Collaborator
by SMARTBEAR

User's Guide

Getting Started with the Collaborator Client

Quick-start guide for installing the client software and starting your first review

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Introduction

This guide is designed to help you get started with Collaborator, the most advanced document and code review tool available. To further shorten the learning curve, we suggest you check out our five-minute demo for a brief tour and watch our demo webinar for a more in-depth tutorial.

Download the Client Software

The client installer includes:

- GUI client
- Tray Notifier
- Command Line client
- External diff-viewer launcher
- Perforce P4V/P4Win plug-ins
- Version control triggers

You'll most likely need a Collaborator client if you plan on uploading files from your Version Control System (VCS). Download the "Client Installer" listed under your platform from the Download page.

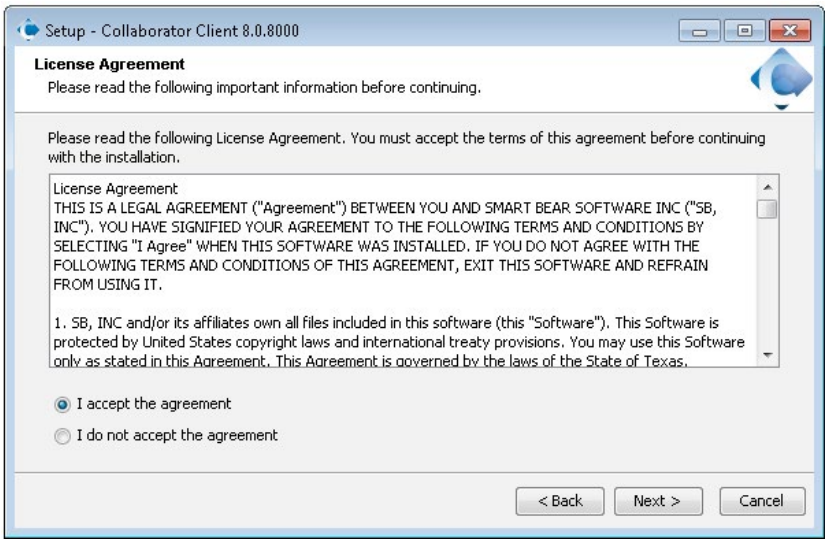
If you use Eclipse, Collaborator also has an Eclipse plug-in available; installation instructions are located on the Install & Update page. If you use Visual Studio, Collaborator also has a Visual Studio plug-in available; installation instructions are located on the Visual Studio Add-in page.

Installation Wizard for the Client Installer

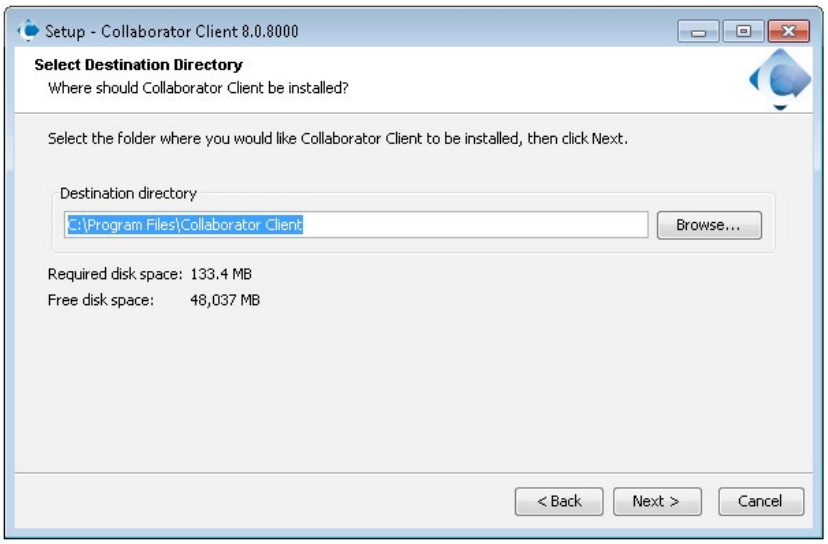
Once you've downloaded the client installer, open it to begin the installation wizard. The wizard guides you through these steps:

1. Welcome Screen – This screen welcomes you to the installation process. Click "Next" to proceed.

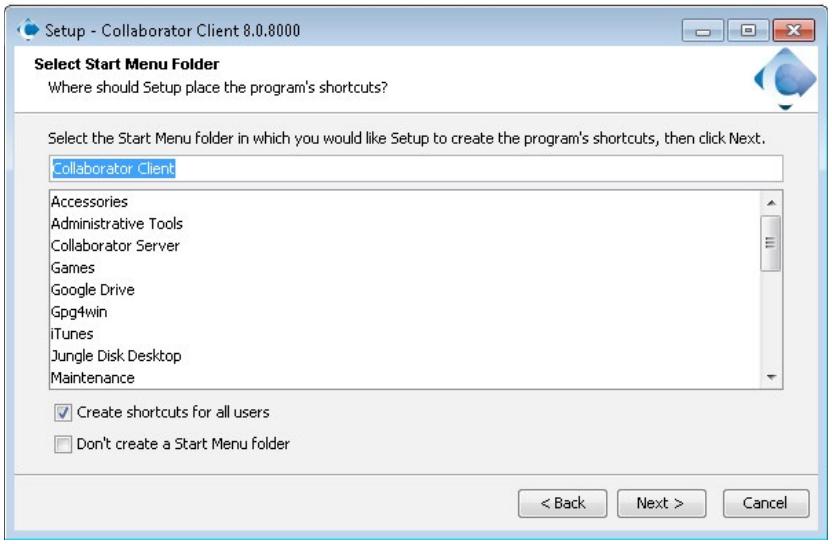
2. License Agreement – Read the license agreement and select “I accept the agreement” before clicking “Next”.



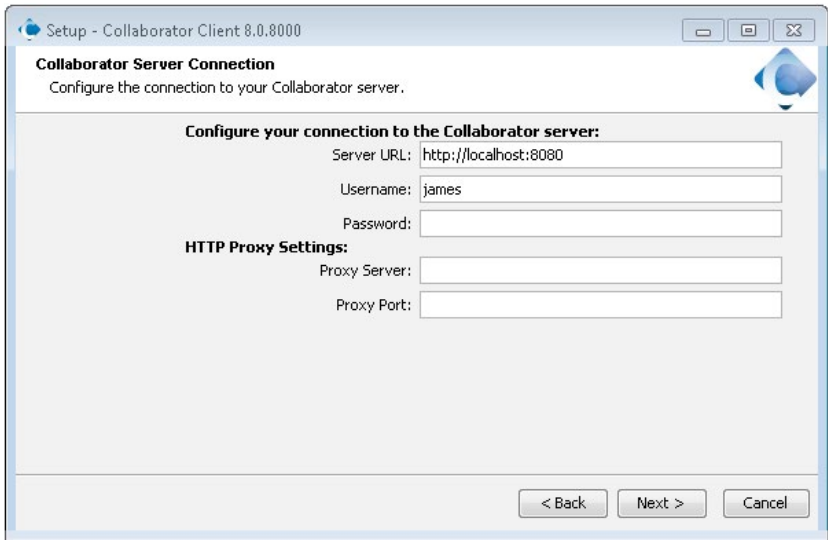
3. Select Destination Directory – Choose the folder where you would like the Collaborator client installed. You’ll need at least 150 MB of disk space.



4. Select Start Menu Folder – Select the Start Menu folder in which you’d like to create the Collaborator shortcut. This option is only available for Windows.



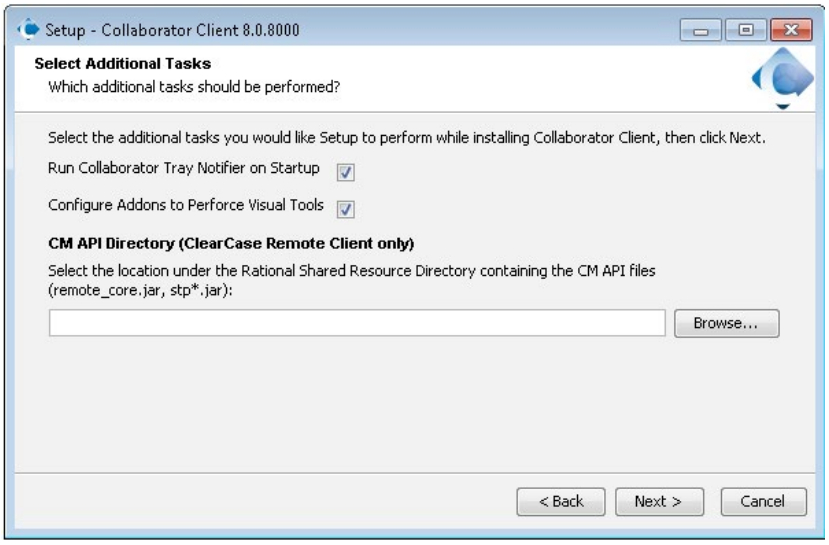
5. Configure Connection to the Collaborator Server – Provide the Collaborator Server URL, username, and password. Remember to specify the protocol (e.g. http:// or https://) and port number and path. If you do not know this information, ask your Collaborator system administrator.



Note: This step assumes your Collaborator server component has already been installed (see “Getting Started with the Collaborator Server” for instructions). If it has not, you can skip this step by clicking “Next,” then “Continue” in the pop-up window that appears.

You can fill this information in later in the Preferences menu of the Collaborator client, but remember to do that before trying to use the client with the server.

6. Select Additional Tasks – Choose whether to run the Tray Notifier on Startup. This option is only available for Windows.

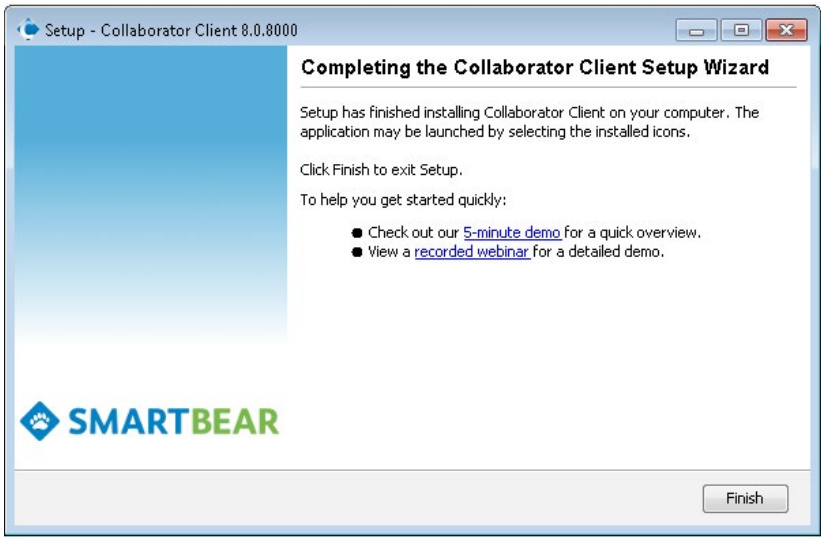


Note: You may find this option very helpful. Through an easily-visible icon on the lower right hand of your screen the Tray Notifier provides easy access to current reviews and to notifications that alert you to take necessary review actions.

To integrate Collaborator with ClearCase Remote Client, enter the location of the Rational CM API files on your system into the CM API Directory field. Otherwise, leave this field blank. See the ClearCase section in our Owner’s Manual for more information on this integration.

You may also see a third additional task here if the installer detects P4V or P4Win (the Perforce GUI clients) installed. Choose whether to “Configure Add-ons to Perforce Visual Tools.” If selected, the installer automatically installs the Collaborator integration into those tools.

7. Finish – Click “Finish”. You’re done installing the client!



Configure the Client for your VCS

Once you connect Collaborator to your Version Control System software, the client can gather changed files for you to send for review.

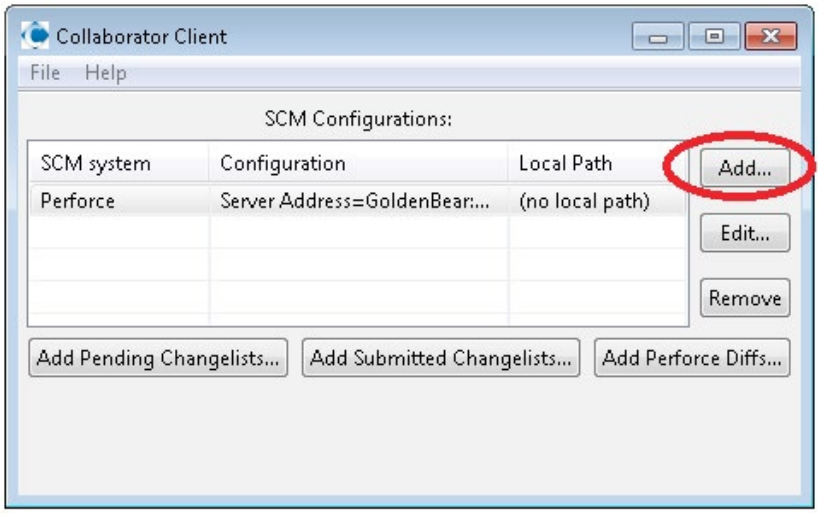
Note: Find a list of supported VCSs and more about their integration on the VCSs page.

1. GUI – Open the Collaborator GUI client.

   Linux: /opt/ccollab_client. Click ”Add”… on the right side of the client.

   Windows: You’ll find it in the Start -> Programs menu.

   MAC OS X: It should be under Applications -> ccollab_client -> collabgui.



Use the Configuration wizard to enter the location of your local source code into the ”Local Path” field at the top, or choose the VCS of your choice

Note: Visual Source Safe (VSS) is not supported by the Collaborator GUI – for more information please refer to VSS page

2. Command-Line – For instructions, visit the command-line client section in our Owner's Manual.

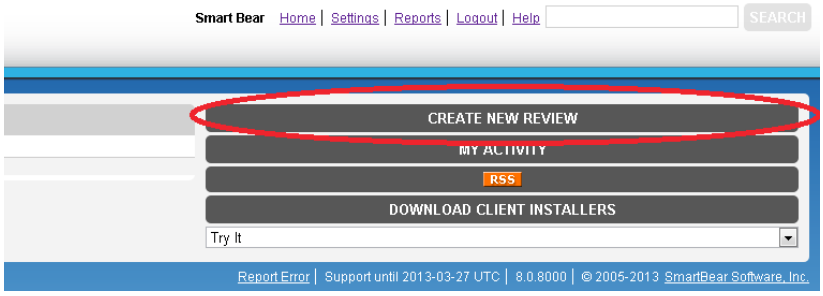
Log into Collaborator Web Browser Client

Open a web browser and go to the Collaborator server URL provided by your system administrator. Enter your login name and password. (The username and password is typically supplied by the administrator, but if your administrator allows user created logins, a Create New Account form appears on the login page where you can create your own login name and password.) Once you log in, you can check your Action Items to see if you have any assigned reviews. You can also edit Preferences by clicking Settings in the menu bar on the top right of the screen. For more information, go to the User Preferences page in our Owner's Manual.

Create a Review as an Author

You have several options for creating a review: the Web Browser client, the GUI client, the Command Line client, the Eclipse plug-in, and Perforce users have the additional option of using P4V or P4Win. To ease you into the process, we'll start with the Web Browser client.

1. To make a new review, click Create New Review button on the top right.



2. Fill in the basic information and participants in the Create a Review screen.

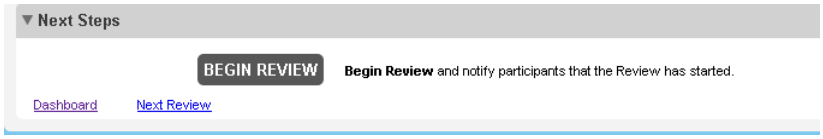
3. The Web Browser client allows you to attach supporting documents and changelists under the Materials section of the Create a Review screen.

- **Changelists** – If your Collaborator system administrator has configured the Collaborator server with any Version Control System (VCS) servers, you may attach a changelist associated with that VCS by clicking the Upload dropdown and select your VCS. You can then enter the unique changelist number. If your Collaborator server has not been configured with a VCS, the link will be unavailable. In this case, you can use the GUI client to add files to the review – see step 5 below.

- **URL** – Click the Upload dropdown, then click URL and enter the link you'd like to review.

- **Local File** – Click the Upload dropdown, then click Files and use the Browse button to find files on your local hard drive.

4. Click Begin Review to start the review and send out notifications to reviewers.

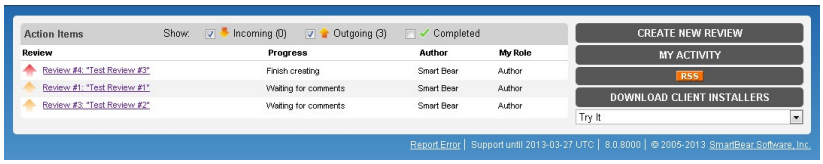


5. Most Collaborator users do not use the Web Browser client for attaching source code files, reserving it for adding supporting documents. Instead, most of our users opt to use the GUI client, command-line client, and/or the Eclipse Plug-in for adding source code files to a review. The extensive integration the GUI client, command-line client, and Eclipse Plug-in provide with Version Control Systems makes them the natural choice for selecting source files to add to a review. To add review materials via the GUI client, command-line client, or Eclipse plug-in:

- **GUI** – Open the GUI client and click on the VCS of your choice. Use the Add to Review buttons at the bottom to add materials to an existing or new review. Because these buttons will differ according to your Version Control System, we encourage you to visit our GUI client section in our Owner's manual.
- **Command-Line** – For instructions, visit the command-line client section in our Owner's Manual.
- **Eclipse Plug-in** – For instructions, visit the Eclipse Plug-in section in our Owner's Manual.

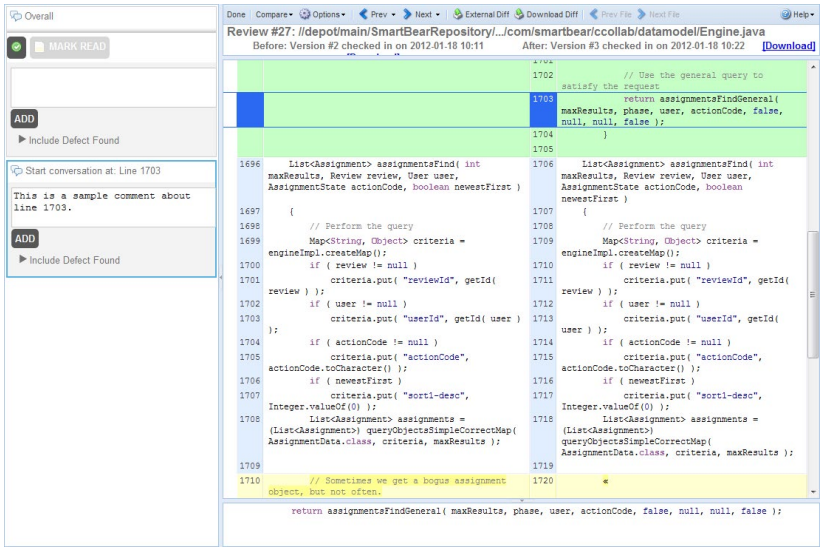
Add Comments and Defects as a Reviewer

When someone invites you to a review, you'll receive an email notification and will see the review in your Action items list. Click on a review to open it.



1. This brings you to the Review Summary Screen. For review participants, the review materials section is the focus of activity on the review. This section displays every changelist, file or URL associated with the review along with the status of comments, approvals and defects for each item.

Click on the line (in text files) or area (in supporting docs) you want to comment on, and type your comment. Comments are threaded into a conversation that stays tied to a specific line of code, even when line numbers change. Unread comments are marked in yellow.



- Tip: You can click Accept or Mark Read to clear the unread comments. Mark Read simply indicates that you have already seen the comment, which may be helpful if you don't want to re-read the same comments when you view a file multiple times. Accept does not have an explicit meaning in Collaborator; it is used differently in different environments. You can use this feature however you think best suits your code review environment. When the Accept button is clicked, a green checkmark appears to notify participants that a comment

has been Accepted. (For more information on the “Accept” button, read our blog entry “What Does the Accept Button Do?”)

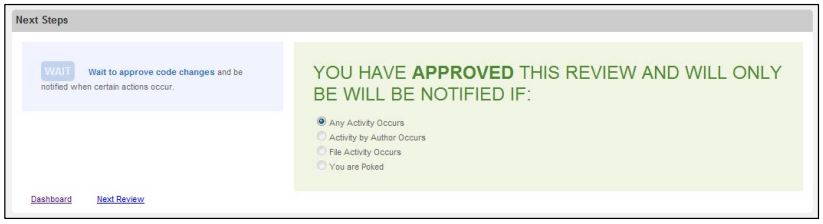
- Defects – When you find a defect, click on the line (in text files) or area (in supporting docs) to which you want to attribute the defect. Make sure the Add Defect tab is selected and write a description of your defect, filling in the fields underneath. Once a defect is created, you can mark the defect as fixed, edit or delete the defect, or make it an external defect (moving the defect from Collaborator into an external issue tracker) by using the links at the bottom of the comment box. If defects are entered, authors should fix the defects and upload the fixes, and reviewers should inspect the code again until the code is acceptable. Note that a review cannot be completed until all defects are resolved: either marked as fixed, deleted, or tracked externally.

Finish Review

The Next Steps section at the bottom of the Review Summary Screen allows you to indicate whether you are finished with the review or waiting on further actions from other participants. Both options offer selections that allow you to choose when you will be notified of activity on the review. For example, if you want to finish your participation in the review by approving, but want to know if new files are added, click Approve, select the File Activity Occurs option, and click the Dashboard or Next Review links to save the changes and move forward.

If the selected activity occurs when you are waiting or finished, Collaborator sends you a notification and re-invites you to the review.

- **Wait** – This option keeps you deactivated from the review until the action option you have selected occurs. This option signals other participants that you have temporarily stepped out from the review but plan to return.



- **Approve** – Selecting this option signals to other participants that you are done with the review unless the selected activity occurs. If you don’t return and the selected activity does not occur, the review remains marked finished by you.

Now you are ready to start your peer code reviews.

To learn more about Collaborator and review in general:

- Check out our full documentation.
- For more information about the flow of a review, please read the instructions on How to Use Collaborator.
- Visit our Resources page.
- Read the Collaborator Blog.
- To request a specific feature or vote for features suggested by others, visit our Feature Feedback Forum.

About SmartBear Software

More than one million developers, testers and operations professionals use SmartBear tools to ensure the quality and performance of their desktop, mobile, Web and cloud-based applications. SmartBear products are easy to use and deploy, are affordable and available for trial at the website. Learn more about SmartBear, the company's award-winning tools or join the active user community at http://www.smartbear.com, on Facebook or follow us on Twitter @smartbear and Google+.

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