madcap software

USER GUIDE

MADCAP LINGO 12

# Source Control: Perforce

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MadCap Software
1660 17th Street, Suite 201
Denver, Colorado 80202
858-320-0387
www.madcapsoftware.com

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CHAPTER 1

# Introduction

You can use the Lingo interface to perform various source control tasks for a project that is bound to Perforce Helix Core.

## General Information


- "Common Source Control Terms" on page 7
- "Source Control Icons" on page 8
- "Bind Detection, Disabling Providers, and Unbinding Providers—Perforce Helix Core" on page 10


## Process

1. Install and Set Up Perforce Helix Core (done outside of Lingo)
2. "Binding a Project to Perforce Helix Core" on page 14
3. (Other Team Members) "Importing From Perforce Helix Core" on page 21
4. "Getting the Latest Version of Source Control Files" on page 23
5. "Checking Out Source Control Files" on page 25
6. "Submitting Source Control Files" on page 27
7. "Merging Source Control Files" on page 30

NOTE When you remove files from your project and submit your changes, you still need to perform a "get latest" in order for those files to be removed from the client.

CHAPTER 2

# General Information for Perforce Helix Core

There are various pieces of general information you should know if you plan to use this feature.

This chapter discusses the following:


Common Source Control Terms ..... 7

Source Control Icons ..... 8

Bind Detection, Disabling Providers, and Unbinding Providers—Perforce Helix Core ..... 10

# Common Source Control Terms

Following are definitions for some of the common phrases used in Lingo's built-in source control system.

- Bind This means to connect your project to Perforce Helix Core. After doing this, you can then take advantage of all the automated source control tasks (such as submit, revert, lock, unlock, and so on).
- Submit This means to send changes made to your open Lingo files to the server, or depot.
- Check Out This means to copy the latest source control files to your local Lingo project and remove the "Read Only" designation from them so that you can edit the files.
- Get Latest Version This means to copy the latest source control files to your local project without necessarily checking out the files. This means that the "Read Only" designation will remain associated with the files until you check them out.
- Revert This means to undo changes you have made to a Lingo file. Changes are reverted to the way they were at the last submit.
- Lock This means to prevent other users from submitting changes to an opened Lingo file in source control.
- Unlock This means to remove an existing lock from an open Lingo file so other users can submit changes to the file.

NOTE Lingo integrates with multiple source control providers to provide built-in source control support. Each of the source control providers built-in to Lingo uses different terms. As such, Lingo's source control interface is different depending on which source control provider you use. Please refer to the sections for each source control provider if you need to see information about the terms used by other built-in systems.

# Source Control Icons

Following are descriptions for the primary icons that you may see next to files when using source control.

| Icon | Description |
|---|---|
| ✔ | Checked Out<br><br>This indicates that the file has been checked out from source control. You can submit the file when you are ready (if you are the user who has checked it out). |
| ✚ | New File (Pending Add)<br><br>This indicates that you have a file in your project but have not yet added it to Helix Core. This might occur, for example, if you create a new topic and do not add the file to source control during the topic creation process. To resolve this, simply right-click on the file and select Source Control > Add. |
| | Not Checked Out<br><br>This indicates that the file is added to source control but is not currently checked out, which means that it contains a "Read Only" designation in its properties. In order to edit the file, you must check it out from source control. |
| | Locked by Another User<br><br>This indicates that another user has locked the file. You will often see this icon in conjunction with the icon, indicating that another user is both using the file and has locked the file. You can still make changes to this file even if another user has locked it, but you cannot submit them until the lock is removed. |
| | Locked by You<br><br>This indicates that you have locked the file. You will often see this icon in conjunction with the ✔ icon, indicating that you have both locked and checked out the file. Other users can make changes to this file even if you have locked it. |

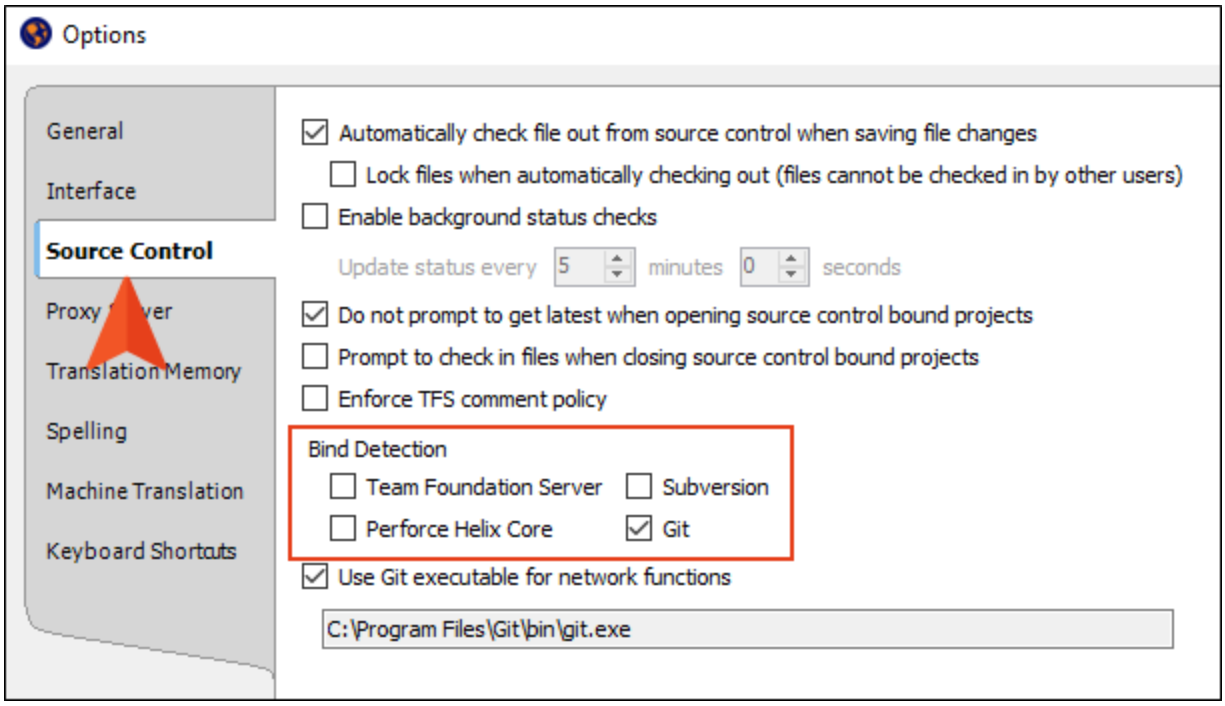
| Icon | Description |
| --- | --- |
| | Checked Out to Other User<br><br>This indicates that the file is currently checked out by another user. You will often see this icon in conjunction with the icon, indicating that another user is both using the file and has locked the file. |
| | Out of Date<br><br>This indicates that the file is not current (i.e., the local copy of the file is older than the source control copy). This might happen, for example, if another user checks out the file, makes changes to it, and submits it to source control. If this occurs, you can check the file out or get the latest version of the file from source control. |

# Bind Detection, Disabling Providers, and Unbinding Providers—Perforce Helix Core

Lingo has options for bind detection, disabling providers, and unbinding providers. Although these are separate features, they are all somewhat related. This information is especially important if you are using an external tool to bind and manage your source control tasks.

## Bind Detection

Lingo's bind detection settings are found on the Source Control tab of the Options dialog.




Bind detection scans your project when you load it to see if the project has been previously bound to source control. If a binding is detected, you then have the option of applying the binding and committing the project to source control. Depending on the provider you are using, Lingo may search the file system and its artifacts, as well as contact and query servers, to find potential source control bindings.

When you open a Lingo project that hasn't been bound to source control before, the bind detection option is disabled for Perforce Helix Core, Subversion, and Team Foundation Server. It is enabled by default for Git. If you bind a project to source control using the Lingo interface, the option is then automatically enabled.

> NOTE You can use bind detection as an alternative to importing a Lingo project. If you have received a Lingo project file (e.g., by copying it from a server, by opening it from a network location), you can simply open the file and Lingo will search for and apply existing source control bindings.

> NOTE Source control providers are scanned in the following order:
>
> 1. Git
> 2. Subversion
> 3. Perforce Helix Core

> TIP Detecting source control bindings may take a considerable amount of time. It is recommended that you select only the source control providers that you use to speed up the detection process.

# Disabling Providers

By default, when a project is bound to source control, the provider (Git, Perforce Helix Core, Subversion, or Team Foundation Server) is enabled. This means that the source control interface elements in Lingo are visible, and you can use them to perform various tasks (e.g., commits, synchronize changes).

Disabling a provider means that the source control interface elements are no longer shown. This does not mean you cannot use source control. As long as the provider is still *bound* to the project, you can perform source control tasks in a third-party tool outside of Lingo.

For more details and steps, see "Disabling a Perforce Helix Core Provider" on page 38.

# Unbinding Providers

When you unbind a provider, it means you are removing the connection altogether between the Lingo project and the local repository.

You can unbind a provider via the Project Properties dialog or the Settings view in the Source Control Explorer. Click the **Unbind Provider** button.

For more details and steps, see "Unbinding a Perforce Helix Core Provider" on page 53.

CHAPTER 3

# Process for Perforce Helix Core

Certain tasks must be completed in order when using this feature.

This chapter discusses the following:


Binding a Project to Perforce Helix Core ..... 14

Importing From Perforce Helix Core ..... 21

Getting the Latest Version of Source Control Files ..... 23

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# Binding a Project to Perforce Helix Core

Use the following steps if you have already created a Lingo project and want to bind ("connect") it to Perforce Helix Core. You can also automatically detect existing source control bindings if your project has been previously connected to Helix Core.

> NOTE The following steps show how to bind a project using the Lingo interface. It is also possible to bind a project outside of Lingo (e.g., using Git Bash). If you decide to do this, you should be aware of some additional aspects of source control, such as bind detection and disabling providers.

# How to Bind a Project Using the Project Properties Dialog

1. Open the project.
2. Select File > Project Properties. The Project Properties dialog opens.
3. Select the Source Control tab.
4. Click Bind Project. The Bind Project dialog opens.
5. From the drop-down, select Perforce Helix Core.
6. In the Server field, enter the server address.
7. Next to the User field, click ▪▪▪.
8. Select a user and click OK. (Users are set up separately in Perforce Helix Core.)
9. From the Type drop-down, select whether you want to bind to a stream or a depot. A depot contains multiple streams.

### IF BINDING TO A STREAM

a. Next to the **Stream** field, click **New**.

   If the Log In dialog opens, complete the **User name** and **Password** fields and click **OK**.

   The New Stream dialog opens.

b. From the **Stream Type** drop-down, select the type of stream you want to use. Most streams are mainline streams.

c. Next to the **Streams Depot** field, click **Browse**.

   The Browse Depots dialog opens.

d. Select a depot. This is essentially a folder or directory in Perforce Helix Core that contains multiple streams, one of which will be your Lingo files.

e. Click **OK**.

f. (Optional) In the New Stream dialog, you can complete any of the other fields as necessary. For information about these fields, please refer to the documentation provided with Perforce Helix Core.

g. Click **OK**.

### IF BINDING TO A DEPOT

a. Next to the **Depot** field, click **New**, or select an existing depot using the drop-down arrow.

   If you clicked **New**, the New Depot dialog opens.

b. In the **Name** field, enter a name for the depot.

c. (Optional) In the **Description** field, enter a description for the depot.

d. Click **OK**.

e. Next to the **Path** field, click ▪▪▪.

   If the Log In dialog opens, complete the **User name** and **Password** fields and click **OK**.

   The Browse Source Control Folders dialog opens.

f. Select the location where you want to bind the project.

g. Click **OK**.

10. (Optional) In the **Comment** field, you can enter any internal comments.
11. (Optional) If you want the files in the project to be checked out when you are finished, click **Keep files checked out**.
12. In the Bind Project dialog, click **OK**.
13. If the Log In dialog opens, complete the **User name** and **Password** fields and click **OK**. Copies of the Lingo files are created and added to the folder you specified.
14. In the Project Properties dialog, click **OK**. The project is connected to Perforce Helix Core, and you can now submit files and check them out as necessary.

# How to Bind a Project Using the Explorer

1. Open the project.
2. Select **View > Source Control Explorer**. The Source Control Explorer opens.
3. From the drop-down or the Home pane, select **Settings**. The Settings pane opens.
4. Click **Bind**. The Bind Project dialog opens.
5. From the drop-down, select **Perforce Helix Core**.
6. In the **Server** field, enter the server address.
7. Next to the **User** field, click ▪▪▪.
8. Select a user and click **OK**. (Users are set up separately in Perforce Helix Core.)
9. From the **Type** drop-down, select whether you want to bind to a stream or a depot. A depot contains multiple streams.

   ### IF BINDING TO A STREAM

   a. Next to the **Stream** field, click **New**.

      If the Log In dialog opens, complete the **User name** and **Password** fields and click **OK**.

      The New Stream dialog opens.

   b. From the **Stream Type** drop-down, select the type of stream you want to use. Most streams are mainline streams.

   c. Next to the **Streams Depot** field, click **Browse**.

      The Browse Depots dialog opens.

   d. Select a depot. This is essentially a folder or directory in Perforce Helix Core that contains multiple streams, one of which will be your Lingo files.

   e. Click **OK**.

   f. (Optional) In the New Stream dialog, you can complete any of the other fields as necessary. For information about these fields, please refer to the documentation provided with Perforce Helix Core.

   g. Click **OK**.

### IF BINDING TO A DEPOT

a. Next to the **Depot** field, click **New**, or select an existing depot using the drop-down arrow.

   If you clicked **New**, the New Depot dialog opens.

b. In the **Name** field, enter a name for the depot.

c. (Optional) In the **Description** field, enter a description for the depot.

d. Click **OK**.

e. Next to the **Path** field, click ▪▪▪.

   If the Log In dialog opens, complete the **User name** and **Password** fields and click **OK**.

   The Browse Source Control Folders dialog opens.

f. Select the location where you want to bind the project.

g. Click **OK**.

10. (Optional) In the **Comment** field, you can enter any internal comments.

11. (Optional) If you want the files in the project to be checked out when you are finished, click **Keep files checked out**.

12. In the Bind Project dialog, click **OK**.

13. If the Log In dialog opens, complete the **User name** and **Password** fields and click **OK**. Copies of the Lingo files are created and added to the folder you specified. The project is connected to Helix Core, and you can now submit files and check them out as necessary.

## What’s Noteworthy?

TIP If you are having difficulty binding your project, try binding to a brand new directory in your source control provider. You should also ensure that the directory on your local machine (and its parent directories) is not already mapped to source control, as this may cause issues with binding.

NOTE You can also bind a new Lingo project to source control while creating it.

# Importing From Perforce Helix Core

This  chapter focuses on importing a Lingo project from source control. You might use this method, for example, if you are working on a project with several other translators and another member of the team has placed the Lingo project in Perforce Helix Core.

## How to Import a Project From Perforce Helix Core

1. Do one of the following, depending on the part of the user interface you are using:
   - Ribbon Select File > New Project > Import Project.
   - Source Control Explorer  From the View ribbon, open the Source Control Explorer. From the drop-down, select the Home pane. Click Import Project.

   The Import Project from Source Control Wizard dialog opens.
2. From the drop-down, select Perforce Helix Core.
3. In the Server field, enter the server address.
4. Next to the User field, click ▪▪▪.
5. Select a user and click OK. (Users are set up separately in Perforce Helix Core.)
6. Next to the Location field, click Browse. The Browse Depots and Streams dialog opens.
7. Select a depot or stream (i.e., the name of your Lingo project).
8. Click OK.
9. Click Next.
10. Next to the Project field, click Browse. The Browse Source Control Files dialog opens. (You may need to log in with your user name and password.)
11. Find and click on the Lingo project file (LIPRJ) that you want to import. (You may need to log in with your user name and password.)
12. Click OK.
13. Click Next.

14. In the **Project name** field, the name of the project being imported is displayed. It is recommended that you leave the name as it is, especially if you are working with other users on the project. However, you can enter a different project name if you want.
15. In the **Project folder** field, either accept the default location for the new project or click ··· to browse for and select a folder.
16. Click **Finish**. The project is imported and loaded into Lingo.

> **NOTE** If you want to import a project from source control, you can alternatively open the project file from another location (e.g., a server location), and then use Lingo's bind detection functionality to automatically apply available source control bindings to the project.

# Getting the Latest Version of Source Control Files

After you bind a Lingo project to a source control application, you can get the latest version of any of the source control files. When you do this, you are copying the most current files stored in the source control application to your local Lingo project without necessarily checking out the files. This means that the "Read Only" designation will remain associated with the files until you check them out.

## How to Get the Latest Version of Source Control Files Manually

1. Do one of the following, depending on the part of the user interface you are using:
   - Ribbon Select Source Control > Get Latest Version (for selected files) or Source Control > Get Latest Version All (for all files in the project).
   - Right-Click In the File List, right-click the file you want to get and select Source Control > Get Latest Version.
   - Local Toolbar In the File List, select the file(s) you want to get. In the local toolbar of the File List, click , then select Get Latest Version (for selected files) or Project > Get Latest Version All (for all files in the project).
   - Source Control Explorer With the Pending Changes pane open, right-click the file you want to update and select Get Latest Version.
2. If the local and server files are the same, a message tells you so. Click OK.

   If the local file is different from the file on the server, the Resolve Conflicts dialog opens. If you want to accept all of the differences between the local and server files, thus merging them, click Auto Merge All. If you want to review the differences in the files side by side and resolve each conflict, click Resolve

If the local file is different from the file on the server, the Resolve Conflicts dialog opens. If you want to accept all of the differences between the local and server files, thus merging them, click Auto Merge All. If you want to review the differences in the files side by side and resolve each conflict, click Resolve

NOTE By default, when you open a project that is bound to source control, a message automatically asks if you want to get the latest version of files. However, you can disable this prompt in the Source Control tab of the Options dialog (**File > Options**).

NOTE If you update your read-only files with read-only files and you do not perform a check out, the files will appear to be checked in without actually updating the server-side version.

# Checking Out Source Control Files

When you need to work on any of the Lingo project files, you can check them out. Checking out files means to copy the latest source control files to your local Lingo project and remove the "Read Only" designation from them so that you can edit the files. A red check mark is displayed next to each file that is checked out.

You can check files out automatically or manually.

## How to Check Out Files From Source Control Automatically

1. Select **File > Options**. The Options dialog opens.
2. Select the **Source Control** tab.

   > NOTE This tab will not be visible if your project is not yet bound to source control. See "Binding a Project to Perforce Helix Core" on page 14.

3. Click the check box **Automatically check file out from source control when saving file changes**. A check mark in the box indicates that the feature is enabled.
4. (Optional) If you want files that are automatically checked out to be locked as well, select **Lock files when automatically checking out**.

   Locking files means that other users cannot submit those same files when you have them checked out. You might use this feature to prevent conflicting changes from occurring and having to merge files as a result.

5. Click **OK**.

   Whenever you open a file that is not checked out, make changes, and save, not only will your changes be saved but the file will automatically be checked out to you.

# How to Check Out Files From Source Control Manually

1. Do one of the following, depending on the part of the user interface you are using:
   - Ribbon Select Source Control > Check Out (for selected files) or Source Control > Check Out All (for all files in the project).
   - Right-Click In the File List, right-click the file you want to check out and select Source Control > Check Out (for selected files) or Source Control > Project > Check Out All (for all files in the project).

   The Check Out dialog opens. The selected files are listed with check boxes next to them.
2. Make sure to click the check box next to each file you want to check in so that it contains a check mark.
3. (Optional) If you want the files to be locked as well, select Lock files.

   Locking files means that other users cannot submit those same files when you have them checked out. You might use this feature to prevent conflicting changes from occurring and having to merge files as a result.
4. Click Check Out.

# What's Noteworthy?

NOTE When you check out a file from source control, you are actually checking out the file's corresponding XLF file. You will see the XLF file if you open the Source Control Explorer. This is because you need the XLF file available in order to make changes, view the file's history, or view differences.

# Submitting Source Control Files

When you are finished editing files, you can submit them to source control. Submitting a file overwrites the old copy of the file in the source control database with the new one from your local machine. So even if others will not be working on that file, it is a good idea to periodically submit files so that you have a backup in source control.

# How to Submit Files to Source Control

1. Do one of the following, depending on the part of the user interface you are using:
   - Ribbon Select Source Control > Submit (for selected files) or Source Control > Submit All (for all files in the project).
   - Right-Click In the File List, right-click the file you want to submit and select Source Control > Submit (for selected files) or Source Control > Project > Submit All (for all files in the project).

   The Submit dialog opens. The selected files are listed with check boxes next to them.
2. (Optional) In the Comment field, enter an optional comment tied to the submit. This enables you to keep an audit trail for a file. The comment can then be viewed from the History dialog, which can be accessed from the Source Control Explorer, the Source Control ribbon, or the Source Control button .
3. (Optional) If you want to see all files with pending changes (rather than only those you selected), click .
4. Make sure to click the check box next to each file you want to check in so that it contains a check mark.
5. If you want to keep the files checked out of source control, select Keep Checked Out. Doing this will overwrite the source control copies of the files so that they have the latest changes, but it lets you continue working on the files. This is a useful option if you are the only author working on the files in question.
6. Click Submit.

   If no other users have also made changes to the file and submitted it while you were working on it, your version of the file is submitted.

   However, if that is not the case, the Resolve Version Conflict dialog opens to let you know that another user has already submitted the file with changes. You can merge the files automatically if there are no conflicting changes (i.e., changes do not occur in the same location in the file). If there are conflicting changes, you can use the Merge Changes dialog to determine how changes are merged. See "Merging Source Control Files" on page 30.

# How to Submit Files to Source Control Using the Explorer

1. Select **View > Source Control Explorer**. The Source Control Explorer opens.
2. From the drop-down or the Home pane, select **Pending Changes**.

   The Pending Changes pane opens. Files that will be committed are listed under **Included Changes**, and files that will not be committed are listed under **Excluded Changes**. You can identify edited files because [modified] is displayed next to the file name.

   > NOTE When you check out a file in source control, you may sometimes see a SKL file alongside the XLF and original files. This skeleton file is a placeholder file. Be sure to submit all three associated files together. Submitting just the SKL file may result in errors.

3. (Optional) In the **Comment** field, enter an optional comment tied to the submit. This enables you to keep an audit trail for a file. The comment can then be viewed from the History dialog, which can be accessed from the Source Control Explorer, the Source Control ribbon, or the Source Control button ..
4. (Optional) If you want to select the files or folders that you include in the submit, right-click a file or folder and select one of the following options from the context menu.
   - **Exclude** Excludes the selected file from the submit
   - **Exclude Unselected** Excludes all unselected files from the submit
   - **Include** Includes the selected file in the submit
   - **Include Unselected** Includes all unselected files in the submit
5. Click **Submit Included** to submit all of the files in the Included Changes list.

   If no other users have also made changes to the file and submitted it while you were working on it, your version of the file is submitted.

   However, if that is not the case, the Resolve Version Conflict dialog opens to let you know that another user has already submitted the file with changes. You can merge the files automatically if there are no conflicting changes (i.e., changes do not occur in the same location in the file). If there are conflicting changes, you can use the Merge Changes dialog to determine how changes are merged. See "Merging Source Control Files" on the next page.

# Merging Source Control Files

There may be times when you need to merge changes from different users when checking in a file. The merge occurs automatically if there are no conflicting changes (i.e., changes do not occur in the same location in the file). If there are conflicting changes, a dialog opens, allowing you to determine how changes are merged.

If you selected the option to use the merge tool, the Merge Changes dialog opens. Use this dialog to view and select changes. You can take actions in the following ways.

## How to Merge Source Control Files

1. Go through the process of getting the latest version of files from source control or submitting files. If your local copy of the file is different from the server copy (e.g., another user has already submitted the same file), the Resolve Conflicts dialog opens.
2. Click Auto Merge All. If changes from the other user do not conflict with your changes, this will merge all changes. A message lets you know that a backup of your local copy has been made. This lets you restore that file if you do not want to keep the merged version. You do not need to complete the rest of the steps below.

   However, if your changes conflict with those from another user, a message displays to tell you. In this case, continue with the next step.
3. Click OK on the conflict message.
4. In the Resolve Conflicts dialog click Resolve. The Resolve Version Conflict dialog opens. From this dialog, you can choose from the following options.
   - Merge changes for me Automatically merges changes within the same file that are not part of the same element. If changes have been made to the same element (e.g., the same segment), Lingo will display a prompt to merge the changes using the merge tool.
   - Merge changes in merge tool Opens a merging interface, which lets you see exactly what changes were made and choose which to keep.
   - Undo my local changes Automatically removes your changes and keeps changes from other users.
   - Discard external changes Automatically removes changes from other users and keeps your changes.

5. If you selected the option to use the merge tool, the Merge Changes dialog opens. Use this dialog to view and select changes. You can take actions in the following ways.
   - Click a change You can click a change on either the remote or local side. This lets you select a particular change. Use the key at the top of the merge changes dialog, as well as the color coding on the local and server sides, to determine if a change has been added (new), deleted, changed, or moved.

     When you select a change, the change you selected will display with a solid colored background, and the conflicting change will display with a striped background. If you select the other change, the background shading will switch.
   - Type content If you want to use your changes as well as those from another user, and even tweak the paragraph a bit more, you can click in the area at the bottom of the dialog and simply type content.
   - Previous/next conflict When you are finished resolving the first conflict, you can use the "Previous Conflict" and "Next Conflict" buttons at the bottom of the dialog to work on other conflicts in the file.
6. After all conflicts have been resolved, a message lets you know that a backup of your local copy has been made. This lets you restore that file if you do not want to keep the merged version. Click OK.

EXAMPLE — Auto Merging

Let's say two translators—Bob and Jill—are working on the same project, using source control to manage the files.

Bob checks out the glossary and starts making changes to it.

Jill also checks out the glossary and makes some changes to it. Jill's changes are in a different segment in the glossary than Bob's changes; there are no conflicts. She finishes before Bob and submits the file to source control.

Bob finishes his changes and tries to submit the file. Before the file can be submitted, Bob is prompted with a dialog, indicating that changes from another user have already been submitted.

Bob selects **Auto Merge All**. The changes from Bob and Jill are now both shown in the merged topic.

CHAPTER 4

# Other Activities for Perforce Helix Core

In addition to the many features already covered in this guide, there are many more tasks related to source control that you can perform in Lingo.

This chapter discusses the following:


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# Adding Files to Source Control

When working in a project that is connected to source control, there may be occasions when you have files in your local copy of the project that are not yet part of the source control copy.

## How to Add Files to Source Control

1. Do one of the following, depending on the part of the user interface you are using:
   - Ribbon Select Source Control > Add.
   - Right-Click In the File List window pane, right-click the file you want to add and select Source Control > Add.

   The Submit dialog opens. The selected files are listed with check boxes next to them.
2. (Optional) Enter an optional comment tied to the submit. This enables you to keep an audit trail for a file. The comment can then be viewed from the History dialog, which can be accessed from the Source Control Explorer, the Source Control ribbon, the File menu, or the Source Control button .
3. (Optional) If you want to see all files with pending changes (rather than only those you selected), click .
4. Make sure to click the check box next to each file you want to check in so that it contains a check mark.
5. If you want to automatically check the files out of source control, select Keep Checked Out.
6. Click Submit.

# How to Add Files to Source Control Using the Explorer

1. Select **View > Source Control Explorer**. The Source Control Explorer opens.
2. From the drop-down or the Home pane, select **Pending Changes**.

   The Pending Changes pane opens. Files that will be submitted are listed under **Included Changes**, and files that will not be submitted are listed under **Excluded Changes**. You can identify newly added files because they say **[add]** next to the file name.
3. (Optional) Enter an optional comment tied to the submit. This enables you to keep an audit trail for a file. The comment can then be viewed from the History dialog, which can be accessed from the Source Control Explorer, the Source Control ribbon, the File menu, or the Source Control button .
4. (Optional) If you want to select the files or folders that you include in the submit, right-click a file or folder and select one of the following options from the context menu.
   - **Exclude** Excludes the selected file from the submit
   - **Exclude Unselected** Excludes all unselected files from the submit
   - **Include** Includes the selected file in the submit
   - **Include Unselected** Includes all unselected files in the submit
5. Click **Submit Included** to submit all of the files in the Included Changes list.

> NOTE Adding files from other areas of the Lingo interface (e.g., Pending Changes window pane, Source Control ribbon) will only add new files. However, if you use the Source Control Explorer to submit your files, it will submit all of your pending changes: both new files and modified files. If you do not want to include all of your files in the submit, you can right-click them and select **Exclude**. Files you exclude will not be submitted.

# Deleting Source Control Files

You can delete a topic or file that is bound to source control. This also removes the file from Perforce Helix Core.

## How to Delete a File

1. In the File List window pane, select the relevant file(s).
2. On your keyboard press DELETE.
3. The Delete dialog opens. Select the bound files you want to delete.
4. Click Delete. The files are removed from your project and from the source control repository.

# Disabling the Get Latest Prompt for Source Control

By default, when you open a project that is bound to source control, a message automatically asks if you want to get the latest version of files. However, you can disable this prompt in the Source Control tab of the Options dialog (**File > Options**). Therefore, in the future when you open the project you will no longer see the message, and the project will open without replacing any local files with the latest ones from source control.

## How to Disable the Get Latest Prompt for Source Control

1. Select **File > Options**. The Options dialog opens.
2. Select the **Source Control** tab.

   > NOTE This tab will not be visible if your project is not yet bound to source control. See "Binding a Project to Perforce Helix Core" on page 14.

3. Click the check box **Do not prompt to get latest when opening source control bound projects**.
4. Click **OK**.

# Disabling a Perforce Helix Core Provider

By default, when a project is bound to source control, the provider (Git, Perforce Helix Core, Subversion, or Team Foundation Server) is enabled. This means that the source control interface elements in Lingo are visible, and you can use them to perform various tasks (e.g., commits, synchronize changes).

Disabling a provider means that the source control interface elements are no longer shown. This does not mean you cannot use source control. As long as the provider is still *bound* to the project, you can perform source control tasks in a third-party tool outside of Lingo.

## How to Disable a Provider

Use this method if you want to disable a provider in just one project, rather than many projects.

1. Do one of the following, depending on the part of the user interface you are using:
   - Project Properties Select File > Project Properties.
   - Source Control Explorer Select View > Source Control Explorer. Then, in the window pane, click Settings.
2. Click Enabled to remove the check mark.
3. If you used the Project Properties dialog, click OK.

NOTE If you disable a Git provider, the local repository will continue to track your changes in case you later decide to enable the provider once again.

If you disable one of the other providers (Perforce Helix Core, Subversion, Team Foundation Server), your changes after that point will not be tracked. Therefore, if you later enable the provider again, it will not have recorded any changes made since the time that you disabled it.

NOTE When you disable a provider, that information is written to the registry on your computer.

NOTE If you disable a provider, but then perform one of the following actions in the Lingo interface, the provider will automatically become enabled once again.

- Bind an existing project
- Bind a new project
- Import a project from source control

NOTE Having a provider enabled in Lingo does not interfere with your workflow if you are performing source control actions exclusively outside of Lingo. Even if a provider is enabled in the project and the source control user interface elements are visible, this does not mean Lingo is automatically performing any source control actions with your files. It simply means Lingo is recognizing the binding, so it reflects your activities (e.g., the Pending Changes window is populated when you make edits in topics). However, if you prefer not to see any of this in Lingo, you can disable the provider.

# Disconnecting From Source Control

There may be times that you need to disconnect from source control to work offline. You can disconnect from Perforce Helix Core and reconnect at any time.

Disconnecting from source control is beneficial because it lets you modify files when you would otherwise not have access to the source control system (e.g., you are out of the office with your laptop or you do not want to access source control over VPN). It also provides a fallback offline status in the event that the network is disconnected while you are working, so you are able to continue working on the files you have checked out until the network connection is restored.

## How to Disconnect From Perforce Helix Core

When you want to work offline, you can disconnect from source control.

1. Check out the files you will need to work on while disconnected. See "Checking Out Source Control Files" on page 25.
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select **Source Control > Disconnect**.
   - **Right-Click** If you have the File List open, right-click on any file and select **Source Control > Project > Disconnect**.
3. A confirmation dialog appears. Click **Yes**. You will be disconnected from source control.

> NOTE When you disconnect from source control, you are not able to see the source control status of files or access source control functions.

> NOTE If you attempt to modify a file that is not checked out, you will receive an error when you try to save the file. To avoid this, be sure you have all necessary files checked out before disconnecting from source control.

NOTE If you make a change to a file's properties (e.g., delete) while disconnected from source control, your changes may not be preserved when you reconnect to the network. To prevent errors, it is recommended that you do not make these kinds of changes until you reconnect to source control.

# How to Reconnect to Perforce Helix Core

When you are finished working offline, you can reconnect to source control.

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select **Source Control > Reconnect**.
   - **Right-Click** If you have the File List open, right-click on any file and select **Source Control > Project > Reconnect**.
2. Submit the files you previously checked out. See "Submitting Source Control Files" on page 27.

# What's Noteworthy?

NOTE Your current network connection status is indicated in the lower right corner of the Lingo interface. If you are connected you will see Connected; if you are disconnected you will see Disconnected.

# Enabling Source Control Status Checks

If you are using source control integration in Lingo, you can check for frequent status changes automatically. You can specify the number of minutes and seconds when you want Lingo to ping the source control repository and get status changes for files that have been checked out, submitted, moved, deleted, etc. The upside of this feature is that you can ensure that the source control status information is always up to date. The downside is that you may experience slower performance due to this constant communication over the network.

## How to Enable Source Control Status Checks

how to enable source control status checks

1. Select **File > Options**. The Options dialog opens.
2. Select the **Source Control** tab.

   NOTE This tab will not be visible if your project is not yet bound to source control. See "Binding a Project to Perforce Helix Core" on page 14.

3. Click the check box **Enable background status checks**. A check mark in the box indicates that the feature is enabled.
4. Enter the number of minutes and or seconds between each status update.
5. Click **OK**.

NOTE See "Viewing Files That are Checked Out" on page 59.

# Locking a File

When you are working, you may want to lock the files you have modified. Locking a file does not prevent other users from modifying the file. However, no one else can commit a file that you have locked until you unlock the file. If your project is bound to Subversion, you can steal a lock from another user if you need to commit a locked file while they are working on it. Likewise, another user can steal a lock on a file you have locked. You will see this option if your project is bound to Perforce Helix Core or Subversion.

## How to Lock a File

1. In the Source Control Explorer or File List, select the relevant file(s).

   OR

   Open a file.

2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select **Source Control > Lock**.
   - **Right-Click** In the File List, right-click the files you want to lock and select **Source Control > Lock**.
   - **Source Control Explorer** Right-click the files you want to lock and select **Lock**.

   The Lock dialog opens. The selected files are listed with check boxes next to them.

3. Make sure to select the check box next to each file you want to lock so it contains a check mark.
4. Click **Lock**.

> **NOTE** You cannot lock files with Checked In status.

# Reverting a Checkout of Source Control Files

If you have files checked out from source control but do not want them checked out anymore, you can use the "Revert" option instead of submitting the files. While submitting the file would save your changes to source control, reverting a checkout returns the files to their previously submitted state and does not submit any of your changes to source control.

## How to Revert a Source Control File

1. In the Source Control Explorer or File List, select the relevant file(s).
2. Do one of the following, depending on the part of the user interface you are using:
   - Ribbon Select Source Control > Revert (for selected files) or Revert All (for all files in the project).
   - Right-Click In the File List, right-click the files you want to revert and select Source Control > Revert (for selected files) or Source Control > Project > Revert All (for all files).

   The Undo Check Out dialog opens. The selected files are listed.
3. (Optional) If you want to see all files with pending changes (rather than only those you selected), click .
4. Make sure to click the check box next to each file you want to check in so that it contains a check mark.
5. Click Undo Check Out.

# Rolling Back to an Earlier Version of a File

One of the benefits of Lingo's integrated source control is that you can view the history and differences for a particular file. You can view code and content differences between two source control versions of the same file. This is useful if you need to roll back to an earlier version of a file.

See "Viewing the History of Source Control Files" on page 64 and "Viewing Differences in Source Control Files" on page 56.

EXAMPLE You have been working on translating a particular topic for a few days. Each day you check out the latest version of that topic file from source control, make your changes, and submit the file back to source control at the end of the day. At a certain point, you determine that you need to "roll back" to an earlier version of the file, using it to replace the latest version. Therefore, you use this feature to view the highlighted differences between the current version and an older version of the file. Once you have identified the older version that you want to use, you can perform a "get" of that version.

# How to Roll Back to an Earlier Version of a File

1. In the Source Control Explorer or File List, select the relevant file(s).

   OR

   Open a file.

2. Do one of the following, depending on the part of the user interface you are using:

   - Ribbon Select Source Control > View History.
   - Right-Click If you have the File List open, right-click the file you want to roll back and select Source Control > View History.
   - Source Control Explorer With the Pending Changes pane open, right-click the file you want to roll back and select View History.

   The History dialog opens.

3. (Optional) View the differences between two versions of the file. This may help you decide which version of the file you want to retrieve. (Another way is to look at the dates for each version in the History dialog.)

   To view the differences, follow these steps.

   a. Select the first file version from the list.

   b. Hold the CTRL key and select the second file version from the list.

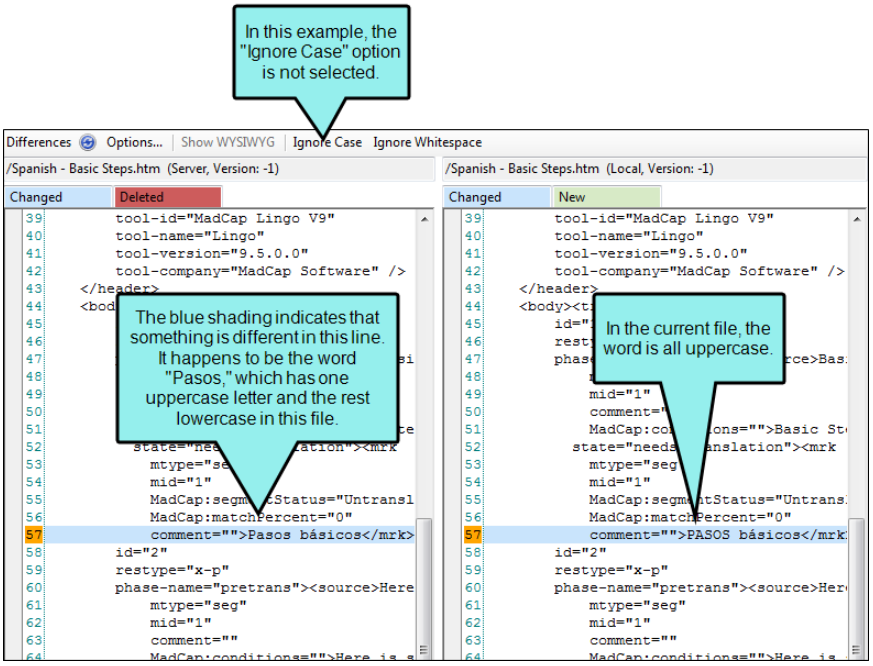
   c. Click Show Differences. The Differences Editor opens to the right, showing content from the backup file on the left and the current version of the file on the right.

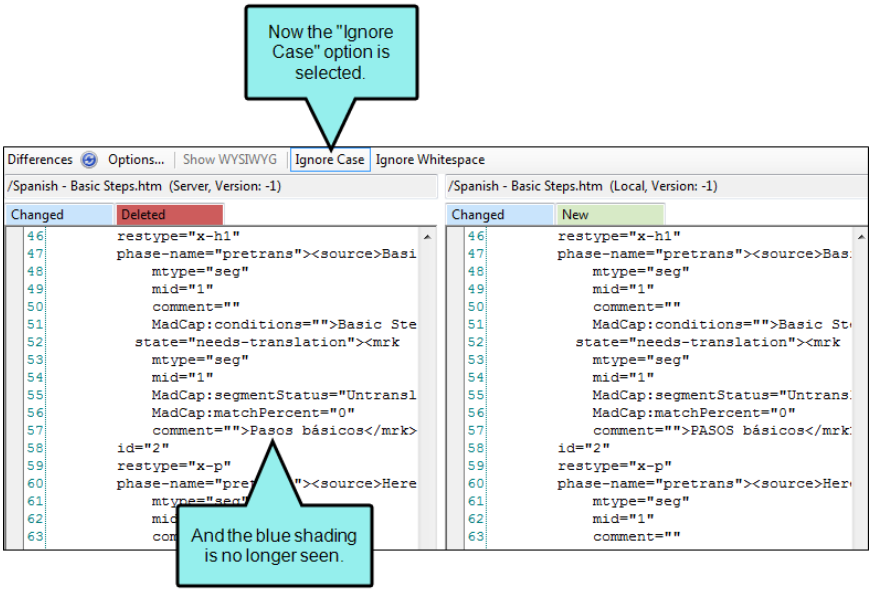
   d. In the local toolbar of the Differences Editor, you can click any of the following to make adjustments.

      - Options Click this to open the File Differences dialog, which lets you change the colors used to display content differences between the files.

- **Ignore Case** Click this to ignore changes in case when viewing differences.

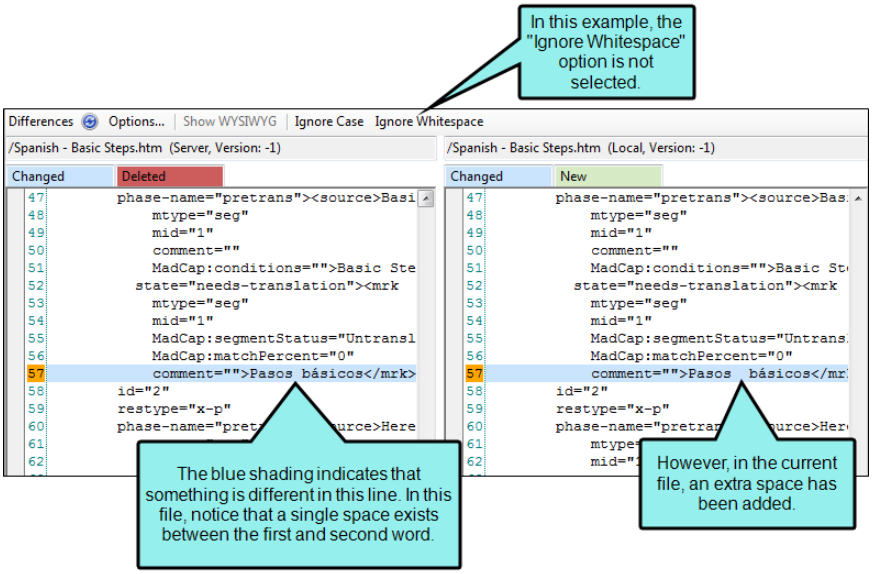
> ☆ EXAMPLE If a word is not capitalized in the original file but it is capitalized in the current file, this option does not highlight those differences.




Now the "Ignore Case" option is selected.
Differences
Options...
Show WYSIWYG
Ignore Case
Ignore Whitespace
/Spanish - Basic Steps.htm (Server, Version: -1)
/Spanish - Basic Steps.htm (Local, Version: -1)
Changed
Deleted
Changed
New
And the blue shading is no longer seen.

- **Ignore Whitespace** Click this to ignore whitespace when viewing differences.

☆ EXAMPLE A segment is identical in both files, except for an extra space that was added within the segment in one of those files. If you click this option, that difference is not highlighted.



e. When you are finished viewing the differences, close the window pane.

4. In the History dialog, select the version of the file to which you want to roll back.
5. Click **Get Selected Version**. That file is downloaded from source control and replaces the local copy of the file in your project.
6. In the History dialog, click **Close**.

# Setting Color Options for Project File Differences

If you are using Lingo's integrated source control features, you can view differences between files in various ways. One way is to view file differences between a local version of a Lingo project and the source control version.

When viewing file differences between a local version of a Lingo project and the source control version, you can select color options to display the files. Color coding makes it easier to discern where differences between files occur.

For more information see "Viewing Differences in Source Control Files" on page 56.

EXAMPLE By default the files that are included only in your local copy are displayed as green in the Differences Editor, and the files that are included only in source control are displayed in red. You can use this dialog to change the local-only files to blue and the source control–only files to yellow.

# How to Set Color Options for Project File Differences

1. In the Source Control Explorer or File List, select the relevant file(s).

   OR

   Open a file.

2. Do one of the following, depending on the part of the user interface you are using:

   - Ribbon Select Source Control > Show Differences.
   - Right-Click If you have the Source Control Explorer or File List open, right-click the file you want to view and select Source Control > Show Differences.

   The Differences Editor opens.

3. In the local toolbar of the Differences Editor, click Options. The File Differences dialog opens.
4. Change the text or background color for any of the difference types. To do this, simply click in the appropriate Text or Background cell and select Pick Color. In the Color Picker dialog, choose the new color.
5. Click OK.

# Unbinding a Perforce Helix Core Provider

When you unbind a provider, it means you are removing the connection altogether between the Lingo project and the local repository.

## How to Unbind Using the Project Properties Dialog

1. Open the project.
2. Select File > Project Properties.
3. Select the Source Control tab.
4. Click Unbind Provider. (If your project is dual-bound, you will also see a section for the other binding.)
5. Click OK.

# How to Unbind Using the Source Control Explorer

1. Open the project.
2. Select **View > Source Control Explorer**.
3. From the drop-down or the Home pane, select **Settings**. The Settings pane opens.
4. Click **Unbind Provider**. (If your project is dual-bound, you will also see a section for the other binding.)
5. Click **Yes**.

# What's Noteworthy?

NOTE You can also disable a provider, which retains the binding but hides source control elements from the user interface.

# Unlocking a File

If you have locked a file, you should unlock it when you are done modifying it. Other users can modify the file while you have it locked, but they cannot submit a locked file until you unlock it. To help prevent file conflicts and make sure that everyone on your team has the most current version of the file, you should unlock and submit the file when you are finished working on it.

See "Locking a File" on page 43 for more information on locking files.

## How to Unlock a File

1. In the Source Control Explorer or File List, select the relevant file(s).

   OR

   Open a file.

2. Do one of the following, depending on the part of the user interface you are using:
   - Ribbon Select Source Control > Unlock.
   - Right-Click If you have the File List open, right-click the files you want to unlock and select Source Control > Unlock.
   - Source Control Explorer Right-click the files you want to unlock and select Unlock.

   The Unlock dialog opens. The selected files are listed with check boxes next to them.

3. Make sure to click the check box next to each file you want to check in so that it contains a check mark.
4. Click Unlock.

# Viewing Differences in Source Control Files

One of the benefits of Lingo's integrated source control is that you can view the history and differences for a particular file.

## Ways to View Differences Between Files

You can view differences between files in the following ways:

- Two Versions of Same Source Control File (History/Roll Back) You can view code and content differences between two source control versions of the same file. This is useful if you need to roll back to an earlier version of a file. See "Rolling Back to an Earlier Version of a File" on page 45 and "Getting the Latest Version of Source Control Files" on page 23.

  > ☆ EXAMPLE You have been working on translating a particular file for a few days. Each day you check out the latest version of that file from source control, make your changes, and check the file back in to source control at the end of the day. At a certain point, you determine that you need to "roll back" to an earlier version of the file, using it to replace the latest version. Therefore, you use this feature to view the highlighted differences between the current version and an older version of the file. Once you have identified the older version that you want to use, you can perform a "get" of that version.

- Local Versus Source Control Version of a File You can view code and content differences between the local version of a file and the source control version of that file.

  > ☆ EXAMPLE You check out a topic from source control and then make changes to some of the translations in your local copy of that file. You save your changes. Later that day, you want to revisit the new translations, but you cannot remember exactly which translations you added and which were there before. Therefore, you use this feature to highlight the text differences between your local version of the file and the version stored in the source control application. The new text is highlighted on the side displaying the local version of the file.

# How to View Differences Between Two Versions of the Same Source Control File

1. In the Source Control Explorer or File List, select the relevant file(s).
2. Do one of the following, depending on the part of the user interface you are using:
   - Ribbon Select Source Control > View History.
   - Right-Click If you have the Source Control Explorer or File List open, right-click the file (s) you want to view and select Source Control > View History.

   The History dialog opens.
3. From the list, select the first file version that you want to compare.
4. Hold the CTRL key and select the second file version from the list.
5. Select Show Differences.The Differences Editor opens.
6. (Optional) In the Differences Editor, use the buttons in the local toolbar to customize the information shown in the editor.
7. When you are finished viewing the differences, close the window.

# How to View Differences Between the Local Version of a File and the Source Control Version

1. In the Source Control Explorer or File List, select the relevant file(s).
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select **Source Control > Show Differences**.
   - **Right-Click** If you have the Source Control Explorer or File List open, right-click the file (s) you want to view and select **Source Control > Show Differences**.

   The Differences Editor opens.
3. (Optional) In the Differences Editor, use the buttons in the local toolbar to customize the information shown in the editor.
4. When you are finished viewing the differences, close the window.

# What's Noteworthy?

> **NOTE** When you check out a file from source control, you are actually checking out the file's corresponding XLF file. You will see the XLF file if you open the Source Control Explorer. This is because you need the XLF file available in order to make changes, view the file's history, or view differences.

# Viewing Files That are Checked Out

You can use the Source Control Explorer to view all of the files that you have checked out and need to submit.

## How to View Files That You and Others Have Checked Out—Pending Changes Window Pane

1. Select **Source Control > Pending Changes**.

   The Pending Changes window pane opens.

2. (Optional) You can use the **Filter** field to limit the files that are displayed.
   - **All Files** Displays all translatable files.
   - **Topic Files** Displays only the topic (HTM and HTML) files.
   - **Page Layout Files** Displays only the page layout (FLPGL) files.
   - **Snippet Files** Displays only the snippet (FLSNP) files.
   - **Stylesheet Files** Displays only the stylesheet (CSS) files.
   - **Template Page Files** Displays only the template page (FLMSP) files.
   - **Image Files** Displays only the image files.

3. (Optional) You can use the following toggle buttons in the local toolbar to limit the files that are displayed.

| Option | Description |
|---|---|
| | This filters the Pending Changes window pane to show or not show files that other users have checked out. |
| | This filters the Pending Changes window pane to show or not show files that are out of date. |

| Option | Description |
| --- | --- |
| | This filters the Pending Changes window pane to show or not show files that have been deleted. |
| | This filters the Pending Changes window pane to show or not show files that are locked. |

4. Take note of the **Status** and **User** columns. (You may need to use the scroll bar to view these columns.)
   - **Status** Displays the status of the file, such as whether you have it checked out. You can also see if another user has a file checked out.
     - **Checked Out** This indicates that the file has been checked out from source control. You can submit the file when you are ready (if you are the user who has checked it out).
     - **Pending Add** This indicates that you have a file in your project but have not yet added it to Perforce Helix Core. This might occur, for example, if you create a new topic and do not add the file to source control during the topic creation process. To resolve this, simply right-click on the file and select **Source Control > Add**.
     - **Out of Date** This indicates that the file is not current (i.e., the local copy of the file is older than the source control copy). This might happen if another user checks out the file, makes changes to it, and checks it back in to source control. If this occurs, you can check the file out or get the latest version of the file from source control.
     - **Locked** This indicates that a file has been locked by you or another user.

     NOTE You can click the refresh button in the local toolbar to make sure you have the most recent status for each file. Another option is that you can use a feature to automatically ping the source control repository periodically, thus refreshing this information frequently. However, you may experience slower performance with this automatic status update option set.

   - **User** Displays the user name. If you see the name of another user in this column, it means that the file is checked out by that user through source control.

# How to View Files That are Checked Out by Others—File List Window Pane

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select **View > File List**.
   - **Keyboard Shortcut** Press **CTRL+SHIFT+J**.
2. (Optional) You can use the **Filter** field to limit the files that are displayed.
   - **All Files** Displays all translatable files.
   - **Topic Files** Displays only the topic (HTM and HTML) files.
   - **Page Layout Files** Displays only the page layout (FLPGL) files.
   - **Snippet Files** Displays only the snippet (FLSNP) files.
   - **Stylesheet Files** Displays only the stylesheet (CSS) files.
   - **Template Page Files** Displays only the template page (FLMSP) files.
   - **Image Files** Displays only the image files.
3. Take note of the **Status** and **User** columns. (You may need to use the scroll bar to view these columns.)
   - **Status** Displays the status of the file, such as whether you have it checked out. You can also see if another user has a file checked out.

     > **NOTE** You can click the refresh button in the local toolbar to make sure you have the most recent status for each file. Another option is that you can use a feature to automatically ping the source control repository periodically, thus refreshing this information frequently. However, you may experience slower performance with this automatic status update option set. See "Enabling Source Control Status Checks" on page 42.

   - **User** Displays the user name. If you see the name of another user in this column, it means that the file is checked out by that user through source control.

# How to View Files That You Have Checked Out—Source Control Explorer

1. Select **View > Source Control Explorer**.

   The Source Control Explorer opens.

2. From the drop-down or the Home pane, select **Pending Changes**.

   The Pending Changes pane opens. Files that you have changed appear in the **Included Changes** or **Excluded Changes** section (depending on whether you are going to include or exclude them in your next submit).

3. Take note of the file's status. The status is written in brackets next to the file name (e.g., edit, add).

> NOTE You can click the refresh button in the local toolbar to make sure you have the most recent status for each file. Another option is that you can use a feature to automatically ping the source control repository periodically, thus refreshing this information frequently. However, you may experience slower performance with this automatic status update option set. See "Enabling Source Control Status Checks" on page 42.

## What’s Noteworthy?

NOTE When you check out a file from source control, you are actually checking out the file's corresponding XLF file. You will see the XLF file if you open the Source Control Explorer. This is because you need the XLF file available in order to make changes, view the file's history, or view differences.

NOTE When you modify a file in source control, you may sometimes see a SKL file alongside the XLF and original files. This skeleton file is a placeholder file. Be sure to check in all three associated files together. Checking in just the SKL file may result in errors.

# Viewing the History of Source Control Files

One of the benefits of Lingo's integrated source control is that you can view the history for a particular file, including who submitted the file and when it was submitted. You can also view differences between different versions of the file and roll back to an older version if necessary.

For more information see "Viewing Differences in Source Control Files" on page 56 and "Rolling Back to an Earlier Version of a File" on page 45.

## How to View the History of a Source Control File

1. In the Source Control Explorer or File List, select the relevant file(s).

   OR

   Open a file.

2. Do one of the following, depending on the part of the user interface you are using:
   - Ribbon Select Source Control > View History.
   - Right-Click If you have the Content Explorer, Project Organizer, Source Control Explorer, Pending Changes window pane, or File List open, right-click the file(s) you want to view and select Source Control > View History.Right-Click If you have the Source Control Explorer or File List open, right-click the file(s) you want to view and select Source Control > View History.

3. The History dialog opens. The following are explanations of the different parts of this dialog.
   - Version Displays a number for each version of the file. The lower the number, the older the version. The higher the number, the more recent the version.
   - Users Displays the name of the user who has been working on the file.
   - Date Displays the date and time when the action has occurred.
   - Action Displays the action that has taken place for the file (e.g., submit).
   - Comment Displays the comment (if any) associated with the file. A comment can be added to a file when you submit that file to source control. This enables you to maintain an audit trail for the file's history.

- **Get Selected Version** Performs a "get" of a particular version of a file, thus rolling back to that version of the file. The local version of the file is replaced with the source control version that you selected.
- **Show Differences** Opens a dialog that lets you view the differences between two versions of a file. If you select one row in the History dialog and view the differences, you will see the content differences between the version that you selected and the version of the file in your local copy of the Lingo project. If you select two files in the History dialog (by holding down the CTRL key) and view the differences, you will see the content differences between those two versions of the file.

4. In the History dialog, click **Close**.

> **NOTE** When you check out a file from source control, you are actually checking out the file's corresponding XLF file. You will see the XLF file if you open the Source Control Explorer. This is because you need the XLF file available in order to make changes, view the file's history, or view differences.

# PDFs

The following PDFs are available for download from the Help system.

## Cheat Sheets

*Shortcuts Cheat Sheet*

## User Guides

*Alignment Guide*

*Getting Started Guide*

*Key Features Guide*

*Source Control Guide: Git*

*Source Control Guide: Perforce Helix Core*

*Source Control Guide: Subversion*

*Source Control Guide: Team Foundation Server*

*Termbases Guide*

*Touring the Workspace Guide*

*Translation Guide*

*What's New Guide*