CodeCollaborator

User's Guide

Getting Started with the CodeCollaborator Client

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

Introduction

This guide is designed to help you get started with CodeCollaborator, the most advanced 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.

I.   Download the Client Software

You'll most likely need a CodeCollaborator 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.

The client installer includes:

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

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

II.   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 CodeCollaborator client installed. You'll need at least 60 MB of disk space.

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

5. **Configure Connection to the CodeCollaborator Server** – Provide the CodeCollaborator 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 CodeCollaborator system administrator.

Note: This step assumes your CodeCollaborator server component has already been installed (see "Getting Started with the Code 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 CodeCollaborator 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 CodeCollaborator 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 CodeCollaborator integration into those tools.

7. **Finish** – Click "*Finish*". You're done installing the client!

III. Configure the Client for your VCS

Once you connect CodeCollaborator 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 CodeCollaborator 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*.
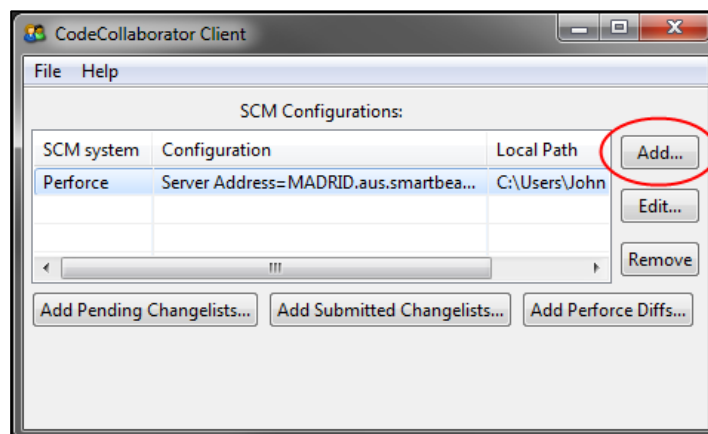
Use the Configuration wizard to enter the location of your local source code into the "*Local Path*" field at the top, or choose the VCS of your choice.

> *Note: Visual Source Safe (VSS) is not supported by the CodeCollaborator 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.

## IV. Log into CodeCollaborator Web Browser Client

Open a web browser and go to the CodeCollaborator 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.

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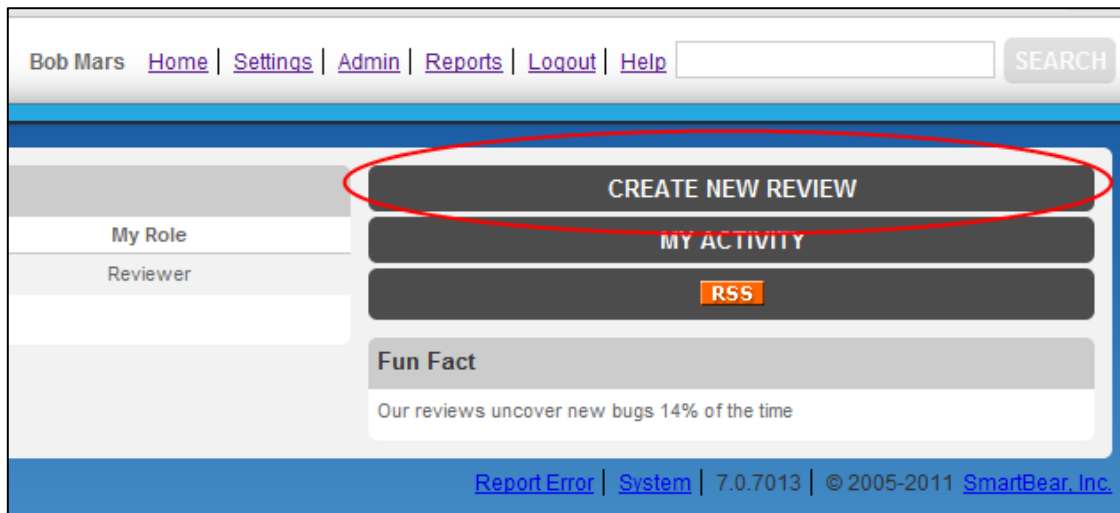
2. Fill in the basic information and participants in the Create a Review screen.

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

Materials   Attach Checked-in Changelist   Attach URL   Attach File

Materials for review may be added using the CodeCollaborator client tools or by attaching materials directly using the links above. Changing the review materials may cause a change in the participants list if users are subscribed to content that is added. Those changes will be reflected above until this page is refreshed.

- **Changelists** – If your CodeCollaborator system administrator has configured the CodeCollaborator server with any Version Control System (VCS) servers, you may attach a changelist associated with that VCS by clicking **Attach Checked-in Changelist**. Just choose the VCS and enter the unique changelist number. If your CodeCollaborator server has not been configured with a VCS, the link will be unavailable, denoted by **Attach Checked-in Changelist**. In this case, you can use the GUI client to add files to the review – see step 6 below.

- **URL** – Click **Attach URL** and enter the link you'd like to review.

- **Local File** – Click **Attach File** and enter the file path or use the **Browse** button to find files on your local hard drive. You may use the Description field to add any notes regarding your file.

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

Next Steps

APPLY	Apply the current changes and continue making changes.
APPLY AND ANNOTATE	Apply the current changes and proceed to the main review screen where you can annotate the review materials. Other participants will not be invited until you begin the review by clicking the "Begin Review" button on the review screen or return to this screen and click "Apply and Begin Review"
APPLY AND BEGIN REVIEW	Apply the current changes and begin the review immediately.

5. Most CodeCollaborator 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.

VI. 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.

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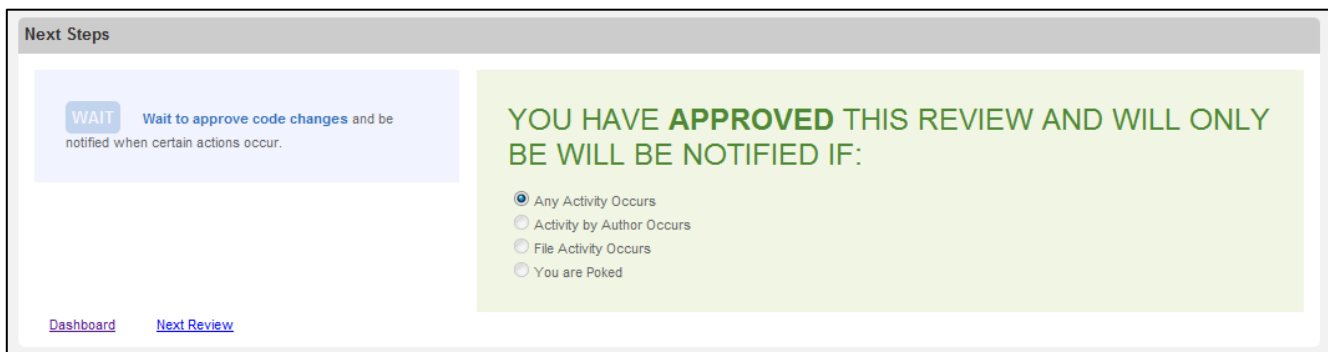
Comment – Click on the line (in text files) or area (in supporting docs) you want to comment on, and type your comment. Comments are threaded into a conversation that stays tied to a specific line of code, even when line numbers change. Unread comments are marked in yellow.

> *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 CodeCollaborator; 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 CodeCollaborator 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.

VII. 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, CodeCollaborator 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 CodeCollaborator 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 CodeCollaborator.
- 🐾 Visit our Resources page.
- 🐾 Read the CodeCollaborator Blog.
- 🐾 To request a specific feature or vote for features suggested by others, visit our Feature Feedback Forum.