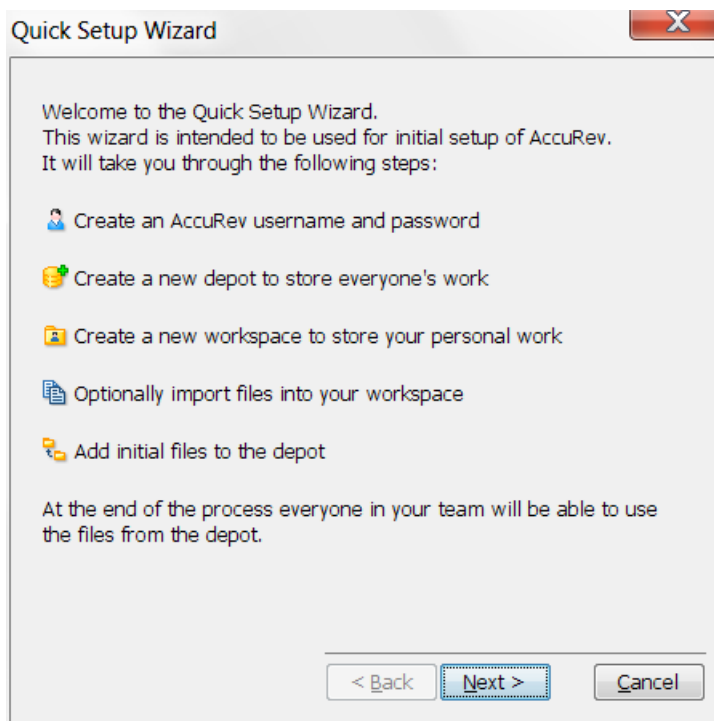
Use a file browser to find a directory that contains files that want to place under version control. The directory you choose can have subdirectories. The data in these directories will not be modified — the Wizard makes a copy of it. Note the pathname of this directory for use in the procedure, [Using the Quick Setup Wizard](#) on page 4.

Starting the AccuRev® Graphical User Interface

To start AccuRev:

- Double-click the AccuRev shortcut () on your desktop, or
- In a Command Prompt window, enter **acgui**

If this is the first time you are starting AccuRev, the AccuRev Quick Setup Wizard appears:



See [Using the Quick Setup Wizard](#) on page 4 for more information. Otherwise, see [The Developer Experience](#) on page 5 to get started using AccuRev.

Using the Quick Setup Wizard

This section describes how to use the AccuRev Quick Setup Wizard to quickly get files under AccuRev control.

1. In the Quick Setup Wizard click the **Next** button to start the wizard. Then:
2. Create an AccuRev username.
3. Create a new storage repository (depot).
4. Create a workspace for yourself, and copy data files to the workspace. Make these choices when prompted by the wizard:
 - Select **Yes** when asked “Do you have files that you would like to import into AccuRev?”
 - Select **Yes** when asked “Do you want to create a workspace in a new location ...?”
 - When prompted “Where are the files stored ...” specify the directory you chose in [Before You Begin](#) on page 3.
 - Accept AccuRev’s suggestion for the location of the new workspace.
5. Add the files in your workspace to the depo by clicking **Promote** in the Promote window.

What Next?

After completing the initial setup, you can proceed to use any or all of the remaining three sections of this guide:

- [The Developer Experience](#) on page 5
- [The Release Engineer Experience](#) on page 9
- [Issue Management with AccuWork™](#) on page 17

The Developer Experience



The Developer experience includes accessing workspaces, creating new versions of files (edit/keep/promote), updating workspaces, and merging two versions of a file.

Going to Your Workspace

Perform this step if your workspace is not already open in the AccuRev GUI.

1. Select **File > Open Workspace**.
2. Select the workspace that you created in [Step 4](#) in [Using the Quick Setup Wizard](#) on page 4.

*All of the files in your workspace have a status of **(backed)**. This means that you have not yet modified these files.*

Editing Your Source Files

1. If necessary, navigate through folders in the Folders pane (upper left); then select a file to edit.
2. Right-click and choose **Edit** from the context menu.
3. Make some changes to your source file.
4. Save the file, and close the editor.

*You did not have to “check out” the file before editing it. The status of the file is now **(modified)**.*

Keeping Your Modified Files

The “Keep” operation is a “private checkin”. It makes a copy of your modified file in secure storage maintained by the AccuRev Server process. It also records the creation of a new version of the file in the AccuRev database. Keeping new versions in the workspace enables you to checkpoint and back up your own code, while preventing your changes from being seen by other developers.

1. Select the file you modified.
2. Right-click and choose **Keep** from the context menu.

Enter a comment, and click **Ok**.

Note: The status of the file now includes the indicator **(kept)**.

Share Changes with the Rest of the Group

The “Promote” operation allows you to share your changed file with other users.

1. Select the file you just modified and kept.
2. Right-click and choose **Promote** from the context menu.

3. Enter a comment, and click **Promote**.

*Promote makes the version that you created with “Keep” available to be copied into other users’ workspaces. The status of the file is once again (**backed**).*


Creating a Second Workspace

1. Select **File > New > Workspace** from the AccuRev main menu.
2. From the List of depots, select your depot.
3. As the **Basis stream**, select the stream with the same name as the depot.
4. Click **Next**.
5. As the **Name of workspace to create**, enter a new name (example: **acme2**).
6. As the **Location** for the new workspace, choose an existing directory (example: **C:\Documents and Settings\Derek** or **/usr/home/derek**).
7. Make sure the **Append workspace name to its location** checkbox is checked.
8. Click **Finish**.

The new workspace is created, and Update is invoked to copy the files you placed under version control to the workspace.

Working on Files in the Second Workspace

You can perform a search to list all the files that you are currently working on.

1. Select a text file to edit in your second workspace.
2. Right-Click Edit.
3. Make some changes to your text file.
4. Save the file, and close the editor.
5. Repeat steps 1-4 on one or more additional files.
6. Select the  Pending search in the Searches pane (lower-left).
7. Select the file(s) you modified.
8. Right-click a file and choose **Keep** from the context menu.
9. Select the same file(s).
10. Right-click and choose **Promote** from the context menu.

Switching Back to Your First Workspace

1. Click the tab in the GUI window that contains your first workspace.

If you have closed that tab, re-open the workspace using:
File > Open Workspace

2. Click the **Update** toolbar button.



This brings the changes you promoted while working in your second workspace into your first workspace.

Merging Two Versions of a File

1. In your first workspace, select a file to edit.
2. Right-click and choose **Edit** from the context menu.
3. Make some changes to your text file, save the file, and close the editor.
4. Select the file.
5. Right-click and choose **Keep** from the context menu.
6. Select the file.
7. Right-click and choose **Promote** from the context menu.
8. Switch to your second workspace, and click the edited file's folder in the Folders pane. **Don't perform an Update.**

The file's status now includes the indicator (stale).

9. Edit the *same* file in the second workspace.

The file's status now includes the indicator (overlap). The yellow highlight emphasizes this status. This means that someone else has promoted a version before you did. In this case, the "someone else" is you, working in your first workspace. The file in your second workspace requires a merge before you can promote it.

10. Select the file.
11. Right-click and choose **Merge** from the context menu.
12. Proceed to merge the file, using the graphical Merge tool. Use the up (⬆) and down (⬇) toolbar buttons to navigate from conflict to conflict; use the left (⬅) and right (➡) buttons to resolve the current conflict by selecting text from one of the versions. You finish the Merge by preserving the merged file, selecting **Keep & Exit** when all the conflicts have been resolved.



See the topic "The AccuRev Merge Tool" in the AccuRev online help (in your AccuRev install directory under doc/WebHelp/Merge_Tool_AccuRev.htm).

13. Select the file.
14. Right-Click Promote.

The Release Engineer Experience



The AccuRev experience for a Release Engineer or Quality Engineer includes working with the StreamBrowser™, creating new streams and snapshots, comparing streams, and rearranging the stream hierarchy.

Launching the StreamBrowser™

The StreamBrowser allows you to easily see and control your development stream hierarchy graphically.

1. Select **View > Streams** from the AccuRev main menu.
2. If necessary, select your depot from a list of depots in a pop-up window.

The StreamBrowser tab appears, showing the streams in your depot.

3. In the filter at the bottom of the StreamBrowser tab, make sure that **All Workspaces** or **Current User** is selected in the drop-down field. These settings include your “private” workspace streams in the display.

Currently, there's only one "public" development stream: the depot's "base stream" or "root stream". It has the same name as the depot.

Creating a Snapshot Stream to Capture the Current State of Development

1. Select the depot's base stream.
2. Right-click and select **New Snapshot** from the context menu.
3. Give the new snapshot a name (example: **acme_1.0**).
4. Leave the Basis Time set to **Now**.
5. Click **Ok**.

The newly created snapshot stream appears in the StreamBrowser.

Creating an Integration Stream Based on the Base Stream

Now, rather than having to promote directly into the base stream you can promote to an integration stream below the base stream.

1. Select the base stream.
2. Right-click and select **New Stream** from the context menu.
3. Give the new stream a name (example: **acme_int**).

4. Leave the Stream Type set to **Dynamic stream**.
5. Leave the Basis Time set to **None**.
6. Click **Ok**.

The newly created integration stream appears in the StreamBrowser, as a direct “child” of the base stream.

Reparenting Your Workspaces


*You can easily “reparent” your workspaces within the StreamBrowser, so that they are based on the integration stream rather than the base stream (example: reparent them from **acme** to **acme_int**).*

1. Drag-and-drop one of your workspaces onto the integration stream.
2. Drag-and-drop the other workspace onto the integration stream.

The StreamBrowser shows that your workspace streams are now based on the integration stream.

Updating Your Workspace



Execute the following steps for each workspace that you have just reparented. Work with **different** files in the two workspaces.

1. Double-click the workspace to open it.
2. Click the **Update** toolbar button () .
An Update is always required after reparenting a workspace.
3. Select a file in your workspace.
4. Right-click and select **Edit** from the context menu.
5. Right-click and select **Keep** from the context menu.
6. Right-click and select **Promote** from the context menu.

*This promotes the new version of the file to the integration stream. The process remains the same no matter which stream the workspace is based on: > **Edit**; > **Keep**; > **Promote**.*

7. (optional) **Edit/Keep/Promote** additional files.

Promoting Your Changes from the Integration Stream to the Base Stream

1. Switch back to the StreamBrowser tab (example:  **acme**).
2. Click the **Show Active Files** button () under the integration stream (example: **acme_int**).

This opens a subwindow showing the files you just promoted to the integration stream.

3. Select all of the files.
4. Right-click and select **Promote** from the context menu.

The files have now been promoted from the integration stream to the base stream.

Creating a Second Snapshot of the Base Stream

1. Select the base stream.
2. Right-click and select **New Snapshot** from the context menu.
3. Give the second snapshot stream a name (example: **acme_2.0**).
4. Leave the Basis Time set to **Now**.
5. Click **Ok**.

The newly created snapshot stream appears in the StreamBrowser.

Comparing the Contents of the Two Snapshot Streams

1. Select the first snapshot stream (example: **acme_1.0**).
2. Right-click and select **Show Diff By Files** from the context menu.
3. Click on the second snapshot stream (example: **acme_2.0**).



A “show difference” icon is added to the mouse pointer.

A list appears, containing the files you promoted above.


Observing the Differences Between Snapshots at the Individual File Level

1. Select a file from the differences list you just generated.
2. Right-click and select **Show Difference** from the context menu.


Seeing Inheritance in the Stream Hierarchy



1. Go to the StreamBrowser tab (example:  **acme**).
2. Drag-and-drop one workspace from its current parent, the integration stream, to the base stream. (Leave the other workspace under the integration stream.)
3. Double-click the workspace you just “reparented” to open it, then click the **Update** toolbar button (.
4. Note the version-ID of some file in the workspace (example: **acme/1**). The direction of the separator character varies with the operating system.
5. Modify that file (right-click and choose **Edit** from the context menu).
6. Select the same file, then right-click and choose **Promote** from the context menu.
7. Switch back to the StreamBrowser tab.

This is a shortcut—the Promote command in the GUI performs an automatic Keep on the modified file.


8. Double-click the base stream to open it, then navigate to the file that you just promoted.
 9. Note the new version of the file in the stream (example: **acme/2**).
 10. Switch back to the StreamBrowser tab.
 11. Double-click the integration stream to open it, then navigate to the file that you just promoted to the base stream.
*The version of the file in the integration stream (example: **acme/2**) is the same as the version in the base stream. This version has been automatically inherited from the base stream.*
 12. Switch back to the StreamBrowser tab.
 13. Double-click the second workspace (the one that is still under the integration stream) to open it, and navigate to the same file.
*The version-ID of the file in this workspace is **not** the same as in its parent, the integration stream. This fact is reflected in the file's (**stale**) status indicator. Inheritance by workspaces is not automatic, but occurs only when you Update the workspace.*
 14. Click the **Update** toolbar button ().
- The same file version (example: **acme/2**) has now been loaded into the workspace. The file's status no longer includes the (**stale**) indicator.*

Using a Basis Time to Block Inheritance


1. Go to the StreamBrowser tab (example:  **acme**).
2. Select the integration stream.
3. Right-click and select **Change Stream** from the context menu.
4. Select a Basis Time of **Now**, then click **Ok**.
5. Double-click the workspace below the base stream to open it.
6. Modify a file in the workspace (right-click and select **Edit** from the context menu).
7. Select the same file, then right-click and select **Promote** from the context menu.
8. Switch back to the StreamBrowser tab.
9. Double-click the base stream to open it, then navigate to the file that you just promoted.
*Note the version of the file in the stream (example: **acme/3**).*
10. Switch back to the StreamBrowser tab.
11. Double-click the integration stream to open it, then navigate to the file that you just promoted to the base stream.
*The version of the file in the integration stream is **not** the same as the version in the base stream. The basis time prevents automatic inheritance from the base stream.*
12. Switch back to the StreamBrowser tab.
13. Double-click the workspace below the integration stream to open it.


14. Click the **Update** toolbar button (). Then click **View Full Log**.
No new file versions are loaded into the workspace.
15. Switch back to the StreamBrowser tab.
16. Select the integration stream.
17. Right-click then select **Change Stream** from the context menu.
18. Select a Basis Time of **None** (cancelling the basis time setting), then click **Ok**.
19. Double-click the integration stream to open it, then navigate to the file that you just promoted to the base stream.
*The version of the file in the integration stream (example: **acme/8**) is the same as the version in the base stream. As soon as the basis time is removed from the integration stream, it inherits the new file version from the base stream.*
20. Double-click the workspace below the integration stream, then click the **Update** toolbar button (). Then click **View Full Log**.
The new file version is loaded into the workspace.

Viewing the History of a Stream


1. Go to the StreamBrowser tab (example:  **acme**).
2. Select the base stream.
3. Right-click then select **Show History** from the context menu.
4. Select the most recent **promote** transaction.
The file versions involved in the transaction appear in the bottom pane of the History Browser.
5. Experiment with changing the transaction range, searching for a comment string, etc.
6. Locate the oldest **promote** transaction, and note the timestamp for use in the next operation.

Using a Time-based Stream to Reproduce a Previous Configuration

1. Go to the StreamBrowser tab (example:  **acme**).
2. Select the base stream.
3. Right-click then select **New Stream** from the context menu.
4. Specify the stream name (example: **acme_old_config**).
5. Specify the basis time by clicking the **Specified** radio button, then entering a time just after that of the base stream's first **promote** transaction (the time you noted above). Then click **Ok**.
6. Drag-and-drop the workspace from the integration stream to the newly created stream.



7. Double-click the workspace to open it, then click the **Update** toolbar button (). Then click **View Full Log**.


Older versions of files are loaded into the workspace.

8. Drag-and-drop the workspace from the newly created stream back to the integration stream.
9. Double-click the workspace to open it, then click the **Update** toolbar button ().

Newer versions of files are loaded into the workspace.


Making Fixes to a Previous Release


1. Go to the StreamBrowser tab (example:  **acme**).
2. Select the second snapshot created (example: **acme_2.0**).
3. Right-click then select **New Stream** from the context menu.
4. Enter a name for the new maintenance stream (example: **acme_2.0_maint**) and click **Ok**.
5. Drag-and-drop the workspace from the base stream to the new maintenance stream.
6. Double-click the workspace to open it, then click the **Update** toolbar button ().
7. Modify some files in the workspace.

8. Select the  Modified search in the Searches pane.


*All files in the workspace with (**modified**) status appear in the Details pane.*

9. Select all the modified files.
10. Right-click then select **Promote** from the context menu.
11. Switch back to the StreamBrowser tab.

A default group icon  appears below the new maintenance stream.

12. Click the  button to display the versions that were promoted to the maintenance stream.
13. Click the icon again to close this display.


Promoting Changes from the Maintenance Stream to the Integration Stream

1. Drag-and-drop the  icon below the maintenance stream to the integration stream.
A Change Palette tab opens.
2. If any files in the Change Palette have (**overlap**) status (yellow highlight), select them and right-click and select **Merge** from the context menu. Click **Ok** in the pop-up window.

Proceed to merge the files, using the graphical Merge tool (just as in [Merging Two Versions of a File](#) on page 7).

3. Select all the files in the Change Palette tab, and right-click and select **Promote** from the context menu.

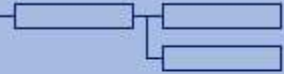
If you merged one or more files, they are displayed in a separate pane at the bottom of the Change Palette tab. You must Promote these files separately from the files in the upper pane, which did not need to be merged.

4. Close the Change Palette tab.
5. Once again, drag-and-drop the  icon the maintenance stream to the integration stream.

No files are displayed in the Change Palette tab, showing that all the changes in the maintenance stream have already been promoted to the integration stream.

6. Close the Change Palette tab.

Issue Management with AccuWork™



The AccuWork experience includes setting up an issues database format (“schema”), creating issue records, querying the issues database, and using the “change package” integration between configuration management and issue management.

Setting up the Default Schema

1. Select **Admin > Schema Editor** from the AccuRev main toolbar.
2. If necessary, select your depot from a list of depots in a pop-up window.
3. Click **Yes** (“Do you want to use the default schema?”).
4. Click **Ok** (“Please note ...”).
5. Click **Save** (lower right-corner of Schema Editor tab).

Creating a Few New Issues



1. Select **Issues > New Issue** from the AccuRev main toolbar.
2. Enter data in all of the required fields (red labels).
3. Experiment with how the different types of fields manage various types of data.
4. Click the **Save and Close** button () to save the issue record and close the tab.
5. Repeat this process a few times so you have a few issues to work with.

Creating a Query and Making it Your Default Query

1. Select **Issues > Queries** from the AccuRev main toolbar.
2. Click the **New Query** button () to create an empty new query.
3. Give your query a name by clicking its name "New Query 1" twice (with a short pause in between) and then typing the name (for example, **All Defects**).
4. Click **Click here to add...**
5. Set the first choice box value to **issueNum**.
6. Set the second choice box value to **greater than or equal to**.
7. Enter the number **1** in the third query box.

8. Click **Ok**.

The name of the new query appears in the left (Query List) pane, which lists all the queries that you have created. The right (Query Results) pane shows the results of running the query against the issues database.

9. In the Query List pane, with the query you just created ...right-click and select **Set as Default** from the context menu.
10. Click the **Setup Columns** button () in the Query Results pane.
11. Select additional fields to appear in the Query Results pane:
 - a. Select a field from the **Available** list (Example: **shortDescription**).
 - b. Click the right-arrow button () to move the field to the **Selected** list.
 - c. Repeat the steps above for all of the fields you wish to add to the query results output.
 - d. Click **Ok**.



12. Click the **Save All Queries** button () above the left pane to save your query.


13. Close the query tab.

14. Reopen a query tab by selecting **Issues > Queries** from the AccuRev main toolbar.

The query you just created runs automatically, because you set it as your default query.

Enabling the Built-in Integration Between AccuRev Configuration Management and AccuWork Issue Management

1. Select **Admin > Schema Editor** from the AccuRev main menu (or return to the existing Schema Editor tab).
2. Go to the **Change Packages** tab.
3. In the Change Package Results section (top part), click the Setup Columns button ()
4. Select some fields from the **Available** list (Example: **issueNum**, **shortDescription**), and click the right-arrow button () to move the fields to the **Selected** list.
5. Click **Ok**.

6. In the Change Package Triggers section (bottom part), click **New Trigger** button () in the toolbar.

A new window opens, in which you specify a condition, along with a query to be performed if that condition is satisfied when the integration is invoked.

7. In the Condition section (top part), click **Click here to add....**
8. Use the three choice boxes to form this condition:
PROMOTE_DEST_STREAM is in hierarchy *<depot>*.
... where *<depot>* is the name of your depot.
9. In the Query section (bottom part), click **Click here to add....**

10. Use the choice boxes and the text field to form this condition:

issueNum greater than 0

This query selects all issue records.

11. Click **Ok**.
12. Click **Save** (lower right-corner of Schema Editor tab).
13. Open a workspace (or go to one that is already open).
14. Edit and Keep several files.
15. Promote all those files.

The integration evaluates the condition you defined in Step 8 (it is TRUE), then runs the query you defined in Step 10. The selected records are presented as a list of issues to choose from.

16. Select the issue that you want to associate the promoted files with, and click **Ok**.
17. Select **Issues > Look Up** from the AccuRev main menu.
18. Enter the number of the issue you chose when prompted by the integration ([Step 16](#)), and click **Ok**.

The issue appears in an edit form.

19. (Go to the **Changes** tab.

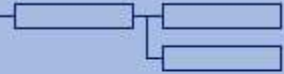
*The files that you promoted are listed on this tab. The specific versions that you promoted are listed in the **Version** column.*

Turning Off the Integration Between Configuration Management and Issue Management


1. Select **Admin > Schema Editor** from the AccuRev main menu (or return to the existing Schema Editor tab)
2. In the **Change Packages** tab, click the condition/query pair to select it.
3. Click the Delete Trigger button (✖).
4. Click **Save** (lower right-corner of Schema Editor tab).

With no query to be invoked at Promote time, the integration is effectively disabled.

Initial Setup without Using the Quick Setup Wizard



Create an AccuRev Username and Password

1. Select Admin > Security from the AccuRev main menu.
2. Click the Add User button () to create a new user.
3. Enter a username, but do not enter the optional password.
4. Click Ok.
5. Select Tools > Login from the AccuRev main menu.
6. Select your newly created user.
7. Click Ok.

Create a New Storage Depot

1. Select File > New > Depot from the AccuRev main menu.
2. Give the depot a name (example: widget).
3. Click Ok (and continue to the next operation).

Create a Workspace to Store Your Work



1. Click Yes (“Do you want to create a workspace for the depot?”).
2. Click Next to select your newly created depot, and the stream that has the same name as the depot.
3. Click Next to accept the default name for the workspace.
4. Click Next to accept defaults for the new workspace.
5. Choose a physical location for the workspace (example: C:\ws\widget).
6. Click Next.
7. Select the pathname you prefer from the two pathnames offered.
8. Click Finish.

Import Files into Your Workspace

Use operating system commands to copy some sample files into workspace. For example:
xcopy /E /Y c:\myfiles\src* c:\ws\acme)

Add the Files in Your Workspace to the Depot

If your newly created workspace is not already open in the AccuRev GUI, open it by selecting File > Open Workspace from the AccuRev main menu.

1. Select the External Search button ( External) in the Searches pane (lower-left).
2. Select one of the files in the search results.
3. Select Edit > Select All from the AccuRev main menu.
4. Right-click then select Add to Depot from the context menu.
5. (optional) Enter a comment string.
6. Click Ok.
7. Select the Pending filter.
8. As above, select all the files listed in the details pane.
9. Right-click then select Promote from the context menu.
10. (optional) Enter a comment string.
11. Click Promote.
12. Click the Update button () to update your workspace.

Updating often greatly improves workspace-search performance.