



**Collaborator**  
by SMARTBEAR

# Administrator's Guide

## Getting Started with the Collaborator Server

A quick-start guide for installing and configuring the server software

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## Introduction

These instructions help you get started with Collaborator, 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.

## Download the Server Software

In order for your users to use Collaborator, you must first install and configure the server component.

Download the “Server Installer” listed under your platform from the Download page.

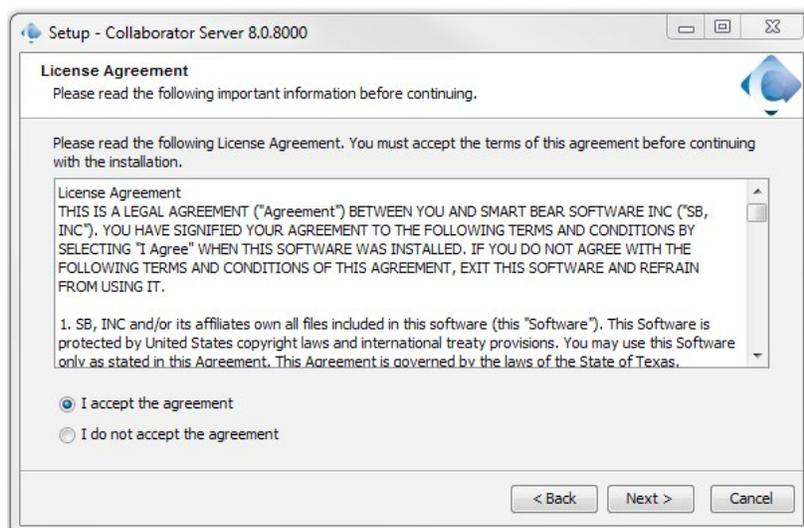
## Installation Wizard for the Server Installer

Once you’ve downloaded the server installer, open it to begin the installation wizard. The wizard guides you through the steps below:

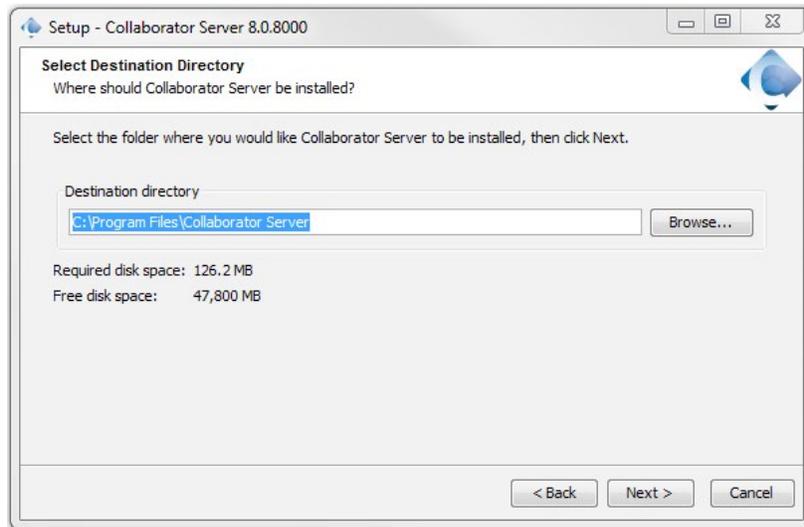
1. Welcome Screen – This screen welcomes you to the installation process. Click “Next” to proceed.



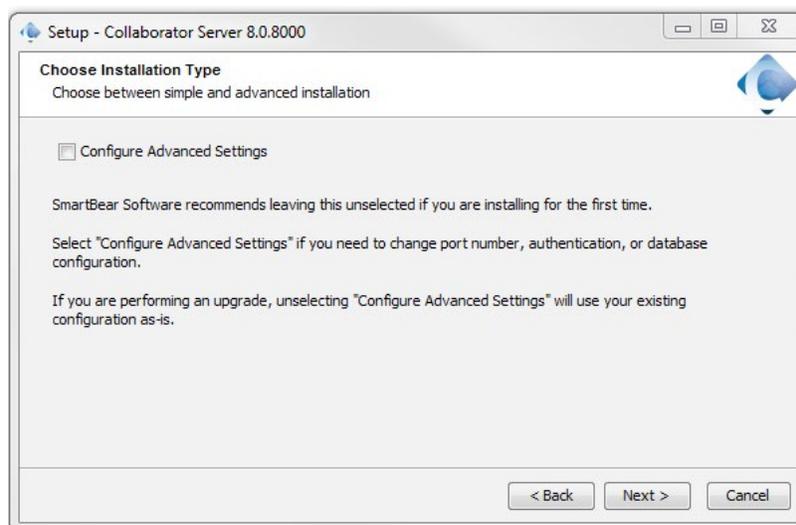
2. License Agreement – Read the license agreement and select “I accept the agreement” before clicking “Next”.



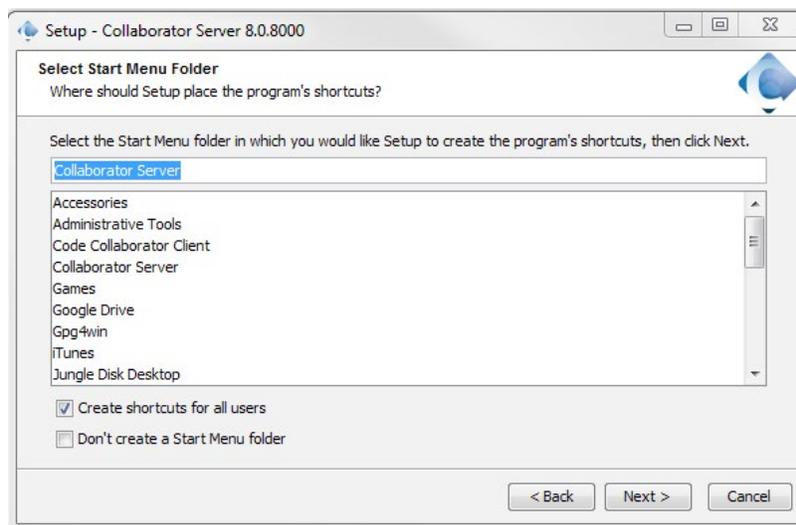
3. Destination Directory – Choose the folder where you would like the Collaborator server installed. Make sure that the directory is writable by the server and that there are at least 5 gigabytes of space available in the directory.



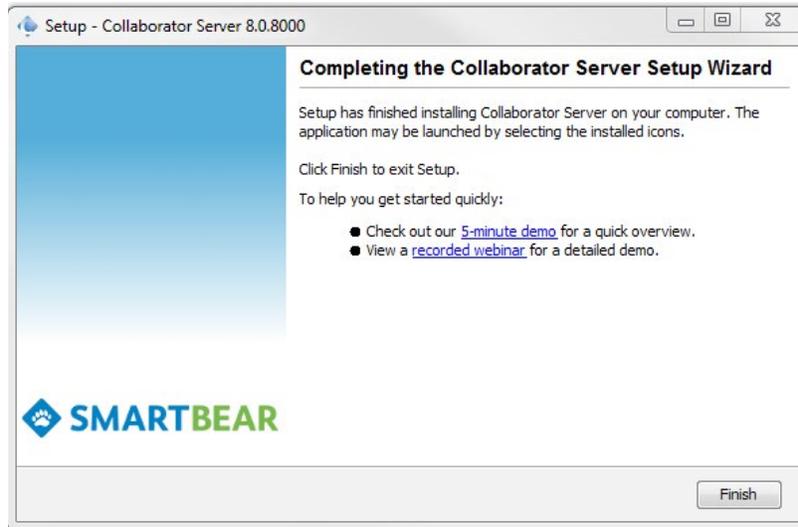
4. Installation Type – If you are installing Collaborator for the first time, we recommend that you leave the Configure Advanced Settings box unchecked. If you have an existing installation and wish to modify the existing settings, then check the Configure Advanced Settings box and proceed to step 7, otherwise click “Next” to proceed.



5. Start Menu Folder – Select the Start Menu folder in which you'd like to create the Collaborator shortcut. Click “Next” to proceed.

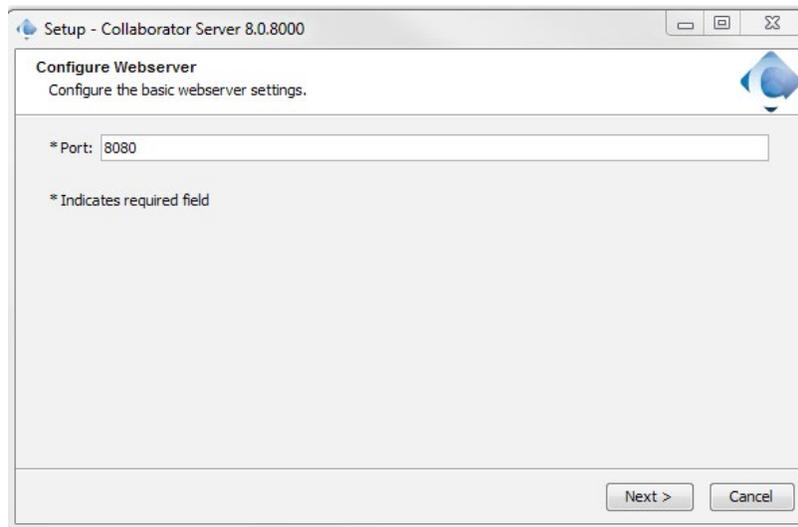


6. Completed Page – This page appears once the server is installed. Click “Finish”. The installer will now place you in the webUI interface to complete the configuration. Please proceed to the “[Log into Web Browser Client](#)” section to complete the configuration of the server.

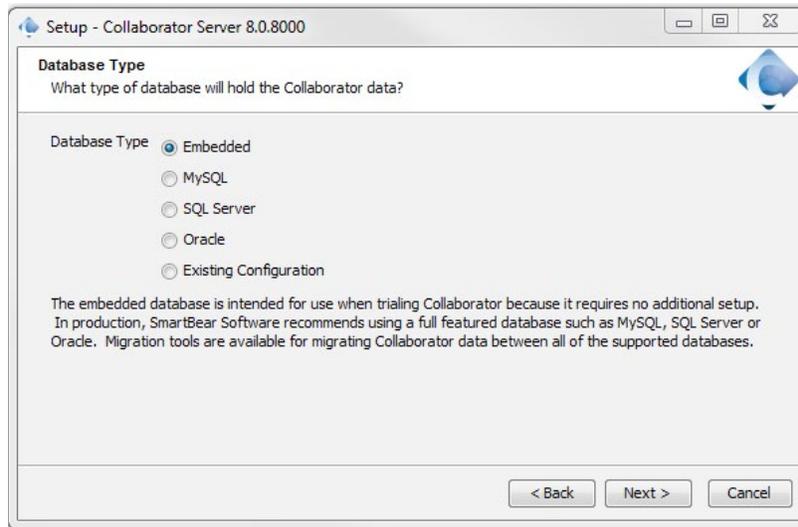


If you have an existing installation, you have the option now to modify the various settings for the server by checking the Configure Advance Settings box and then click “Next”.

7. Configure Webserver – Enter an open port number that does not conflict with any existing services. Port 8080 is the standard port we default to. When you click “Next”, the installer attempts to connect to this port. If the port is in use, a warning message appears and you must specify a different port or free up the desired port.



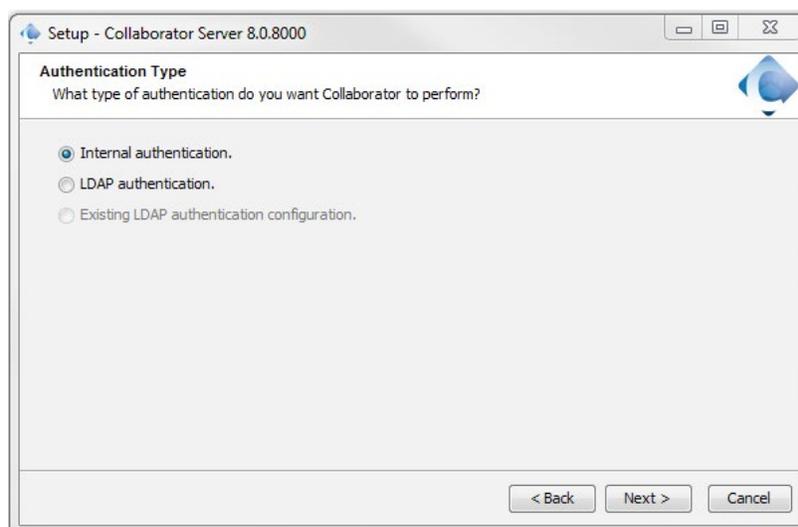
8. Database Type – Choose one of the following database types:



**Embedded** – If you are trying out Collaborator, we recommend that you select Embedded to keep things simple. This choice does not require a prior setup. However, if you’re ready to use Collaborator in production, we require that you use a full-featured database instead of the embedded database. The embedded database has limited scalability. But don’t worry; we have a built-in database migration tool, so you can easily migrate from the embedded database to a full-featured database later.

**MySQL, SQL Server, or Oracle** – These are the three full-featured databases we support in Collaborator. If you choose to use one of these, we recommend MySQL because it’s a free, open- source database. (It’s also important to note that if you are planning to use Code Reviewer, only MySQL is supported.) If you choose one of these databases, you are taken to a screen where you can configure a connection for the Collaborator server to use for accessing the database server. You must have your database already installed and set up in order to correctly configure this. For more details, visit the Database page. If you do not have the database set up, you can always choose Embedded for now and migrate later. If you have your database ready, fill out the configuration details using the database username and password for the Username and Password.

9. Authentication Type – Choose one of the following authentication types:



**Internal** – Collaborator maintains usernames and passwords in its own database.

**LDAP** – You can use LDAP authentication, which won't require you to maintain the Collaborator usernames and passwords. If you choose this option, the next screen lets you configure your LDAP integration. Since this configuration is a bit trickier, please visit the LDAP section of our documentation for full details.

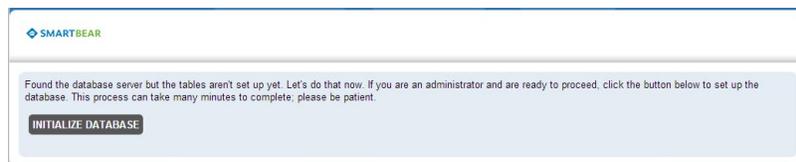
**10. Start Menu Folder** – Select the Start Menu folder in which you'd like to create the Collaborator shortcut. Click "Next" to proceed.

**11. Completed Page** – This page appears once the server is installed. Click "Finish".

## Log into Web Browser Client

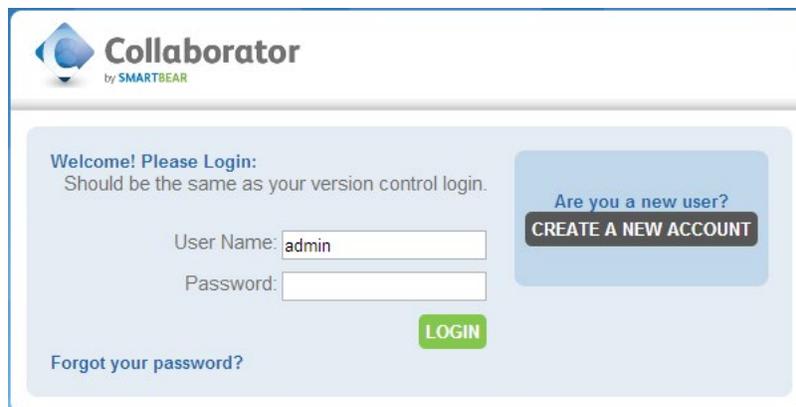
After you complete the installation, a web browser opens automatically and points to your installed server. This page, part of the Collaborator web browser client, is what you will use to administer your Collaborator server.

**1. Database Initialization Required** – When opening the web browser for the first time after configuring the Collaborator server, you will need to initialize the database. Click "Initialize Database" to continue.



**2. Log In**

**Internal Authentication** – If you have chosen Internal Authentication earlier in the installation process, specify "admin" as the Username, and leave the Password field blank. Click "LOGIN".



**LDAP Authentication** – For LDAP authenticated installations, the admin username and password will be the username and password you have provided earlier in the Collaborator installation process when configuring your LDAP integration. Please view our LDAP page for more information.

## First-Run Initialization

Once you have logged in as the admin, the next page asks you to provide necessary information to set up the Collaborator server.

### Administrative Contact

This section allows you to choose the product type and provide the administrator's contact information.

### Administrative Contact

This contact information is used for error messages inside Collaborator and also for the primary customer support contact for updates and licensing.

<b>Product:</b>	Collaborator <input type="button" value="v"/>
<b>Company / Unit:</b>	SmartBear Software
<b>Full Name:</b>	Smart Bear
<b>Phone Number:</b>	512.257.1569
<b>Email Address:</b>	user@smartbear.com

In the first field, Product, use the drop down menu to choose which product you'd like to use, Collaborator or CodeReviewer. Although both products are designed to make your peer code review process easier and more effective, only Collaborator offers full functionality regarding customization, configuration, etc.

To view differences between these two products, visit [Code Review Features](#) page. In the remaining fields under this section, fill in the company name, the Collaborator administrator's full name, phone number, and e-mail address. SmartBear only uses this information to contact you when there is a critical issue with your Collaborator installation; we will not sell or share this information. The contact information is primarily there for your users to know who to contact if they are having issues with Collaborator.

### First Few Users

The next section helps you get started on populating your user list.

### First Few Users

Supply the logins for the first few users of the system, including yourself.

Logins should match your version control logins. Why make your users remember yet another login? This also makes cross-system reporting simple.

<b>User Login #1:</b>	jcohen
<b>User Login #2:</b>	bdurette
<b>User Login #3:</b>	ebrown
<b>User Login #4:</b>	sbrown
<b>User Login #5:</b>	foobar
<b>User Login #6:</b>	jan

You should supply at least two usernames for this section. Typically, the admin login is used only for administrative purposes, so we recommend that you enter a personal username for yourself to use for code reviewing purposes. We also recommend that the Collaborator usernames match your version control usernames for simplicity. Click “Initialize” once you have entered the usernames. This section only appears if you have selected Internal authentication. LDAP authenticated installations do not have this option because your usernames are already set.

## Home Page

After the first-run initialization, you’ll be taken to the Collaborator Home page. This page looks similar to the average Collaborator user’s home page with a few exceptions: It displays the “Admin” button, and a disabled “Create a New Review” link in the main menu (since by default, Collaborator does not allow administrators to create reviews). As the Collaborator administrator, you’ll want to familiarize yourself with the Admin button at the top right, so click the Admin link.

## Admin Section

Once you click the “Admin” link, the browser directs you to the Admin section where you can configure the settings to your liking.

The screenshot displays the 'Site-Wide Administration' interface. On the left is a navigation menu with categories like General, Users, Groups, Email, Version Control, Review Custom Fields, Participant Custom Fields, Defect Custom Fields, Roles, Review Templates, Triggers, Notification Templates, Automatic Links, Licensing, Archive, and System Status. The main content area is titled 'System' and contains several configuration sections:

- System:** External URL:  TEST
- Display Options:**
  - Company / Unit:
  - User Login Prompt:  Text to display on the login page underneath the "Username" input field.
  - Global "Create User":  Should the "Create New User" form be displayed on the CodeCollaborator log-in screen?
  - Use Global Tab Width:  All users will have the same tab width, otherwise each individual user will be able to modify their tab width.
  - Global Tab Width:  Width of a tab, in spaces, to use when displaying source code for all users.
  - Chat Refresh Interval:  The minimum time (in seconds) to wait before auto-updating conversations.
  - Name Abbreviation Length:  The minimum number of letters to use when abbreviating user names during a review. Typically 2 or 3.
  - Defect Label (singular):  User-visible label for "defect" (lower case), e.g. "Marked defect fixed".
  - Defects Label (plural):  User-visible label for "defects" (lower case), e.g. "Can not finish because there are open

The box to the left of the screen is the Admin menu, which contains a number of helpful links that guide you through different configuration sub-categories. See the Other Configurations section of this document for more information regarding specific configurations.

## Licensing

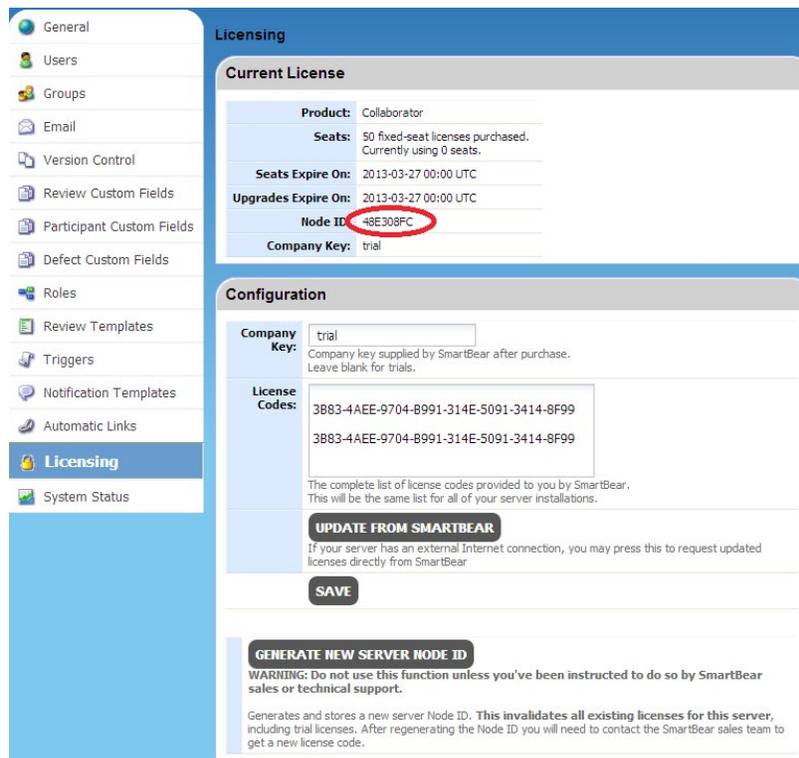
If you have an external internet connection, Collaborator will attempt to contact our licensing server so that we can set you up with a 30-day trial license. Your licensing status is denoted by a description in the top toolbar to the right of the search bar.

If you do not have an external connection, or if a firewall prevents access to our licensing server, you need to manually obtain a license code. The following instructions also apply if you want to obtain and enter a permanent license code.

1. Admin – Go to the Admin section. If you're following along with this document, you should already be in the Admin section. If not, click the "Admin" link at the top right.



2. Licensing – Click the "Licensing" link near the bottom of the yellow Admin menu, located to the left.

The screenshot shows the 'Licensing' page in the Collaborator Admin interface. On the left is a navigation menu with 'Licensing' highlighted. The main content area is divided into two sections: 'Current License' and 'Configuration'. The 'Current License' section shows a trial license for 'Collaborator' with 50 seats, expiring on 2013-03-27. The 'Node ID' is 48E308FC, which is circled in red. The 'Configuration' section has a 'Company Key' field with 'trial' and a 'License Codes' field with two 32-character codes. There are buttons for 'UPDATE FROM SMARTBEAR', 'SAVE', and 'GENERATE NEW SERVER NODE ID'.

This page will provide information regarding the licensing, such as when the license expires, when the support and upgrades expire, how many seats you have, etc.

3. Node ID – Find the 8-character Node ID under "Current License". The Node ID is unique to every installation, and the Node ID is tied to every license code we generate, so it is important to send your unique Node ID to your Account Manager to activate your license. If you do not know who your Account Manager is, just send the Node ID to sales@smartbear.com.
4. Company Key and License Code – After you send us the Node ID, you will receive an e-mail with a company key and license code. The company key is "trial" for temporary licenses and a word or phrase for permanent licenses. The license code will be a 32-character code. Enter the company key and the license code in their respective fields, and click "Save".

## Other Configurations

Most of the settings are self-explanatory, and if you need more detailed explanations, visit the Configuration section of the Owner's Manual. But to get started, we'll briefly introduce you to a few important sub-categories and settings. Remember, you can navigate through different sub-categories by using the yellow Admin menu in the Admin section.

### 1. General

- ◆ External URL – Enter the full URL to the main page of the web server on which Collaborator was installed, as it would be seen by external clients.
- ◆ Global “Create User” – When you're starting out, and you don't want to manually create usernames for all users, mark this field as “Show” so the users can create their own username and password. Mark it as “Hide” if you want to control the creation of users and usernames.
- ◆ Access Restrictions – Control who has access to reviews, reports, subscriptions, and systems information.
- ◆ Review Process Options – Control what users can or cannot do during the review process.
- ◆ Bug-Tracking Integration – Add the URL for creating a new bug in your bug tracking system here. See the Bug-Tracking page for more information.

### 2. Users – Create users, view user statistics, and edit user accounts.

### 3. E-mail – You must configure this section in order for Collaborator to send out e-mail notifications of review activity.

### 4. Review and Defect Custom Fields – Create your own fields for users to annotate defects and reviews with necessary information.

### 5. Role Configuration – Specify the rights and privileges of review participants.

### 6. Triggers – Execute an external script or application when certain events occur. See the Scripting page of the Owner's Manual for more information.

### 7. System Status – The “Peak Usage” chart plots the maximum number of simultaneous users, measured by day. This feature is most useful when determining the number of floating seats necessary to handle your Collaborator usage.

Now, your Collaborator server should be ready to use with the Collaborator clients.

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+](#).

